



Experience Development Strategy

prepared by:



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Acknowledgements

We would like to acknowledge the effort put into the preparation of this Experience Development Strategy (EDS) by the Project Management Committee, local businesses and other stakeholders in the Flinders Ranges.

The outcome is a shared strategy.

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Photo credits: Many of the photos in this document were provided by SATC.

Acronyms

DENR	Department of Environment and Natural Resources
DKA	Desert Knowledge Australia
EDS	Experience Development Strategy
FRTOA	Flinders Ranges Tourism Operators Association
ITOs	Inbound Tour Operators
NLPMC	National Landscape Project Management Committee
PAC	Port Augusta City Council
RDAFN	Regional Development Australia Far North
RDAYMN	Regional Development Australia Yorke and Mid North
SATC	South Australian Tourism Commission
SFRTA	Southern Flinders Ranges Tourism Association
SFTnT	Southern Flinders Tourism and Tastes
TA	Tourism Australia

Recommended actions are coded as follows:

AP	Attractions and Products
S	Services
IN	Infrastructure
W	Workforce Development
M	Marketing
G	Governance



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Executive Summary

Purpose of the Experience Development Strategy

The Experience Development Strategy (EDS) for the Flinders Ranges National Landscape guides the development of compelling experiences, as well as marketing, product development, workforce development and infrastructure, aimed at building the Flinders Ranges into a sustainable tourism destination.

The Flinders Ranges as a National Landscape is broadly that area from Yacka in the south to the Strzelecki Track in the north, and from the Spencer Gulf in the west to the Barrier Highway in the east. It is entirely contained within the Flinders Ranges and Outback region.

Across the region there are a number of national parks, conservation reserves, and areas of cultural significance. There is a diversity of landscapes from rural scenery in the south to the peaks, ridges and gorges in the centre and the Outback plains in the north. Each has distinctive characteristics. The region has unique semi-arid vegetation and is rich in wildlife including three varieties of kangaroos and the rare yellow footed rock wallaby. Whilst some of the region's flora and fauna are protected in national parks and reserves, they are evident across the destination on public and private land.

The Flinders Ranges is one of 12 places of outstanding natural beauty and cultural significance under the National Landscapes Program – a cooperative partnership between tourism and conservation agencies that is being implemented at the national, state and local levels. The target visitor market for National Landscapes is Tourism Australia's global target market of international *Experience Seekers*.

The EDS is an important starting point for building the Flinders Ranges into a competitive destination. It was prepared under the guidance of a Project Management Committee (PMC) made up of industry and government representatives from the local region, South Australia and the national level. It involved considerable engagement with stakeholders across the region, at key milestones in the process and through an online forum on the Flinders Ranges Tourism Operators Association website.

The focus of the EDS is to identify those projects that will make the biggest difference in attracting international *Experience Seekers* to the Flinders Ranges. It is about determining the most compelling experiences for this audience.

While *Experience Seekers* differ by age, country of origin and spending power, they are united by values, attitudes and motivations. They are typically looking for: (i) authenticity (ii) interaction (iii) points of difference (iv) challenges and (v) learning opportunities. Some, but not all, *Experience Seekers* are high-yield consumers. Currently, most of those visiting the Flinders Ranges are budget conscious to mid-range spenders. They seek quality activities (commercially guided and self-drive) and value for money. They have limited time, want clarity about available products and seek experiences that deliver on expectations.



Vision and brand

Regional stakeholders believe the Flinders Ranges is a place offering:

- spiritual connection between communities, visitors and the ancient landscape
- peace and tranquillity
- exhilarating and soft adventure
- reflection on life's beginnings.

The vision for the Flinders Ranges National Landscape developed by stakeholders is:

Visitors will remember the Flinders Ranges in very simple terms: amazing landscapes, 'real people', great things to do that reveal the story of life on earth.

The starting point for this strategy is a positioning statement that has been developed with stakeholders. This and the Vision will guide the development and delivery of experiences for *Experience Seekers* in the Flinders Ranges¹.

The Flinders Ranges – where ancient landscapes inspire its peoples and reveal the story of life on earth.

This is the essential point of difference between the Flinders Ranges and other destinations. It has been developed to guide the identification and development of the experiences that will be most compelling for the Flinders Ranges as a destination and which will embody the region's unique character. The destination positioning will assist the alignment of activities, products, merchandise and stories by all tourism operators throughout the region.

¹ It is important to note that this National Landscape positioning was not developed to replace or diminish existing destination brand. It should be seen as complementary to the existing brands that form part of this iconic landscape and destination.

Two hero experiences that reflect the Flinders Ranges positioning have been developed:

Up close with an ancient landscape

Connecting with people in the Outback

These experiences can be delivered via a range of products, services, activities and attractions around the region. They also complement each other, in that experiences of the ancient landscape frequently involve interaction with Outback people through accommodation, tours and activities. The opportunities to experience the natural environment and to see unique wildlife are cross cutting across the two hero experiences.

Current opportunities for experiences Up close with an Ancient Landscape involve exploration of the landscape and geological stories at:

- *Wilpena Pound* (self-guided and guided walks, scenic flights)
- *Brachina and Parachilna Gorges* (4WD and 2WD trips, walks and wildlife)
- *Rawnsley Park* (self-guided and guided walks, 4WD trips, scenic flights, hot-air balloons)
- *Arkaroola Wilderness Sanctuary* (Ridgetop Tour, walking, scenic flights and self-guided 4WD trips)
- *other properties* that offer guided and self-drive 4WD experiences (eg Willow Springs, Arkaba, Alpana, Bendleby Ranges)
- *Quorn* (such as on a Pichi Richi Camel Tour)
- in *national parks* where wildlife abound
- *guided tours* including those with Aboriginal guides that tell a particular story
- *cycling* the Flinders Ranges (range of options).

Future possibilities have been identified:

- extending the range of ways to explore the spectacular Flinders Ranges landscape from the air – eg. through skydiving, paragliding, and combined scenic flight and walking experiences

- development of an iconic ‘must do’ overnight walk or cycling and day walk trail
- improvements to cycling opportunities in the southern Flinders Ranges
- activities linked to the Flinders Ranges geological story, such as at Pichi Richi Pass and events celebrating the Ediacarn fossils.
- Current opportunities for experiences *Connecting with people* in the Outback are to be found at, or through:
 - pastoral stations and farms across the Flinders Ranges which offer a diversity of experiences at a range of scales associated with station life, the environment, wildlife and the landscape
 - distinctive pubs, hotels and cafes such as The Prairie Hotel, North Star, Blinman and Copley Café
 - specific interactive products run by local people such as Pichi Richi Camel tours, the Blinman Mine, Yullu Wirru (Ticklebelly Hill), bike riding activities at Melrose, Steamtown and the Pichi Richi Railway
 - day-to-day interactions with people across the destination in caravan parks, shops and visitor centres.
 - Possible future experiences are linking Flinders Ranges Outback pub encounters by air or road. With a strong cluster of Outback encounters in the north, future attention should perhaps focus on strengthening heritage attractions, service standards and accommodation options in the south in order to provide a more balanced touring route through the Flinders Ranges region.

How the Flinders Ranges compares with other destinations

Put alongside the likes of Kakadu, Red Centre and the Kimberley National Landscapes, the Flinders Ranges – while being an appealing destination in its own right – currently lacks a strong brand position in Experience Seeker markets and has a limited supply of products that are ready for international tour wholesalers or Inbound Tour Operators (ITOs).

The Flinders Ranges National Landscape does however have comparative strengths in the experiences it offers based around the life and challenges of those living on pastoral stations and seeing the landscape from the air.

It is also strong in opportunities to learn about the early phases of life on earth and experience the landform of the Flinders. The Flinders Ranges’ unique feature, the Ediacaran fossil, is not yet market ready as a stand-alone product.

Positioning the destination and delivering the brand – the values

To achieve the vision and to deliver the brand, businesses in the Flinders Ranges need to focus on:

- world-class delivery – all aspects of the product, including interpretation, must be outstanding
- highly personalised service – high levels of engagement and interaction with guides/business operators
- strong brand reinforcement – the experience should reflect the emotional and intellectual territory that defines the region.

All operators need to aim to achieve the following with their products regardless of the ‘star class’ of the product:

- focus on alignment with the Flinders Ranges brand position
- reveal the Flinders landscape or people through storytelling at its best
- offer something distinctively ‘Australian’ for appeal to international markets
- be authentic and highly engaging – true to local life, encourage visitors to be immersed with people and place
- offer high quality at every point of delivery
- reflect the values of delivering a conservation and/or sustainability message – whether in design of infrastructure, management of resource use, or interpretation and education
- be market ready – that is packaged or ready for wholesalers or ITOs.

Catalyst tourism projects

Ensuring the Flinders Ranges becomes one of Australia's leading destinations for the Experience Seeker market requires innovative experiences that appeal to this target market and deliver on the destination positioning.

A small number of projects have been identified with stakeholders that have the potential to attract the target market and encourage people to stay longer and spend more in the region.

Each of these catalyst projects has been agreed to by stakeholders because it:

- appeals to the Experience Seeker market
- delivers on the destination positioning
- has the potential to be a truly iconic experience that links conservation and tourism and offers an opportunity for visitors to learn about and engage with the environment, the landscape and the people of the Outback
- has the potential to be environmentally, socially, financially and culturally sustainable
- enables the community to actively participate in implementation.

1. The Flinders Ranges Touring Route

This self-drive touring route will direct *Experience Seekers* towards the best opportunities in the region for getting up close with an ancient landscape, seeing wildlife, and connecting with people in the Outback.

The Flinders Ranges Touring Route is intended to become the backbone of the destination offer and the focus for additional product, a range of accommodation standards suited to target market and different price points and appropriate services. As the main route is developed and becomes recognised, themed loops and alternative journeys offering different experiences can also be developed.

2. Showcasing the Ediacaran story

A number of experiences are identified that will enable the visitor to go home with an appreciation of the significance of the oldest complex animals ever found on earth (the Ediacaran fossils). Identified projects include three opportunities on the Flinders Ranges Touring Route (Brachina Gorge, Parachilna and Arkaroola) and a further project that could be developed in the longer term at Pichi Richi.

3. Aerial experiences

Increased marketing emphasis on experiencing the Flinders Ranges from the air is proposed to enable visitors to appreciate the age, scale and grandeur of the landscape. This includes access by air, travelling between accommodation by air, and packaging air and land components aimed at achieving a high degree of appreciation of the place and its people.

In addition to scenic flights by fixed wing aircraft and helicopter, other opportunities for aerial adventure (hot-air balloons, paragliding, skydiving, heli-hiking, hang-gliding and a fixed high-level 'via ferrata') offer adventurous ways for *Experience Seekers* to view the landscape from above. As a cluster, aerial adventure can become a strong product offering that sets the Flinders Ranges apart.

4. Flinders Great Adventure Journeys

Walking and cycling are popular with *Experience Seekers* and an effective way become immersed in the ancient landscape, appreciate the conservation values of the region, and connect with local people.

Three Great Adventures are proposed that will be attractive to different people.

- A three night/four day accommodated walk that offers opportunities for getting close to the landscape and interpretation of the range of stories.
- A cycling route that traverses the Flinders Ranges from south to north that can link all areas of the destination and offer business opportunities.
- An iconic one day guided walk from Wilpena Pound.

Priority actions

Top priority projects and associated activities are outlined below.

No	Action
AP1	Develop a Flinders Ranges Touring Route Project Plan that details all the necessary components of implementation, staging, funding and responsibilities.
AP2	Plan, design and implement innovative interpretation at Brachina Gorge incorporating: <ul style="list-style-type: none"> • engaging and memorable self-drive experience • opportunities for tour guides • consideration of an evening automated or tour–guide–managed light experience of the gorges and wildlife • consideration of exclusive licence for an operator interested in investing in evening experience of Brachina Gorge.
AP3	Continue overall development and promotion of Melrose as an active adventure destination with: <ul style="list-style-type: none"> • a broader range of activities • consistent high quality accommodation, food and wine • opportunities for visitors to interact with local people.
AP4	Offer business mentoring and support for brand-aligned product development, packaging and marketing initiatives for businesses across the destination, including ways in which they can package their product with other businesses to provide better value for money.

AP16	Pursue investment in additional aerial adventure experiences through <ul style="list-style-type: none"> • consumer research • investigating the interest of current commercial businesses and new operators to expand the range of aerial experiences on offer • investigating potential for financial incentives such as reduced landing fees or hangar facilities.
AP17	Work with commercial partners to develop, implement and promote a series of three day Flinders Ranges aerial journeys including land-based experiences and to encourage ‘Flinders by Air’ including scenic flights as an excellent Flinders Ranges experience.
AP20	Work with commercial partners to develop, implement and promote an iconic multi-day walk in the Flinders Ranges through: <ul style="list-style-type: none"> • a review of the planning to date (in the light of changes in supply) • consumer research if necessary to determine the best option

Priority actions to support the catalyst projects and general development of the Flinders Ranges destination have been identified in the areas of service improvement, infrastructure, workforce development, marketing and governance of the Flinders Ranges National Landscape.

No	Action
S1	<p>Work with operators and businesses across the Flinders Ranges to ‘get the basics right’ including:</p> <ul style="list-style-type: none"> • customer service – hours of opening and availability of the essentials of fuel, food and accommodation • information availability pre-trip and at the destination • booking systems for accommodation • consistent service standards across all product areas – visitor centres, accommodation, attractions, pubs, villages, properties, retail • high environmental standards.
S2	<p>Develop a Visitor Information Plan to improve visitor access to information including:</p> <ul style="list-style-type: none"> • consistency and quality of information at visitor centres • information delivery by all operators • other media for information delivery.
IN1	<p>Attract private investment in developing more quality accommodation for the region, to cater for current and future demand.</p>
IN2	<p>Pursue funding for the facilities required (fuelling, airstrips, hangars) to encourage additional aircraft using Hawker, Quorn, Leigh Creek, Balcanoona airstrips in support of new and expanded aerial experiences</p>

IN3	<p>Lobby Transport SA to develop strategy and seek funding for the following important improvements for the Flinders Ranges Touring Route:</p> <ul style="list-style-type: none"> • sealing the Blinman–Parachilna Gorge road • sealing last 6 km of the road to Arkaroola • developing a maintenance regime that enables quick restoration of the Brachina Gorge Road after floods.
W1	<p>Develop a three-year pre-season workplace interpretation training program and develop associated support materials – a ‘Flinders Tour Guide Companion’ with the key facts, stories, legends, place-names, natural and cultural history that every employee should know (front-line staff, guides, pilots, retail).</p>
W2	<p>Run an annual regional product familiarisation for front-line personnel and business owners to encourage cross promotion and on-selling across the destination</p>
M1	<p>Finalise and communicate the Flinders Ranges brand creative and visual identity including industry workshops to communicate the ways which operators and businesses can deliver the brand through their products and services.</p>
M2	<p>Review and implement the Flinders Ranges Marketing and Communications Plan, including clarification of brand positioning and the destination offering for offshore marketing campaigns and integrating existing cooperative marketing approaches.</p>
M3	<p>Establish a program to support operators moving towards international market-ready product using other successful operators as mentors.</p>
G1	<p>Broaden composition on the existing Flinders Ranges National Landscape Project Management Committee to include local council representation.</p>

1. Introduction

Background

Australia's National Landscapes showcase distinctive places and people. Twelve National Landscapes have been established and include the Kimberley, Australia's Red Centre, Kakadu, Great Ocean Road, Australia's Green Cauldron, Greater Blue Mountains, Australian Alps, Kangaroo Island, Ningaloo – Shark Bay, Australia's Coastal Wilderness, the Great South West Edge and the Flinders Ranges. The National Landscape program is a partnership between tourism and conservation agencies that is being implemented at national, state and local levels. The program aims to enhance the global competitiveness of National Landscapes through investment in product development, marketing, workforce development and infrastructure in places of outstanding natural beauty and cultural significance. An important starting point for National Landscapes involves preparation of an Experience Development Strategy (EDS).

What is this document about?

This is the EDS for the Flinders Ranges National Landscape. It outlines the experiences that will be most sought after by international *Experience Seekers*, now and in the future (see section 5.3).

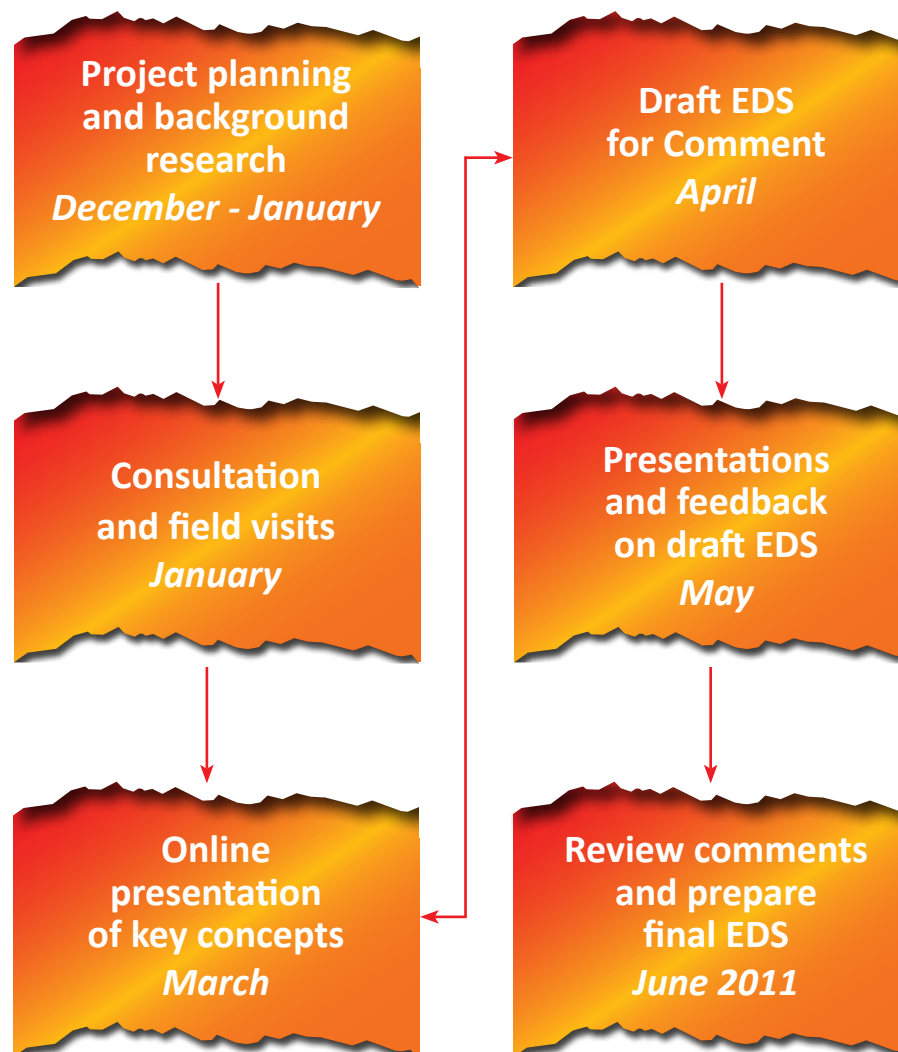
The key aim of an EDS is to balance the long term economic benefits of tourism with the community and conservation values of the region. The EDS provides a platform for ongoing marketing and product development throughout the Landscape, built on a spirit of cooperation.

While the focus of this EDS is on projects that will make the biggest difference in attracting the international Experience Seeker target market, it recognises that domestic visitors are increasingly making their travel purchase decisions in the global market place.

How was it put together?

A Project Management Committee (PMC) made up of industry and government representatives agreed on a six-step process in December 2010 and this guided preparation of the EDS (Figure 1).

Figure 1: The EDS Planning Process



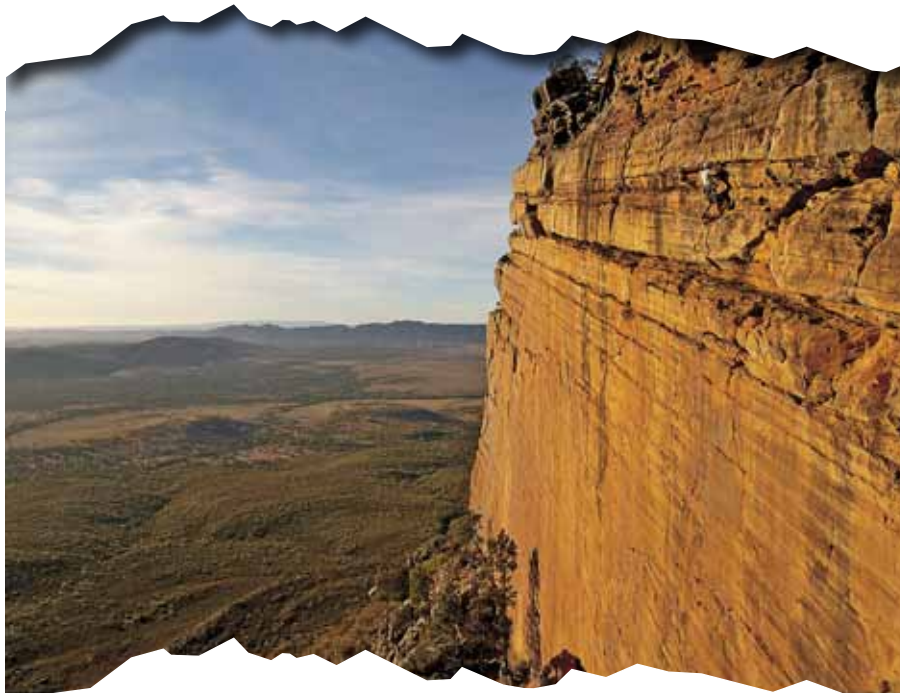
The project involved considerable engagement with stakeholders across the region. Stakeholder consultation included:

- workshops in Adelaide, Gladstone, Quorn, Melrose and Wilpena to gain early input on current experiences and new opportunities
- meetings with operators across the region
- field visits to a range of parks, products, places and businesses
- presentations and discussions in Adelaide, Melrose and Hawker on the draft EDS
- ongoing discussions with the PMC .

A summary of initial findings from the background research, consultation and fieldwork was provided online in March via the Flinders Ranges Tourism Operators Association website (www.frtoa.com.au/natlands). This generated over 30 detailed comments and provided a useful debate on the key issues, opportunities and how the EDS could pick up on these.

The draft EDS was distributed for comment, and presentations held to initiate interest. Over 30 additional comments were made on the FRTOA website.

This EDS has been influenced by a combination of the findings from consultation to date, federal guidelines on preparation of EDS documents and input from the PMC.



2. Overview of the destination

National Landscape boundaries are, by definition, experience boundaries. The boundary should not be regarded as a strictly defined geographical entity but rather a flexible guide that can change over time as tourism products and experiences evolve.

The Flinders Ranges as a National Landscape is broadly that area from Yacka in the south to the Strzelecki Track in the north, and from the Spencer Gulf in the west to the Barrier Highway in the east (see Figure 2).

The National Landscape is entirely contained within the Flinders Ranges and Outback region.

Across the region there is a number of national parks, conservation reserves, and areas of cultural significance. There is diversity of landscapes from rural scenery in the south to the peaks, ridges and gorges in the centre and the Outback plains in the north. Each has distinctive characteristics. The region has distinctive semi-arid vegetation and is rich in wildlife, including

three varieties of kangaroos and the rare yellow footed rock wallaby. Whilst some of the region's flora and fauna are protected in national parks and reserves, they are evident across the destination on public and private land. It is this diversity of landscapes, outstanding natural beauty, distinctive geology, and cultural stories that led the region to be considered as a National Landscape.

Within the region there are several local government areas, three major national parks and other smaller conservation reserves. It includes freehold and pastoral leases as well as public land. Lakes Eyre, Frome and Torrens, although not strictly in the Flinders Ranges, are commonly part of the journey for some visitors to the region. This has been particularly so in recent years when Lake Eyre has been filled with water and has offered exceptional experiences that reveal the story of life on earth as the landscape changes through climate.

The vast Flinders Ranges have traditionally been divided into three distinct regions (Southern, Central and Northern), but the National Landscape EDS is based on the Flinders Ranges as one integrated destination.

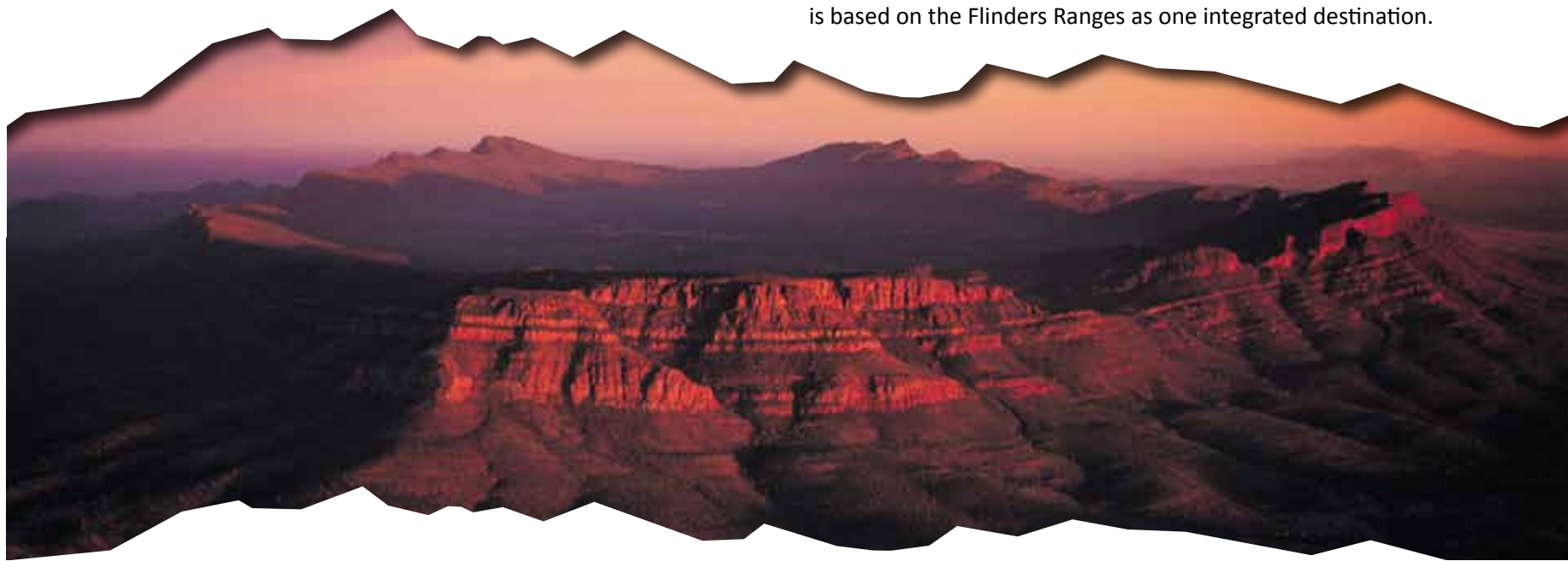
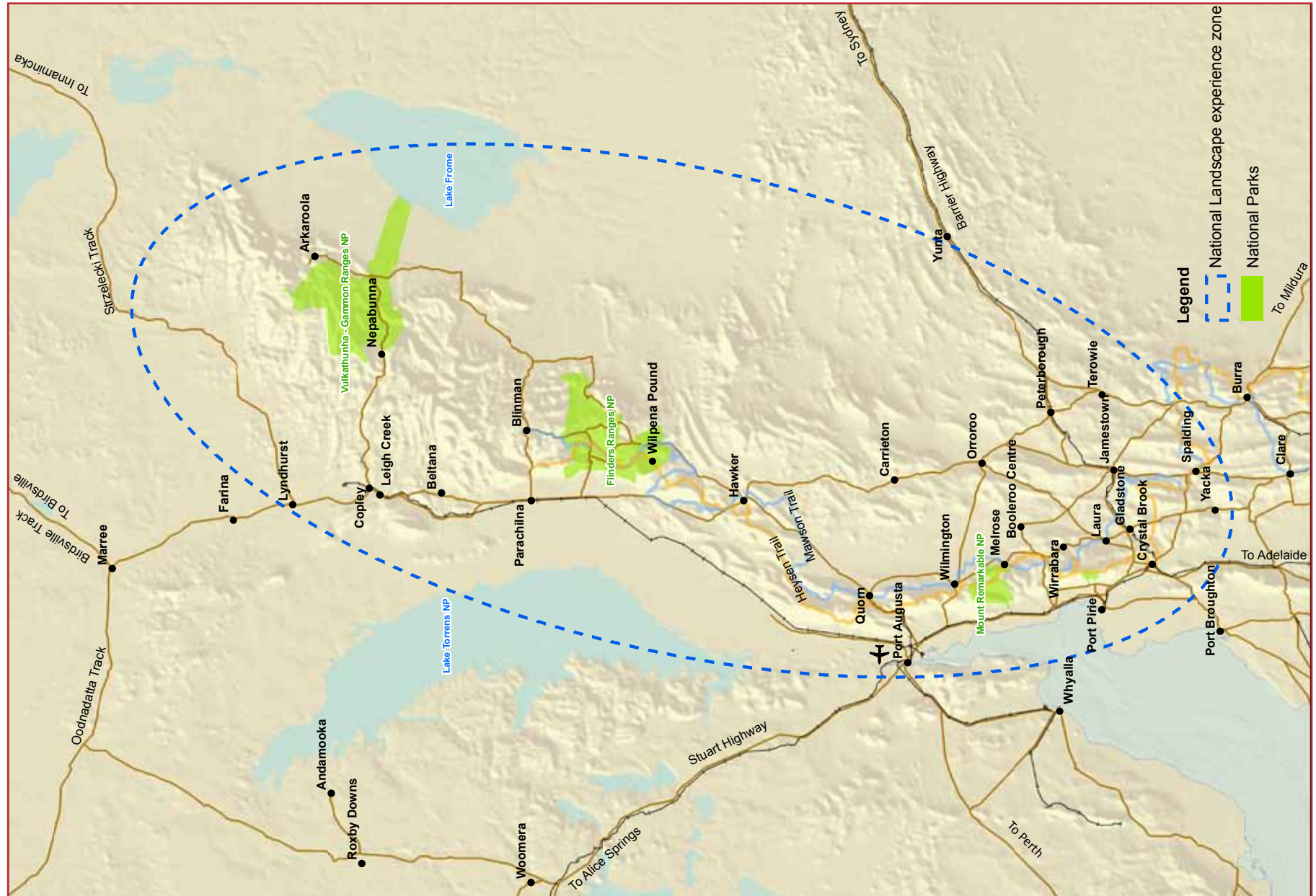


Figure 2: Map of Flinders Ranges National Landscape



3. Vision

Regional stakeholders believe the Flinders Ranges is a place offering:

- spiritual connection between communities, visitors and the ancient landscape
- peace and tranquillity
- exhilarating and soft adventure
- reflection on life's beginnings.

The vision for the Flinders Ranges National Landscape developed by stakeholders is that:

Visitors will remember the Flinders Ranges in very simple terms: amazing landscapes, 'real people', great things to do that reveal the story of life on earth.

Over the next decade, regional stakeholders want to see:

- a stronger profile in key international markets
- more significant experience precincts focused on Wilpena Pound, Arkaroola Wilderness Sanctuary, Melrose and Port Augusta
- better service standards across the region
- viable businesses
- bold new activities to support the brand
- a 'must do' touring route highlighting the best of the region
- improved infrastructure to enable growth and to manage visitor impacts
- a dedicated and skilled workforce who will act as ambassadors for the brand position
- dispersal across the region as visitor numbers increase.



4. Guiding Principles

The long-term financial sustainability of the tourism industry is reliant on a sustainable environment. For this to be achieved, the following Guiding Principles must be at the core of the EDS and guide development and marketing of the region.

- *Sustainability* – visitor experiences and associated infrastructure and services are environmentally, socially, culturally and financially sustainable.
 - Natural and cultural values of the region are protected from adverse impacts and enhanced through sensitive presentation and infrastructure.
 - Development of new tourism product focuses on low volume, high yield opportunities that are conducive to long-term sustainability of the destination.
 - Infrastructure is designed to reflect destination positioning, reflect local character and history, and incorporate sustainable services.
- *Quality* – whatever their nature and price, every activity, place and associated infrastructure and services will be of high quality. Training, support, partnerships and, where appropriate accreditation, will be used to ensure that all personnel have a high standard of service and expertise appropriate for their product.
- *Authenticity* – experiences are unique and strongly based on the distinctive qualities of the Flinders Ranges and its people. Visitors will have opportunities to immerse themselves in the environment and landscape and meet local people in authentic settings and situations.
- *Enlightening* – visitors are provided with meaningful opportunities to appreciate the significance of the Flinders Ranges and the importance of conservation in protecting natural, cultural and social values.



5. Destination positioning

5.1 Positioning Statement

The starting point for this strategy is the following destination positioning that has been developed with stakeholders. This and the Vision will guide the development and delivery of experiences for *Experience Seekers* in the Flinders Ranges².

The Flinders Ranges – where ancient landscapes inspire its peoples and reveal the story of life on earth.

This is the essential point of difference for presenting the Flinders Ranges to *Experience Seekers*. At the heart of the Flinders Ranges story lies the Ediacaran fossil story – first evidence of the earth’s earliest multi-cellular life. Ancient landforms over 300 million years old, a beautiful and well-preserved environment and an intriguing human history of exploration, survival and settlement, provide the platform for distinctive visitor experiences. The inter-relationship between the landscape and the people, and how they have shaped the place as it is now, are all part of the story that is the Flinders Ranges.

For each of Australia’s National Landscapes, one word has been identified to encapsulate the brand essence. For the Flinders Ranges, the word **revealing** is the key to the destination positioning and forms the basis for evaluation of experiences. It is the word that operators, businesses and the community can focus on in planning delivery of tourism experiences.

Through interpretation, stories told by local people, or interactive experiences, a range of messages can be *revealed* to create an understanding and appreciation of the destination. These messages are summarised below.

Regional stakeholders believe the Flinders Ranges is a place offering:

- spiritual connection between communities, visitors and the ancient landscape
- peace and tranquillity
- exhilarating and soft adventure
- reflection on life’s beginnings.

The Flinders Ranges are *revealing*:

- Surprises await you just around the corner
- You will be taken into places that on your own you might not venture or know about
- Light and clear skies – day and night - will provide a spiritual sense of revelation and a desire to find out more about yourself

And *inspiring*:

- Your spirits will soar as you look at this great stretch of ridges and outcrops bathed in strong Outback light.

And *intimate*:

- You are brought into close encounter with both the land and people.

² It is important to note that this National Landscape positioning was not developed to replace or diminish existing destination brand. It should be seen as complementary to the existing brands that form part of this iconic landscape and destination.

5.2 Bringing the brand to life

A brand or positioning statement is intangible – it is not a product or service. A brand reflects a deep, emotional connection that influences a consumer’s thoughts, images and feelings about a destination long before they visit.

The positioning statement for the Flinders Ranges will guide the tourism industry, councils, businesses and others in creating a visitor experience that brings the brand to life. Examples of how this might be achieved are:

- tours that reveal the story of life on earth or result in unexpected interactions with wildlife
- merchandise (food products, art and local furniture) linked to the messaging
- an event that may be for a niche market of *Experience Seekers*, but provides the opportunity to increase the profile of the region through public relations.

Importantly, every person who interacts with a visitor must be able to impart knowledge of the region and reveal its history. They should also be able to reveal how living and working in this destination inspires their life and what they do.

Every business should strive to achieve the highest of standards in delivering their experience. Regardless of the type of experience or the price point at which it is delivered, it needs to demonstrate exceptional customer service, meet and exceed industry standards, and be the best of its kind. Crisp, clean sheets and friendly knowledgeable staff are as important in the rustic shearers’ quarters as they are in the luxury lodge.

5.2.1 Keys to bringing the brand to life

All tourism operators in this area have the opportunity to reflect the overall destination positioning for the Flinders Ranges in their collateral, merchandise and activities. The keys for the various activities and products offered in the region are:

- *The gorges* are a journey into the heart of the Flinders Ranges; they twist and turn with new vistas revealing themselves ‘just around the corner’.
- *Aerial views* allow you to see the landscape from a new perspective – revealing its complexity of form in a way not seen from the ground.
- *Storytelling* will let the visitor hear and understand the significance of the geological story and pastoral and settlement history, right across the Flinders Ranges.
- Authentic farm and station stays, pubs and *encounters with local people* at a range of price points right across the Flinders Ranges allow the visitor to appreciate pastoral and settlement history and how living and working in the Outback inspire the people and what they do.
- *Journeys* by air, foot, vehicle, bike, camel or horseback, whether guided or self-drive, allow the visitor to appreciate the extent of the landscape, its wide vistas and panoramic views, the extraordinary diversity of wildlife, and the night skies.
- *National parks* and reserves offer opportunities to explore nature, appreciate wildlife, learn about the landscape and recreate in magnificent natural settings.
- *Guided tours* allow visitors to gain a sense of how the jigsaw of life on earth fits together.

5.2.2 Our values – how businesses can benefit from the brand

Some of the key things businesses need to consider to offer an outstanding experience at any price point include:

- world-class delivery – all aspects of the product, including interpretation, must be outstanding
- highly personalised service – high levels of engagement and interaction with guides/business operators
- strong brand reinforcement – the experience should reflect the emotional and intellectual territory that defines the region.

All operators need to aim to achieve the following with their products regardless of the ‘star class’ of the product:

- focus on alignment with the Flinders Ranges brand position
- reveal the Flinders Ranges landscape or people through storytelling at its best
- offer something distinctively ‘Australian’ for appeal to international markets
- be authentic and highly engaging – true to local life, encourage visitors to be immersed with people and place
- offer high quality at every point of delivery
- reflect National Landscape values of delivering a conservation/ sustainability message – whether in design of infrastructure, management of resource use, or interpretation and education
- be market ready – that is, packaged or ready for wholesalers or commissionable.

A premium product could also offer an element of exclusivity such as access to a site not usually available to visitors.

5.3 Delivering experiences to markets

5.3.1 What makes an experience?

Experiences are generated by an interaction between visitors, places and local people. One half of the interaction comes from the area, and can include activities (guided and self-guided), the natural or cultural setting, storytelling or interpretation, information (before, during and after the visit), infrastructure and facilities, and the customer service received along the way. These components are provided by the local industry, the wider community, local council and other agencies responsible for management of the destination. They represent the key ingredients that can be managed and changed creating better or new experiences.

The other half of an interaction is created by the visitor. It includes their expectations, motivations, special interests, prior experience, itinerary and other socio-psychological dimensions. Ultimately, the visitor decides what type of experience they have had.

To deliver a quality experience means finding the best match between what is on offer and what the visitor desires. High quality experiences do not necessarily mean high prices, as quality to one visitor is not the same to another.

The whole experience – people, place, infrastructure, services and storytelling – equals the sum of its parts.



5.3.2 Targeting the Experience Seeker market

Experience Seekers are the target market for National Landscapes. Although *Experience Seekers* differ by age, country of origin and spending power, they are united by values, attitudes and motivations. They are typically well educated, motivated by opportunities for personal growth, fulfilment and learning, and discerning about experiences, especially the presentation of natural and cultural heritage.

Experience Seekers are looking for: (i) authenticity (ii) interaction (iii) points of difference (iv) challenges and (v) learning opportunities. Some, but not all *Experience Seekers* are high-yield consumers. Currently, most of those visiting the Flinders Ranges are budget conscious to mid-range spenders. They seek quality activities (commercially guided and self-drive) and value for money. They have limited time and want clarity about what is best to do during a short stay. The potential yield of this market will increase as experiences develop in line with the EDS and people are encouraged to see the Flinders Ranges as a destination where there is enough to do to spend a week of their holiday..

Any strategy aimed at increasing tourism yield, length of stay and dispersal in the Flinders Ranges must ensure that a mix of experiences and products is provided that will meet the expectations of all consumer segments. In a slowing economy with rising fuel prices, increased personal and household debt and declining levels of discretionary income for travel, value for money is likely to be a key driver of product choice for most market segments in the foreseeable future. However, demand for premium products is likely to increase and new product will be required to meet high-end expectations³.

5.3.3 Flinders Ranges international market performance

The Flinders Ranges is emerging as an appealing destination for international *Experience Seekers*. Although currently having a relatively small share of international visitors, there is good potential to grow this market.

The Flinders Ranges captures about 10% of all international visitors to South Australia – the third most popular region behind Adelaide and Kangaroo Island.

Of the 530,000 total annual visitors to the Flinders Ranges and Outback region, approximately 8–10% (47,000–53,000) are from overseas, staying 4.8 nights on average. Of these, close to 30,000 visitors per annum (2007–2009) visited the Flinders Ranges and 36,000 visited the Outback region (18,000 are estimated to have visited both)⁴.

The proportion of *Experience Seekers* to total international visitors is not known at this point, although it is reasonable to assume this is high, given the nature of the destination.

Key international source markets include ‘Germany and other Europe’ (55%), UK (16%), ‘USA and Canada’ (11%) and New Zealand (8%). Asia (6%) and ‘other countries’ (3%) make up the rest⁵. The long-haul markets of the UK and Europe help to reduce the effects of seasonality by preferring to travel to the Flinders Ranges between January and April. Peak months across all markets are May to late October.

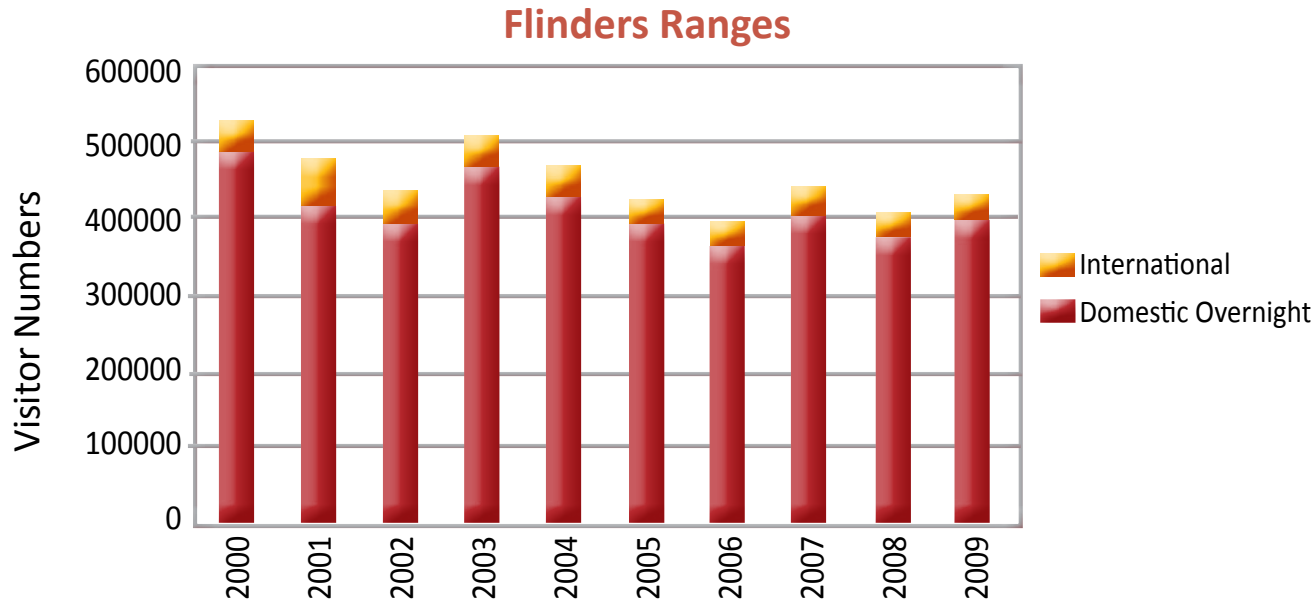
Put alongside the likes of Kakadu, Red Centre and the Kimberley National Landscapes, the Flinders Ranges – while being an appealing destination in its own right – currently lacks a strong brand position in Experience Seeker markets and has a limited supply of products that are ready for export. (see Appendix 4)

³ *Mountains of Memory Geotourism Interpretation Strategy, 2009.*

⁴ *These figures should be treated with caution as they are within error margins for the modelled data from Tourism Research Australia.*

⁵ *SATC Regional Tourism Profile 2009*

Figure 4: Flinders Ranges Visitors 2000-2009



National Landscape planning is very clearly focused on the international Experience Seeker market and particularly on the most compelling experiences for this audience.

However, the starting point for many experiences in the Flinders Ranges will be to get things right for the domestic market first.

It needs to be understood that the domestic market are increasingly making their travel purchase decisions in the global market place.

5.4 Communicating the stories

5.4.1 The stories

Experience Seekers are looking for interaction, learning opportunities and the opportunity to build a connection with the destination they are visiting.

The information they get before the visit will firstly affect the decision to visit, and then shape the places they go, the things they do and the way they travel.

Underpinning all this are the stories of the destination and the ways in which they are told to ensure the experience is memorable.

Interpretation is a means by which scattered stories can be pulled together and given shape and direction to provide a stronger regional voice. Core messages can be used to link stories across a large geographic area within which each district delivers its own locally focused content.

For example:

- The ancient earth history of the Flinders Ranges can be told from all districts, as a repeated story.
- Conservation messages can be told in any national park and beyond. They can be built into all elements of experience and product development across the region.
- By focusing upon narratives that explore the local landscape at a district level, a mosaic of complementary stories and experiences can be offered to visitors, all of which reinforce the key theme of connecting with people and an ancient landscape⁶.

Interpreting the landscape through its people with a range of complementary stories and experiences right across the Flinders Ranges has the potential to be a distinctive aspect of the destination that will allow it to be differentiated from other places.

Through interpretation, stories told by local people, or interactive experiences, we reveal a range of messages such as:

- How the Flinders Ranges were formed and the origins of the oldest life form
- How flora and fauna survive in this semi-arid environment
- The impacts of climate and how nature ebbs and flows – salt lakes, drought, flooding rain
- How the early settlers battled against nature
- Contemporary conservation (such as Bounceback and eco link corridors)
- Indigenous stories of life before and after settlement
- What it means to live in small remote communities 50kms from the nearest shop or 10kms from your neighbour.

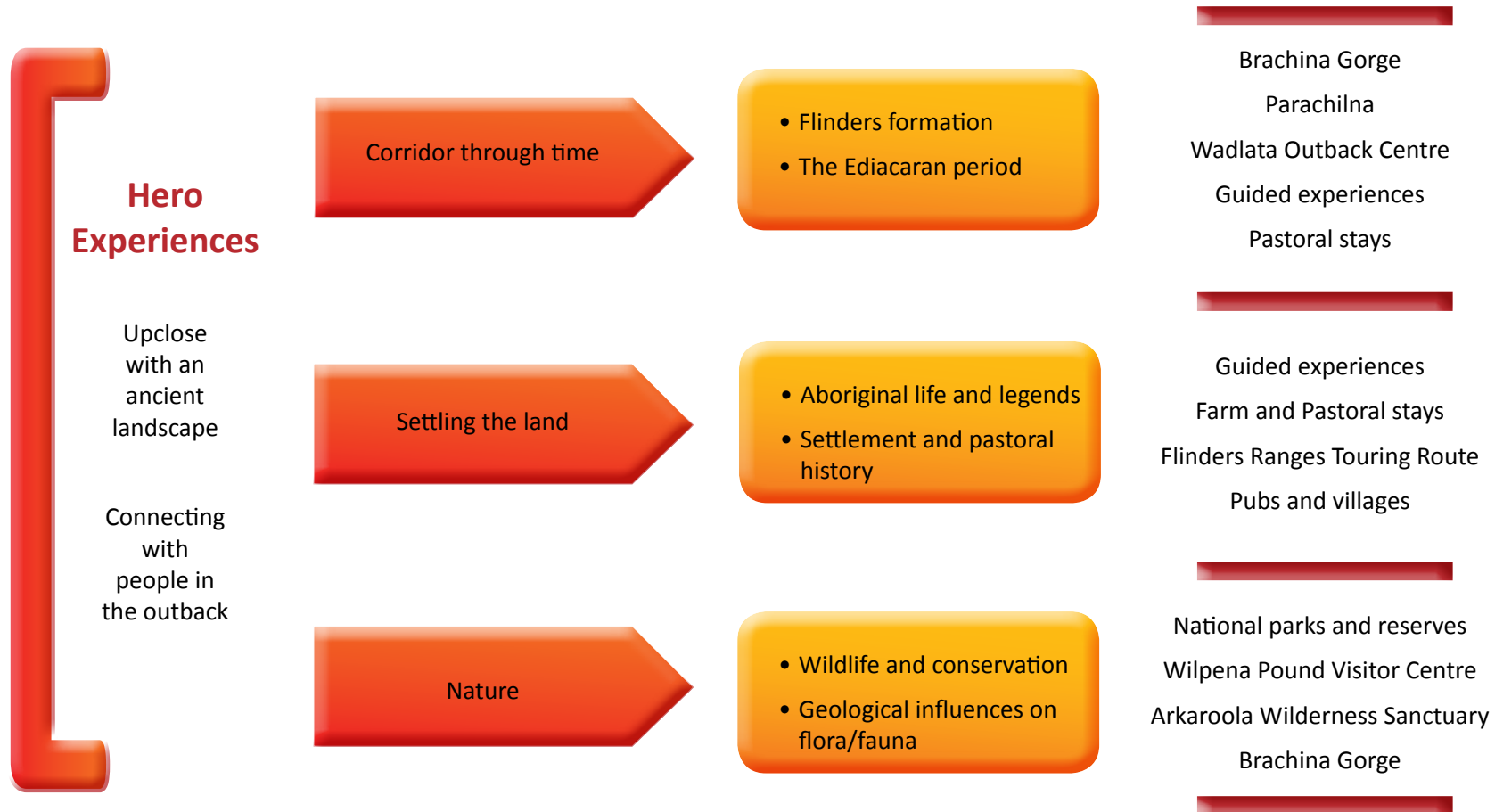
Figure 4 shows the iconic stories to be told in the Flinders Ranges to link the distinctive experiences of the Flinders Ranges to destination positioning. Some examples of how the stories can be told are provided.



⁶ *Mountains of Memory Geotourism Interpretation Strategy, 2009*

Figure 5: Iconic stories of the Flinders Ranges

The Flinders Ranges – where ancient landscapes inspire its peoples and reveal the story of life on earth.



5.4.2 How stories can be told

Interpretation can be integrated into every level of tourism service delivery. Self-guiding materials, wayside signage, interpretive centres and guided tours are the most obvious interpretive products. There is, however, great scope to integrate interpretation at a more subtle level.

Experience Seekers are eager to learn and are looking for information about the places they visit and the activities they do. This can be through word of mouth, guiding, written and web-based material or interpretive signage.

Static interpretation is poorly developed across much of the Flinders Ranges, with no interpretation at all at many popular sites. Where signage exists it tends to be dated.

National parks and conservation reserves in the Flinders Ranges offer distinctive landscapes and experiences. Nature in the Flinders Ranges surrounds the visitor and takes them by surprise:

- amazingly adaptable plants
- three different types of kangaroo, emus, yellow-footed rock wallabies, brightly coloured parrots, wedge-tailed eagles, lizards and snakes on an Outback road
- a landscape with not another human being in sight.

Anecdotally, wildlife encounters add substantial value for international *Experience Seekers* and add depth to the story of nature and conservation in the Flinders Ranges.

The story of Aboriginal life is important in any Australian destination. Continued improvement to current indigenous product (in the Flinders Ranges and from Adelaide) can provide a solid base for telling the Aboriginal story of life and legends. Partnerships with indigenous tour operators and guides could also be an effective way to incorporate Aboriginal stories into some existing products (eg within national parks, pastoral properties and on guided walks).

Ensuring local people and seasonal staff are equipped to tell visitors the range of stories of the Flinders Ranges is one of the most effective and compelling means of interpretation – this way visitors are also encouraged to connect with the local people. Providing an appropriate range of training on a regular basis is necessary.

The Mountains of Memory Geotourism Interpretation Strategy recommends a range of initiatives that will allow the Flinders Ranges stories to be brought to life across the whole destination. Staged implementation of this strategy to complement the priorities within this EDS will result in significant improvement in interpretation of the key stories.

A touring route and suggested itineraries are ways of directing visitors to the key sites where stories are best told. Encouraging people to visit Wadlata Outback Centre and Brachina Gorge, for example, or to stay in stations that offer high quality Outback pastoral experiences, will result in an appreciation of the range of Flinders Ranges stories.

Hotels, cafés and accommodation also need to play a role in telling the stories. They can use in-house interpretation to tell the district's stories. Objects, photographs, temporary and permanent exhibitions, custom-made furnishings and bed linen, menu offerings, bakery products, can all reflect Flinders Ranges stories.⁷

⁷ *Mountains of Memory Geotourism Interpretation Strategy, 2009*

These stories can be told:

- by local people on stations, and in pubs and villages
- by guides across the region
- at centres such as Wadlata Outback Centre and Wilpena Visitor Centre
- by innovation in interpretation at specific sites including Brachina Gorge, Pichi Richi Pass, Nilpena Station and Arkaroola Wilderness Sanctuary

• These stories need:

- brand-aligned regional signage and orientation
- Mountains of Memory implementation (*)
- indigenous product development and improvement
- innovation in interpretation

**Mountains of Memory: Geotourism Interpretation Strategy for the Flinders Ranges*



6. Flinders Ranges experiences

6.1 Overview

Brand Australia identified seven different experience pillars that have the most potential to encourage international travellers to visit Australia:

- Outback Australia
- Aussie Coastal Lifestyle
- Nature in Australia
- Food & Wine
- Australian Major Cities
- Australian Journeys
- Aboriginal Australia.

Recent research has revealed that Nature in Australia and Australian Journeys are the two experience types that are the most motivating to international travellers. They are also ranked by these travellers as the most appealing, exciting and relevant.

The Flinders Ranges can readily deliver on Outback Australia, Nature in Australia, and Australian Journeys. Aboriginal Australia, Aussie Coastal Lifestyle, and Food and Wine are emerging experiences in the region.

6.2 The hero experiences

Hero experiences are an expression of the elements of a destination that encapsulate the essence of the positioning statement and will deliver the Vision. They provide direction for the development of products, activities and attractions and for the delivery of services. They are a focus for marketing the region and differentiating it from other destinations.

Regional stakeholders believe there are two hero experiences associated with the Flinders Ranges:

Up close with an ancient landscape

Connecting with people in the Outback

These hero experiences should be seen as complementary, in the sense that visitor perceptions of the Flinders Ranges are generated by interacting with friendly local people who live in a vast ancient landscape.

Each of the hero experiences offers opportunities for visitors to appreciate the environment of the Flinders Ranges, whether by themselves or guided by an operator or an accommodation host. The extensive wildlife of the Flinders Ranges, for example, which is so popular with international visitors, can readily be seen whether driving through the landscape or staying on a property. The hero experience can also be complemented or enjoyed through adventurous activities for which the region will become known.

Key stories are associated with each of the hero experiences. The stories are integral parts of the experience and are delivered to varying standards and by different means by the regional products, activities and services.

The following sections will explore in more detail where the experiences are being delivered and what improvements could be made. The delivery of hero experiences will need to take account of current strengths, opportunities and gaps in Flinders Ranges tourism, including the following:

- The current experience of the Flinders Ranges is, with the exception of a small number of accommodation products, predominantly enjoyed by self-drive domestic visitors.
- While the Ediacaran story is a key element within the brand positioning and the Flinders Ranges stories, there are limited opportunities to experience it directly.
- Connecting with people in the Outback is happening to varying standards across the whole destination through the interaction between visitors and local people running accommodation, including farms, pastoral stays, resorts, hotels and caravan parks and the diverse range of experiences they offer.
- Nature including wildlife is a distinctive feature of the region and one that supports and adds value to both of the hero experiences.
- With a few exceptions, current delivery of the 'ancient landscape' hero experience suitable for *Experience Seekers* is clustered in the centre and

north of the region, around Wilpena Pound, Flinders Ranges National Park, nearby pastoral stations and Arkaroola Wilderness Sanctuary. The challenge over the next decade will be to strengthen these clusters and generate viable linkages to other parts of the region.

- The Aboriginal history of the area is important and there is some emerging product, but the majority of international visitors seek their Aboriginal experiences in other parts of Australia.
- There is limited promotion to encourage visitors to explore some parts of the landscape that offer insights into conservation, such as the Mount Remarkable or Vulkathuhna–Gammon Ranges National Parks.
- A small proportion of operators are ready to work with international *Experience Seekers* – out of approximately 550 operators in the region, less than 5% (20) are listed in the 2011 South Australia and Outback Wholesaler Product Manual.
- Only 12 operators registered for Australian Tourism Exchange in 2011 and 47 operators are accredited with the Australian Tourism Accreditation Program.
- Road access has some limitations that impact on visitors being able to explore areas that offer distinctive experiences of the Flinders Ranges.
- While flights to, through and over the Flinders Ranges offer some of the best opportunities there are infrastructure issues limiting the potential of this type of access.

6.3 Up close with an ancient landscape

6.3.1 Key features

- The ancient landscape of the Flinders Ranges encompasses majestic rock outcrops and mountain ranges, a geological history and archive of climate change spanning a billion years, vast open plains and rolling hills, gorges, a dramatic contrast between earth and sky, the unique Ediacaran fossil, and the distinctive Australian attribute – the Outback. Significant parts of the landscape are conserved within national parks, and other vast areas are pastoral leases.

- The Flinders Ranges landscape shares many common features with the Kimberley, parts of the Red Centre and the vast ancient landscapes found in Utah, New Mexico and the Dakota Badlands.
- The Flinders Ranges are comparatively more accessible by road and air than these destinations. Only 3–5 hours drive from Adelaide, the Flinders Ranges must rate as one of, if not the, most accessible Outback areas in Australia. While to a first time visitor, the Flinders Ranges landscape would appear similar to the Kimberley, it offers more easily accessible opportunities to experience the landscape in a more intimate way. Its gorges, peaks and valleys occupy a more compact area and allow visitors to travel into the heart of the landscape - to explore from within and on top, rather than from afar. It is the intimacy of ready access into Mount Remarkable, Flinders Ranges and Vulkathuhna–Gammon Ranges National Parks that sets the Flinders Ranges apart from other ancient landscapes in Australia and possibly the world.
- Experience of the landscape is derived primarily by driving (2WD and 4WD), scenic flights, self-guided and guided walks, bike riding, camel safaris and camping. Most visitors to the Flinders Ranges, including *Experience Seekers*, currently explore the landscape without the services of a tour operator - although many operators of accommodation provide advice on the best places to visit and the stories of the landscape. Some properties include opportunities to explore the landscape (eg. Skytrek, the Ridgetop Tour, Arkaba walking safari). National parks offer walking tracks and visitor nodes that allow the visitor to appreciate the landscape.

Whether it's Clocks on the Rocks at Quorn, the Recent megafauna, or whether it's the immense vista of Wilpena Pound; it's our amazing geological landscape that underpins it all. It creates our soils, shapes our topography, supports special vegetation types, and attracted our forebears to the Ranges. Thanks to the geology we have this fabulously diverse landscape that the plants and animals, including humans have helped to shape.

Flinders Ranges operator

6.3.2 Current opportunities

The leading opportunities for *Experience Seekers* to be up close with this ancient landscape are found at:

- *Wilpena Pound* (self-guided and guided walks, scenic flights)
- *Brachina and Parachilna Gorges* (4WD and 2WD trips and walks)
- *Rawnsley Park* (self-guided and guided walks, 4WD trips, scenic flights, hot-air balloons)
- *Arkaroola Wilderness Sanctuary* (Ridgetop Tour, walking, scenic flights and self-guided 4WD trips)
- *other properties* that offer guided and self-drive 4WD experiences (eg Willow Springs, Arkaba, Alpana, Bendleby Ranges)
- *Quorn* (such as on a Pichi Richi Camel Tour)
- in *national parks* where wildlife abound
- *guided tours* including those with Aboriginal guides that tell a particular story
- *cycling* the Flinders Ranges (range of options).

The natural attractions and geological stories at or close to these areas are nationally and internationally significant. There are two hero activities:

- seeing the landform of the Flinders Ranges (Wilpena Pound, ABC Range and Arkaroola) from the air and
- driving through the corridor of time via the Brachina Gorge.

The Ediacaran fossil, while unique, is largely inaccessible due to concerns over visitor impacts, potential black market trading and the location of key sites on private land.

6.3.3 Future possibilities

The most spectacular way to absorb the Flinders Ranges landscape is from the air. Adding new variations such as skydiving, paragliding, and heli-hikes would strengthen market appeal to a broader range of *Experience Seekers* (especially those looking for adventure). Many of these visitors lack time

rather than money, thus ‘aerial adventures’ would provide an intense experience within a short space of time.

Other parts of the region could also be explored by air - such as Mount Remarkable National Park (potential for heli-hiking). Air journeys by helicopter – offering a combination of a scenic flight with landing on spectacular viewpoints for short walks – could potentially connect the highlights of Wilpena, Vulkathuhna–Gammon Ranges and Arkaroola Wilderness Sanctuary into a spectacular one-day package.

On the ground, the region lacks a well-recognised iconic overnight walk or overnight cycle route. There is a wide range of short walks as well as bushwalks in national parks, but no one-day walk is clearly identified as a ‘must do’ experience. Previous planning had identified potential for a three-night/four-day iconic walk on the Heysen Trail (also known as the Huts on Heysen project) to build on existing Heysen Trail market profile. The potential of this walk needs to be evaluated relative to the newly launched Arkaba Station Walk, which also has the potential to become an iconic Flinders Ranges walk.

The Flinders by Bike trail, while currently not working as planned (as the original operator is no longer promoting it), offers a journey across the landscape linked to pastoral stays that enable riders to connect with local people. The product links into the Mawson Trail, a well-recognised cycling trail for South Australia.

With improvements to the extent of cycling opportunities in the southern parts of the Flinders Ranges, and promotion of links to the Clare Valley and the Melrose cross country bike riding hub, cycling can become a key feature of the Flinders Ranges and a way to explore different parts of the landscape.

Other areas such as Pichi Richi Pass offer significant sites to tell the story of Flinders Ranges geology, with access by camel tour or potentially the railway in the future.

Events that celebrate the Ediacaran fossil, conservation, Flinders Ranges landform, spirituality and night sky could be explored in the future for the peak season.

6.4 Connecting with people in the Outback

6.4.1 Key features

The Outback is a distinctly Australian environment. The Flinders Ranges provides the most developed and accessible range of opportunities to connect with pastoral and Outback communities in Australia. Pastoral stations and other farm properties that have diversified into tourism, as well as pubs, caravan parks and a range of other businesses, now provide *Experience Seekers* with a distinctive window into the human history of the Flinders Ranges and of the Outback lifestyle. There is now a critical mass of opportunities to interact with families who have lived on the land for several generations. The cluster of farms and pastoral stations engaging with visitors, showing them the environment, flora and fauna and telling the stories of exploration, human settlement and daily life in the Outback is a key feature of the Flinders Ranges.

It is the diversity of experiences as well as the interaction with the people that sets the Flinders Ranges apart. A visitor can stay in accommodation that ranges from rustic to luxury, from shearers' quarters or a cabin in a campground to a five-star lodge, but they will still find the same friendly people telling the local stories. Whilst the Flinders Ranges cross several hundred kilometres, someone in the south will tell the visitor about another business owner in the north as though they are next door.

No two places offer the same experience. Some enable the visitor to be a part of everyday farming life with cattle mustering and shearing; others offer well planned 4WD tours or self-drive tracks; some are about sitting having a BBQ with the owners or talking with a local Aboriginal person. Most offer opportunities to see wildlife (kangaroos, emus, birds) at close range on a daily basis. Each is about revealing the stories of the Flinders Ranges – past and present. It is the diversity and intimacy that sets the Flinders Ranges experience apart from other similar Australian destinations such as the Kimberley. It is also the fact that the Flinders Ranges community is able to tell the special story of the landscape and the Ediacaran fossil to their visitors with pride and understanding.

6.4.2 Current opportunities

The leading opportunities for *Experience Seekers* to interact with people in the Outback are provided through:

- pastoral stations and farms across the Flinders Ranges at a range of scales and offering a diversity of experiences associated with property life, the environment, wildlife and the landscape
- distinctive pubs, hotels and cafes such as The Prairie Hotel, North Star, Blinman and Copley Café
- specific interactive products run by local people such as Pichi Richi Camel tours, the Blinman Mine, Yullu Wirru (Ticklebelly Hill), bike riding activities at Melrose, Steamtown and the Pichi Richi Railway
- day-to-day interactions with people across the destination in caravan parks, shops and visitor centres.

Accommodation ranges from self-catered cottages and shearers' quarters to five star accommodation and gourmet catering. Activities range from farm tours to 4WD adventures. Each provides an insight into the past and the realities of present day life in the Flinders Ranges. Some places such as Arkaroola Wilderness Sanctuary tell a conservation story.

The region also offers other opportunities and service nodes for *Experience Seekers* to connect with its people and human history. Examples include the Wadlata Outback Centre, Port Augusta, tours of the Spencer Gulf, towns such as Melrose, Quorn, Hawker, Peterborough, Gladstone and Orroroo. Only a few of these are geared towards international *Experience Seekers* – most focus on domestic travellers. Port Augusta is the key service centre and gateway town for the region and will continue to play a key role as a visitor hub. Port Augusta receives the only regular scheduled air service into the region from Adelaide.

The primary values that need to be expressed in any business in the Flinders Ranges are:

- Authentic – the opportunity to interact with real local people, hear their stories and return to old values of trust, hospitality, time to chat.
- Engaging – local people being knowledgeable and prepared to tell visitors about the stories of settling the land and the ancient landscape.
- Experience driven – whatever the business, it will offer the visitor an experience of the region and, for some, soft adventure in a safe environment (with someone looking out for you).

Many small businesses in the region already demonstrate these values.

The communities of the Flinders Ranges will become the narrators of the region's stories, sharing its unseen and poorly known history and heritage. For the visitor who takes the time to listen, a journey through the Flinders Ranges will leave them with inspiration and revelation, knowledge and understanding.

Mountains of Memory: Geotourism Interpretation Strategy for the Flinders Ranges

6.4.3 Future possibilities

Linking Flinders Ranges Outback pub encounters by air or road would also add value to the hero experience of interacting with local people. With a strong cluster of Outback encounters in the north, future attention should perhaps focus on strengthening heritage attractions, service standards and accommodation options in the south in order to provide a more balanced touring route through the Flinders Ranges region. With few exceptions, there is insufficient supply of quality accommodation, food and attractions in the southern and central parts of the region to appeal to Experience Seeker markets.

It will be important to build on the Pastoral Tourism Strategy to expand and promote the range of properties across the destination as well as to seek investment in new types of accommodation to create diversity.



7. Key challenges for the Flinders Ranges

7.1 Attractions, products and services

The conservation of natural and cultural values is integral to a high quality visitor experience for the *Experience Seeker* market. Conservation and environmental sustainability are also key values of any National Landscape.

Attractions, products and services are the fundamental elements of a destination for the Experience Seeker (or any) market.

Any strategy for making the Flinders Ranges more appealing to *Experience Seekers* must pay attention to existing activities, products and services that can be enhanced, and the development of new activities, products and services. Both of these underpin the two hero experiences.

Consistently high quality international market-ready and accessible product needs to be attained to deliver on the brand. Product needs to be supported by an appropriate range and level of services.

Customer service needs to offer quality at every price point and be of a high standard. Visitors also need to be able to readily access information about the destination's tourism offer. The Flinders Ranges stories need to be effectively told to visitors at every touch point across the region.

High quality food and wine are an important part of any visit for the *Experience Seeker*. Ideally the destination will have distinctive regional product. While there are pockets within the Flinders Ranges where the food and produce offer is very good, generally there is scope for significant improvement.

Issues and challenges to be addressed in developing attractions, products and services include:

- a need for new and refreshed product that meets market needs;
- variable standards of service and food across the destination;
- limited accommodation or accommodation diversity in northern and southern parts of region;

- the centre piece of the brand proposition – the Ediacaran fossil – is largely inaccessible;
- ensuring conservation and sustainability values are integral to experience development;
- a very small proportion of operators who are ready to work with international *Experience Seekers* (although many work with domestic markets that could be grown);

a very small range of attractions and commercial products are market-ready for international *Experience Seekers*, many of them being in the north of the region.

7.2 Infrastructure

Reliable and efficient road and air access are critical to encouraging additional visitors to the Flinders Ranges. Access needs to be reliable (both to the region and within it) to those locations on the touring route that offer the best Flinders Ranges experiences.

Issues and challenges to be addressed in developing infrastructure include:

- effective promotion of existing air services into Port Augusta for fly drive visitors to consolidate scheduled services
- slow response times to re-open key tourist drives after rain events (Brachina and Parachilna Gorges)
- lack of sealed roads on key tourist routes such as Parachilna Gorge and the last 6 km to Arkaroola
- perennial constraints over mobile phone coverage, limited broadband, and power generation
- limited commercial viability at present for investment in upgrades to airport facilities at Hawker and to airstrips that access remote parts of the region for visitors (eg. Leigh Creek, Balcanoona).

7.3 Workforce development

Like any remote and seasonal destination, the Flinders Ranges faces workforce challenges in retaining staff and ensuring a consistent high standard of customer service and storytelling across the region. This is particularly pertinent given the *Experience Seeker* need for authentic experiences and interaction with local people. Many operators understand that it is their responsibility to manage these challenges within their own businesses.

It is beyond the scope of this strategy to try and solve issues such as pay rates, staff accommodation and seasonal demand. Initiatives that are within reach include

- (i) making sure all front-line personnel have the confidence, skill and knowledge to impart the key stories
- (ii) that they are familiar with what the region has to offer and
- (iii) those involved with marketing the region's hero experiences and supporting products are highly skilled at marketing to *Experience Seekers*.

Issues and challenges to be addressed in developing the workforce include:

- a limited pool from which tourism operators can attract personnel given high employment in other sectors combined with small local populations
- the perennial challenge faced by remote and seasonal destinations of finding and retaining skilled staff, particularly chefs, managers and tour guides
- issues with staff housing and support services (eg childcare, social networks) to attract people to the region
- capacity building to maximise opportunities for the creation of new tour products and improved guiding capacity to ensure high quality delivery of the Flinders Ranges stories.

7.4 Marketing

Marketing of the Flinders Ranges has traditionally been the domain of SATC, the region and individual operators. As a National Landscape, the international marketing effort will need to be based on a clear identification of the Flinders Ranges product offering, and a strategic approach engaging all levels of government and the industry.

Issues and challenges to be addressed in marketing include:

- low market share of international visitors to SA
- the current low profile of the region in key international markets;
- a lack of clarity of the Flinders Ranges tourism offer
- poor understanding of demand potential in relation to visitor flows
- lack of operator awareness of how to market products internationally
- inadequate or poorly developed product packaging both within the region and with other SA destinations.

Stakeholders at national, state and regional level will play a role in marketing Flinders Ranges as a National Landscape. This will require effective communication based on the recognised positioning and hero experiences identified in this EDS and smart marketing techniques suited to *Experience Seekers*.

Focus should be on cooperative marketing with Tourism Australia, South Australian Tourism Commission and larger businesses with international networks, as well as online presence through website, partners' websites and participation in social media.

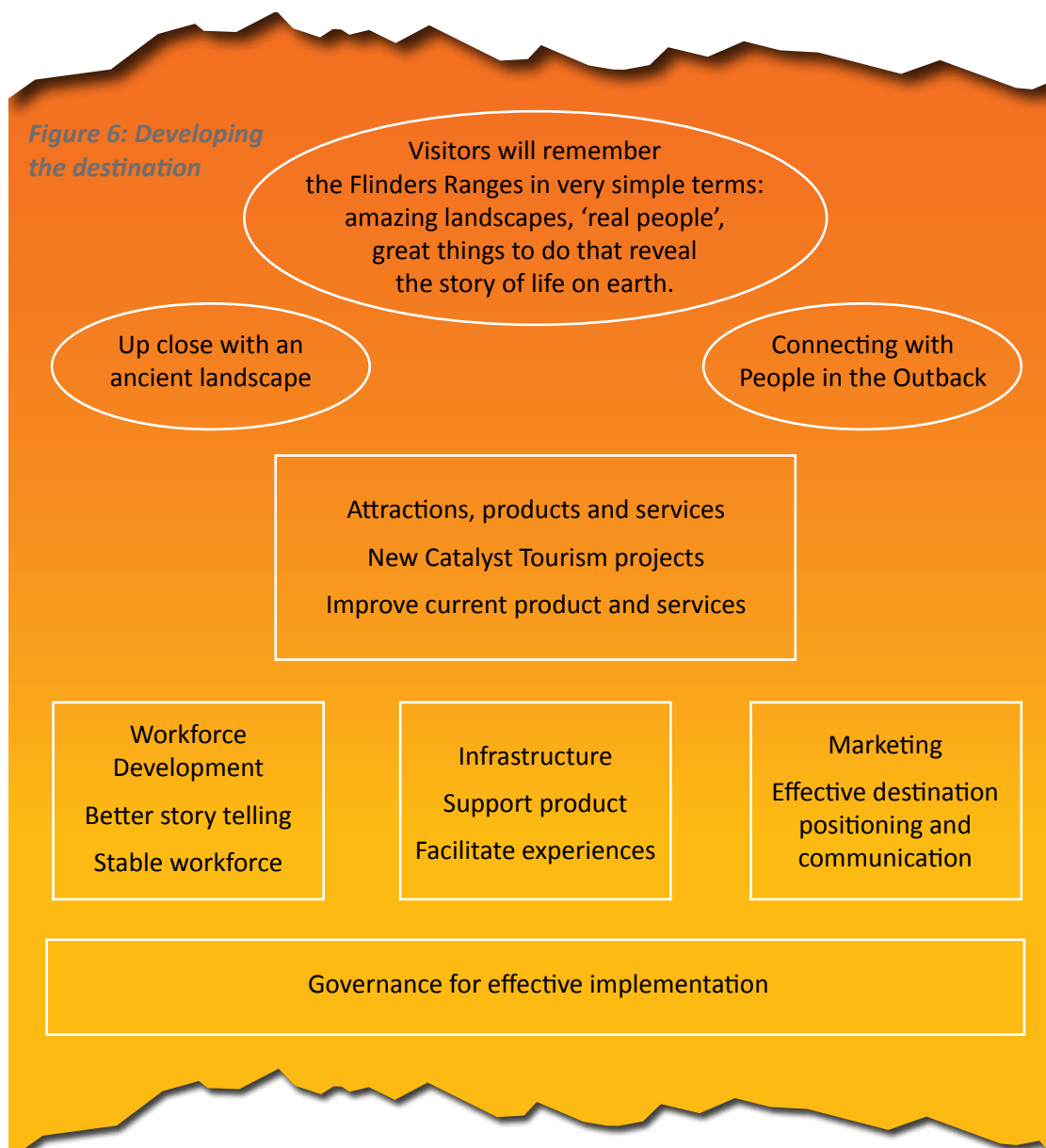
Stakeholders are committed to achieving pride in the Flinders Ranges as a whole destination. Achieving this will require considerable cooperative action and focus on implementing the brand including:

- communicating the brand essence to all those with a role in tourism
- ongoing monitoring of the effectiveness of brand delivery
- clear definition of the tourism offer of what a visitor may expect to find in the Flinders Ranges and why they would want to go there.
- communication with operators and businesses across the destination about ways in which they can deliver the brand through their products and services
- strategic approach to distributors/wholesalers and transport operators in relation to Flinders Ranges product and packaging including options for fly / drive journeys via Port Augusta.

7.5 Governance

Implementation of the EDS will require a coordinated approach between the various tourism stakeholders with Commonwealth, state and local government. One organisation will need to provide leadership.

Issues and challenges to be addressed include ensuring an integrated approach between stakeholders to leading and managing the sector.



8. Developing the Destination

This section outlines the priority actions required to further develop and manage the destination using a sustainable approach.

Recommended actions are coded as follows:

AP	Attractions and products
S	Services
IN	Infrastructure
W	Workforce Development
M	Marketing
G	Governance

8.1 Attractions, Products and Services

a) *New Product – the catalyst tourism projects*

A small number of catalyst tourism projects have been identified as having the potential to drive growth in Experience Seekers to the Flinders Ranges.

Details and actions associated with these projects follow this section.

b) *Improved Product and Services*

Continuing to grow and develop current products and services and expand the international market will strengthen the appeal of the destination.

Priority One projects

S1 Work with operators and businesses across the Flinders Ranges to 'get the basics right' including:

- customer service – hours of opening and availability of the essentials of fuel, food and accommodation
- information availability pre-trip and at the destination
- booking systems for accommodation
- consistent service standards across all product areas – visitor centres, accommodation, attractions, pubs, villages, properties, retail

- high environmental standards, (FRTOA/NLPMC)

S2 Develop a Visitor Information Plan to improve visitor access to information including:

- consistency and quality of information at visitor centres
- information delivery by all operators
- other media for information delivery. (FRTOA/NLPMC)

Priority Two projects

S3 Design and deliver annual training seminars on best practice marketing techniques and channels aimed at *Experience Seekers* to assist more businesses to become international market ready. (FRTOA/SFTnT)

8.2 Infrastructure that supports priority projects

Implementing the catalyst tourism projects and improving existing products and services requires some investment in infrastructure.

Priority One Projects

IN1 Investigate the need and location for accommodation across the region to meet both current and future demands. (SATC/RDAYMN/RDAFN)

IN2 Pursue funding for the facilities required (fuelling, airstrips, hangars) to encourage additional aircraft using Hawker, Quorn, Leigh Creek, Balcanoona airstrips in support of new and expanded aerial experiences. (RDAYMN/RDAFN /SATC)

IN3 Lobby Transport SA to develop strategy and seek funding for the following important improvements for the Flinders Ranges Touring Route:

- sealing the Blinman–Parachilna Gorge road
- sealing last 6 km of the road to Arkaroola
- developing a maintenance regime that enables quick restoration of the Brachina Gorge Road after floods. (RDAYMN/ RDAFN/SATC/Transport SA/ DENR)

Priority Two projects

IN4 Seek funding and construct the Southern Flinders Rail Trail; connect this trail with the Riesling and Rattler trails in the south, and continue enhancements of the Mawson Trail in the north. (RDAYMN/SFRTA/ SATC)

IN5 Work with Government to ensure appropriate levels of telecommunications, mobile phone coverage and services across the region to better support the tourism industry. (SATC/ RDAYMN/RDAFN)

8.3 Workforce Development

If the destination positioning is to be delivered and the stories of the Flinders Ranges told to customers, stability in workforce and high quality training in interpretation are necessary.

Priority One projects

W1 Develop a three-year pre-season workplace interpretation training program and develop associated support materials – a ‘Flinders Tour Guide Companion’ with the key facts, stories, legends, place-names, natural and cultural history that every employee (front-line staff, guides, pilots, retail etc) should know so they can be delivering the important Flinders Ranges stories. (FRTOA/SFTnT/DENR/Universities)

W2 Run an annual regional product familiarisation for front-line personnel and business owners to encourage cross promotion and on-selling across the destination. (FRTOA/SFTnT)

Priority Two Projects

W3 Investigate cooperative regional approaches to seasonal staffing and support services that assist in retaining knowledgeable staff for longer periods of time. (FRTOA/SFTnT)

W4 Offer incentives for businesses that achieve Eco certification as a means of underpinning important conservation messages as part of the National Landscape. (FRTOA/SFTnT)

W5 Investigate partnerships with local schools and TAFEs to engage the local youth in school-based training and potential traineeships in the tourism sector to lead to local people in the industry and reduced staff turnover. (SFTnT)

8.4 Effective Marketing and international focus

With product and services in place, a focused and cooperative approach to marketing to the target market will be necessary.

Priority One Projects

M1 Work with Tourism Australia to provide creative ideas for stakeholders to implement the destination positioning and communicate the ways which operators and businesses can deliver the positioning through their products and services. (NLPMC/TA)

M2 Review and implement the Flinders Ranges Marketing and Communications Plan, including clarification of destination positioning and the destination offering for offshore marketing campaigns, and integrating existing cooperative marketing approaches. (NLPMC)

M3 Establish a program to support operators moving towards international market-ready product using in-region successful operators as mentors. (NLPMC)

8.5 Governance - Effective implementation by stakeholders

Implementing the strategy will require all the appropriate stakeholders to be committed to projects and engaged in the Project Management Committee.

Priority One projects

G1 Broaden composition on the existing Flinders Ranges National Landscape Project Management Committee to include local council representation. (NLPMC)

9. The catalyst tourism projects

Ensuring the Flinders Ranges becomes one of Australia's leading destinations for the *Experience Seeker* market requires innovative experiences that appeal to this target market and deliver on the destination positioning.

A small number of projects have been identified with stakeholders that have the potential to attract the target market and encourage people to stay longer and spend more in the region.

Each of these catalyst projects has been agreed to by stakeholders because it:

- appeals to the *Experience Seeker* market
- delivers on the destination positioning
- has the potential to be a truly iconic experience that links conservation and tourism and offers an opportunity for visitors to learn about and engage with the environment, the landscape and the people of the Outback
- has the potential to be environmentally, socially, financially and culturally sustainable and contribute to the long term financial sustainability of the tourism industry
- enables the community to actively participate in implementation.

The catalyst projects are described below. In identifying and detailing the projects there has been a review of relevant examples from elsewhere. This is summarised in Appendix 3.

1. The Flinders Ranges Touring Route

The Flinders Ranges Touring Route will direct *Experience Seekers* towards the best opportunities in the region for getting up close with an ancient landscape, seeing wildlife, and connecting with people in the Outback.

The Flinders Ranges Touring Route will become the backbone of the destination offer and the focus for additional product, a range of accommodation standards suited to target market and different price points and appropriate services. As the main route is developed and becomes recognised, themed loops and alternative journeys offering different experiences can also be developed.

2. Showcasing the Ediacaran story

A number of experiences are identified that will enable the visitor to go home with an appreciation of the significance of the oldest complex animals ever found on earth.

Projects that will deliver on this aspect of the destination positioning include three opportunities on the Flinders Ranges Touring Route (Brachina Gorge, Parachilna and Arkaroola) and a further project that could be developed in the longer term (Pichi Richi)

3. Aerial experiences

Increased marketing emphasis on experiencing the Flinders Ranges from the air is proposed to enable the visitor to appreciate their age, scale and grandeur. This includes access by air, travelling between accommodation by air, and packaging air and land components to get the greatest appreciation of the place and its people.

In addition to scenic flights by fixed wing aircraft and helicopter, other opportunities for aerial adventure (hot-air balloons, paragliding, skydiving, heli-hiking, hang-gliding and a fixed high-level 'via ferrata') offer adventurous ways for *Experience Seekers* to view the landscape from above. As a cluster, aerial adventure can become a strong product offering that sets the Flinders Ranges apart.

4. Flinders Great Adventures

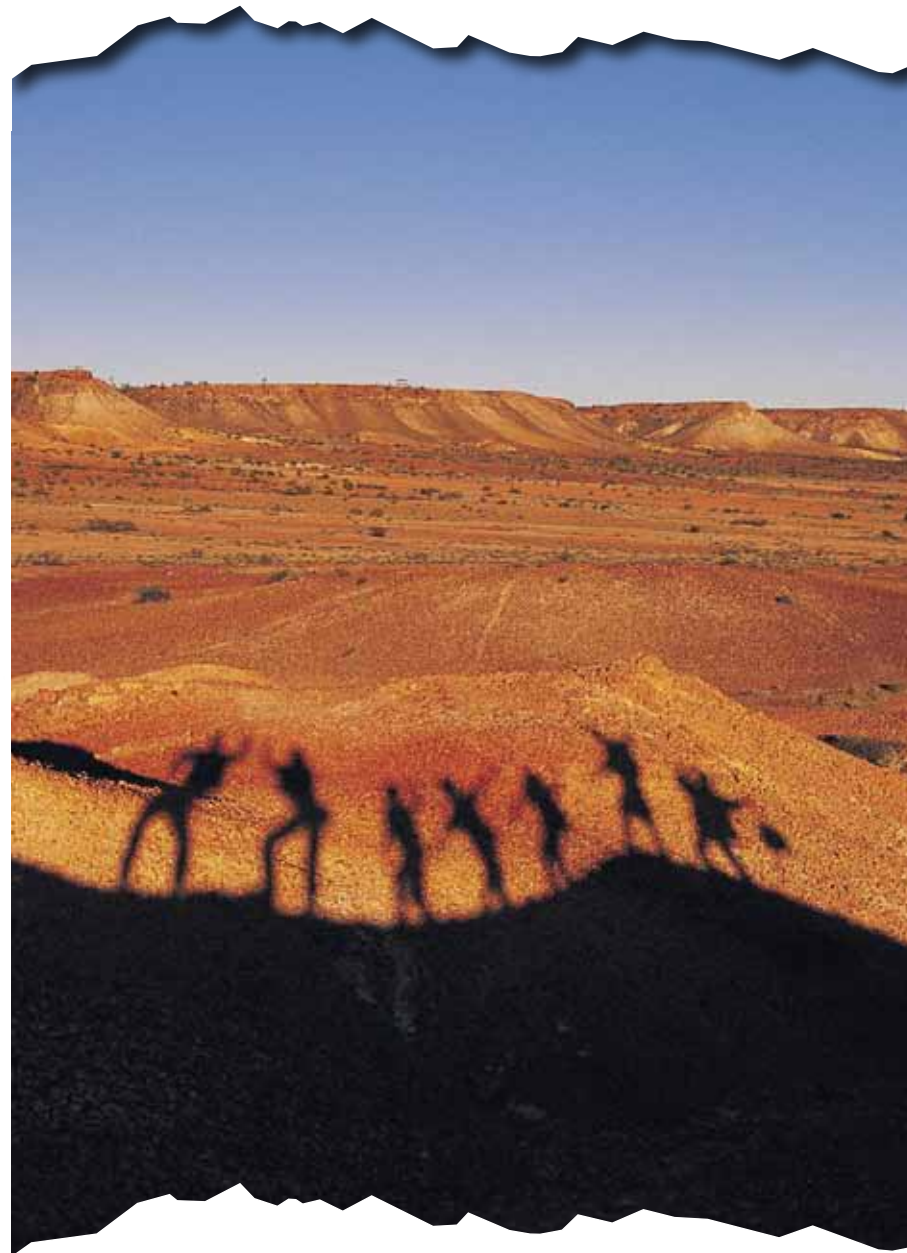
Walking and cycling are activities that are popular with *Experience Seekers*. They are an effective way to get into the ancient landscape, appreciate the conservation values of the region, and connect with local people.

Three Great Adventures are proposed that will be attractive to different people:

- A three night, four day accommodated walk that offers opportunities for getting close to the landscape and interpretation of the range of stories
- A cycling route that traverses the Flinders Ranges from south to north that can link all areas of the destination and offer sustainable business opportunities
- An iconic one day guided walk from Wilpena Pound

Implementing the Catalyst Projects

The following pages detail the catalyst projects and the way in which they can be implemented. Appendix 3 provides examples of how similar projects have been successful elsewhere and lessons that can be learned from other places.



9.1 Flinders Ranges Touring Route

9.1.1 Description

The concept of the Flinders Ranges Touring Route is to direct *Experience Seekers* towards the best opportunities in the region for exploring an ancient landscape, and connecting with people in the Outback. Successfully branded touring routes have the potential to attract people to a destination.

The touring route could:

- help build regional profile and brand recognition in the international markets (in a similar way to the Great Ocean Road in Victoria or the Garden Road in South Africa)
- leverage off the strong market image and access from the Clare Valley
- provide the opportunity for adventure and engaging with the local community in Melrose
- encourage visitors to the Mount Remarkable National Park as an introduction to the Flinders Ranges landscape
- offer the opportunity for interpretation of the overall Flinders Ranges landscape through Wadlata Outback Centre, the Gulf Experiences and the Australian Arid Lands Botanic Garden at Port Augusta
- offer options for short and longer journeys from visitor hubs:
 - Wilpena Pound–Brachina return loop
 - Wilpena Pound–Brachina–Blinman–Parachilna loop
 - Wilpena Pound–Brachina–Parachilna–Copley–Nepabunna–Arkaroola–Wirrealpa–Blinman–Wilpena
 - Or other towns (eg Hawker, Quorn) to Wilpena and then the loops
- allow the traveller to select their return journey according to their interests or time constraints.

The development and marketing of the Flinders Ranges Touring Route needs effective planning linked to the brand, and identification of priority improvements. It needs to be readily accessible to the market (including

those in hire cars) and offer a range of accommodation options suited to different price points. It must be the focus for additional product, a range of accommodation standards and appropriate services. As the main route is developed and becomes recognised, themed loops and alternative journeys offering different experiences can also be developed.

Other routes into and from the region such as the RM Williams Way, the Explorers Way, Strzelecki, Birdsville, and Oodnadatta Tracks are, and will continue to be, popular with domestic tourists as they travel to and from the east and to and from the north/south. Building on current brand recognition, resources and planning for the Explorers Way in particular need to be pursued.

Three tiers of hubs are identified within the touring route (see Table 1 below):

- *Tier 1 hubs* are those that offer the greatest concentration of tourism product that is suited to *Experience Seeker* markets.
- *Tier 2 hubs* are those that have strong potential to offer distinctive experiences for the market, but where additional product, improved services and/or accommodation is required.
- *Tier 3 hubs* are those that offer a strong service component but need additional product developed.

Table 1: Flinders Ranges Touring Route Hubs

Tier 1 hubs	Tier 2 hubs	Tier 3 hubs
<ul style="list-style-type: none"> • Port Augusta • Melrose • Wilpena Pound • Parachilna • Blinman • Arkaroola 	<ul style="list-style-type: none"> • Quorn • Peterborough • Copley 	<ul style="list-style-type: none"> • Gladstone • Hawker • Jamestown • Orroroo • Port Pirie

9.1.2 What is required?

Priority One projects

AP1 Develop a Flinders Ranges Touring Route Project Plan that details all the necessary components of implementation, staging, funding and responsibilities (SATC)

AP2 Design and implement innovative interpretation at Brachina Gorge incorporating:

- engaging and memorable self-drive experience
- opportunities for tour guides
- consideration of an evening automated or tour-guide-managed light experience of the gorges and wildlife (DENR)
- consideration of exclusive licence for an operator interested in investing in exclusive evening experience of Brachina Gorge. (DENR)

AP3 Continue overall development and promotion of Melrose as an active adventure destination with:

- a broader range of activities
- consistent high quality accommodation, food and wine
- opportunities for visitors to interact with local people. (RDAYMN/COUNCILS/SATC)

AP4 Offer business mentoring and support for brand aligned product development, packaging and marketing initiatives including ways in which businesses can package their product to provide better consumer opportunities and value for money. (RDAYMN/RDAFN)

Priority Two projects

AP5 Undertake a Master Plan for Wilpena Pound visitor precinct including Ikara and the Homestead that provides a base for a vibrant visitor experience including good access and circulation, effective delivery of information, high quality interpretation and a range of visitor activities (walking, cycling, rock climbing, abseiling). (DENR)

AP6 Investigate feasibility of a joint venture Visitor Centre expansion at Wilpena Pound to offer more comprehensive and innovative information and interpretation as a focus of the visitor hub. (DENR/SATC)

AP7 Support the partners in Parachilna in gaining investment in the Parachilna town centre project that will offer exciting and innovative interpretation about the geology and Ediacaran story of the Flinders Ranges. Promote this as part of the touring route. (Parachilna Community/SATC)

AP8 Work with Arkaroola Wilderness Sanctuary in a staged approach to:

- pursue funding for sealing of the last 6 kilometres of road
- ensure consistent high quality storytelling associated with the Ridgetop Tour
- promote heli-hiking as an exciting part of the product offer
- create a distinctive food and wine offering
- expand and/or refurbish accommodation offering to encourage additional visitors
- investigate niche product offering linked to the Ediacaran story and scientific history of the sanctuary (eg an event or engagement with scientists). (Arkaroola /SATC)

AP9 Encourage investment in additional brand aligned accommodation at Wilpena Pound (to embrace the landscape and views) and Blinman (to reflect the mining heritage and offer opportunities to interact with locals). (SATC/DENR)

AP10 Improve and promote Port Augusta as an important gateway and opportunity to understand the Flinders Ranges before travelling into them. Efforts to include:

- better opportunities for water-based experiences of the Gulfs
- packaging of Wadlata Outback Centre, Arid Lands Botanic Garden and Gulf experiences as an introductory itinerary. (NLPMC)

AP11 Encourage community to implement Mountains of Memory recommendations as the focus of interpretation for hubs. (RDAYMN/RDAFN).

Sample itineraries suited to *Experience Seekers*

Fly-drive three-day/two-night

Day 1

- Fly into Port Augusta
- Wadlata Outback Centre, Australian Arid Lands Botanic Garden
- Drive to Quorn
- Short camel tour
- Drive to Wilpena Pound Area (overnight could be resort, pastoral stay or camping)
- Sunset on Chase or similar evening activity.

Day 2

- Early morning balloon ride or scenic flight
- Wilpena Pound–Blinman–Parachilna via Blinman Mine
- Stay overnight Parachilna.

Day 3

- Parachilna–Wilpena Pound via Brachina Gorge
- Short walk
- Drive back to Port Augusta.



Five-day drive package

Day 1

- Adelaide Melrose via Clare Valley and Gladstone
- Overnight Melrose.

Day 2

- Morning bike ride on town trails or walk in Mount Remarkable National Park
- Port Augusta – Wadlata Outback Centre, Australian Arid Lands Botanic Garden, Gulf Water product
- Quorn – camel ride or railway
- Overnight Quorn with Ticklebelly Hill evening activity.

Day 3

- Quorn to Wilpena Pound via Parachilna and Brachina Gorge
- Late-afternoon guided experience Brachina Gorge
- Overnight Wilpena Pound area (could be resort, pastoral stay or camping).

Day 4

- One-day guided St Mary's Peak walk or Sky Trek 4WD
- Overnight Wilpena Pound Area.

Day 5

- Scenic flight or balloon trip
- Drive back to Adelaide via Peterborough (Steam town).

Three-day fly package

Day 1

- Fly into Balcanooka
- Ground transport to Arkaroola Wilderness Sanctuary
- Ridgetop tour
- Yellow-footed rock wallabies
- Evening astronomy and overnight stay.

Day 2

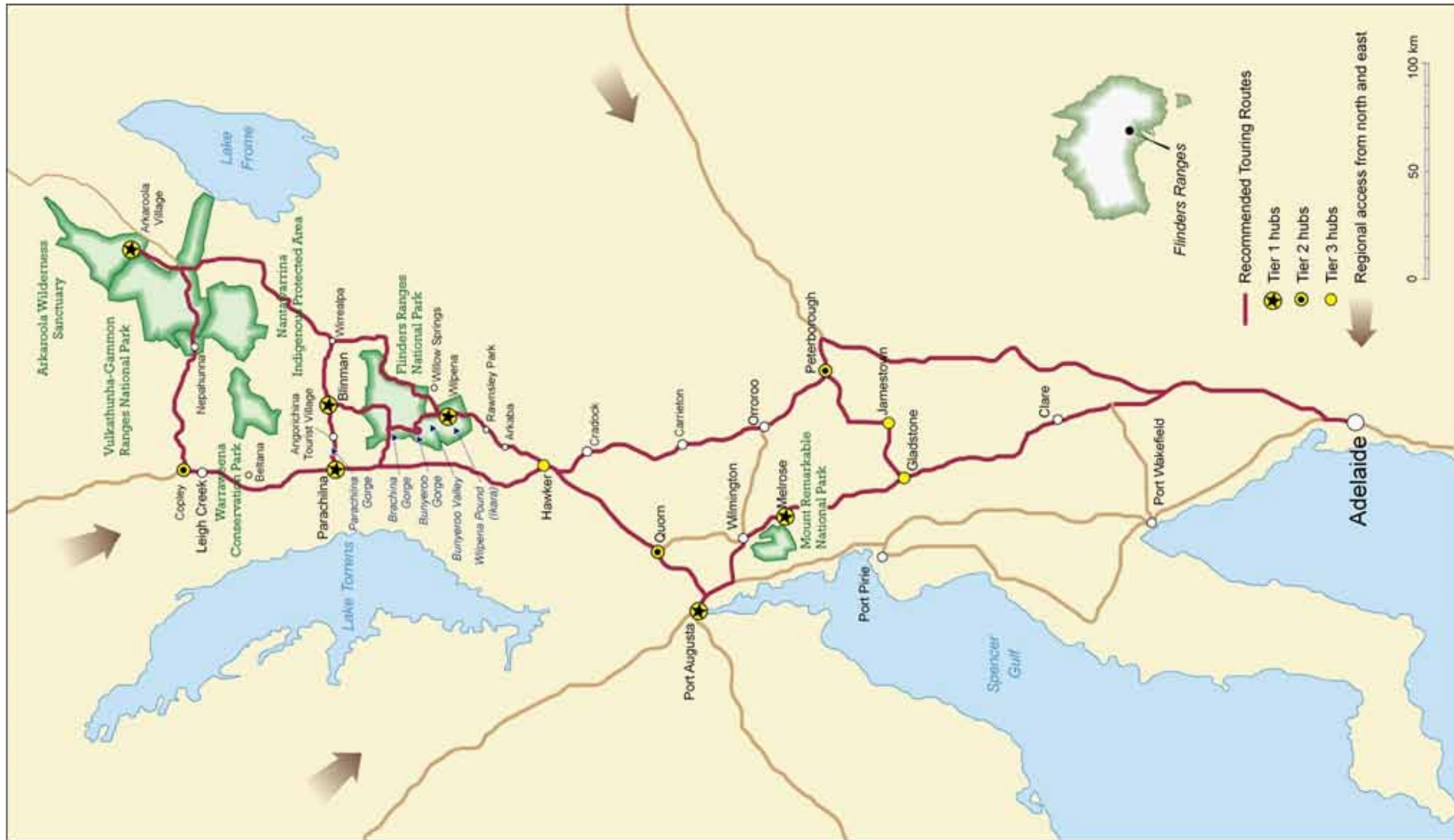
- Fly to Copley – lunch
- Fly to Blinman
- Mine tour and guided drive to Parachilna
- Overnight Parachilna.

Day 3

- Guided drive through Brachina Gorge to Wilpena
- Short walk or cycle Wilpena Pound
- Fly out of Wilpena Area/Hawker.



Figure 1: Recommended Flinders Ranges touring route



9.2 Showcasing the Ediacaran story

9.2.1 Description

The story of the Ediacaran fossil is unique to the Flinders Ranges, and as such, every visitor needs to have an opportunity to appreciate the significance of the oldest complex animals ever found on earth. While the story of the Ediacaran period may not be the ultimate hook to attract visitors, exciting experiences will mean that they go home talking about it.

Ideally there will be a range of different experiences in those places suited to telling the Ediacaran story.

Opportunities to understand the Ediacaran story are currently limited to the Wadlata Outback Centre, somewhat dated static interpretation in Brachina Gorge, and those guides and local people who tell the story to visitors. The Ediacaran Fossil Conservation Reserve (where fossils were visible) suffered serious vandalism and they can no longer be seen.

Wadlata Outback Centre currently tells the story of life on earth in effective and innovative displays. This serves as a valuable introduction for visitors to the region but, due to the cost of entry, only a small percentage of visitors to the centre actually enter the display.

Brachina Gorge in Flinders Ranges National Park and Nilpena Station, which is private property, are the best physical locations where evidence can be seen of the Ediacaran fossils. Arkaroola Wilderness Sanctuary, as the home of the Sprigg family (Reg Sprigg first discovered the fossils in 1946), is also ideal for storytelling by the Spriggs. Pichi Richi Pass may also offer opportunities in the future.

The Flinders Ranges Touring Route will encourage people to travel through Brachina Gorge, and many will also come through Parachilna and Quorn (Pichi Richi Pass).

Brachina Gorge offers a series of sites that offer insights into 150 million years of geological history including 'the golden spike'. The golden spike chosen for the beginning of the Ediacaran period is a 'rung on the ladder of geological time' that other scientists will use to identify rock sequences from the same period in other continents. The nature of the topography

and geology has also resulted in habitat suited to a colony of rare yellow-footed rock wallabies.

Providing a range of interpretive opportunities for guided and self-drive visitors in Brachina Gorge will create an exciting way to tell the 'corridor through time' story. It also offers the opportunity to create an appreciation of conservation and the relationship between species, habitat and the landscape.

An interpretive opportunity or light-based experience that attracts people in the evenings will strengthen the offering and provide greater potential to also view wildlife. Options might include a light show focused on the gorge walls, use of night-vision glasses to observe yellow-footed rock wallabies, remote cameras in rock wallaby caves back to a central viewing location, ranger guided talks, or a combination of these.

Nilpena Station is a private property with an extensive area of Ediacaran fossils that are the subject of ongoing research and discovery. The nature and location of the site are suited to small group visits only, and likely to be of interest to a small sector of the market.

Parachilna community has developed a concept plan for landscaping and construction of a major public space with an innovative and interactive interpretive facility that tells the 'corridor through time' story. This area once built could be one of the best ways to tell this story in the Flinders Ranges. As well as being an attractant in its own right, it will encourage some visitors to follow up their interest through guided experiences. Small-group guided visits to Nilpena or working with scientists at Nilpena may also be viable products.

The Pichi Richi Railway travels through the Pichi Richi Pass, one of the other sites that provide a clear picture of the Ediacaran period. Whilst the current volunteer-run railway experience is focused on railway history and family fun, potential exists to create an interpretive experience of the Pass that can form part of the train journey.

9.2.2 What needs to be done?

Priority One projects

Implement recommendations AP2, AP6 and AP7 under the Flinders Ranges Touring Route that deliver Ediacaran experiences.

Priority Two projects

AP12 Promote Wadlata Outback Centre as an important attraction for visitors coming to the Flinders Ranges. Develop a business plan that identifies ways to support higher visitor attendance to the display through reducing the entry price. (PACC)

AP13 Work with the Pichi Richi Railway to explore ways in which the Ediacaran evidence on the Pichi Richi Pass can be interpreted to passengers. (SATC)

AP14 Support and promote guided tours that include the geological stories of the Flinders Ranges and encourage an operator to offer half-day trips from Wilpena Pound and surrounds that allow for independent travellers to have a guided and interpreted experience. (NLPMC/FRTOA)

AP15 Extend the Ediacaran merchandise offer ensuring that the merchandise created appeals to the Experience Seeker market and is offered in all retail and tourism industry operator outlets. Merchandise may for example be food products, art, or local furniture inspired by the Ediacaran fossil. (NLPMC/FRTOA/SFTnT)

9.3 Aerial experiences

9.3.1 Description

One of the best ways to appreciate the Flinders Ranges, their age, scale and grandeur is from the air. Scenic flights are available from a number of places across the region, but there is not a strong message of the great experience a flight offers in revealing the landscape.

Flying between locations across the region also offers a perspective on the Outback and the opportunity to connect with people at pastoral stays, pubs and villages. Aerial journeys have been emerging with private operators and charter flights but the product can be expanded and more effectively promoted as a key Flinders Ranges journey.

Air journeys to Lake Eyre have been a strong experience for domestic visitors since the lake has had water in it and has provided an exceptional opportunity for visitors to appreciate the impacts of climate on the landscape and environment. Continuing to build off this new market has potential for the future.

There is currently an excellent range of farms and pastoral stays across the region, many of which are accessible by air as well as by land. The classic old pubs of the Flinders Ranges are also fantastic locations for getting to know the locals, and as bases for land-based journeys. Each offers a different sense of place and of the character of the town/village where they are located.

Each pastoral stay or pub needs to have something that sets it apart from others – the food offering, the accommodation, the characters telling stories, the setting or the activities that are offered. Pub owners and staff need to be committed to being part of the tourism sector and of telling the stories of the Flinders Ranges.

Packaging and promotion of air journeys with pastoral and/or pub accommodation and land packages to key sites offers an exciting opportunity for the Flinders Ranges.

In addition to scenic flights and journeys by fixed wing aircraft and helicopter, other opportunities for aerial adventure would add to the

range of products *Experience Seekers* may choose to do. Hot-air balloons, paragliding, skydiving, heli-hiking, hang-gliding and a fixed high-level 'via ferrata' adventure all offer new ways to view the landscape from above. As a cluster, aerial adventure can become a strong product offering that sets the Flinders Ranges apart.

9.3.2 What needs to be done?

Priority One projects

Air journeys

Implement IN2 to attract funding to support aerial journeys and adventure.

Aerial adventure

AP16 Pursue investment in additional aerial adventure experiences through:

- consumer research
- investigating the interest of current commercial businesses and new operators to expand the range of aerial experiences offered
- investigating potential for financial incentives such as reduced landing fees or hangar facilities. (SATC)

AP17 Work with commercial partners to develop, implement and promote a series of three-day Flinders Ranges aerial journeys including land-based experiences and to encourage 'Flinders by Air' including scenic flights as an excellent Flinders Ranges experience. (SATC/NLPMC)

Priority Two projects

AP18 Establish a network of pub owners with the aim of strengthening the pub product with distinctive experiences at each, and encourage cooperative marketing of pubs as part of the journey. (NLPMC)

AP19 Investigate opportunities for siting a via ferrata somewhere in the Flinders Ranges (possibly the Wilpena area) and, if appropriate, progress to feasibility study. (SATC/RDAs/DENR)

As per AP7, support Arkaroola Wilderness Sanctuary in the development and promotion of heli-hiking as a guided product. (SATC)

9.4 Flinders Great Adventures

9.4.1 Description

Walking and cycling are activities that are popular with *Experience Seekers* and an effective way to get into the ancient landscape, appreciate the conservation values of the region, and connect with local people.

Walking

Iconic multi-day walks have been recognised as key drivers for some destinations (eg Overland for Tasmania, Larapinta for Alice Springs).

The Heysen Trail could become one of the iconic images for the Flinders Ranges with linkages to artists, the geology and crossing the ranges. Already reasonably well known, with an iconic walk product, it has potential to leverage *Experience Seekers* into the region. Planning has been undertaken for the Heysen Trail, and pursuing investment in a new product that meets market needs would be required.

Arkaba Station has recently initiated a three-day walk that also has potential as a Flinders Ranges iconic experience.

It will be necessary to evaluate the walk products to determine which has the greatest potential to meet consumer expectations and attract *Experience Seekers* to the Flinders Ranges.

As Wilpena Pound is a key attraction for much of the market, and there is a large choice of walks on offer, identifying, planning and developing one great day-walk experience that can be offered with a guide would add to the current range of walks.

As the highest peak in the Flinders Ranges, and one that is sacred to the Adnyamathanha community, St Mary's Peak offers potential as a one-day guided walk with an Aboriginal guide. Planning for trail alignment has commenced, but working with the Adnyamathanha community to consider the guided product is necessary.

Efforts also need to continue to maintain a suite of short walks across the Flinders Ranges for people visiting other parts of the destination (eg Alligator Gorge, Warren's Gorge, Dutchmens Stern), and to have readily accessible information available for the visitor about walking and cycling.

Cycling

The development of a cycling route that traverses the Flinders Ranges from south to north can link all areas of the destination with opportunities that target both *Experience Seekers* and a high-growth market segment of recreational cyclists.

The concept involves building on the already successful Riesling Trail, linking to the planned Southern Flinders Rail Trail, and eventually extending through the Flinders Ranges to link with the Mawson Trail. The trail would offer a range of experiences from short cycle trips between wineries in the south to full-day trips and overnight trips using accommodation across the region.

The Southern Flinders Rail Trail is a key part of the development of cycling opportunities for *Experience Seekers* in the Flinders Ranges. This trail, from Wilmington to Yacka initially, but later to connect with the Clare Valley Riesling and Rattler trails in the south, and with an enhanced Mawson Trail in the north through towns such as Hawker, Quorn and Blinman, will provide *Experience Seekers* with links to quality accommodation, dining options and adventure opportunities

The trail would offer a broad range of business development opportunities across the Flinders Ranges from bike hire to accommodation close to the trail, cafes, commercial guiding and shuttle services to take cyclists from accommodation to trail heads.

As some trail sections are on private property, it offers excellent opportunities for farms stays in southern parts of the destination and for connecting with people who live on the land.

Some of the building ruins across the Flinders Ranges may be able to be incorporated into the route as shelters/interpretation points/coffee stops.

Other adventures

There is a range of opportunities for other adventure tourism across the Flinders Ranges, and any new or expanded activities offered commercially will add to the overall appeal of the Flinders Ranges.

Activities that may be suitable include hang-gliding, abseiling, rock climbing, via ferrata, canoeing, kayaking, rogaining, and geo-caching.

9.4.2 What needs to be done?

Priority One projects

AP20 Work with commercial partners to develop, implement and promote an iconic multi-day walk in the Flinders Ranges through:

- a review of the planning to date (in the light of changes in supply)
- consumer research if necessary to determine the best option
- investment in development of a multi-day walk consistent with outcomes of planning/research. (DENR/SATC)

Priority Two projects

AP21 Engage with Adnyamathanha people to ascertain potential for developing and promoting St Mary's Peak (or alternative walk) as a guided one-day walking product. If found suitable, pursue funding for infrastructure, business development and capacity building to implement the project. (DENR)

AP22 Continue to maintain a range of short walks across the Flinders Ranges and promote them as local experiences through a regional brochure and on website. (COUNCILS/DENR/RDAYMN/RDAFN)

A23 Further develop the Flinders by Bike product between pastoral stays with packaging of accommodation, active engagement with local people and storytelling as part of the experience. (NLPMC/FRTOA]

AP24 Support operators who wish to expand or introduce new adventure activities in the Flinders Ranges as part of the product offering. (RDAYMN/RDAFN)

As per IN2, pursue funding for the Southern Flinders Rail Trail and linkages to the Clare Valley and establish new brand of Flinders Ranges Cycle Trail (or similar). (RDAYMN/SFRTA)

10. Implementation

10.1 Priorities

There is a small volume of *Experience Seekers* drawn to the Flinders Ranges at this point. Forecast growth in international arrivals is between 3% and 5% per annum for the next few years and domestic travel within South Australia is fairly static. It would be easy to over-invest in new development in the hope that it will stimulate growth. A balanced strategy, in terms of risk versus return in the current economic climate would be to focus on enhancing existing products while exploring the development of new experiences. In addition to enhancing the product offering, there is a range of actions that will need to be taken by stakeholders to ensure the destination meets visitor needs and competes internationally.

Projects were identified through a process of prioritising undertaken with the Project Management Committee. This looked at the likely impact of each project in terms of supporting catalyst projects, generating growth in visitor numbers, and enhancing the experiences on offer in the Flinders Ranges. This has been weighed up with the timeframe within which a project may be delivered.

The top 7 priority projects determined by the PMC are as follows:

No	Action	Lead responsibility	Partners	Target timeframe	Performance indicators
AP1	Develop a Flinders Ranges Touring Route Project Plan that details all the necessary components of implementation, staging, funding and responsibilities.	SATC	NLPMC, RDAYMN, RDAFN, DENR, Councils, Roads SA, FRTOA, SFTnT, SFRTA, all stakeholders	Plan 2011/2012 followed by staged delivery	Plan completed and funding / budget commitments by June 30 2012
AP2	Plan, design and implement innovative interpretation at Brachina Gorge incorporating: <ul style="list-style-type: none"> • engaging and memorable self-drive experience • opportunities for tour guides • consideration of an evening automated or tour-guide-managed light experience of the gorges and wildlife • consideration of exclusive licence for an operator interested in investing in evening experience of Brachina Gorge. 	DENR	NLPMC, FRTOA, SATC	Plan 2011/2012 followed by staged delivery	Plan completed by June 30, 2012 Implementation funding committed by December 2012;

No	Action	Lead responsibility	Partners	Target timeframe	Performance indicators
AP3	Continue overall development and promotion of Melrose as an active adventure destination with: <ul style="list-style-type: none"> • a broader range of activities • consistent high quality accommodation, food and wine • opportunities for visitors to interact with local people. 	SATC	RDAYMN, DCMR, SFTnT, NLPMC SRFTA	Ongoing	Increase in visitor nights and expenditure for Melrose
AP4	Offer business mentoring and support for brand-aligned product development, packaging and marketing initiatives for businesses across the destination, including ways in which they can package their product with other businesses to provide better consumer opportunities and business value for money.	RDAYMN / RDAFN	NLPMC, SFRTA, FRTOA, SFTnT DKA	Start 2011/12 then ongoing	The number of operators being sold internationally has increased by 5% by 2013 and 10% by 2014
AP16	Pursue investment in additional aerial adventure experiences through <ul style="list-style-type: none"> • consumer research • investigating the interest of current commercial businesses and new operators to expand the range of aerial experiences offered • investigating potential for financial incentives such as reduced landing fees or hangar facilities. 	SATC	RDAFN, RDAYMN, SFRTA	2012/13	The viability and consumer support for additional aerial experiences has been tested and a strategy developed to move forward by 2013
AP17	Work with commercial partners to develop, implement and promote a series of three day Flinders Ranges aerial journeys including land-based experiences and to encourage 'Flinders by Air' including scenic flights as an excellent Flinders Ranges experience.	SATC	NLPMC	Start 2011/12 then ongoing	Operators are promoting new aerial products and there is an increase in take up by wholesalers

No	Action	Lead responsibility	Partners	Target timeframe	Performance indicators
AP20	Work with commercial partners to develop, implement and promote an iconic multi-day walk in the Flinders Ranges through:	DENR	RDAYMN, DCMR, SFTnT, NLPMC SRFTA	Ongoing	Increase in visitor nights and expenditure for Melrose
AP20	Work with commercial partners to develop, implement and promote an iconic multi-day walk in the Flinders Ranges through: <ul style="list-style-type: none"> • a review of the planning to date (in the light of changes in supply) • consumer research if necessary to determine the best option • investment in development of a multi-day walk consistent with outcomes of planning/research. 	DENR	SATC	Review 2011/2012 followed by staged delivery	June 2012 with way forward identified.

Implementation of the priority projects needs to be supported by actions that address the key challenges for the destination.

The following priority projects relate to

- (S) Improvements to the current tourism offer
- (IN) Infrastructure to deliver the catalyst projects
- (W) Workforce development to ensure the Flinders Ranges stories are told
- (M) Marketing
- (G) Implementation

No	Action	Lead responsibility	Partners	Target timeframe	Performance indicators
S1	<p>Work with operators and businesses across the Flinders Ranges to 'get the basics right' including:</p> <ul style="list-style-type: none"> • customer service – hours of opening and availability of the essentials of fuel, food and accommodation • information availability pre-trip and at the destination • booking systems for accommodation • consistent service standards across all product areas – visitor centres, accommodation, attractions, pubs, villages, properties, retail • high environmental standards. 	NLPMC	FRTOA, SFTnT, SATC, all stakeholders	Start 2011/ongoing	<p>Regular monitoring reports improvement in visitor satisfaction</p> <p>There is a reduction in complaints regarding services.</p>
S2	<p>Develop a Visitor Information Plan to improve visitor access to information including:</p> <ul style="list-style-type: none"> • consistency and quality of information at visitor centres • information delivery by all operators • other media for information delivery. 	NLPMC	FRTOA, SFTnT, SATC Councils	2011/2012	The Plan has been completed and an annual review reports an agreed level of implementation
IN1	Attract private investment in developing more quality accommodation for the region, to cater for current demand and future increased opportunities.	SATC	RDAYMN, RDAFN, SFRTA	ongoing	One new property approved within 24 months
IN2	Pursue funding for the facilities required (fuelling, airstrips, hangars) to encourage additional aircraft using Hawker, Quorn, Leigh Creek, Balcanoona airstrips in support of new and expanded aerial experiences	RDAYMN/ RDAFN	SATC	ongoing	Funding for improvements to two airstrips achieved within 24 months

No	Action	Lead responsibility	Partners	Target timeframe	Performance indicators
IN3	Lobby Transport SA to develop strategy and seek funding for the following important improvements for the Flinders Ranges Touring Route: <ul style="list-style-type: none"> • sealing the Blinman–Parachilna Gorge road • sealing last 6 km of the road to Arkaroola • developing a maintenance regime that enables quick restoration of the Brachina Gorge Road after floods. 	RDAFN	DENR, NLPMC	ongoing	Transport SA agrees to priority projects and provides seed funding for partnership opportunities.
W1	Develop a three-year pre-season workplace interpretation training program and develop associated support materials – a ‘Flinders Tour Guide Companion’ with the key facts, stories, legends, place-names, natural and cultural history that every employee (front-line staff, guides, pilots, retail etc) should know.	FRTOA	SFTnT, DENR	2012/13	Minimum one program conducted each year. Minimum 75% new staff trained annually.
W2	Run an annual regional product familiarisation for front-line personnel and business owners to encourage cross promotion and on-selling across the destination	FRTOA	SFTnT, DENR	ongoing	Minimum one program conducted each year.
M1	Finalise and communicate the Flinders Ranges brand creative and visual identity including industry workshops to communicate the ways which operators and businesses can deliver the brand through their products and services.	NLPMC	Tourism Australia	2011/12	50% of operators are using the Flinders Ranges destination positioning in their product and collateral by 2014.
M2	Review and implement the Flinders Ranges Marketing and Communications Plan, including clarification of brand positioning and the destination offering for offshore marketing campaigns and integrating existing cooperative marketing approaches.	NLPMC	TA, SATC	2012/13	The Plan has been completed and an annual review reports an agreed level of implementation.

No	Action	Lead responsibility	Partners	Target timeframe	Performance indicators
M3	Establish a program to support operators moving towards international market-ready product using in-region successful operators as mentors.	NLPMC	FRTOA	2011	The number of operators being sold internationally has increased by 5% in first year and 10% in second year.
G1	Broaden representation on the existing Flinders Ranges National Landscape Project Management Committee to include local council representation.	NLPMC	Councils	2011	All key stakeholders actively engaged in PMC.

10.2 The keys to implementation

Implementation will require:

- an integrated and cooperative effort by stakeholders with leadership by the National Landscape Project Management Group in implementing the EDS
- dedicated support (resources, project staff) for project implementation
- working groups including the PMC and other appropriate representation for specific projects (eg Flinders Ranges Touring Route, marketing)
- a strategic approach to seeking grants, sponsorship and Government support
- the development of an investment prospectus.

10.3 Monitoring and evaluation

It is expected that the priorities would be reviewed on an annual basis. Other projects not identified in the top priorities in this EDS may be taken up by operators or other stakeholders, or may be suited to particular funding opportunities.

Ongoing monitoring of progress and outcomes will be necessary. The following is recommended:

- The PMC fine tunes and agrees performance indicators and priorities immediately this EDS is signed off.
- Annual review and evaluation of EDS implementation to align and aid Outcome Reporting and maintain engagement/focus of stakeholders.
- Independent review of the EDS within 3-5 years to assess project priorities and the progress of implementation
- Regular coordinated analysis of tourism using existing sources (DENR, regional statistics etc.) focusing on visitor numbers, length of stay, spend and origin.

Appendix 1: Links to other plans

A range of stakeholders are involved in varying aspects of the Flinders Ranges and there are numerous reports and plans that impact on the destination. The key ones that can influence this EDS are briefly discussed here.

South Australian Tourism Plan 2009–2014

The South Australian Tourism Plan 2009–2014 maps out key strategies for growing the value of the state’s tourism sector.

The SA Vision for Tourism aligns directly with the expectations for the Flinders Ranges as a national landscape:

By 2020 South Australia will have capitalised on its massive tourism potential and will be a world’s best destination supporting a sustainable and profitable industry.

South Australia will reap enormous benefits from developing its leading Australian experiences (e.g. food and wine, major events and the natural environment), along with its vibrant convention and education tourism sector.

The SA experience will be characterised by our:

- *bringing to life an authentic South Australian story*
- *marriage of heritage with contemporary expression*
- *engagement with people on their life journey*
- *‘bundling’ and presentation of quality, value for money, activities*
- *excellence in innovative sustainable design*
- *provision of choice and exceeding visitor expectations.*

South Australia will stick to its message and tell the world about the best we have to offer. It will take partner commitment to new levels.

South Australia’s authentic experiences will be so compelling it will be our visitors who spread the word about the amazing and memorable time they spent here. South Australia could be their favourite Australian destination.

Flinders Ranges and Outback SA Region Integrated Strategic Tourism Plan (Strategic Tourism Plan) 2008–2014

Implementation of the Flinders Ranges Experience Development Strategy will go hand-in-hand with the Strategic Tourism Plan. The EDS focus on the international Experience Seeker will be complemented by the Strategic Tourism Plan addressing broader markets. The promise and brand positioning of the plan align directly with that for the National Landscape.

Regional Development Australia Far North Regional Road Map and Strategic Plan 2010–2013 (The Road map)

The Road map illustrates the current socio-economic and environmental status of the Far North and collated community views on the region. It addresses priorities for economic development including tourism, and recognises tourism as one of the major economic drivers for the region.

The EDS aligns with many of the identified priorities for the region including infrastructure improvements (roads, airstrips, communications, power and water supply) and employment and skills development outcomes. The Road map highlights the National Landscape and Mountains of Memory projects as critical to economic development of the region.

Regional Development Australia Yorke and Mid North Road Map

Like the RDA Far North Road Map, the Yorke and Mid North Road Map illustrates the current socio-economic and environmental status of the Yorke and Mid North and collated community views on the region. It addresses priorities for economic development including tourism and recognises tourism as one of the major economic drivers for the region. Interestingly, ‘tourism’ was identified through community consultation as the highest priority for development by stakeholders – above ‘health’ and ‘roads’. This demonstrates the importance tourism has in ensuring sustainable regional communities.

National Park Plans of Management

The Flinders Ranges region includes the Flinders Ranges, Vulkathunha-

Gammon Ranges and Mount Remarkable National Parks. Plans of Management for these national parks provide the direction for development, management and protection of the range of values in parks. Any significant proposals in parks identified through this strategy will need to be considered in those parks' management planning process.

Mountains of Memory Geotourism Interpretation Strategy

'Mountains of Memory' is an operator-driven initiative that aims to stimulate regional development through an expanded tourism product offering in the Flinders Ranges. Nine key communities have collaborated to develop thematically linked tourism products and experiences.

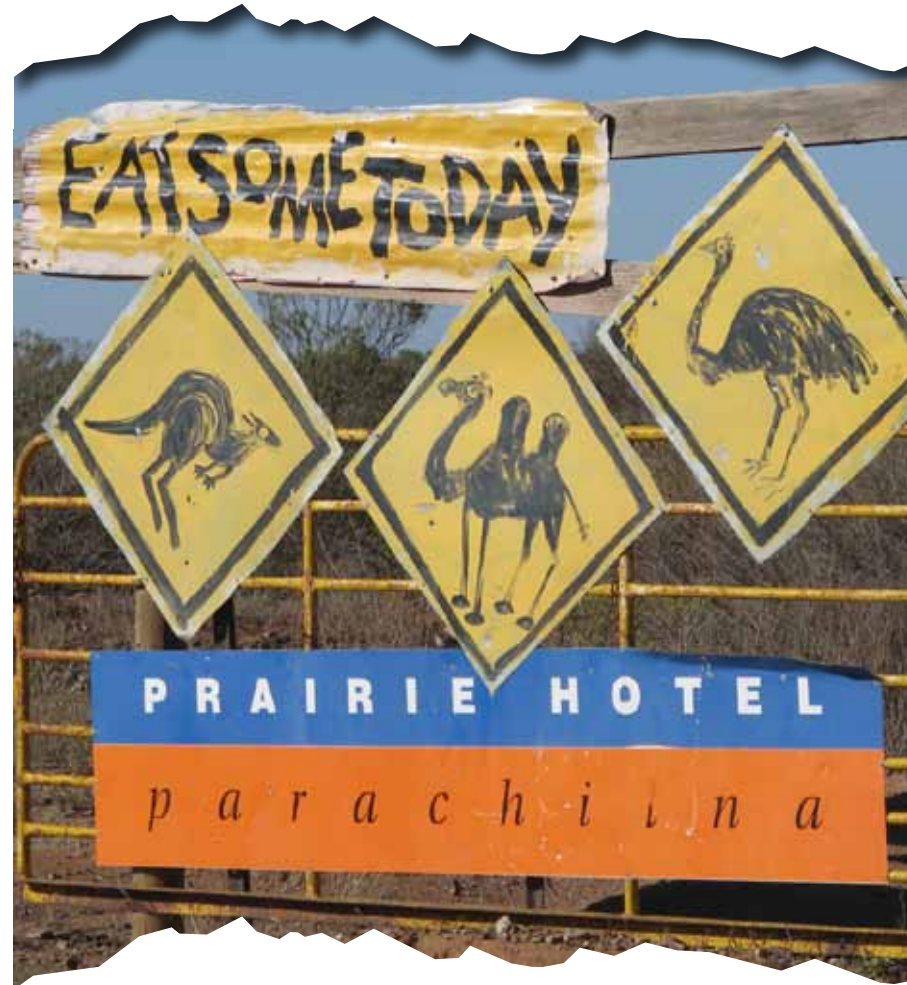
The Mountains of Memory Geotourism Interpretation Strategy aims to guide the development and implementation of interpretation initiatives that form part of the Mountains of Memory Geotourism Project, within the Flinders Ranges tourism region.

Mountains of Memory is a key element of delivering the Flinders Ranges National Landscape stories through interpretation initiatives across the region. It has been drawn on in the development of this strategy.

Other documents

Other documents that have been important in evaluating the tourism experiences in the Flinders Ranges and assisting in strategy development have included:

- *Flinders Ranges Tourism Products Audit*, Lisa Pearson 2007
- *Flinders Ranges National Park Interpretive Plan 2007–2011*, Department for Environment and Heritage
- *Flinders Ranges Geotourism Strategy*, The Flinders Ranges Tourism Operators Association, 2007
- *Flinders Ranges and Outback South Australia Pastoral Tourism Strategy*, Draft 2011.



Appendix 2: Priority Two projects

The following is a list of Priority Two projects recommended in the EDS. Whilst a project may be in this list, it is still an important action to pursue as resources become available.

No	Project	Lead responsibility	Partners
AP5	Undertake a Master Plan for Wilpena Pound visitor precinct including Ikara and the Homestead that provides a base for a vibrant visitor experience including good access and circulation, effective delivery of information, high quality interpretation and a range of visitor activities (walking, cycling, rock climbing, abseiling).	DENR	Anthology
AP6	Investigate feasibility of a joint venture visitor centre expansion at Wilpena Pound to offer more comprehensive and innovative information and interpretation as a focus of the visitor hub..	DENR	SATC
AP7	Support the partners in Parachilna in gaining investment in the Parachilna town centre that will offer exciting and innovative interpretation about the geology and Ediacaran story of the Flinders Ranges. Promote this as part of the touring route.	Parachilna community	SATC
AP8	Work with Arkaroola Wilderness Sanctuary in a staged approach to: <ul style="list-style-type: none"> • pursue funding for sealing of the last 6 kilometres of road • ensure consistent high quality storytelling associated with the Ridgetop Tour • promote heli-hiking as an exciting part of the product offer • create a distinctive food and wine offering • expand and/ or refurbish accommodation offering to encourage additional visitors • investigate niche product offering linked to the Ediacaran story and scientific history of the sanctuary (eg an event or engagement with scientists). 	Arkaroola	SATC
AP9	Encourage investment in additional brand aligned accommodation at Wilpena Pound (to embrace the landscape and views) and Blinman (to reflect the mining heritage and offer opportunities to interact with locals).	SATC	DENR private partners

No	Project	Lead responsibility	Partners
AP10	<p>Improve and promote Port Augusta as an important gateway and opportunity to understand the Flinders Ranges before getting into them. Efforts to include:</p> <ul style="list-style-type: none"> • better opportunities for water-based experiences of the Gulfs • packaging of Wadlata Outback Centre, Arid Lands Botanic Garden and Gulf experiences as an introduction. 	NLPMC	PACC
AP11	Encourage community to implement Mountains of Memory recommendations for hubs.	RDAFN, RDAYMN	FRTOA
AP12	Promote Wadlata Outback Centre as an important attraction for visitors coming to the Flinders Ranges. Develop a business plan that identifies ways to support higher visitor attendance to the display through reducing the entry price.	PACC	NLPMC
AP13	Work with the Pichi Richi Railway to explore ways in which the Ediacaran evidence of the Pichi Richi Pass can be interpreted to passengers.	SATC	RDAFN
AP14	Support and promote guided tours that include the geological stories of the Flinders Ranges and encourage an operator to offer half-day trips from Wilpena Pound and surrounds that allow for independent travellers to have a guided and interpreted experience.	NLPMC	FRTOA
AP15	Extend the Ediacaran merchandise offer ensuring that merchandise created appeals to the Experience Seeker market and is offered in all retail and tourism industry operator outlets. Merchandise may for example be food products, art, or local furniture inspired by the Ediacaran fossil.	NLPMC	FRTOA, SFTnT
AP18	Establish a network of pub owners with the aim of strengthening the pub product with distinctive experiences at each, and cooperative marketing of pubs as part of the journey.	NLPMC	FRTOA, SFTnT, DKA
AP19	Investigate opportunities for siting a via ferrata somewhere in the Flinders Ranges and, if appropriate, progress to feasibility study.	DENR	RDAYMN, RDAFN, DENR, SFRTA
AP21	Engage with Adnyamathanha people to ascertain potential for developing and promoting St Mary's Peak (or alternative walk) as a guided one-day walking product. If found suitable, pursue funding for infrastructure, business development and capacity building to implement the project.	COUNCILS, DENR	RDAYMN, SFRTA, RDAFN

No	Project	Lead responsibility	Partners
AP22	Continue to maintain a range of short walks across the Flinders Ranges and promote them as local experiences through a regional brochure and on website.	NLPMC	FRTOA
AP23	Further develop the Flinders by Bike product between pastoral stays with packaging of accommodation, active engagement with local people and storytelling as part of the experience.	NLPMC	FRTOA
AP24	Support operators that wish to expand or introduce new adventure activities in the Flinders Ranges as part of the product offering.	RDAYMN, SFRTA, RDAFN	SATC
S3	Develop a Visitor Information Plan to improve visitor access to information including: <ul style="list-style-type: none"> • consistency and quality of information at visitor centres • information delivery by all operators • other media for information delivery 	FRTOA	NLPMC
IN4	Seek funding and construct the Southern Flinders Rail Trail, connect this trail with the Riesling and Rattler trails in the south, and continue enhancements of the Mawson Trail in the north.	SATC	RDAYMN, SFRTA
IN5	Work with Government to ensure appropriate levels of telecommunications, mobile phone coverage and services.	RDAYMN, RDAFNSATC	SATC
W3	Investigate cooperative regional approaches to seasonal staffing and support services that assist in retaining knowledgeable staff for longer periods of time .	FRTOA	SFTnT
W4	Offer incentives for businesses that achieve Eco certification as a means of underpinning important conservation messages as part of the National Landscape. .	FRTOA, SFTnT	
W5	Investigate partnerships with local schools and TAFEs to engage the local youth in school-based training and potential traineeships in the tourism sector to lead to local people in the industry and reduced staff turnover..	ARDAFN, RDAYMN FRTOA	FRTO, SFTnT

Appendix 3: Learning from other places

Comparison to other National Landscapes

The Flinders Ranges National Landscape does not compare particularly well with other similar National Landscapes featuring vast ancient landforms. Put alongside the likes of Kakadu, Red Centre and the Kimberley National Landscapes, the Flinders Ranges – while being an appealing destination in its own right – currently lacks a strong brand position in Experience Seeker markets and has a limited supply of products that are ready for export (as in, being at a stage where they can be sold via commission to international wholesalers or that are easily booked directly by virtue of having a strong international reputation).

The Flinders Ranges National Landscape does, however, have comparative strengths in the experiences it offers based around the life and challenges of those living on pastoral stations, and seeing the landscape from the air.

It is also strong in opportunities to learn about the early phases of life on earth. The Brachina Gorge, Arkaroola Wilderness Sanctuary and Pichi Richi Pass are three such opportunities. Other opportunities to experience the landform of the Flinders Ranges are also well developed but not necessarily unique or seen as market leaders when compared with other National Landscapes. The Flinders Ranges' unique feature, the Ediacaran fossil, is not yet market ready as a stand-alone product.

Internationally, other vast ancient landscapes such as those in Arizona (Sedona), Utah and the North Dakota Badlands offer experiences not too dissimilar to those of the Flinders Ranges National Landscape. Sedona has positioned itself on a spiritual-cultural and wellness theme; Utah is based on landscape grandeur and adventure, and the North Dakota Badlands are essentially a drive-through (US Highway 85), national park and remote adventure offering to visitors. The standout point of difference between the Flinders Ranges National Landscape and these international examples is the range of opportunities to interact with people living off the land – the pastoral Outback experience. In terms of landscape grandeur and geological history, the Flinders Ranges is up against strong competition both within Australia and overseas.

The main lessons to be learned for the the catalyst projects for the Flinders Ranges are from other destination. Some examples of successful and innovative tourism projects are described below.

Touring routes

There are several examples of touring routes that have acted as catalysts for regional tourism development, attracted people to a region and provided a central means for exploration of a region and linking its attractions.

Great Alpine Road

The Great Alpine Road traverses some 300 kilometres from Wangaratta (on the Hume Highway in Victoria) to Bairnsdale on the Gippsland Coast, traversing the Victorian high country near Mt Hotham. Development of the road as a touring route followed completion of sealing of the route in 1999. Development and marketing of the route and sourcing of funding is undertaken cooperatively through Great Alpine Road Marketing Incorporated (GARMI), a committee of regional tourism organisations, local government councils and tourism operators. This process is guided by a comprehensive strategy that identifies infrastructure development needs (including signage and information) and opportunities for investment and improvement. Funding is sourced from stakeholder organisations and grants, with stakeholders often providing matching funding to obtain and supplement grants.

The Great Alpine Road has become one of Victoria's recognised great drives with a distinctive brand identity. It links the region's major destinations, attractions and activities suited to a range of markets and price points – including nature-based activities in national parks, outdoor adventure, walking trails, cycling trails, historic heritage, goldfields, and food and wine experiences. Six themed loops have been developed to cater for different interests and enable in-depth exploration of parts of the region. The Road is also promoted for motor cycle and cycle touring, as well as for cars and buses and has become associated with cycling events.

The Road has become a focus for tourism development in the region, providing leverage opportunities for local tourism operators and a marketing focus through participation in annual marketing campaigns conducted by GARMi. A website and brochures provide information on accommodation, activities and events to assist prospective visitors to plan their trip. A mark of the success of the touring route concept is the recent sealing one of the linked loops (the Bogong Alpine Way, which crosses the Bogong High Plains through Falls Creek to the east of the main route) and plans for major improvements of visitor opportunities along that route (including a potential walk connecting the two areas).

Great Ocean Road

The Great Ocean Road provides a similar focus to tourism for the 240 kilometres of road between Torquay (south of Geelong) and Warnambool in south western Victoria. Cooperative development and marketing between local government and other tourism stakeholders occurs through Great Ocean Road Marketing Inc.

In this case, an existing road along a spectacular coastline (characterised by the iconic Twelve Apostles rock formations) has been developed into a touring experience which is well recognised in the domestic and international marketplaces. A dedicated website sets out the wide range of accommodation, activities, tours and events available along the route at both beach and inland locations focussing on the beaches, nature-based activities and wildlife viewing (both coastal and inland), historic heritage of sea travel and shipwrecks, and Aboriginal culture and history. The iconic Great Ocean Walk is closely linked to the Great Ocean Road and may be completed as a series of day walks utilising local accommodation. Thus, accommodation operators in the area benefit from both the walk and drive markets.

The Savannah Way

The Savannah Way is a 3700 kilometre drive route between Cairns and Broome. From the rainforests near Cairns, it crosses through the tropical savannah landscapes of north Queensland, the Top End of the Northern Territory and the Kimberley region of Western Australia. The route links 15 national parks and 5 World Heritage Areas and provides opportunities for numerous nature based, heritage and cultural experiences, as well as Outback communities.

A dedicated website (www.savannahway.com.au) provides information on the route, safe outback driving, weather, itineraries, activities, tours, the land and its people, and links to downloadable guides and a wide range of information about the area.

The Savannah Way is linked to initiatives of the sustainable development of communities in northern Australia and aims to promote the economic and social well-being of communities in the region. Marketing of the route is managed by Savannah Way Ltd, a non-profit company whose membership is composed of tourism operators, business, government operators and organisations from the region. Funding is also obtained by sponsorship. The company has Directors from Queensland, the Northern Territory and Western Australia and a part-time Manager. As well as promoting the route, Savannah Way Ltd assists businesses and communities along the route with tourism promotion, road signage, brochure and merchandise distribution, agent and media contact.

Cascade Loop Scenic Highway Washington State, USA

The Cascade Loop is a 700 kilometre driving loop through areas to the north and east of Seattle in Washington State. Described by National Geographic Traveller magazine as ‘one of America’s grandest, most spectacular drives’, the Loop circles through the North Cascades mountain ranges, national parks, the Columbia River valley, country towns and (via ferries) the islands of Puget Sound. A well-designed and attractive website (www.cascadeloop.com) provides a wealth of information for trip planning, including detailed information and links to accommodation, activities and interactive maps, suggested itineraries, an online or free printed trip planner, tours, printed guides and DVDs, and links to further information and relevant agencies and operators. The drive is divided into nine geographical regions that provide different landscapes, local colour, culture and activities.

The drive trail was initially established as a shorter linear route in 1989 by tourism operators in the Leavenworth area due to concern that the opening of Highway 20 to the north may attract visitors away from the southern communities. The success of the route led to its extension into a longer loop trail and development of the nine regional loops.

The Cascade Loop information and marketing is managed by a non-profit organisation, the Cascade Loop Association, which has a membership of tourism operators, business organisations and government bodies. Operators pay to be listed in Loop information material. The Association has a Director and staff and works closely with Chambers of Commerce, Washington State Department of Tourism, Hotels, Motels, Attractions, Forest Service, Park Service and many other tourism-related organisations to provide comprehensive information on the Cascade Loop. The success of the drive trail has been attributed to its promotion as a single product and the investment that individual businesses have in its success.

Lessons for the Flinders Ranges

Successful driving routes have the following characteristics.

- *Effective engagement of stakeholders.* The various tourism businesses, operators, government agencies and land managers support the route and participate in its development and marketing.
- *Effective coordination and marketing.* An organisation composed of stakeholders or their representatives is responsible for marketing the route and coordinating the range of stakeholders involved in managing the route. Commitment from stakeholders (a sense it is worth their while being involved) has been achieved through requiring financial contributions (eg. The Cascade Loop) and offering effective marketing and promotion services (all routes).
- *Funding.* Funds for development of the route, marketing and administration are essential. These have been obtained variously through financial contributions of members or stakeholder organisations, grant funding, sponsorship.
- *Planning.* Strategic planning for overall development of the route is important to coordinate the efforts of multiple stakeholders and guide their ongoing investments and infrastructure work. This has proven especially effective for the establishment of new routes such as the Great Alpine Road and the Red Centre Way (which was established in 2006 in the area of Alice Springs and the MacDonnell Ranges in Central Australia).

- *Strong branding and identity.* All of the above routes have a strong brand and identity which has established them as destinations in the minds of the travelling public and the tourism industry. This has been particularly effective for the Cascade Loop and Great Alpine Road, where the promotion of the route as one product has led to further tourism operator involvement, visitation and extension of the route.
- *Accessible information.* Successful drive routes provide prospective visitors with ready access to information about experiences, accommodation, itinerary planning, booking and tours, and local conditions through dedicated websites and printed guides and maps. On the route, there is clear branded signage, information and interpretation which matches material provided in online and printed guides and enables travellers to follow the route easily.
- *A range of experiences.* Successful drive routes provide for a range of visitor markets, time frames, accommodation standards and interests. They enable visitors to undertake the drive as an experience in itself or to focus on particular activities and interests (eg. heritage, nature based activities, food and wine) through themed routes or itinerary planning.
- *Side trips and loops.* Additional journeys off the drive –route that enable different return or a choice of itineraries add to the potential for a destination. Focusing attention on development of the primary route to begin with and then developing the options has proven successful in other destinations.

Walking and cycling journeys

Overland Track, Tasmania

The Overland Track is a 65 kilometre walk in the Cradle Mountain-Lake St Clair National Park in the Tasmanian Wilderness World Heritage Area known for its spectacular, rugged mountain scenery. The walk is usually undertaken in 6 days and 5 nights and can incorporate an optional ferry trip over Lake St Clair at one end of the trip.

The long distance walk is closely managed by the Tasmanian Parks and Wildlife Service (the managers of the area) in order to provide for a quality walking experience (eg. reduce crowding at peak periods) and to protect the walk's natural values (which are vital in attracting people to the walk). The current model for the walk was introduced following a strategic planning exercise aimed at improving visitor experiences and track management.

During the peak walking season (November to April), the track is walked from north to south and a booking system ensures that the number of people departing daily does not exceed a daily limit (currently 60 people a day). Walkers may undertake the track independently or in guided groups. Public huts and campsites are provided for independent walkers and guided groups, while there is one high end guided experience which utilises separate huts with higher levels of comfort. The start and end points of the track are located in relatively remote areas. Transport for independent walkers and their luggage is provided by several commercial operators.

An online integrated information and booking system enables prospective walkers to plan and book their walk. The website includes information on, and links to, transport and accommodation during travel to the track, as well as comprehensive information on the walk route, regulations, weather conditions, equipment, sustainable walking practices, and its natural and cultural heritage.

Revenue raised through a track fee (levied for walking the track during from November to May) and commercial operator licence fees is used for track operations and maintenance.

Day walking at either end of the track is not regulated and is a popular activity among visitors to the area.

Milford Track, New Zealand

The world famous Milford Track is situated in Fiordland National Park in the Te Wahipounamu-South West New Zealand World Heritage Area. It provides a 4 day/3 night walking experience over 53 kilometres between Lake Te Anau and Milford Sound, with boat access required at either end. Unguided ('freedom walk') and guided options are provided on the track.

An extremely popular walk traversing the high altitude Mackinnon Pass and experiencing changeable and wet weather conditions, it is closely managed by the New Zealand Department of Conservation (DOC). During the peak season (late October to late April), the track is walked in one direction, walkers must book their walk (for which there is a fee) and departures are limited to 40 freedom and 40 guided walkers a day. Freedom-walk accommodation on the track is in huts staffed by DOC wardens. The exclusive commercially guided experience, Milford Track Guided Walk, provides separate, well-appointed lodges and enables clients to walk carrying light packs. Up to 80 people per day walk the track with very little face-to-face encounters and this contributes hugely to the success of this mountain walking experience.

The Department of Conservation website provides comprehensive information for planning and conducting the walk and access to an online, phone or paper based booking service.

The Milford Track, Milford Sound, Doubtful Sound and nearby Routeburn Track, are cornerstones of the tourism industry in the Fiordland region. Local operators provide bus and boat transport services to the walks and car parking services, and accommodation and other visitor products (eg. boat cruises, kayaking, equipment suppliers) leverage off the presence of walkers in the area.

Great Ocean Walk

The Great Ocean Walk, which parallels the Great Ocean Road for about 100 kilometres from Apollo Bay to near the Twelve Apostles at Port Campbell,

passes through spectacular coastal scenery with views of cliffs, blowholes, sea stacks and historic shipwrecks. It is an example of a long walk which can be accessed at various points and walked in a variety of ways (as a 7 day on-track experience, as a shorter walk, or as a series of day walks staying on off-track accommodation). The walk is managed by Parks Victoria in conjunction with tourism partners.

The walk is a well-marked track with signage at entry points and decision points (eg. at areas affected by tides). Seven hike-in campsites with tent pads are provided for small groups, three of which also provide for large groups. There are also drive-in campsites. Walkers must register and book the hike-in camp sites in advance of their walk. While there are no walker limits for the walk (due to its accessibility), the campsite booking mechanism regulates the number of overnight walkers staying on the trail.

Official partners provide services and accommodation to assist both on-track campers and those choosing to walk the track using off-track accommodation. Services include walker transport (at the beginning and end of the walk, and also daily drop off and pick up from and to accommodation); food drop off; car parking; guided tours; self-guided packages (eg. booking, itineraries, transport); and linked experiences (eg. sea kayaking, mountain biking, fishing). Accommodation partners cover a range of accommodation types – including luxury resorts and villas, ecolodges, motels, self-catering cottages, camp grounds and the historic Cape Otway Light Station.

Established in 2006, the Great Ocean Walk quickly became popular due to a high level of planning for both the walk and the associated partnerships with tourism and accommodation operators. A dedicated website provides prospective walks with access to campsite booking and the range of services and providers to tailor an experience that suits their needs.

Otago Central Rail Trail, New Zealand

The Otago Central Rail Trail (which was opened in 2000) is a remarkable example of a tourism trail that has brought a number of rural villages and underutilised accommodation and hotels to life and rejuvenated the local economy (estimated at an annual contribution in the order of \$7

million). Close to 20,000 people a year cycle the full trail, of which 10% are international visitors. Approximately 50,000–60,000 walkers and bikers also use sections of the Rail Trail as shorter alternative trips.

The Rail Trail occupies the foundations of a former historic railway built to the Otago Goldfields and covers 150 kilometres between the towns of Middlemarch and Clyde inland from Otago on New Zealand's South Island. A large number of new activities and attractions have been developed by local businesses on or near the trail and include visiting historic sites, wildlife viewing, museums, art galleries, restaurants, coffee shops, wineries, fishing, golfing and curling. A wide selection of overnight accommodation has been developed for use by trail tourists and includes character accommodation such as historic inns, other heritage buildings and boutique lodges. Other businesses provide services such as pick up and drop off, luggage and bike transport, car parking and bike repair. Bike hire is available at either end of the trail. Guided tours or self-guided trail packages are also offered.

The Otago Central Rail Trail was established as a cooperative effort between the Department of Conservation and the Otago Central Rail Trail Charitable Trust (an independent body representing local communities). While the Rail Trail is managed and maintained by DOC, the role of the Trust is to seek funding (donations through a Friends of the Rail Trail program, grants, merchandise) to improve and market the Trail. The Trust provides a comprehensive website (www.otagocentralrailtrail.co.nz) on all aspects of the Trail and associated service and accommodation providers and includes suggested itineraries. An Operators Group represents businesses which derive income directly or indirectly from the trail.

Wakatipu Trails Network, Queenstown, New Zealand

The Wakatipu Trails Network is a successful model providing walkers and bikers with a range of opportunities to explore the high country landscape of the Wakatipu Basin in the vicinity of the popular tourism destination of Queenstown. The Trails Network was developed to link scattered trails and build an integrated network for walking, cycling, mountain biking, horse riding and other non-motorised activities to meet demand in a popular tourism destination. A detailed strategy for trail development has been a key aspect of the Network's success.

The Trail Network links together settlements, food outlets, vineyards, lakes and valleys, historic sites and viewpoints and is widely supported by Queenstown bicycle hire companies. Walking and riding times vary between one hour and one day. The Wakatipu Trails Trust oversees and raises funds for ongoing development of the network.

Lessons for the Flinders Ranges

Successful tourism trail journeys, as described above, exhibit a number of key features.

- *Seamless experiences.* The trails (whether in remote or more accessible areas) are well packaged, enabling pre-trip information, booking, transport, accommodation and experiences on the trail itself to be delivered in a seamless manner for both guided groups and independent users. Comprehensive websites bringing together all details of the experience and enabling online booking or providing booking links and information are essential.
- *Effective partnership and coordination.* Successful trails are characterised by a strong commitment and buy-in from managers, tourism operators and the destination. This is essential for trail management, marketing and to enable a well packaged, seamless experience for visitors. This has been achieved by a variety of partnership arrangements involving park management agencies (where relevant), tourism operators and associations representing local business and community interests.

- *Funding.* Funds for management and marketing are essential to maintain the quality of the experience. In the case of the Overland Track, significant funding is derived from fees paid by walkers and guided tour operators. Another widely used model (exemplified above by the Otago Rail Trail) is a non-profit trust or foundation which raises funds from a variety of sources, including donations, sponsorship, grants and merchandise.
- *Point of difference.* Successful trails need to offer something distinctive that is different to other trails and meets market needs. In the examples provided, points of difference include spectacular scenery, exclusive remote experiences and opportunities to enjoy accommodation and activities distinctive to a location.
- *Appeal to a range of markets and price points.* Successful trails offer a choice in ways to experience the trail, such as independent walking or guided tours; choices of camping or roofed accommodation; different types of accommodation; choices of activities and side trips.
- *Managing trail and experience quality.* Trail infrastructure and facilities need to meet expectations of a high quality experience. In remote and sensitive environments, it has been necessary to manage visitor numbers to overcome crowding at peak times and ensure that the core attraction of a natural landscape is protected.
- *Planning.* Strategic plans involving all management and tourism stakeholders are important to guide staged development of new trail experiences and management and improvement of existing experiences.

Aerial experiences

New Zealand

New Zealand offers several distinctive aerial experiences to remote locations whose appeal is enhanced by well packaged ground based add-ons which provide opportunities for visitors to experience unique remote locations that are otherwise difficult to access.

The Stewart Island Coast-to-Coast experience combines a spectacular flight from Invercargill landing on a remote Stewart Island beach with an overnight hut stay, kiwi encounters and a return three-hour walk and boat trip within Rakiura National Park.

The Siberia Experience departs from Makaroa near Wanaka and offers a flight over the spectacular Mount Aspiring National Park (usually only accessible by mountaineering) that can be combined with a landing in the remote Siberia Valley, a bush walk down the valley and a jet boat journey back to Makaroa.

Paragliding from high peaks is a highly successful business in places such as Queenstown where it is undertaken by a broad range of visitors who would not normally take up the opportunity at home.

Kimberley, Western Australia

In the Kimberley, scenic flights from the tourism centres of Broome and Kununurra have become a popular way to see the area's remote and unusual gorge landscapes. Several operators offer day tours to the iconic Mitchell Falls and Purnululu National Park which include other activities, such as guided walks.

More intimate experiences which enable visitors to meet and interact with local people and explore the landscape at pastoral stations and wilderness lodges can be accessed by air. Some of these venues also offer scenic flights from their properties. Multi-day aerial tours are available, which fly visitors between locations, utilise remote accommodation (such as the Bungle Bungle Wilderness Lodge, El Questro Station and the Mitchell Falls Wilderness Lodge) and incorporate walking and four wheel drive exploration of local attractions.

Lessons for the Flinders Ranges

Aerial adventures tend to be successful when they:

- cover spectacular or unusual landscapes that are appealing to view from the air
- provide a view of, and often on-ground access to, remote areas and other unique experiences (such as wildlife viewing, the unique Kimberley Gorges) that would otherwise require time, special skills or four wheel drive vehicles to access
- are well packaged and managed, so that they are easy to access by people who might not otherwise engage in an activity or visit a remote area
- especially for day tours, operate out of major visitor hubs where a variety of activities are available.



Innovative interpretation

Small group guided experiences, remote viewing and other techniques using digital technology are increasingly being used to provide visitors with close encounters with wildlife and sensitive locations while protecting animals and the environment. Examples of some experiences and techniques that may be adapted for the Flinders Ranges (eg. rock wallaby viewing, Ediacaran fossils, Brachina Gorge) are provided below.

Little Penguin viewing – Phillip Island Nature Park

Visitors to the popular Phillip Island Nature Park in Victoria have a range of eco-accredited opportunities to observe and learn about the world's smallest penguin, from general viewing to exclusive experiences (www.penguins.org.au).

Revenue generated from the tours is used for research, environmental and education associated with the Little Penguin. The Little Penguin tours include general viewing of penguins emerging from the sea from tiered seating accompanied by a ranger commentary, or private viewing with a ranger from a covered 'sky box' or a front row seat with headsets and binoculars to enhance viewing. Ranger accompanied tours on the beach are also offered, with a headset commentary and night vision goggles to observe penguins in the dark. Behind the scenes tours that describe penguin research and management can also be taken. The exclusive evening experiences include food and drinks.

Scottish Seabird Centre

Opened in 2000, this award-winning visitor attraction at North Berwick on the Firth of Forth is a world leader in remote viewing of seabirds and marine wildlife, such as dolphins and whales. Live streaming of images of seabirds and other wildlife is projected on giant screens in the centre, allowing visitors a close view of birds nesting, feeding their young and diving without disturbing the birds or their habitat. Visitors in the Centre can remotely control cameras to focus in on activities that interest them. The images are obtained from solar powered cameras located on islands and other key sites. Live seabird webcam images are also streamed to the Centre's website (www.seabird.org).

Other activities at the Centre include guided beach walks, boat trips for bird viewing, and a guided tour to an island which has the largest gannet colony in the world for which the Centre has the exclusive land rights.

Naracoorte Caves, South Australia

Caves at this National Park and World Heritage Area are habitat for a breeding colony of the Southern Bentwing Bat. Using infrared camera technology, the activities of the bats can be observed remotely by visitors (www.naracoortecaves.sa.gov.au). Tours are also conducted of one bat cave and to observe the bats' spectacular exit flight at dusk.

Trail of Time, Grand Canyon National Park

Part of a research program into informal public science education, the Trail of Time walking trail (opened in 2010) aims to present the concept of geological time and the earth history in a way that is understandable and interesting to visitors – to encourage visitors '... to ponder, explore, and understand the magnitude of geologic time and the stories encoded by Grand Canyon rock layers and landscapes'. The geological history is represented through a footpath timeline. Interpretative signs and pedestals made from actual Grand Canyon rocks enable visitors to understand geological history of the area and touch rocks which are otherwise inaccessible. Viewing tubes allow visitors to view remotely the rock layers and landscapes being interpreted.

A website is being developed to provide detailed online information about the Trail of Time (see the website prototype at <http://tot.unm.edu>).

APPENDIX 4: Comparison of Flinders Ranges with selected National Landscapes

National Landscape	Brand and market position	Export-ready product	Perceived iconic landscape, wildlife, Aboriginal content	Unique attribute market ready?	Links to major tourism flows or hubs
Flinders Ranges	<p>Weak</p> <ul style="list-style-type: none"> • Low profile in international markets • Fewer international visitors than other NLs 	<p>Weak to moderate</p> <p>* 12–15 operators linked to wholesalers</p>	<p>Moderate for landscape and wildlife, weak for Aboriginal encounters</p> <ul style="list-style-type: none"> • Although wildlife is plentiful and rated highly, Flinders Ranges is better known for landscape but has lower profile than Red Centre/Uluru and Kakadu 	<p>No (lack of access to sites and tours based on Ediacaran fossil)</p> <ul style="list-style-type: none"> • In early stages of product development – Brachina Gorge tour best opportunity currently 	<p>Moderately developed</p> <ul style="list-style-type: none"> • Flinders Ranges lie off the major tourist flows along the east coast and Top End • Best linkages are with tourist flows through to Red Centre, NSW and Victoria
Kakadu	<p>Strong</p> <ul style="list-style-type: none"> • High profile in online media and guidebooks, wholesale brochures and retail agents 	<p>Strong</p> <ul style="list-style-type: none"> • 20+ operators linked to wholesalers 	<p>Strong for all</p> <ul style="list-style-type: none"> • Kakadu tourism products include a combination of distinctive wildlife, landscape and Aboriginal experiences 	<p>Yes</p> <ul style="list-style-type: none"> • Aboriginal and wildlife tours are established and linked to wholesalers 	<p>Moderately developed</p> <ul style="list-style-type: none"> • Kakadu is positioned amongst the key tourist flows in Northern Territory
Red Centre	<p>Moderate–strong</p> <ul style="list-style-type: none"> • Dominated by Uluru – global profile 	<p>Moderate to strong</p> <ul style="list-style-type: none"> • 20+ operators linked to wholesalers 	<p>Strong for landscape, weak for wildlife, moderate–strong for Aboriginal encounters; limited dispersal across destination</p>	<p>Partially; limited to parts of destination</p> <ul style="list-style-type: none"> • Uluru dominates as the unique feature 	<p>Strongly developed in some parts of destination (ie Uluru Kata Tjuta); poor in other parts</p> <ul style="list-style-type: none"> • Good road and air access due to Uluru attraction
Kimberley	<p>Moderate–strong</p> <ul style="list-style-type: none"> • Growing international profile in online and wholesale media 	<p>Moderate</p> <ul style="list-style-type: none"> • 15+ operators linked to wholesalers 	<p>Strong for landscape, weak for Aboriginal encounters and wildlife</p>	<p>Yes</p> <ul style="list-style-type: none"> • Gibb River Road, Mitchell Plateau, Bungle Bungles, coastal cruises have strong presence in the market 	<p>Moderately developed</p> <ul style="list-style-type: none"> • Broome and Darwin as main hubs • Expensive to get to