



THE GREAT AUSTRALIAN WINE TRAIL

Concept Feasibility Report | November 2021





This report was prepared by TRC Tourism for Regional Development Australia Barossa, Gawler, Light & Adelaide Plains on behalf of consortium Councils in relation to the development of the Great Australian Wine Trail.

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ACKNOWLEDGEMENT

We acknowledge the Kurna, Peramangk and Ngadjuri peoples of the lands, waters and communities we work together with. We pay our respects to their cultures; and to their Elders – past, present and future.

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Executive Summary

The Great Australian Wine Trail (the Wine Trail) will be globally recognised as Australia’s signature gastronomic cycling experience based around South Australia’s world class wines, culinary excellence, heritage towns and villages and iconic landscapes.

Wine, food and cycling are natural allies in South Australia; they both leverage the natural assets of the state with strong growth prospects through to 2030 and beyond. In recognition of this potential, The Great Australian Wine Trail¹ will be Australia’s first international gastronomic cycling experience inviting visitors to “be consumed” by the best of Australia’s food and wine, whilst uniquely connecting to the coast.

Rivalling trails in Bordeaux, France, the Napa Valley in California and the Rioja Wine Trail in Spain, the 280 km trail will connect South Australia’s most famous wineries and cellar doors in Clare Valley, Barossa, Eden Valley, Adelaide Hills and McLaren Vale. By connecting existing trails and developing new sections of trail across the wine regions, visitors will be able to explore beautiful vineyard and coastal landscapes, visit historic towns and villages, enjoy world renowned wines and experience fresh food and produce, thereby extending their stay and expenditure. Visitors will be supported by quality accommodation, attractions, experiences, and other services provided by local communities.

It will be Australia’s only iconic multi-day food/wine cycle trail with significant domestic and international appeal.



The Wine Trail aims to maximise the impact of tourism on the broader South Australian economy, driving increases in visitor expenditure and jobs throughout South Australia's wine regions. It will:

- Brand, market and promote the wine regions in a new and exciting way that will appeal to new markets and attract domestic and international visitors to South Australia.
- Offer new experiences which give previous visitors a reason to return.
- Provide visitors with an expanded itinerary of experiences to extend their stay particularly in the shoulder and off - peak periods.
- Offer visitors the opportunity to immerse themselves in the stunning and iconic imagery of South Australia's landscapes.
- Connect with a series of well recognised regional trail experiences that are at the core of South Australia's trail offering.
- Support events and festivals that promote value to the world and attract visitors to South Australia.
- Proudly protect and nurture the natural, indigenous and cultural heritage that makes the region unique.
- Generate new private investment in tourism accommodation, experiences and services along the way.

The proposed route and experiences associated with the Wine Trail are presented in Figure 2.

The Wine Trail will leverage the significant investment in cycling and walking track infrastructure that has already been made by state and local governments in the region in recent years, augmented by new sections of trail that will connect with the existing trails and establish the Wine Trail as a compelling and inspirational experience at a global scale.

The broad and growing appeal of cycling trails to domestic and international visitor markets, as well as residents for recreational purposes, means that the Wine Trail will boost South Australia's economy and generate employment and business opportunities. It will enhance the liveability of the wine regions, towns and villages in which it passes.

With Adelaide now part of the Great Wine Capital Global Network and South Australia possessing the jewels in the crown of the Ultimate Winery Experiences of Australia network, the opportunity for an iconic cycle trail through the heart of South Australia's wine regions is significant and needs to be fully leveraged.



The estimated construction cost of the Wine Trail project is \$38.548 million, and the 10-year maintenance costs are \$5.782 million (assumed to be \$578,220 per year over 10 years) for a total 10-year cost of \$44.330 million.

This report concludes that the total potential benefit generated by the Wine Trail project is estimated at \$281 million. This is 6.3 times greater than the total costs of the project (\$44 million) over a 10-year period. The indirect health benefit of the Wine Trail is estimated at \$92.748 million.

The Wine Trail is estimated to create an additional 354 jobs for the regional economy. Most of these jobs would be in accommodation; food and beverage; recreational services and other visitor products and services; transport (including shuttles) and other retail.

It is anticipated that local employment would grow even further as ancillary businesses are developed to support the trails (e.g. luggage pick up/drop off services, cafes, bike repairs).

Importantly, investment in the Wine Trail will raise the profile of the region as Australia's premier wine destination and will support local, state and national governments' efforts to encourage high-quality tourism experiences that attract high value visitors and generate economic and employment benefits.



Figure 1. Benefits of the Wine Trail

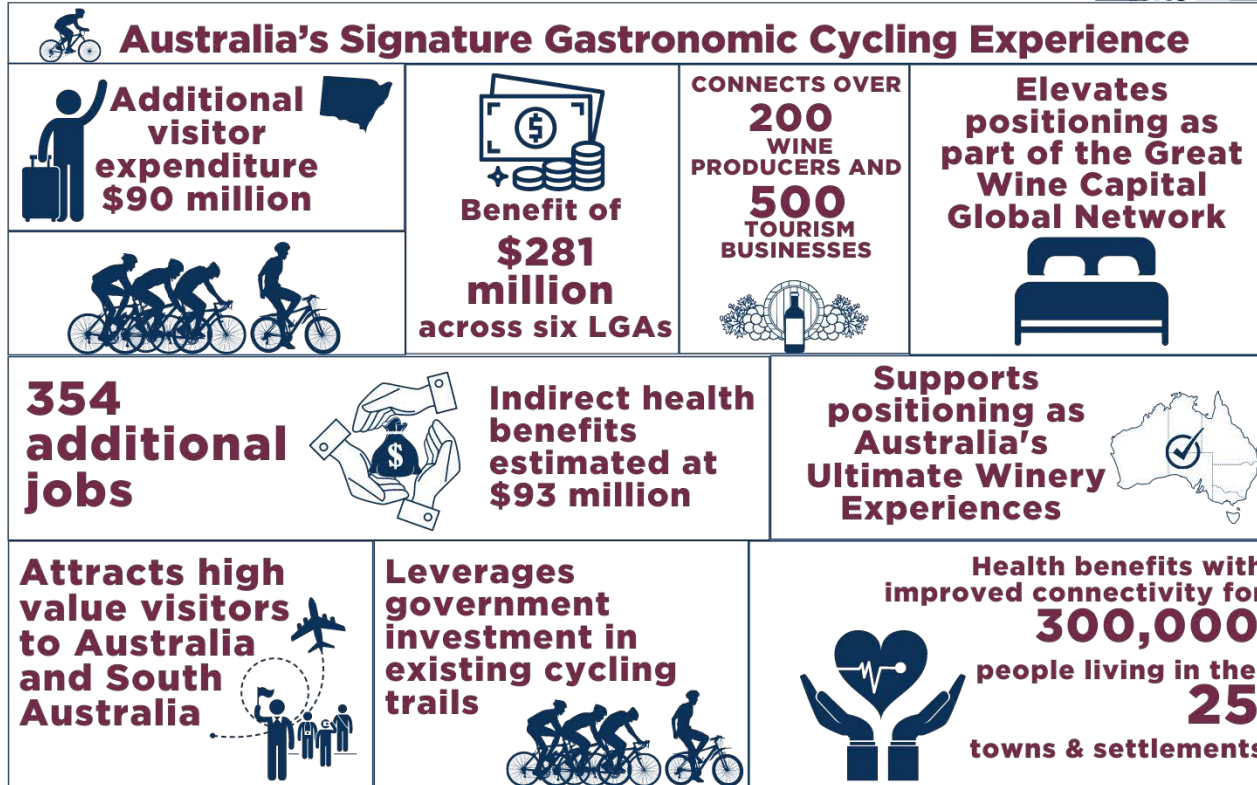
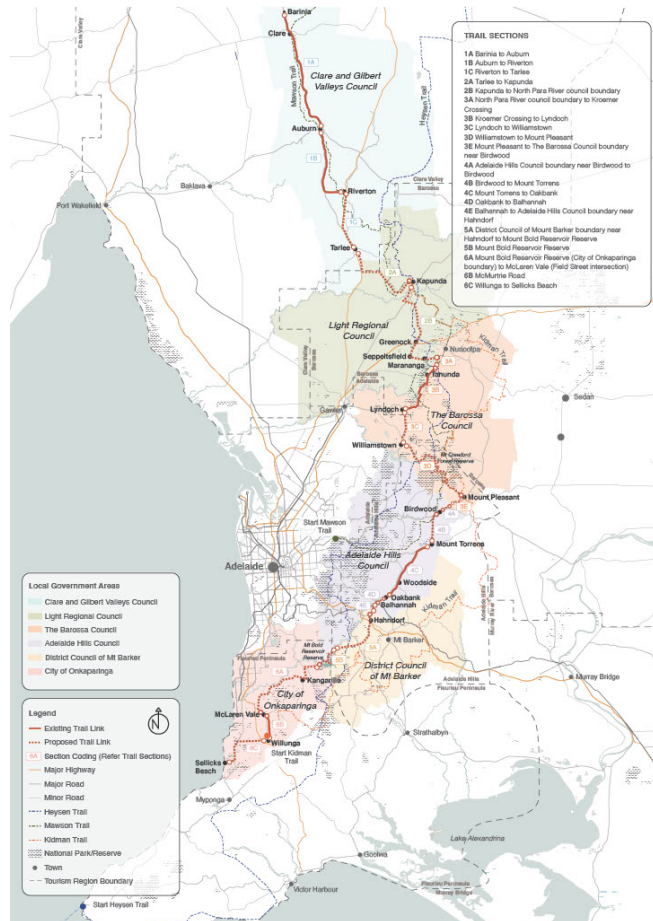


Figure 2. The Wine Trail - Route Concept and Trail Experiences



	<p>Clare Valley</p> <p>A 55 KM CYCLE THROUGH THE CLARE VALLEY THROUGH TO TARLEE</p> <p>HIGHLIGHTS Traversing the picturesque Clare Valley wine region, passing many cellar doors and small heritage towns</p> <p>DURATION 2 nights</p> <p>EXTENSION OPTIONS Loop trails in the Clare Valley and local attractions</p> <p>SUPPORTING SERVICES Bike hire, accommodation, food and beverage, transport from Clare, Riverton and Tarlee</p>
	<p>Barossa</p> <p>A 42 KM CYCLE THROUGH THE HISTORIC TOWNS OF KAPUNDA, GREENOCK AND THE BAROSSA VALLEY INCLUDING FAMOUS SEPPELTSFELD AND TANUNDA.</p> <p>HIGHLIGHTS Traversing the rural landscapes, Barossa wine region, passing many cellar doors and notable restaurants and attractions</p> <p>DURATION 2 nights</p> <p>EXTENSION OPTIONS Kapunda Heritage Trail (10km) and heritage attractions, Barossa Trail Network</p> <p>SUPPORTING SERVICES Bike hire, accommodation, food and beverage, transport in Tarlee, Kapunda, Greenock and the Barossa Valley including famous Seppeltsfeld and Tanunda</p>
	<p>Barossa to Adelaide Hills</p> <p>A 45 KM CYCLE FROM THE BAROSSA AND THROUGH THE BEAUTIFUL LANDSCAPES OF EDEN VALLEY, THROUGH TO BIRDWOOD TAKING IN THE SCENIC LANDSCAPES AROUND THE BAROSSA, LYNDPOCH, WILLIAMSTOWN, MT CRAWFORD FOREST RESERVE, MT PLEASANT AND BIRDWOOD.</p> <p>HIGHLIGHTS Traversing the picturesque Barossa wine region, passing many cellar doors and small heritage towns</p> <p>DURATION 2 nights</p> <p>EXTENSION OPTIONS Williamstown attractions including the Whispering Wall, Hale Conservation Park, Warren Tower Hike, Eden Valley and the Warren Reservoir fishing & kayaking</p> <p>SUPPORTING SERVICES Bike hire, accommodation, food and beverage, transport from Tanunda, Lyndoch, Williamstown, Mt Crawford Forest Reserve, Mt Pleasant and Birdwood</p>
	<p>Adelaide Hills</p> <p>A 40 KM CYCLE THROUGH THE ADELAIDE HILLS FROM BIRDWOOD TO HAHNDORF ON THE AMY GILLET CYCLEWAY</p> <p>HIGHLIGHTS Traversing the picturesque Adelaide Hills wine region, taking in cellar doors and the many attractions and small heritage towns of Mt Torrens, Woodside, Oakbank, Balhannah, and Hahndorf</p> <p>DURATION 2 nights</p> <p>EXTENSION OPTIONS Local attractions and local villages</p> <p>SUPPORTING SERVICES Bike hire, accommodation, food and beverage, transport from Mt Torrens, Woodside, Oakbank, Balhannah, and Hahndorf</p>
	<p>McLaren Vale</p> <p>A 55 KM CYCLE FROM HAHNDORF TO ALDINGA BEACH THROUGH THE SCENIC MT BOLD RESERVOIR, BEFORE LINKING WITH MCLAREN VALE SHIRAZ TRAIL TO WILLUNGA AND THEN CONNECTING WITH THE SPECTACULAR FLEURIEU COASTLINE.</p> <p>HIGHLIGHTS Traversing the stunning vineyard valleys of the McLaren Vale Wine Region, passing many cellar doors including the famous d'Arenberg Cube before reaching the coastal gem of Aldinga Beach</p> <p>DURATION 2 nights</p> <p>EXTENSION OPTIONS Heyson Trail, Kidman Trail, Onkaparinga River National Park, Flat to Vale Trail, Coast to Vines Trail, Coast Park Path, Patrick Jonker Veloway</p> <p>SUPPORTING SERVICES Bike hire, accommodation, food and beverage, transport from Hahndorf, McLaren Vale, Willunga and Aldinga</p>

Part One



The Context

Introduction

This section provides information about the existing trail network, the Wine Trail project and the investment objectives.

Cycle Trails in the Region

Cycle tourism is growing all over the world and in recognition of this growth many countries are investing in cycle networks and touring trails. South Australia is already home to five of the top nine existing trails for cycle tourism in Australia. These trails are located in the Clare Valley, Barossa, Adelaide Hills and McLaren Vale wine regions.² The trails are not currently connected and are managed separately by different authorities.

These trails sit within the broader regional trail network which consists of approximately 145 km of cycling trails. These trails are located within the following local government areas:

- Clare and Gilbert Valleys Council
- Light Regional Council
- The Barossa Council
- Adelaide Hills Council
- District Council of Mount Barker
- City of Onkaparinga.



² <http://www.roymorgan.com/findings/holidayhabitsofregularcyclists>

The most popular and well-known trails are:

- The Riesling Trail - a celebrated picturesque trail from Clare to Riverton (42km) and receives approximately 100,000 users per annum. It is estimated that 40% of use is from residents and 60% is from visitors to the region
- The Barossa Trail - a high-quality sealed cycling and walking network extending 40 kilometres from Angaston to Gawler via the three main townships of Nuriootpa, Tanunda and Lyndoch and follows the North Para River for a hero section. The Seppeltsfield Road precinct is one of the Barossa's most visited tourism destinations however, the Western Barossa region and its icons like Seppeltsfield and Greenock Village, are not currently connected to the rest of the Barossa (and beyond) by cycle/walking trails
- The Amy Gillett Bikeway – connects Mt Torrens to Oakbank (17km) received approximately 40,000 users in 2011 and is likely to be much higher in 2021
- The Shiraz Trail - part of the Coast to Vines Rail Trail, links McLaren Vale to Willunga (9km). It is a scenic trail, taking in views of wineries and vineyards it takes in the villages of McLaren Vale and Willunga offer a range of restaurants, accommodation, retail stores and cafes and cellar doors. There is limited access to cellar doors along the trail, requiring visitors to divert from main trail along public roads. The trail currently receives around 45,000 users per annum
- The Coast to Vines Rail Trail from Marino, through the McLaren Vale wine region and finishes in the historic village of Willunga (37km). The trail experienced a 33% increase in patronage in 2020 on the previous year, with over 77,000 users.
- The region also contains other significant trails including the Mawson, Heysen and Kidman Trails, all of which are multi-day, long-distance predominantly walking trails. A summary of the other trails of significance in relation to their proximity to the Wine Trail are presented in Appendix 4.

The existing trails across the wine regions are currently managed separately by each local government authority and some are managed in partnership with community/volunteer organisations and with State Government support. Local businesses have also co-invested in trail infrastructure across the region. For example, Pernod Ricard and others have co-invested in the Barossa Trail; and wineries in McLaren Vale are currently working with City of Onkaparinga to adjust their properties and winery operations to accommodate trail development.

The Wine Trail Project - A Catalyst Investment

Cycling tourism is a proven earner for South Australia,³ and it aligns with the wider local, regional, state and national context for tourism recovery. As outlined in the previous section, the trails in the wine regions are managed and promoted separately, competing for the same market at the expense of the others. They are also often competing for the same funds for construction and maintenance. Some trails do not link with existing wineries or attractions and require further investment.

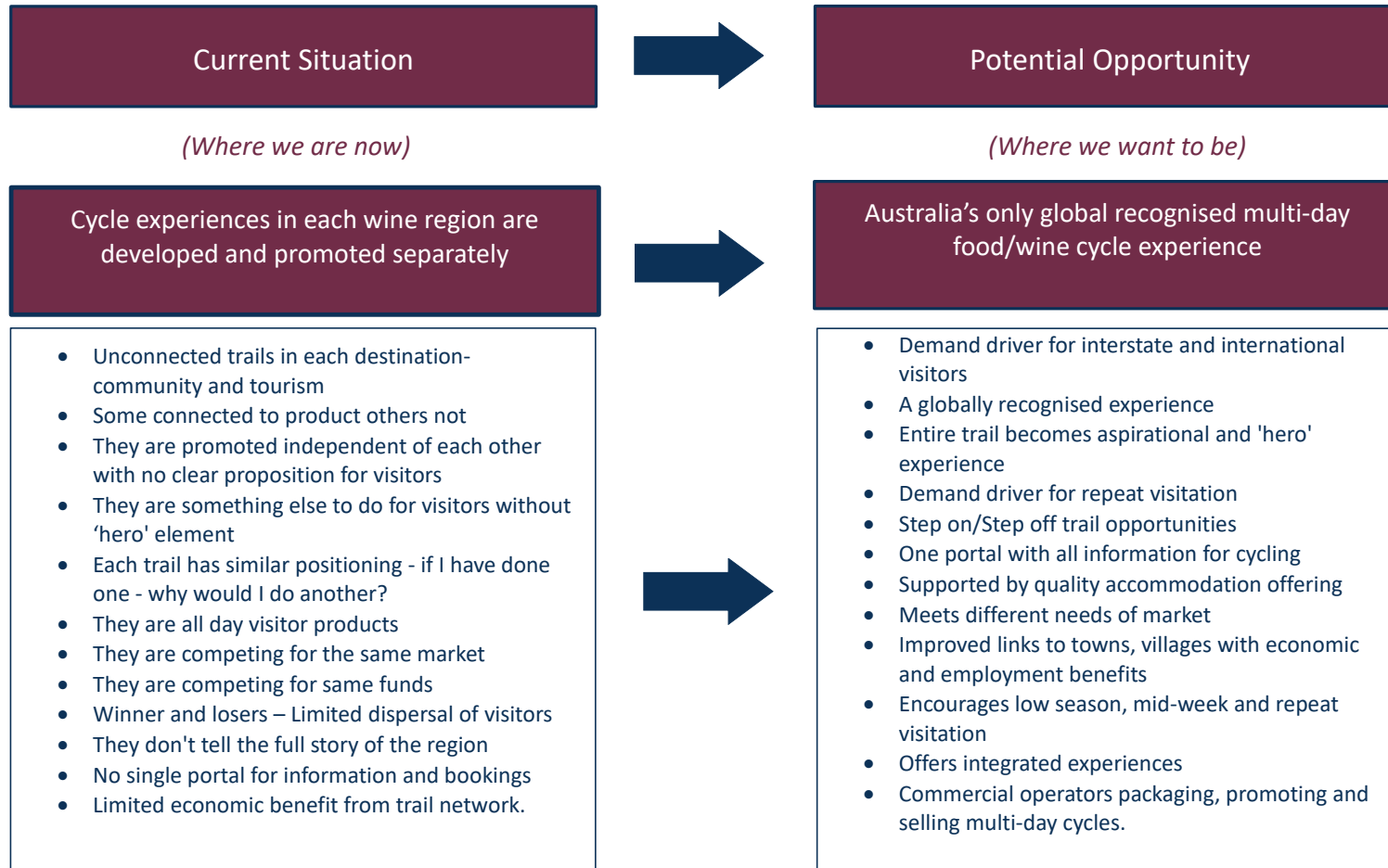
By connecting the most notable cycle trails in the region to form a 247 km spine joining the existing wineries, attractions and towns such as Kapunda, Williamstown, Mount Pleasant, Hahndorf and McLaren Vale, the Wine Trail will become a 'hero' experience for domestic and international visitors. It will combine the best of Australia's wine regions with exceptional food, accommodation and cycling to become Australia's only globally recognised multi-day food/wine cycle trail.

The Wine Trail project is a catalyst investment that will increase business and employment opportunities by capitalising on the profile of Australia's most popular wine regions. It will leverage the significant investment in cycling and walking track infrastructure in the region in recent years and increase the level of return to all regions and the State.

³ TRA Profile of cycling in South Australia 2021

Figure 3 presents the existing situation and the desired state - the opportunity the Wine Trail will bring to the region.

Figure 3. The Case for Change - The Wine Trail Project



Investment Objectives

The investment objectives of the project are:

- **Investment Objective 1: To increase the contribution of tourism to the State and Regional economies through increased visitation and spend.**

This objective aims to increase visitor spending across the wine regions, diversifying the tourism offering and enhancing the overall economic development of the region and State.

- **Investment Objective 2: To increase business activity and employment opportunities across the region.**

This objective to increase employment opportunities and revitalise local businesses. Given the labour- intensive nature of the tourism industry, the Wine Trail has the potential to create new jobs and business and support existing businesses to scale and expand. Flow-on economic effects can include the effect of other local businesses and communities improving existing services and facilities because of increased use.

Achieving these objectives will require the following strategic responses:

- Extending the existing cycle trails to connect with each other and to create one trail (Wine Trail) which will require the construction of additional sections of trail
- Increasing utilisation of the existing trails to better leverage the existing investment.

Figure 4 provides a context map of the proposed route.

Purpose of the Report

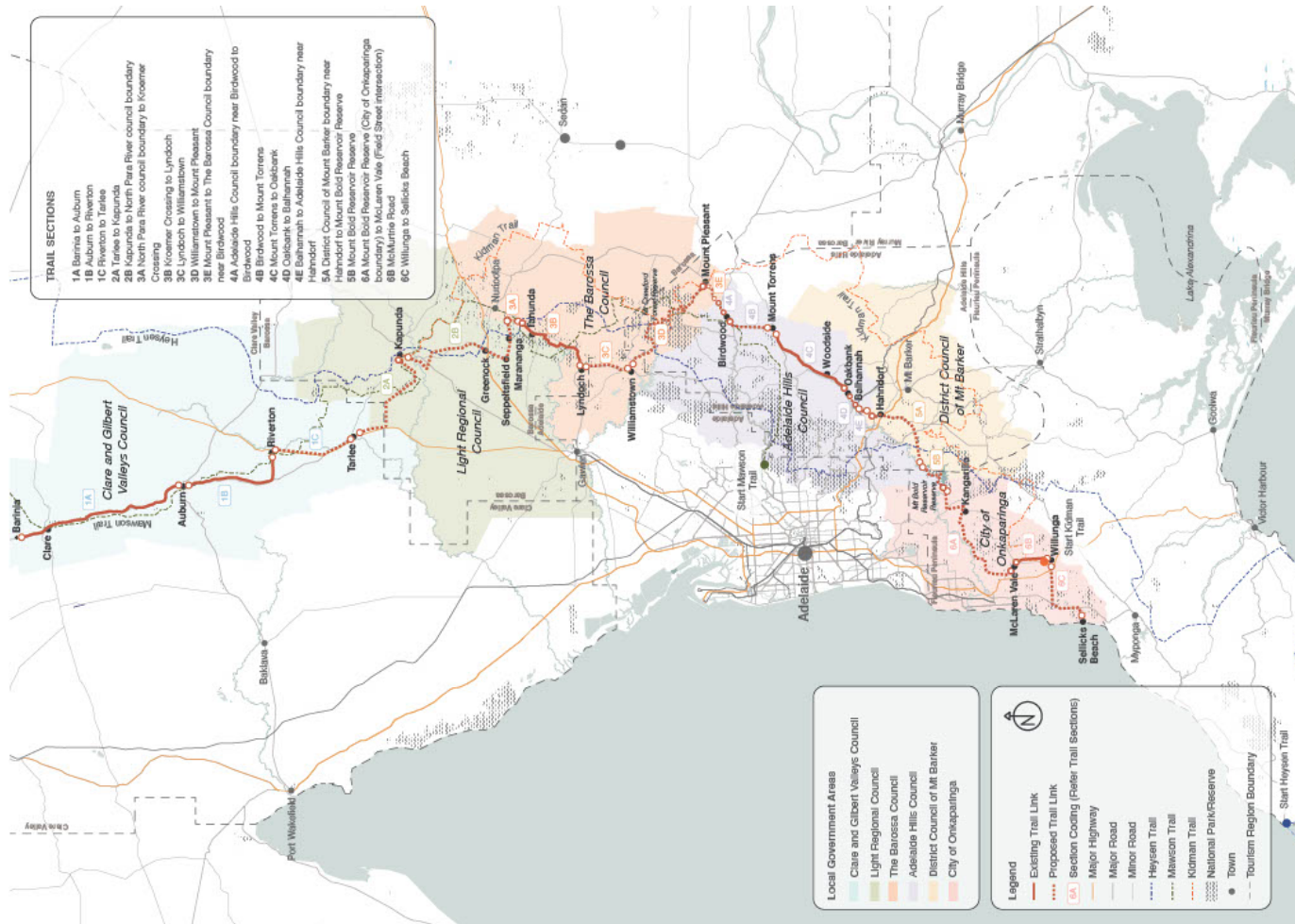
This report provides an assessment of the estimated market demand and socioeconomic impact of the Wine Trail. It aims to determine the Wine Trail's potential meet the investment objectives by:

- appealing to domestic and international visitors, increase repeat visitation, increase the average length of stay and overnight expenditure
- supporting economic recovery
- stimulating investment from the private sector to offer supporting services; and
- generating benefits for communities along the trail.

The analysis has been completed using best available data as well as case studies from the development of similar trail networks in comparable destinations in Australia, New Zealand and elsewhere.



Figure 4. The proposed Wine Trail



Strategic Context

This section provides supporting evidence as to why the Great Australian Wine Trail is critical to supporting the recovery and growth of the visitor economy in South Australia.

Regional Economic Profile

The region's economy is driven by a productive business base from several key industry sectors including agriculture, tourism, education and health. The region produces around two thirds of Australia's wine exports and gross regional product for the region equates to \$9.9 billion. The main business centres generating the higher regional output are Barossa, Adelaide Hills, Mount Barker and Onkaparinga.

The total population of the region is estimated at 302,000 and it has experienced 20% growth since 2011 generating greater demand for trail infrastructure and safe cycling opportunities. Growth has occurred across all local government areas, with significant growth occurring in Mount Barker between 2011 and 2020 (23%). Areas closer to Adelaide also experienced significant growth in the last few years, attracting younger families to the region. This growth also brings workers who need jobs. The socio-economic profile of each local government area is provided in Appendix 1.



The region has faced significant challenges in the last two years with bushfires, drought, the COVID-19 pandemic and the impact of Chinese wine tariffs. The tourism sector has been adversely impacted which has had a flow on effect to many local communities.

Communities most at risk are those within Clare & Gilbert Valleys Council which has a higher percentage of low-income households when compared to the State average, the City of Onkaparinga which has higher levels of unemployment and Adelaide Hills, Mount Barker and City of Onkaparinga where housing stress is more prevalent.

The Visitor Economy

South Australia is a nationally and internationally recognised destination for visitors and the wine regions are a key attractor. Tourism to the region delivers direct benefits to the South Australian economy generating 7,491 jobs across the region and \$712 million to regional and state economies in visitor spending.⁴

The region has the advantage of being geographically close to Adelaide. That advantage, with its wine and food experiences, has translated into a well developed visitor economy driven by a large day trip market and a growing reputation for leisure events. There are over 1,000 tourism businesses in the region and over 200 cellar doors.



⁴ The local government areas fall within four tourism regions Clare Valley, Barossa, Adelaide Hills, Fleurieu Peninsula (McLaren Vale)

The strength of the region's visitor experience lies in:

- Many wineries, most with cellar doors. The larger wineries are also able to service large coach groups, with several having restaurants as part of the winery experience
- A strong accommodation base from small B&Bs to large, sophisticated, resorts.
- A wide range of restaurants and food options from award winning fine dining to cafes and some local providore style experiences, in addition the increase of micro-breweries, distilleries and unique or organic food products
- A significant range of leisure events and festivals
- Historic villages & towns, such as Clare, Riverton, Kapunda, Tarlee, Tanunda, Hahndorf, Birdwood and Willunga with related attractions such as the provedores, galleries, shopping and markets, arts/culture and heritage
- Nature and soft adventure experiences such as ballooning, walking, hiking, bike riding, etc.

Each of the wine regions has developed their own brand and undertake campaigns that have been designed to reflect the contemporary image and experiences the destination now provides the visitor.

Each wine area is distinct with unique characteristics, products and experiences:

- Clare Valley is home to renowned Riesling with more than 50 cellar doors between the towns of Auburn and Clare. The Clare Valley is home to some of the oldest wineries and cellar doors in the state
- Barossa Valley is an internationally acclaimed wine destination and Interstate visitors resonate with the wine offering and are attracted to amazing landscapes, flora and fauna, festivals, bike riding and hot air ballooning. It is adjacent to the Eden Valley with its fantastic Riesling and other cooler climate wines
- Adelaide Hills offers a range of attractions and include the village of Woodside with several pubs, galleries, antique and second-hand shops and

cafés, cellar doors and sculpture trail. Hahndorf is popular with international visitors due to its proximity to Adelaide, nature and wildlife experiences and its popular wineries

- McLaren Vale offers world class food and wine and accommodation, includes the Shiraz Trail between McLaren Vale and Willunga and nature tourism experiences in Onkaparinga River National Park. The region is also a significant coastal location for South Australia and the Fleurieu Peninsula.

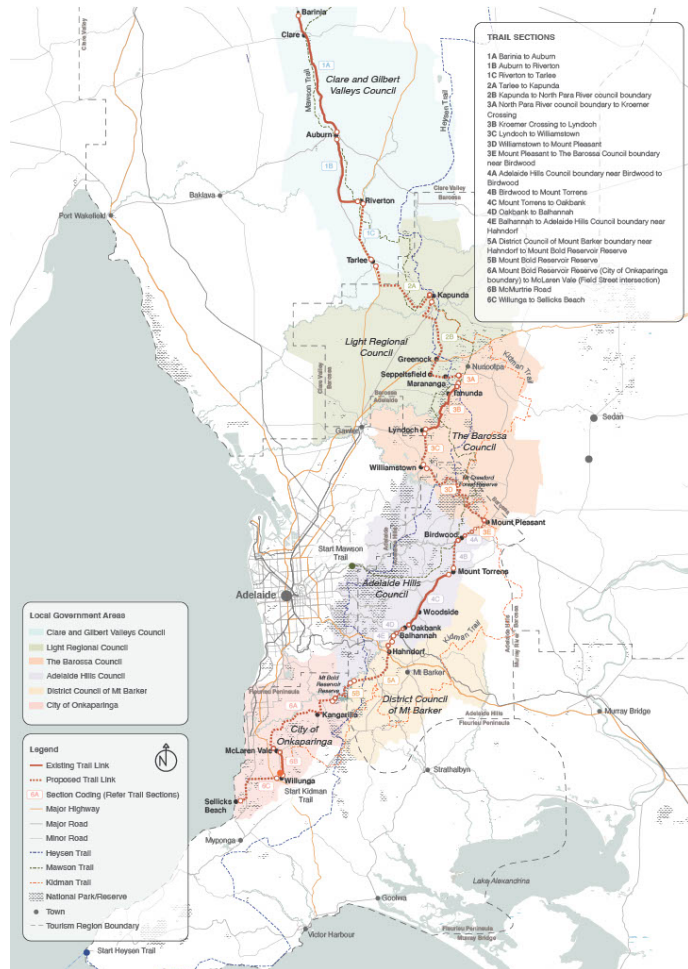
The Barossa, Adelaide Hills and McLaren Vale regions are all represented in Ultimate Winery Experiences Australia, a consortium of hand-selected, premium, award-winning wineries that aim to raise Australia's profile as one of the world's leading wine tourism destinations.

The region is the feature of three of South Australia's official touring routes, namely the Epicurean Way, Explorers Way and connects with the Southern Ocean Drive. The Epicurean Way has the strongest alignment, following a similar theme and route to the Wine Trail in the Clare Valley and Barossa sections. The drive-route also travels through the Adelaide Hills and McLaren Vale via alternative routes to the Wine Trail. The Explorers Way is the South Australian portion of the popular 3,000 km road trip stretching from Adelaide to Darwin, with Kapunda and the Clare Valley located along this.

The Wine Trail will elevate the South Australia food and wine experience; authentic, boutique, contemporary, immersive and vibrant and fuse it with fun and soft adventure experiences.



Figure 5. Strategic Context



Clare Valley

CLARE AND GILBERT VALLEYS COUNCIL

POPULATION

9470 - Higher percentage of low income household

TOURISM

361,000 visitors of which the majority are domestic day visitors
Tourism accounts for 1 in every 13 jobs

EXISTING TRAILS

Existing Trails- Riesling Trail and Rattler Trail –
estimated 100,00 users pa



Barossa

LIGHT REGIONAL COUNCIL AND THE BAROSSA COUNCIL

POPULATION

36,000 - Higher levels of unemployment (7.7%)

TOURISM

1.1 m visitors
The majority are domestic day visitors to the Barossa
Light Regional Council receives 164,000 visitors
Tourism accounts for 1 in every 21 jobs

EXISTING TRAILS

Barossa Trail Network
Featured in Tourism Australia's Ultimate Winery Experiences



Adelaide Hills

ADELAIDE HILLS COUNCIL AND DISTRICT COUNCIL OF MOUNT BARKER

POPULATION

78,000 - Higher percentage of low income households

TOURISM

1.4 million visitors
Majority are domestic day visitors
Tourism accounts for 1 in every 18 jobs

EXISTING TRAILS

Amy Gilley Bikeway – 40,000 users pa
Featured in Tourism Australia's Ultimate Winery Experiences



McLaren Vale

CITY OF ONKAPARINGA

POPULATION

175,000 - Higher percentage of low income households

TOURISM

1.3m visitors – majority domestic day visitors
Tourism accounts for 1 in every 12 jobs

EXISTING TRAILS

Shiraz Trail– 45,000 users pa
Featured in Tourism Australia's Ultimate Winery Experiences



Tourism Performance

In the year ending December 2019 the South Australian visitor economy had experienced strong and consistent growth, outpacing the overall South Australian economy by more than 200% from 2013-2019. Total visitor expenditure was \$8.1 billion, with 44% of this spend in regional South Australia.⁵ In addition, the flow-on effect of the tourism industry in South Australia was evident, with an additional 79 cents spent elsewhere in the economy for every dollar spent in the tourism industry.⁶

As expected COVID-19 has had a major impact and there has been a dramatic drop in the number of international and interstate visitors. The regional data presented in the following section is based on the annual average for the three years to December 2019. This gives an accurate reflection of the state of the regional visitor economy prior to the impact of Covid-19.

- Growth in visitor numbers to the wine regions has been strong in recent years to 2019, particularly in the domestic overnight market. The region experiences a high volume of day visitors (3.7 million in 2019), with the significant potential to convert to overnight. Adelaide Hills receives the largest volume of day visitors, followed by McLaren Vale and Barossa
- The Barossa receives the lion's share of overnight visitors to the South Australian wine regions, followed by McLaren Vale and Adelaide Hills
- The majority of visitors are from Adelaide and New South Wales and Victoria are the main interstate markets
- The Barossa is a highly appealing wine region for international visitors, however the volume and expenditure is low when compared to McLaren Vale

⁵ South Australian Regional Visitor Strategy 2025 (SATC)

⁶ State Tourism Satellite Account 2019-20: South Australia Tourism Summary (TRA)

- Most visitors are aged 55+ years, which presents an opportunity to diversify the offering to attract new markets. The most popular activity is to eat out or dine at a restaurant and or cafe. Other popular activities visiting wineries, friends or relative and visit history/ heritage buildings
- The occupancy rates are generally above the SA regional average of 51%: Clare is 65%, Barossa 59%, Adelaide Hills 58% and McLaren Vale 50%.⁷

Further information on the tourism profile of the region is available in Appendix 3.

High Value Growth Markets

Cycle tourism is a high value growth market

Cycle tourism is a high value growth market and is being targeted by South Australia, other Australian jurisdictions and international destinations. Nationally, cycling tourism is valued at \$2.1 billion in 2019, with visitors undertaking 2.6 million trips, averaging a 4.4 night stay and spending \$189 per night⁸

Cycle tourists in South Australia can be characterised into two main market segments and both are relevant to the Wine Trail project:

- Those who travel to a destination specifically to cycle (Destination Cyclists)
 - Cycle enthusiasts who regularly travel with cycling as a primary motivator
 - Have likely visited other Australian or international destinations
 - Seek high quality routes/trails with good supporting infrastructure in scenic/natural locations
 - Includes event participants who travel to a destination specifically for the event, which may include pre or post event riding/touring



⁷ SA Regional Visitor Strategy 2021.

⁸ Tourism Research Australia, 2019.

- Those who undertake incidental bike riding whilst on holiday:
 - Typically, leisure cyclists whose primary motivator for travel is not bike riding
 - Cycling undertaken may even just be an incidental activity and plays no part in influencing travel behaviour
 - While they view cycling as a secondary motivation for their visit, they will participate in riding activities and will likely hire equipment
 - May place less emphasis on the route/course/trail and more on accessibility of the facility, the setting and nearby attractions and amenities.

Research suggests that the cycle tourism presents a significant opportunity for South Australia and the region⁹:

- More than 80% of visitors believe that the availability and variety of cycle routes is key to attracting them to a destination
- The majority of ‘cycling holidays’ last between 2-3 days
- Cycle Tourists on multi-day trips tend to ride between 30-70 kilometres per day
- Most people on cycling holidays ride in pairs (55%), or with four people or more (52%)
- The majority of cycle tourists are aged 40 or over
- Cycle tourists directly spent \$591 per day on their last cycling holiday not including the contribution of domestic travel.

Wine and Food is a Key Motivator for Travel

Wine is a key driver of international visitors to Australia, with almost a million visitors, or 14% of the total visiting a wine region while in Australia. South Australia, with a strong reputation for quality wine and easily accessible wine regions, has the highest instance of wine region visitation of any state, with more than a third (34%) of international visitors spending time in our wine regions.¹⁰

⁹ The South Australia Cycle Tourism Survey 2015

Wine Trail - A fusion of food, wine and cycling

- South Australia is indisputably Australia’s wine state and is inextricably linked to the state’s character and is a significant economic and cultural asset. Cycling has experienced continual growth over the last five years, food and wine has also grown by more than double for both international and domestic visitors – by combining the opportunity to undertake both activities, the Wine Trail will be compelling proposition for new markets
- The most popular age groups participating in food and wine and cycling activities in Australia is lower than the visitor to the wine regions – suggesting that younger people are attracted to this type of activity and a significant opportunity for the region to develop an appealing product for this market
- A gourmet cycling experience is likely to be an aspirational experience for domestic and international markets.

Strategic Alignment with State Priorities

The Wine Trail project connects State’s priorities in tourism, to regional development and health has strong alignment with local, state and national economic development and tourism strategies as summarised in Table 1 (page 15). Almost exclusively these strategies refer to growing the visitor economy and employment in SA economic recovery and development, transport, safety, sport and recreation and active lifestyles (Figure 6). Improved physical and mental health are also key objectives for governments at all levels. The plans and strategies that are particularly relevant to Wine Trail are presented in Appendix 2. The Wine Trail connects state priorities in tourism, to regional development and health.

¹⁰ South Australian International Wine Tourism Strategy.



Figure 6. State, Regional and Local Plans and Strategies

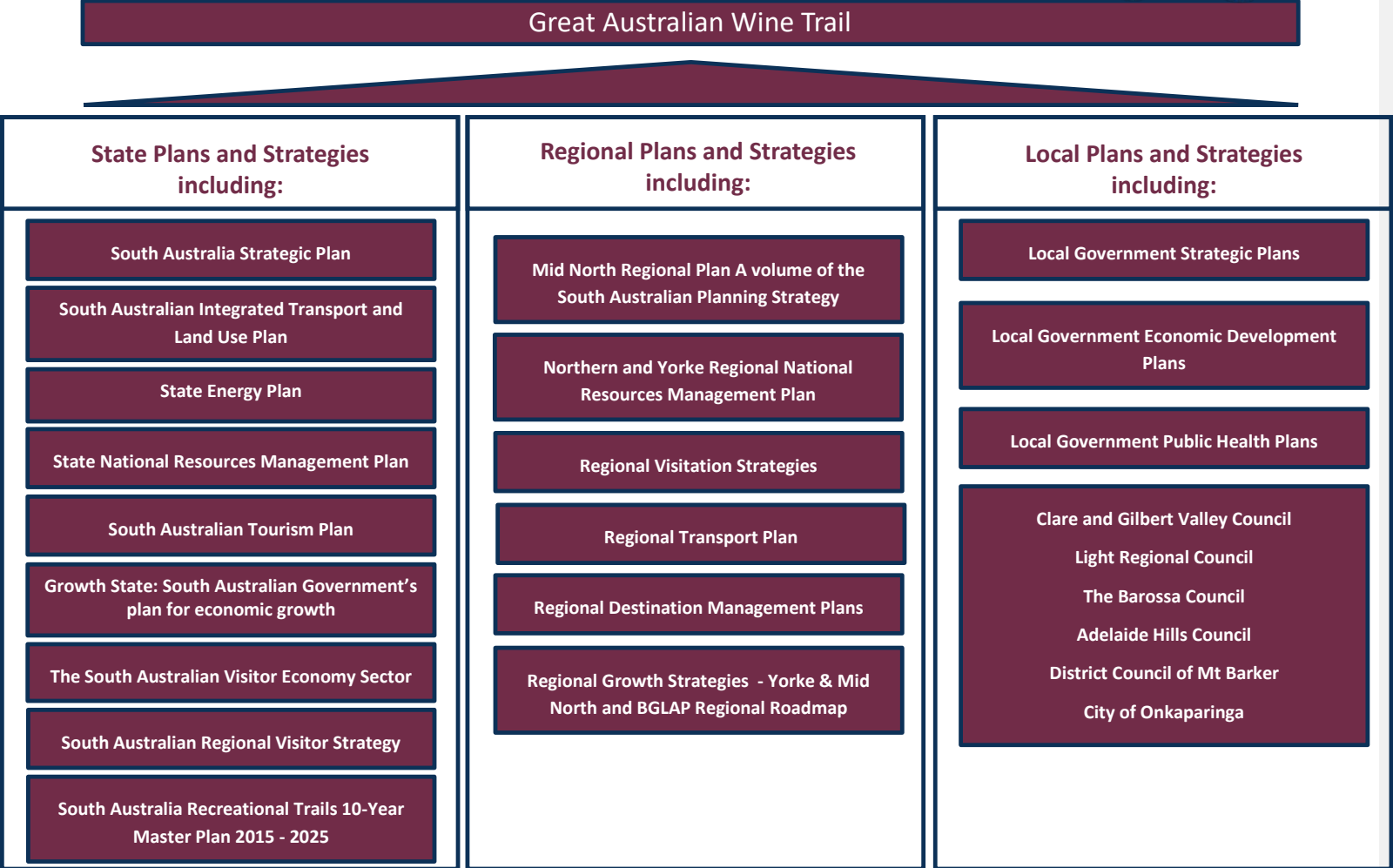


Table 1. Relevant Strategies

STRATEGY	PROJECT ALIGNMENT
The South Australian Government's Growth Strategy	The Wine Trail Project aligns with the Growth Strategy as tourism and wine/agribusiness are two of the nine focus areas to achieve the growth targets for the State. The strategy recognises that the State's food and wine are amongst the best in the world, offered against some of the most stunning landscapes. The growth plan also recognises the global move towards 'clean and green' products, the world-wide climate-transition, a record level of tourists looking for new experiences and shifts provide the State with new opportunities to drive growth.
The SA Visitor Economy Sector Plan and The Regional Visitor Strategy	<p>The Regional Visitor Strategy focusses particular attention on the Wine Trail and states that it is cross regional globally significant asset. It identifies the need to upgrade, maintain and develop new hiking and cycling paths throughout the regions, including in national parks, to support ongoing growth of nature tourism.</p> <p>The Visitor Economy Sector Plan sets targets for creating new jobs and growing visitor expenditure to \$12.8 billion by 2030. The Regional Visitor Strategy 2025 supports this goal and aims to grow the state's regional visitor expenditure to \$4.0 billion by 2025. The plan sets out the priorities including marketing, experience and supply development, collaboration and industry capability.</p>
Economic Development Plans Regional Tourism Strategies	<p>The Regional Tourism Organisations and Local Governments across the wine regions have identified strategic initiatives to ensure sustainable economic development of the region and with a focus on investment and growth particularly with regards to developing its comparative advantage by creating regional wine-food-tourism clusters and improving the liveability of their communities.</p> <p>Trail development is recognised as an investment opportunity with social and economic benefits by all of the local governments, together with the Regional Tourism Organisations. Each Council has a range of trail projects from 'shovel-ready' through to those in the first stages of planning and require support from State and Federal Governments and the private sector to bring them to fruition. Collectively they have identified the value created from trail infrastructure. It is envisaged that when delivered, these projects will enhance community health and wellbeing, drive economic growth and employment, and improve overall liveability.</p>
Regional Development Australia	The local governments fall within the boundaries of Regional Development Australia Barossa Gawler, Light and Adelaide Plains (RDA BGLAP), Regional Development Adelaide Hills, Fleurieu and Kangaroo Island (RDA AHFKI) and Regional Development Australia Yorke and Mid North (RDA YMN). All organisations highlight the visitor economy as a growth industry, and support the sector through various projects, including cycle tourism strategy development and capacity building.

Regional Tourism Investment Priorities

The South Australia Regional Visitor Strategy identifies investment priorities for each wine region. Table 2 (page 17) presents the focus areas, target markets and investment priorities identified in the strategy. The Wine Trail project is consistent with these priorities. In summary investment is required in products and experiences that:

- Leverage the region's global wine and wine tourism reputation
- Extend and connect these existing trails so that the sum of the whole is a much greater asset than the individual parts
- Leverage the region's network of trails for the development of new soft adventure, wellness and Aboriginal tourism experiences
- Augment the authentic food and wine visitor experiences adding value to the local agriculture industry
- Encourage unique accommodation linked to trails, agritourism, nature, wildlife, food, beverage and wellness
- Create opportunities for in- region operators to collaborate and package together to increase nights in the region
- Enhance existing experiences with a focus on food and drink, adventure, nature and wildlife, arts and culture, wellness coastal and aquatic themes
- Support operators to form partnerships and package their experiences and become online bookable and commissionable
- Develop appealing nature based walking and cycling infrastructure
- New business opportunities (i.e. luggage pick up and drop off, cycle hire and maintenance, couriers and guides).

The Wine Trail Project is a Cross Regional, Globally Significant Investment

The South Australian Regional
Visitor Strategy 2025



Table 2. Regional Tourism Investment Priorities

TOURISM REGION	FOCUS	KEY MARKETS	PRIORITIES MOST RELEVANT TO THE WINE TRAIL
Clare Valley	Encourage high spending interstate and international visitors to stay overnight in the region.	Intrastate, interstate and international visitors seeking an active or indulgent holiday.	<p>Use the region’s existing network of trails for the development of new soft adventure, wellness and Aboriginal tourism experiences.</p> <p>Develop more authentic food and wine visitor experiences that lend to the local agriculture industry while enhancing existing offerings.</p> <p>Develop more experiential accommodation linked to farms and vineyards.</p> <p>Create opportunities for in- region operators to collaborate and package together to increase nights in the region.</p>
Barossa	Drive future growth by continuing to increase overnight visitation from intrastate, interstate, and overseas markets focusing on refreshed and new unique accommodation offerings and visitor experiences.	International, intrastate, interstate and trans-Tasman visitors	<p>Leverage the region’s global wine food and wine tourism reputation.</p> <p>Leverage the region’s cycling and walking infrastructure and intersection of key trails for investment and activation.</p> <p>Prioritise the Wine Trail Project as a cross regional globally significant tourism asset.</p>
Adelaide Hills	Build a resilient and sustainable industry that capitalises on its proximity to Adelaide. The region aims to convert more visitors to stay overnight, encourage day trippers to linger longer, spend more and grow repeat visitation.	Locals, VFR, mid-week groups (corporate, sporting and incentives), interstate and international.	<p>Encourage unique accommodation linked to trails, nature, wildlife, food, beverage and wellness.</p> <p>Address infrastructure including walking and cycling trails</p>
Fleurieu Peninsula (includes McLaren Vale)	Encourage year- round visitation and diver visitor yield. The aim is to grow spend form day – tripper and local residents as well as converts some day tips into overnight stays. Levers include events, accommodation improvements, experience development and marketing.	Fleurieu Peninsula – current day-tripper, local residents, holiday home users and VFR in addition to new market segments.	<p>Enhance existing experiences with a focus on food and drink, adventure, nature and wildlife, arts and culture, wellness coastal and aquatic themes.</p> <p>Support operators to form partnerships and package their experiences and become online bookable and commissionable.</p> <p>Develop appealing nature based walking and cycling infrastructure.</p>

Regional Recovery

\$130 million is being invested by the SA Government to drive regional recovery and employment. Recent projects funded which are near the Wine Trail include Mount Lofty in the Adelaide Hills (\$3 million for upgraded infrastructure including trails, amenities and car park); Fleurieu Peninsula (\$3 million for new mountain biking and hiking); and South Para, Barossa and Warren reservoir precincts (\$2 million for new kayak access, walking trails and day visitor infrastructure).¹¹

A total of 31 regional tourism development projects have been granted funding under the SA Government's Tourism Industry Development Fund¹². Investments have been sourced for visitor experiences, cellar doors, restaurants and accommodation, with nearly a third of these projects represented in the regions which the Wine Trail will travel through. This Wine Trail project will leverage that investment and multiply the benefits of these individual projects. It will contribute to build the resilience of the regional economy and increase the international profile of its tourism offering.

The Wine Trail Project - A Game Changer for Recovery

- The wine regions visitor economy contributes to the SA's economic success and continues to showcase the state to a global audience. Significant challenges in the last two years have impacted on the region and many local communities. Investing in the Wine Trail project will build resilience and ensure the continued growth and future prosperity of region's visitor economy. The benefits of the Wine Trail project address the State Government's priorities in tourism, to regional development and health. Importantly the Regional Visitor Strategy identifies the Wine Trail as a cross regional globally significant asset
- The Wine Trail project will also be a catalyst for investment in new products and experiences which will increase yield and length of stay for domestic and international visitors with diverse and interesting jobs
- It will support the much-needed shift in perception that the region is a day trip destination by providing experiences that extend length of stay and appeal to new markets
- Many towns in the region depend on a significant catalyst project like the Wine Trail to disperse the tourism benefits to a wider community (e.g. Light Regional Council)
- Already on a growth trajectory, COVID-19 has accelerated interest and growth in the recreation and wellness tourism market and a trail of global and national appeal positions South Australia well in the recovery era.

¹¹ <https://www.premier.sa.gov.au/news/media-releases/news/record-investment-in-south-australias-parks>

¹² ibid

The Wine Trail Supports:



Creating a World Class Wine and Food Cycling Experience

A world class cycling experience is more than the physical trail. A combination of factors attracts visitors including environment and setting, the quality of trails, their accessibility to food, wine and accommodation and the interest and challenge offered. This section examines other successful cycling trails in wine regions of Australia and elsewhere and summarises their characteristics.

International Wine Cycle Trails

Trail users today have higher expectations about their trail experience and are anticipating ease of planning and fact finding, access, high quality regularly maintained infrastructure, facilities and services and complementary packaged options including accommodation, food and beverage and other value-add activities. It is important that the user experience is central to each element of trail design and management.

The analysis of internationally recognised notable wine cycle trails was undertaken to determine the key characteristics of successful wine cycle trails. The trails were selected on the basis that each trail is located in an existing high-profile destination similar to South Australia's wine regions namely:

- The Marlborough Trail in New Zealand
- The Napa Valley Trail, United States
- Route Des Vins D'Alsace, France.

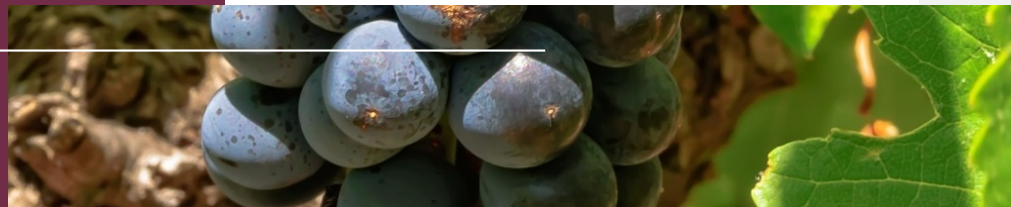


Each case study demonstrates that cycle trails in wine regions increase visitation and spending by domestic and international visitors and generate economic and employment benefits.

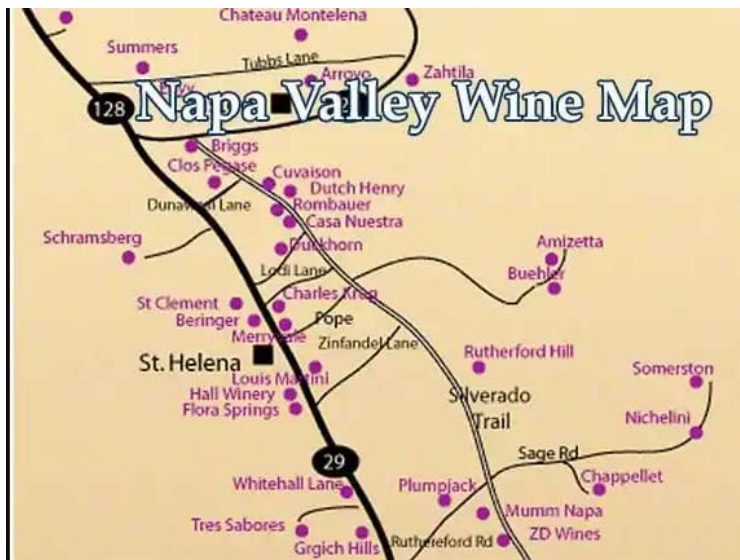
The analysis shows that each trail has:

- A strong brand and distinctive positioning for the overall experience - usually a soft adventure experience amongst unique culture and landscape
 - A clear point of difference for the specific sections of the trail experience that is well communicated through marketing – compelling visitors to return
 - Routes are continuous and without trail gaps, provide dedicated pathways or back roads to ensure cyclist safety
 - Distances are geared to consumer preferences, with attractions along the way for a half or full day rides with good transport and transfer linkages
 - Wineries, eateries, accommodation and attractions are connected to the route
 - A dedicated web site /portal for the entire trails with quality pre-trip information and one booking services available for visitors. Visitors can customise routes according to season, weather, landscape and their conditions by using the website
 - A cycle friendly culture through community and industry engagement and support
 - Safe, rideable and walkable for different ages and ability
 - Consistently branded route markers and interpretation along the trail
 - Provision of multi-language information
 - Some trails include accessible routes for people with mobility issues
 - The regional tourism organisation and/or national tourism agency provides support to create job and business opportunities for local communities
 - Product development workshops are important for local communities to create products with the common wine cycle trail brand
- Successful branding not only promotes the trail itself but also helps add values to local products
 - A trail 'section' is usually around 25 km and the level of difficulty is identified
 - Each trail section is planned to ensure the availability of food and drink, accommodation and resting areas as well as time to explore the surrounding areas
 - Some trails establish minimum standards for accommodation to be labelled as "cycle friendly accommodation" and requirements include:
 - Accommodation should be located within 5 kms of the biking route
 - Offering a special rate for the trail 'passport' holders (at least one night), encouraging return visitation
 - Offering baggage transfer service to the following section
 - Standards for planning and maintaining the route, signage and safety infrastructure in cooperation with local authorities, communities, and private sector
 - Strong governance models that include a mix of government and private sector representatives are critical to long term success and maintenance of a quality product.

Figure 7. Characteristics of Great Cycle Trail Experiences



Case Study 1. NAPA VALLEY VINE TRAIL



Description:

Napa Valley wine country is located in Northern California, 80 kms northeast of San Francisco. The region is known for world-class wine, as well as beautiful countryside and near perfect weather year-round. Napa Valley is home to more than 150 restaurants and has more Michelin stars per capita than any other wine region in the world. There are numerous overnight accommodation options to choose from including hotels, resorts, country inns, and bed and breakfasts. There are a range of airports within easy access between 101 – 152km from the Napa Valley. It is less than a 100km drive from the hub of San Francisco.

When completed, the Vine Trail will be a 75km walking and biking path along the Napa Valley floor from the Vallejo Ferry Terminal to the spa town of Calistoga connecting not only five distinctive towns, but also two regional trails (the Bay Area Ridge Trail and the San Francisco Bay Trail). The Vine Trail will pass through the world-renowned vineyards and towns of Napa Valley on the way.

As at March 2021, 32km of the Vine Trail is complete including a 20km continuous section between Kennedy Park and Yountville. In 2022, a new 13km section of the Vine Trail will be open between St Helena and Calistoga and another 9km section from Vallejo to American Canyon will be under construction. It is estimated that the entire Vine Trail would be completed by 2024.

Route:

The Vine Trail route passes through two counties and multiple municipal jurisdictions. It is organised into 10 sections, each named for the city or vineyard area the trail passes through. From north to south, these are: Calistoga, St. Helena, Rutherford, Oakville, Yountville, Oak Knoll District, City of Napa, Vista Carneros, American Canyon, and Vallejo.

Case Study 2. ROUTE DES VINS, FRANCE



Description:

Alsace is a region of north-eastern France, set in the fertile plain of the Rhine River and bordered by Germany and Switzerland. The region is known for its picturesque villages with half-timbered houses, vineyards and rich gastronomic traditions.

The Route des Vins claims to be the oldest wine route in France, and one of the oldest in the world. Originally planned as an automobile rally linking the vineyards, it became a popular driving route and over the years the project has expanded and generated offshoots, in the form of new walking and cycling trails as well as local events and festivals, all on themes related to the wines of Alsace. There are now around fifty trails that enable tourists to explore the wine country on foot or by bicycle.

Route:

The Alsace Vineyard Cycle Route (CIVA) runs alongside the Alsace Route des Vins driving route and winds through of picture-postcard scenery, between rolling vineyards and picturesque villages. The 131.5 km long trail passes through 70 towns and villages, winding through valleys and introducing visitors to some 1,000 producers. There are 5 main sections of the route each with their own unique identity.:

1. The Northern Alsace Wine Route: *a special local exoticism*
2. The Strasbourg Vineyards: *a land of bounty*
3. The Heart of Alsace Vineyards: *all the emotion of a land brimming with History*
4. The Colmar Vineyards: *all the elegance of an idyllic heritage*
5. The Southern Alsace Wine Route: *freedom to enjoy nature as it is meant to be*

Benefits:

Further estimates indicate that in 2017 visitors to Alsace vineyards stayed on average 4.7 nights in the destination, with 60% of stays defined as long stay of above 4 nights. Staying visitors spent on average €60 per day, while day visitors spent €45.

Marketing:

The CIVA promotes the wines of Alsace widely on social networks – at the time of writing there were 300,000 likes on the Vins d’Alsace Facebook page and 10,000 on Instagram. La Route des Vins d’Alsace has its own Facebook page with 234,000 likes, animating the page with promotional videos and event invitations.

Dedicated websites for themes of interest, so that visitors can have the Alsatian experience that suits them best – Visit Alsace, Alsace at Christmas time, Alsace by bike, Experience Alsace.

Governance:

The Route des Vins is a collaborative initiative, involving many stakeholders:

- The regional tourism organisation, Alsace Destination Tourisme (ADT)
- Tourist Offices in the Route des Vins area
- Agence d’Attractivité de l’Alsace
- Conseil Interprofessionnel des Vins d’Alsace (CIVA), who own the powerful ‘Vins d’Alsace’ brand and who are the principal promoter of the Route Des Vins.
- Wine professionals, wine makers, wine merchants, local shopkeepers and other retailers.
- Cultural associations and officers of small municipalities
- Tourism businesses.

Visitor Statistics

The region attracts around 7.7 million visitors annually (staying visitors + day visitors) and the Route des Vins attracts 2.2 million tourists a year, representing about a quarter of Alsace’s annual tourism. It is estimated that around 1 million visitors cycle the Vins d’Alsace each year. Thirty-nine percent of tourists taking the Route des Vins are international visitors.

Sources:

Tourism Case provided by CABI in association with TEAM Tourism

<https://www.wineroute.alsace/>



Case Study 3. MARLBOROUGH Wine Trail,

NEW ZEALAND

Description

The Marlborough Wine Trail has been rated among the top 10 bike friendly wine routes in the World.¹⁴ Marlborough is New Zealand's largest wine-growing region, producing more than 75% of the country's wine.¹⁵ The Marlborough Wine Trail is set on the wide and mostly flat and fertile Wairau River Valley providing for outstanding wine growing conditions. With more than 150 wineries and 37 cellar doors¹⁶, cycling the is a brilliant way to sample the region's world-renowned wines, along with local produce and seafood.

The Trail provides visitors with options to tour between wineries in cars or private tours, on foot or by riding. Most of the product is between the city of Blenheim and the town of Renwick, which is located approximately 10 kilometres to the west.

There are cycle touring companies basing themselves in the vineyards, located as close as 5 kilometres of more than 20 cellar doors, providing cycle hire, pick up and drop off, maps, bottled water, and wine bottle carriers.



¹⁴ <https://www.theguardian.com/travel/2015/jul/26/top-10-bike-friendly-wine-routes>

¹⁵ <https://media.newzealand.com/en/story-ideas/cycling-nzs-south-island-marlborough-trails/>

Route

As many of the wineries are currently not serviced by off road cycle tracks, a strategy was developed to increase the amount of off-road trail and linkages to clusters of wineries and businesses. The joint objective being to increase cycle tourism to wineries and making it safer and easier for visitors and residents alike to cycle off road.

By taking a visitor experience based approach, the strategy sets out priority areas for firstly developing off roads cycle paths, and secondly where on road cycling is required in the short term, reducing speeds and the provision of dedicated cycle lanes on road to make it both safer and more fun for riders.

The priority area for works is around the Renwick area and where the highest concentration of products and cellar doors are, including the world-famous Cloudy Bay wines as well as Moya Brewery.

Benefits

With over 5,000 people a year riding the winery trails, a significant increase in off road trails is likely to encourage more free independent cyclers as well as tour operators. A Deloitte ANZ¹⁷ study recently showed that those visitors to New Zealand who visit a winery spend on average \$4,500 NZD per visit, while those not visiting a winery spend \$3,200 NZD. the visitor profile and increasing numbers of visitors will drive a significant return to the region, and a positive return on investment in the Trail.

¹⁶ <https://media.newzealand.com/en/story-ideas/cycling-nzs-south-island-marlborough-trails/>

¹⁷ Deloitte – ANZ. Wine Industry benchmarking an Insights 2017. New Zealand.

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Marketing

The Trail has a downloadable map accessible from the Wine Marlborough website http://www.wine-marlborough.co.nz/wp-content/uploads/2018/09/WineTrail_2018.pdf

The website includes an interactive map, with each grape icon representing a winery that features a cellar door. Users can click through from the icon to the winery's website or email (although in testing the links did not seem to be working). The website also has as a downloadable map in PDF form, which includes a very usable map and a listing of vineyards and cellar doors.

Governance

A strong future is underpinned by strong governance and a good strategy. A well governed Trust framework in the form of the Bike Walk Marlborough Trust, supported by the Renwick Smart and Connected group, Marlborough Council and Wine Marlborough provide good management, leadership, and drive to lead the Trail's development.

Vision

The vision is that by 2030, Marlborough will be recognised as New Zealand's foremost wine cycle tourism destination, offering outstanding, safe, and fun access to our cellar doors and attractions via dedicated cycle and walking paths.

Critical success factors for Marlborough Trail into the future include:

- Implementing the strategy and bringing more partners on board to get a critical mass of businesses and wineries supporting the trail.
- Continuing to develop the governance models providing strong leadership.
- The support of the Marlborough District Council including assistance with funding opportunities that emerge nationally and within Council.

- Continuing to measure the growth in tourism and spending on the wine trail highlighting its value to the region.
- Marketing through Destination Marlborough the outstanding opportunities that exist through operators to enjoy Marlborough's features.

Golden Mile

The Golden Mile is a 6km cycle through Rapaura and Renwick featuring nine wineries, with dining, art and cold drink stops along the way. 5 restaurants, 4 bike hires, 5 accommodations, 3 cafes, 1 sweets and cold drinks and 9 cellar doors have listings on the official Golden Mile website <http://www.ridethegoldenmile.com> and a downloadable route map with suggested stops is also available.

An AA Traveller article featuring Blenheim in 2018 stated that the best way to get around the multitudes of vineyards was by bike, and that flat and straight roads and cycle paths make for almost effortless cycling, especially as the wineries are all within easy proximity of each other.¹⁸

An option is available for visitors to complete their Marlborough wine and food experience by checking in at the various boutique family owned cellar doors and food stops and collecting stamps from participating destinations to become a 'Golden Mile Champion'.

The popularity and brand awareness of the route is so much so, that a new micro-brewery in the area named their business after the cycling route, Golden Mile Brewing. The beers themselves have also been named and themed to cycling, with options such as Peloton Pilsner and Grand Tour Lager.¹⁹

The Golden Mile is also promoted on Marlborough's tourism website <https://marlboroughnz.com>.

¹⁸ <https://www.aa.co.nz/travel/on-the-road/get-outside-five-vineyards-to-visit-by-bike-in-blenheim/>

¹⁹ <https://www.stuff.co.nz/life-style/food-wine/drinks/109580203/cycleinspired-beers-go-the-golden-mile>

Case Study 4. WINE CYCLE TRAILS AUSTRALIA

Like the Barossa Trail and the Riesling Trail, most of Australia's wine cycle trails are only short distances of 10 – 30 kms. The most notable are:

- Pedal to Produce, Victoria - Victoria's Pedal to Produce trails allow visitors to explore the King Valley. It's an easy 10-kilometre return trip along flat terrain and passes restaurants and cafés along the way
- Hermitage Food and Wine Trail, Hunter Valley, NSW - A new purpose-built cycleway, opened in 2017, is a 10.6-kilometre trail -travels the most winery-dense stretch of the Hunter, passing restaurants and wineries
- The Margaret River Wine Cycle Trail - a 28 km trail through Western Australia's famous wine region
- Swan Valley Cycle Trail, Western Australia - 90 minutes from Perth, boasts four different bike-friendly routes including an 18-kilometre loop and shorter three-kilometre loop.

The common characteristics of these cycle trails can be summarised as:

- The trail has a strong brand association with one wine region
- Distances tend to be short and under 20km appealing to day visitors only
- Most trails are a combination of off road and road cycling and promoted as part of the core offering of the wine region
- The trails have been developed with strong industry collaboration, strategic planning and product development
- There is no clear point of difference for the specific sections of the trail as mot visitors can complete the trail in a day
- Routes are continuous and generally without trail gaps
- Wineries, eateries, accommodation and attractions are clustered and not always directly connected to the route
- There is a distinct opportunity for the Wine Trail to fill a significant gap in the Australian market by providing a premium overnight cycling experience across Australia's internationally recognised wine regions.

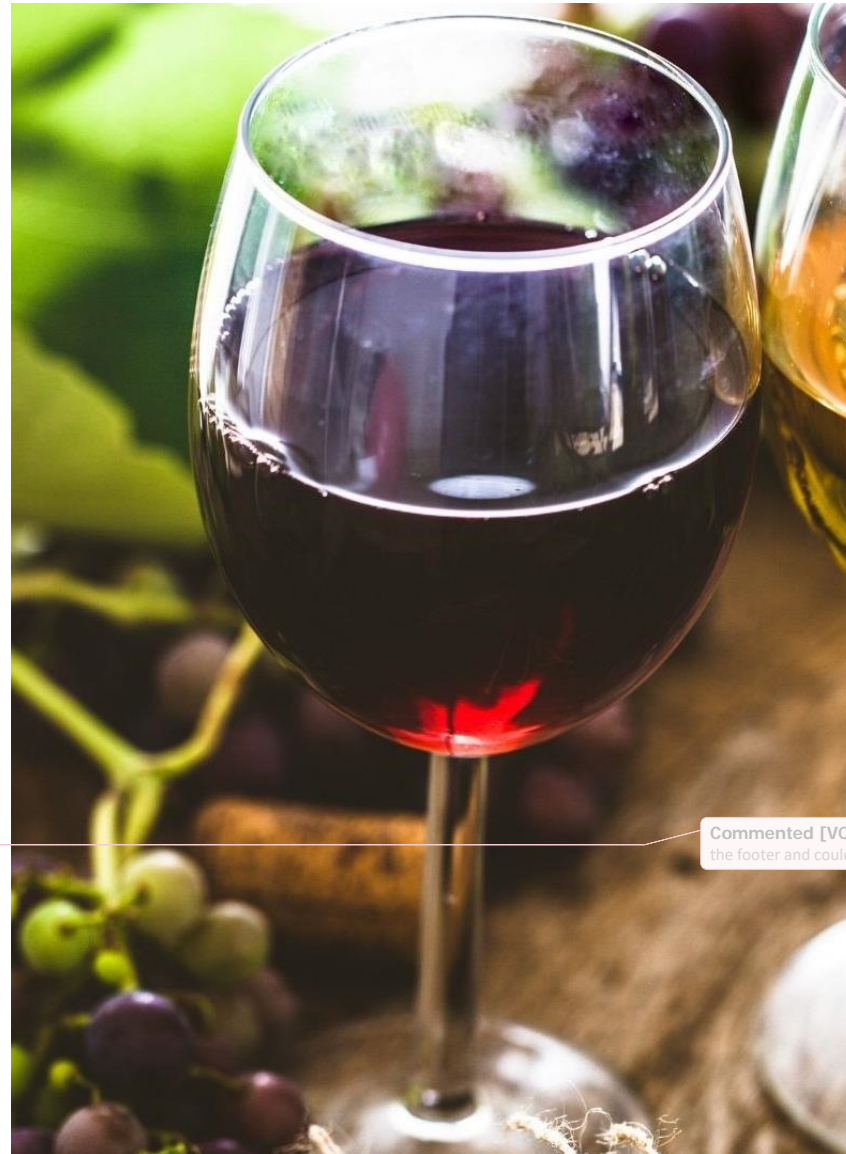


Creating an Exceptional Experience – Learning from Others

Unlike other wine cycle trails in Australia and New Zealand, the Wine Trail has the potential to be a globally recognised wine and food cycling experience for domestic and international visitors. It offers:

- Four of Australia’s most famous wine regions and landscapes serviced by world class wineries, restaurants, attractions, and accommodation
- Status as part of the ‘Great Wine Capitals Global Network’ and a strong brand story that will drive awareness, prestige and appeal
- A compelling history with rich stories along the entire route of the trail
- Iconic rides to suit the short break market as well as longer cycling options to create aspiration and encourage repeat visitation
- Hop on and hop off opportunities with direct connection to the region’s wineries, eateries, attractions, accommodation and visitor servicing hubs
- Clearly defined trail segments each with its own distinct identity.

Using the insights from the international and domestic benchmarking examples, an assessment of what is required to transform the existing trail network across the wine regions into Australia’s premium cycling food and wine cycling experience is presented in Table 3 (page 32).



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Figure 8. SWOT Analysis

<h3>Strengths</h3> <ul style="list-style-type: none"> • The Wine Trail will be a demand driver for travel to and within SA • Connects existing sections of trail that have a strong brand with quality products (e.g. the Reisling Trail and the Barossa Trail) • Leverages extensive investment by local and state government in trails • Established tourism destinations with extensive visitor services • Range of accommodation from camping to high end • Local businesses are supportive and see the opportunity • Accessible trails especially for community, families and young people • Accessible to major markets - domestic and international via Adelaide • Compliments Tourism Australia's Ultimate Winery Experiences (part of the Signature Experience Program) • Aligned with state and regional tourism strategies, trails master plan and transport strategies • Compliments major investments in the region e.g. Hahndorf Township Improvements and Access Upgrade • Supports National Heritage listing of the Mount Lofty Ranges region through presentation of working agricultural landscapes and historic settlements • Supports community wellbeing and health outcomes and economic development strategies • Catalyst for revitalisation of existing tourism attractions, accommodation and experiences • Disperses benefits to local communities such as Kapunda. 	<h3>Weaknesses</h3> <ul style="list-style-type: none"> • The trails are not connected – 5 separate regions with separate trail network • The existing trails are competing for the same market which is mostly day visitors • Diversity of trail types and styles (rail trail, gravel grind, shared path, road) suited to different types of bikes, users and riding abilities • Some of the proposed links of the network may require significant planning and development processes (e.g. SA Water's Mount Bold Reservoir Reserve linking the Adelaide Hills to McLaren Vale) • Consistency of trail standard and signage across the various Wine Trail sections and LGAs responsible for maintenance • Some destinations are at different maturity levels in terms of bike-friendliness than others.
<h3>Opportunities</h3> <ul style="list-style-type: none"> • The new Wine Trail will appeal to new markets • Hope on Hop off - attractions and visitor servicing hubs • Iconic 1,2, 3 and 4 day rides as well as longer cycling options to create aspiration and encourage repeat visitation • Commercial operators expanding to whole of region products • Promotion to stimulate low season, mid-week and repeat visitation via both domestic and international markets • Differentiate various trail segments to encourage riders to 'tick-off' more than one segment of the trail and return travel • New and existing businesses can develop facilities and services and support the establishment of bike-friendly towns • Provide links to towns and villages that previously developed trails have not yet connected • Complements other iconic trail experiences (e.g. Heysen Trail, Mawson Trail and Kidman Trail) • Local businesses will co-invest with the Wine Trail • Utilise the existing 'Great Wine Capitals Global Network' to drive awareness, prestige and appeal • Can build on strong brand story and connection with the consumer. 	<h3>Threats</h3> <ul style="list-style-type: none"> • Growing destination competition • Increased urban development impacting the brand • Lack of product revitalisation in the region • Effective governance, coordination and management • Trail Maintenance and Day-to-Day Management • Loss of market share as competitors invest in trail infrastructure and attract new markets. 

Table 3. Becoming Australia’s premium cycling food and wine cycling experience

CONSUMER EXPECTATIONS	TRAIL PLANNING CONSIDERATIONS
A route that is continuous and without gaps	There are gaps that will need to be addressed and sections of new trail will need to be constructed to connect the existing trails.
An existing high market profile for the destination in which the Wine Trail will be located	All the destinations that Wine Trail will travel through have an existing profile which presents a significant advantage.
Showcases Australian unique nature, culture and landscape	The existing trails presents high quality experiences that take in spectacular landscape of South Australia – the new sections of trail will need to leverage this and ensure each section is iconic.
Step on and step off opportunity to connect with region’s tourism products and services	The Wine Trail offers the potential to connect cycling stop points with towns, accommodation, transport, trail hubs and visitor experiences including side trips. New sections of trail will need to connect.
Shuttle services	Shuttle services will be required to and from Adelaide and between major destinations along the trail.
Accommodation and associated products and services	A range of accommodation linked to users requirements, on and off trail will be required together with other supporting products and services such as eateries, attractions and retail opportunities.
Sustainable and low environmental and cultural impact	Protecting trail and community values while encouraging travel through the landscape is already demonstrated by the existing trail network and this will need to continue for new sections of trail.
Trail based events	The Wine Trail will enable sustainable event opportunities across multiple regions. Events could include food and wine festivals, cycling events as well as community events.
Strong positioning and marketing	The trail as a whole and then each destination must ensure it positions itself well and aligns its core strengths and experiences to the market and promotes it accordingly.
Quality pre-trip information and one stop shop for booking services	On-line content quality pre-trip information and booking service will provide prospective visitors with the information they need to decide on the trail destination they will visit and the range of services available to support their experience.
Cycle friendly culture through community and industry engagement and support.	Product development and cycle friendly schemes where service and accommodation providers offer products and packages that cater for visitor needs such as secure equipment storage, clothes and equipment washing, packed lunches, opening hours convenient to trail users will need to be promoted along the entire length of the trail.
Effective governance for management and maintenance of the trail	A strong sense of vision and long-term planning of the trail is essential for success. An effective governance structure will need to be fit for purpose for the trail and for all the stakeholders involved.

Part Two



The Concept

The Great Australian Wine Trail

The Great Australian Wine Trail will be globally recognised as Australia's signature gastronomic cycling experience connecting South Australia's iconic wine regions offering a world class experience.

The Great Australian Wine Trail will be Australia's first international gastronomic cycling experience inviting visitors to "be consumed" by the best of Australia's food and wine. It will be Australia's only iconic multi-day food/wine cycle trail with significant domestic and international appeal. It will support Adelaide's positioning as one of the Great Wine Capitals of the World.

Rivalling trails in France, USA and New Zealand, the 280 km trail will connect South Australia's most famous wineries and cellar doors in Clare Valley, Barossa, Eden Valley, Adelaide Hills, Langhorne Creek and McLaren Vale.

By connecting existing trails and developing new sections of trail across the wine regions, visitors will be able to explore beautiful landscapes, visit historic towns and villages, enjoy world renowned wines and experience fresh food and produce, thereby extending their stay and expenditure. Visitors will be supported by quality accommodation, attractions, experiences, and other services provided by local communities.

It will be presented as short overnight trips as well as longer cycling options to create aspiration and encourage repeat visitation.

It will be a flexible experience tailored to meet the needs and preferences of different visitors and markets in relation to the overall duration of the experience, the length of daily segments and the location and type of accommodation.



The Wine Trail will leverage the significant investment in cycling and walking track infrastructure that has been made by the state and local governments in the last few years by providing a trail ‘spine’ that will connect the following trails:

- Riesling Trail / Rattler Trail
- Mawson Trail
- Barossa Trail Network
- Stuart O’Grady Way
- Amy Gillet Bikeway
- Mount Barker Trail Network
- Battunga Trails
- Kidman Trail / Heysen Trail / Tom Roberts Horse Trail
- Pioneer Women’s Trail
- Torrens Linear Path
- Coast to Vines Rail Trail / Coast Park Path
- Shiraz Trail / Flast to Vale Trail (under construction) / Patrick Jonker Veloway.

The Wine Trail will raise the profile of all trails, and when connected, provide the ‘hero offering’ for South Australia. It will combine the best of South Australia’s wine regions with exceptional cycling experiences. This will be achieved by creating:

- An end-to-end trail enabling the visitor to visit all wine regions or curate their own itinerary.
- Well-planned and managed infrastructure and effective governance
- Government, tourism and wine industry partnerships to deliver supported, interpreted and accommodated experiences.

On completion, the South Australian Wine Trail will be Australia’s only globally recognised multi-day food/wine cycle trail.

Planning Principles

The following principles will underpin the provision and promotion of the Wine Trail and the high-quality trail experiences within it.

High quality, diverse cycling and walking experiences	The Wine Trail will offer exceptional experiences for domestic and international visitors that complement the natural and cultural assets of the region. The trail experience is planned by understanding target markets and trail users and adapts according to market needs.
Community and Economic benefits	The Wine Trail will have broad appeal and a diverse range of cycling options for people of different capacities and interests for both residents and visitors.
Sustainable	The planning and management of the trail will aim to ensure long term economic, community health, social, cultural and environmental benefits to the region and State.
Borderless Collaboration	The success of the Wine Trail relies on the National, State and Local Government, community and private sector working together. Cooperation will also contribute to building a cycling destination culture across the region to support its global positioning as world class.
Enabling and Cross Cutting	The Wine Trail experiences are integrated with the broader experience offer of the region and enables a range of product development opportunities associated with regions heritage and its natural and cultural attractions. Cycling will feature significantly and will be a core proposition in the marketing and promotion of the region.
Good governance and strong partnerships	Partnerships will be established between government, the private sector, tourism industry and community groups to deliver a range of outstanding trail experiences and support services that meet market needs. The Wine Trail will be appropriately resourced, funded, managed and marketed.
Visitor Economy Approach	Visitation increases providing greater economic value to the regions. New jobs are created, enterprises developed and flow on regional benefits realised. The economic value supports continued investment in the trails (maintenance, marketing and management).



The Proposed Route

The recommended trail alignment is based on connecting the gaps in existing trails, physical constraints, land tenure (i.e. publicly owned land), advice and comment provided by key stakeholders (notably the Steering Committee) and on-site observations. In general terms, trail alignment sits within public owned land and road reserves for the majority of the route.

The proposed route of the trail passes some of the region's most well-known wine brands as well as food establishments and breweries, chocolate and gourmet food producers and local towns and villages. The length of the proposed route is approximately 280 kilometres. This length, the concentration of product, as well as the relatively flat and open nature of the landscape lends itself well to a trail designed for a broad range of markets.

The precise trail route cannot be determined in isolation from several other factors which greatly determine the trail alignment. Amongst the more notable factors influencing the alignment are:

- connection with existing trails – the trail is being developed primarily to make connection with some of the notable cycle trails in the region
- connection with existing attractions – some trails fall short of reaching wineries and other attractions in the region. The trail will make connection with these attractions wherever possible
- route into towns – a fundamental requirement of this trail project is that it make a direct connection with the towns and villages wherever possible such as Kapunda, Williamstown, Mount Pleasant, Hahndorf, McLaren Vale, Willunga, Aldinga and others
- minimal use of on-road sections – the likely trail user groups to use the proposed trail will demand segregated paths and/or trails, without the need for traversing any on-road sections. It is known that recreational cyclists strongly prefer off-road paths/trails. Hence, on-road sections should be minimised wherever possible.

The trail route is shown in Figure 9 and section details are provided in Appendix 5.

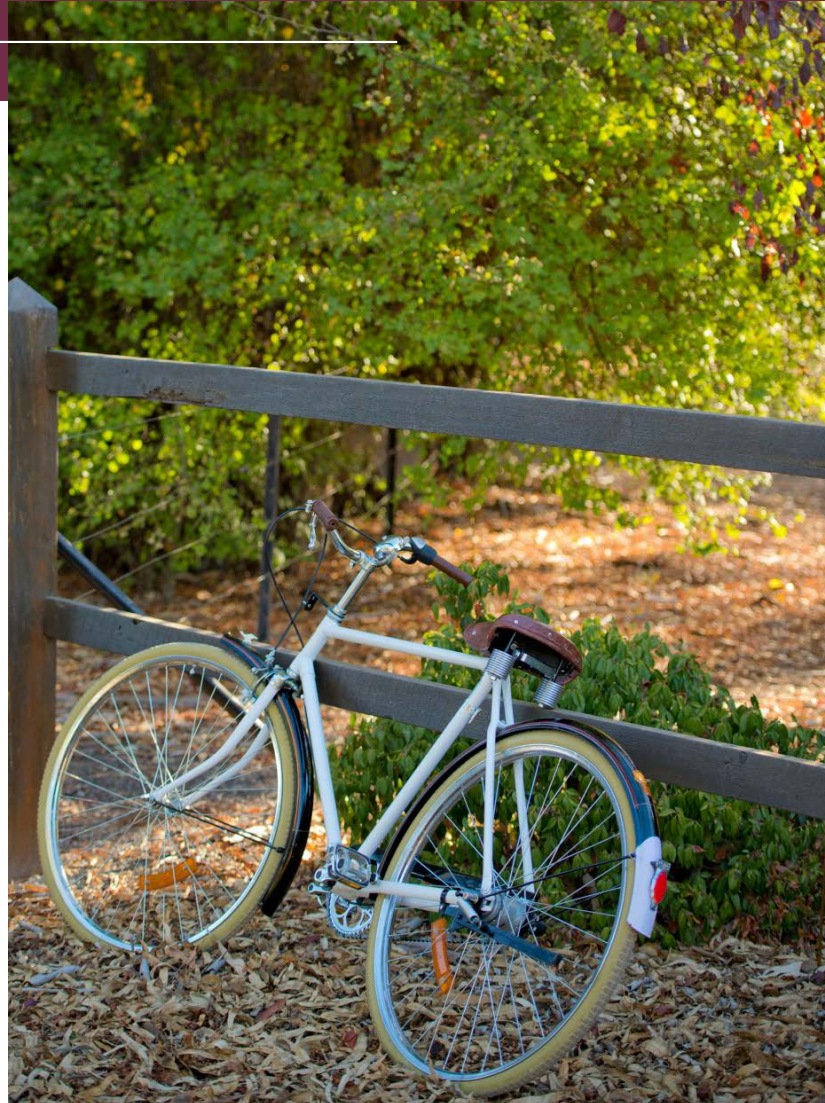
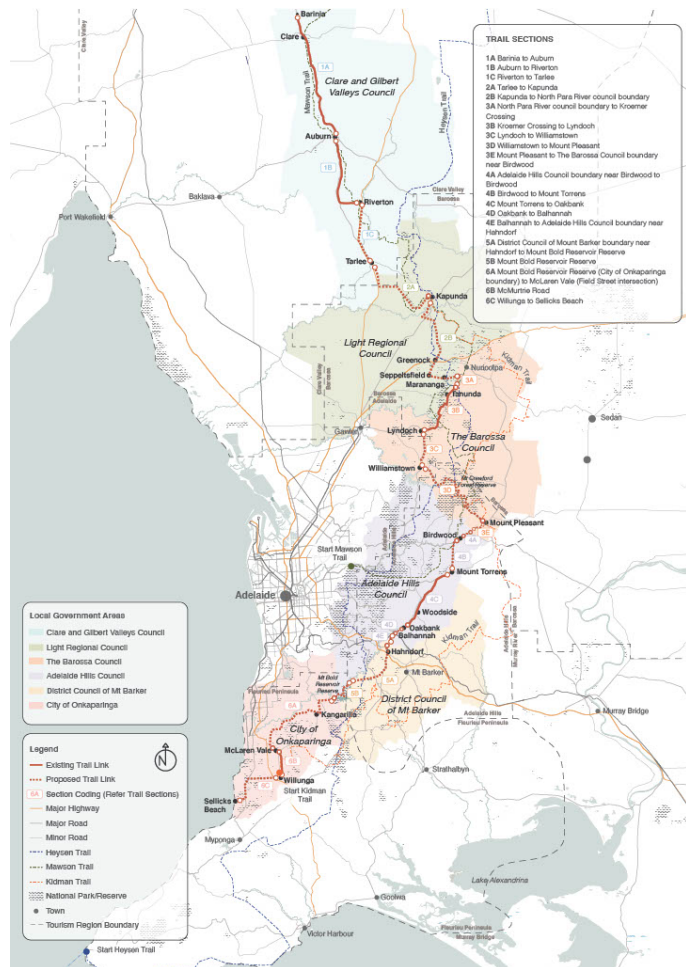


Figure 9. The Wine Trail – Proposed Route



Clare Valley

A 55 KM CYCLE THROUGH THE CLARE VALLEY THROUGH TO TARLEE HIGHLIGHTS

Traversing the picturesque Clare Valley wine region, passing many cellar doors and small heritage towns

DURATION 2 nights

EXTENSION OPTIONS

Loop trails in the Clare Valley and local attractions

SUPPORTING SERVICES

Bike hire, accommodation, food and beverage, transport from Clare, Riverton and Tarlee



Barossa

A 42 KM CYCLE THROUGH THE HISTORIC TOWNS OF KAPUNDA, GREENOCK AND THE BAROSSA VALLEY INCLUDING FAMOUS SEPPELTSFIELD AND TANUNDA. HIGHLIGHTS

Traversing the rural landscapes, Barossa wine region, passing many cellar doors and notable restaurants and attractions

DURATION 2 nights

EXTENSION OPTIONS

Kapunda Heritage Trail (10km) and heritage attractions, Barossa Trail Network

SUPPORTING SERVICES

Bike hire, accommodation, food and beverage, transport in Tarlee, Kapunda, Greenock and the Barossa Valley including famous Seppeltsfield and Tanunda



Barossa to Adelaide Hills

A 45 KM CYCLE FROM THE BAROSSA AND THROUGH THE BEAUTIFUL LANDSCAPES OF EDEN VALLEY, THROUGH TO BIRDWOOD TAKING IN THE SCENIC LANDSCAPES AROUND THE BAROSSA, LYNDCH, WILLIAMSTOWN, MT CRAWFORD FOREST RESERVE, MT PLEASANT AND BIRDWOOD. HIGHLIGHTS

Traversing the picturesque Barossa wine region, passing many cellar doors and small heritage towns

DURATION 2 nights

EXTENSION OPTIONS

Williamstown attractions including the Whispering Wall, Hale Conservation Park, Warren Tower Hike, Eden Valley and the Warren Reservoir fishing & kayaking

SUPPORTING SERVICES

Bike hire, accommodation, food and beverage, transport from Tanunda, Lyndoch, Williamstown, Mt Crawford Forest Reserve, Mt Pleasant and Birdwood



Adelaide Hills

A 40 KM CYCLE THROUGH THE ADELAIDE HILLS FROM BIRDWOOD TO HAHNDORF ON THE AMY GILLET CYCLEWAY HIGHLIGHTS

Traversing the picturesque Adelaide Hills wine region, taking in cellar doors and the many attractions and small heritage towns of Mt Torrens, Woodside, Oakbank, Balhannah, and Hahndorf

DURATION 2 nights

EXTENSION OPTIONS

Local attractions and local villages

SUPPORTING SERVICES

Bike hire, accommodation, food and beverage, transport from Mt Torrens, Woodside, Oakbank, Balhannah, and Hahndorf



McLaren Vale

A 55 KM CYCLE FROM HAHNDORF TO ALDINGA BEACH THROUGH THE SCENIC MT BOLD RESERVOIR, BEFORE LINKING WITH MCLAREN VALE SHIRAZ TRAIL TO WILLUNGA AND THEN CONNECTING WITH THE SPECTACULAR FLEURIEU COASTLINE. HIGHLIGHTS

Traversing the stunning vineyard valleys of the McLaren Vale Wine Region, passing many cellar doors including the famous d'Arenberg Cube before reaching the coastal gem of Aldinga Beach

DURATION 2 nights

EXTENSION OPTIONS

Heysen Trail, Kidman Trail, Onkaparinga River National Park, Flat to Vale Trail, Coast to Vines Trail, Coast Park Path, Patrick Jonker Veloway

SUPPORTING SERVICES

Bike hire, accommodation, food and beverage, transport from Hahndorf, McLaren Vale, Willunga and Aldinga

Summary of Costs

The estimated construction cost of the Wine Trail project is \$38.548 million, and the 10-year maintenance costs are \$5.782 million (assumed to be \$578,220 per year over 10 years) for a total 10-year cost of \$44.330 million

Trail Construction and Maintenance Costs

Table 4. Wine Trail Construction Cost Estimates (2021)*

	PRICE PER UNIT (PER KM)	TOTAL KM	TOTAL COST (2021 PRICES)
Onkaparinga (C)	\$352,473	36.4	\$12,830,000
Adelaide Hills (DC)	\$201,412	34	\$6,848,000
Barossa (DC)	\$108,810	58.8	\$6,398,000
Clare and Gilbert Valleys (DC)	\$58,660	69.4	\$4,071,000
Light (RegC)	\$115,550	57.3	\$6,621,000
Mount Barker (DC)	\$70,916	25.1	\$1,780,000
Total 6 LGAs	Average \$151,304	281 kms 89.6 kms of new trail 92 kms of existing trail	\$ 38,548,000

* Estimates are ex GST and do not include ongoing maintenance costs. Estimates include: surveying, geotechnical advice, engineering, 20% contingency and project management fees (where specified).

Table 5. Maintenance costs

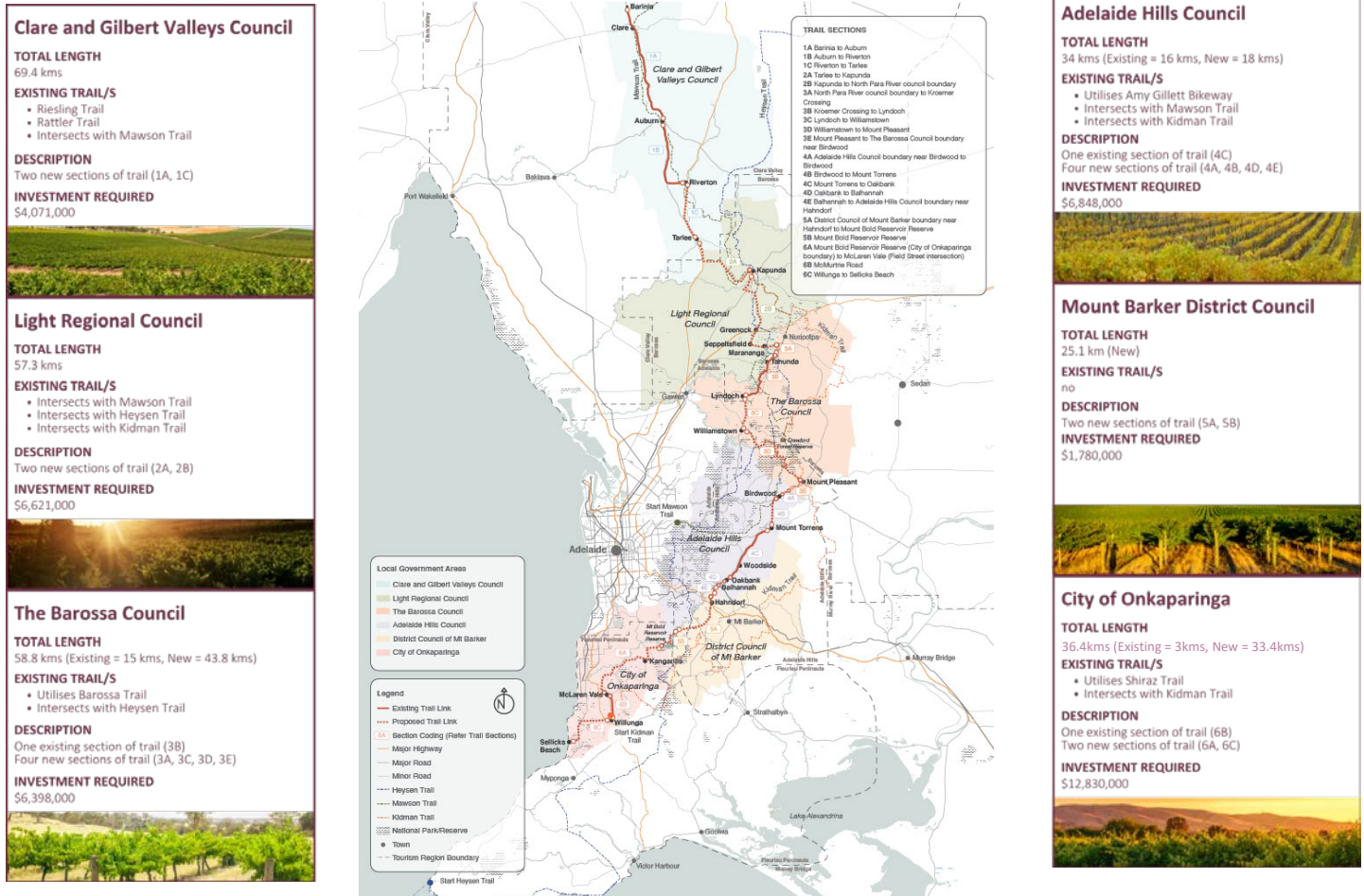
MAINTENANCE COSTS	
Annual Maintenance Cost (1.5%) ²⁰	\$578,220

Table 6. Additional Trail Costs

POSITIONING AND BRAND STRATEGY	\$100,000
MARKETING	\$100,000 /annum
DESIGN GUIDELINES	\$50,000
SIGNAGE AND INTERPRETATION / FURNITURE	\$500,000
TRAIL MAINTENANCE PLAN	\$50,000
DEDICATED PART TIME RESOURCE	\$80,000 per annum
TOTAL ADDITIONAL COSTS	\$880,000

²⁰ Annual maintenance costs are estimated at 1.5% of construction cost.

Figure 10. Trail Construction and Estimated Cost



Commented [VC5]: The Total length for City of Onkaparinga needs to change to 36.4kms
 Existing = 3kms, New = 33.4kms

These need to be updated to reflect changes made on page 45

Clare and Gilbert Valleys Council

The Clare and Gilbert Valleys Council area is predominantly rural, with the main township at Clare. Two well established trails support this section of the Wine Trail: the Riesling Trail and the Rattler Trail. There are several other loops that intersect or branch for the trails including the Mawson Trail and the Lavender Federation Trail.

Work consists of

(i) trail extensions to connect the Riesling Trail and the Rattler Trail, and

(ii) a new section of trail utilising the unused rail corridor to provide an off road connector between Riverton and Tarlee and connecting two small but picturesque areas central to both the Clare Valley and Barossa.

Table 7. Clare and Gilbert Valleys Council – Trail Routes

LGA	TOTAL LENGTH	EXISTING TRAIL/S	DESCRIPTION	INVESTMENT REQUIRED
Clare and Gilbert Valleys Council	69.4 kms	Riesling Trail Rattler Trail Intersects with Mawson Trail	Two new sections of trail (1A, 1C)	\$4,071,000

Light Regional Council

Two new sections of trail are proposed within the Light Regional Council area - Tarlee to Kapunda and Kapunda to Tanunda.

The Light Regional Council area is largely rural, with residential areas in the small townships of Kapunda, Freeling, Greenock, Roseworthy and Wasleys, as well as the suburb of Hewett. This section of the trail connects Tarlee, Kapunda, Tanunda and Greenock and safely connects the Western Barossa and Kapunda to the existing cycle trail network in the Eastern and Southern Barossa (and beyond).

Kapunda has a rich copper mining heritage which is celebrated at the Kapunda historic mine site and supporting historic buildings, trails and museum. The town receives around 6,000 – 7,000 visitors per annum. While there are several tourism experiences on offer, many are under developed. Council is proposing to revitalise the historic railway precinct with Silo Art, Goods Shed precinct revitalisation and associated infrastructure to support tourism and local businesses. Three leading SA trails intersect at Kapunda - the long distance Heysen, Kidman and Mawson Trails.

The Seppeltsfield Road Business Alliance (SRBA) commissioned the design of a safe connection between Tanunda, Greenock and Nuriootpa via the villages of Marananga and Seppeltsfield (Section 2C) joining more than 27 wine producers/cellar doors, four restaurants, three cafes, 11 cellar door lunches/platters and 16 accommodation providers.

Seppeltsfield Wines have lodged plans with Light Regional Council for a \$50 million six-star luxury hotel project and the Wine Trail will compliment this investment.

Table 8. Light Regional Council – trails

LGA	TOTAL LENGTH	PROPOSED TRAIL/S	DESCRIPTION	INVESTMENT REQUIRED
Light Regional Council	57.3 kms	Intersects with Mawson Trail Intersects with Heysen Trail Intersects with Kidman Trail	Two new sections of trail (2A, 2B)	\$6,621,000

The Barossa Council

The Barossa Council area is predominantly rural, with substantial rural-residential and township areas. The major townships include Angaston, Lyndoch, Mount Pleasant, Nuriootpa, Tanunda and Williamstown. Rural land is used mainly for viticulture and wine grapes, sheep and cattle grazing, crops and fruit growing.

Work consists of:

- (i) a small trail extension to connect with Light Regional Council at the North Para River boundary,
- (ii) a new section of trail connecting Lyndoch to Williamstown,
- (iii) Trailhead at Williamstown
- (iv) a new section of trail connecting Williamstown to Mount Pleasant travelling via Mount Crawford Forest Reserve
- (v) completion of the Mount Pleasant to Birdwood Rail Trail (otherwise known as Amy Gillett Bikeway Stage 5) as far as the Barossa Council boundary just before Birdwood.

Table 9. Barossa Council – trails and trailhead

LGA	TOTAL LENGTH	PROPOSED TRAIL/S	DESCRIPTION	INVESTMENT REQUIRED
Barossa	58.8 kms (Existing = 15 kms, New = 43.8 kms)	Utilises Barossa Trail Intersects with Heysen Trail	One existing section of trail (3B) Four new sections of trail (3A, 3C, 3D, 3E) Trail head	\$6,398,000

Adelaide Hills Council

It is predominantly rural with substantial rural-residential and township areas, including significant water catchments.

Work consists of:

(i) completion of the Mount Pleasant to Birdwood Rail Trail (otherwise known as Amy Gillett Bikeway Stage 5) from the Adelaide Hills Council boundary just before Birdwood

(ii) completion of the Birdwood to Mount Torrens Rail Trail (otherwise known as Amy Gillett Bikeway Stage 4)

(iii) connection of Oakbank to Balhannah

(iv) connection of Balhannah to Hahndorf via wineries and backroads.

Table 10. Adelaide Hills Council – trails

LGA	TOTAL LENGTH	EXISTING TRAIL/S	DESCRIPTION	INVESTMENT REQUIRED
Adelaide Hills	34 kms (Existing = 16 kms, New = 18 kms)	Utilises Amy Gillett Bikeway Intersects with Mawson Trail Intersects with Kidman Trail	One existing section of trail (4C) Four new sections of trail (4A, 4B, 4D, 4E)	\$6,848,000

Mount Barker District Council

The District Council of Mount Barker is predominantly rural, with rural-residential areas and rapidly growing urban areas. The major township is Mount Barker, with Littlehampton and Nairne in close proximity. The area is characterised by historic townships and farming areas located in the Mount Lofty Ranges. Many of the towns in the district are noted for their collection of historic buildings, most notably Hahndorf. It is accessed by the South Eastern Freeway and the Princes Highway.

Work consists of:

- (i) a new section connecting Hahndorf to Mount Bold Reservoir Reserve
- (ii) a new trail through the Mount Bold Reservoir Reserve forming the Wine Trail's connection from Hahndorf to McLaren Vale – this requires detailed scoping, planning, costings and approval from SA Water.

Table 11. Mt Barker District Council - Trails

LGA	TOTAL LENGTH	EXISTING TRAIL/S	DESCRIPTION	INVESTMENT REQUIRED
Mt Barker	25.1 km (New)	No	Two new sections of trail (5A, 5B)	\$1,780,000

City of Onkaparinga

The City of Onkaparinga encompasses coastline, beaches, hills and hinterland. Most of the population live in established suburbs, while others inhabit small coastal communities, farms and iconic townships. Rural land is used mainly for viticulture, horticulture, forestry, cropping and grazing.

Work consists of

- (i) a new trail through the Mount Bold Reservoir Reserve forming the Wine Trail's connection from Hahndorf to McLaren Vale – this requires detailed scoping, planning, costings and approval from SA Water
- (ii) a new section connecting from Mount Bold Reservoir Reserve to the Coast to Vines Trail, Flat to Vale Trail and Shiraz Trail via a scenic route overlooking the Onkaparinga River National Park with winery, brewery and distillery cellar doors including the iconic d'Arenberg Cube. Detailed scoping and planning as well as approval from landowners including the Department of Environment and Water will be required. An approved large-scale luxury tourism accommodation development on Seaview Road will further enhance this section of trail.
- (iii) a new section of trail providing a safe cycling route from the end of the Shiraz Trail in Willunga to Sellicks Beach via Aldinga creating the Wine Trail's unique connection to the coast.
- (iv) McMurtrie Road connection from the existing Shiraz Trail. This will provide a safe cycling route along McMurtrie Road, home to a number of cellar doors including the iconic Wirra Wirra Winery. Wirra Wirra are partnering with a developer to build the first five-star accommodation of scale in the McLaren Vale wine region and the first integrated winery resort of its type in South Australia. The \$30 million hotel concept has received development approval and will be built around the theme of health and wellness, targeting both international and domestic travellers. This forms part of a broader cluster of accommodation in this location.

All costings are estimates based on unit rates and high level assumptions. Noting the diversity of the terrain and stakeholders involved, further ground proofing which may include surveying, geo technical, engineering, land owner consent and design is required. It is highly likely this will impact the construction estimate.

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Table 12. City of Onkaparinga – trails

LGA	TOTAL LENGTH	EXISTING TRAIL/S	DESCRIPTION	INVESTMENT REQUIRED
City of Onkaparinga	36.4 kms (Existing = 3 kms, New = 33.4 kms)	Utilises Shiraz Trail Intersects with Kidman Trail	One existing section of trail (6B) Two new sections of trail (6A, 6C)	\$12,830,000

The Wine Trail Positioning

The Wine Trail needs to be positioned as an international product for the strength of experience it offers across all wine regions – it's a new way to visit and experience the best of Australia's wine regions.

The Wine Trail: drink, eat, cycle and experience the best of Australia's wine regions and their beautiful landscapes within an hour of Adelaide.

This positioning:

- Reinforces the pre-eminence of SA wine and wine regions
- Provides a visual picture of the diversity of country for the rider
- Places the experience close to the capital, access, accommodation etc.

Positioning the Wine Trail can commence in the short term by promoting the existing hero experiences – the Riesling, the Barossa Trail and the Shiraz Trail as well as the heritage of Kapunda and its status as hub for a range of trails.

Strong planning and collaboration between partners, land managers, businesses and the tourism industry more generally are essential to getting the positioning and brand strategy right.

Consistent application of the Wine Trail brand across the trail and the partners involved is critical to avoid mixed signals and inconsistent messaging.

Establishing and displaying the trail brand across all existing sections as soon as possible combined with appropriate collateral (as discussed below) will start creating brand awareness and attracting visitor commentary and social media presence. As other parts of the trail come online, these can be branded and further promoted as part of the Wine Trail.

Marketing

Marketing of the Wine Trail will be enhanced through collaboration such as cooperative marketing campaigns that involve private sector, tourism operators and local government agencies.

For all markets, it is important to provide inspirational and accessible content, images and videos to view and share on popular digital platforms (specific to the target audience). This will be critical for promotion and growing advocacy, especially among the leisure and nature-based markets.

It will be vitally important to build knowledge of the trail to start promoting aspects of experience as it is developed. That includes promotion of the current experience available, highlighting what parts of the experience are already accessible (either for the free independent traveller), or working with local operators to bundle and package opportunities for immediate promotion.

Table 13. Short term marketing activities

TARGET MARKET
All Markets

KEY CONSIDERATIONS AND ACTIONS
<ul style="list-style-type: none">• Develop a Marketing Plan for the Wine Trail.• For each wine region website create campaign pages relating specifically to the Wine Trail.• Ensure that the campaign site also has its own URL and IP registration. The name for the URL would need to be researched and consider search engine optimisation (SEO). The URL will also provide the opportunity to promote the experience as a stand-alone offering.• Create an online map or maps, with information about the experience and key locations, including accommodation, wineries, access points, etc to ensure that accessibility and navigation of the experience is easy and visitor focused.• As operators come on board and develop packages based on the SA Wine Cycle Trail, ensure the experience campaign site can provide information specifically about those operators, provide links directly to their websites, and/or provide an online booking system for the visitor.• Develop a Content Strategy (as part of the Marketing Plan) to curate accessible and inspirational content, images and videos to view and share across digital platforms regardless of target market. Video is very important for this type of experience offering and will significantly assist in driving conversion of interest to bookings, especially with younger markets.• Highlight the seasonal opportunities (including events, produce and side tours) that could be experienced while undertaking the ride.• Share relevant content with third-party or partner channels, such as SATC and Tourism Australia. Use these channels to profile the Wine Trail. This would also include sharing seasonal events.

KEY CONSIDERATIONS AND ACTIONS

The development of content and the promotion of the experience should be developed in two stages.

Stage 1 – What is required now (2021-22)

- Create content based on the aspects of the experience that already exist. This would include working with operators who already provide an offering that fits within the experience, or have an opportunity to develop a product that could deliver on the experience as it exists now. (e.g. shuttle and baggage transport between existing regions)
- Create an experience that bundles several operators together (e.g. bike hire, accommodation and a local produce offering). This could be a bundle offer or a price package.
- Develop a map (soft and hard copy) to showcase those aspects of the experience that accessible now.
- Develop an app that assists the consumer to undertake the journey, including the map, opening times of different wineries, information about each stage of the journey.
- Collate information and/or undertake an audit to identify all the products and operators that could be used to create packages that could be delivered into the market as part of the experience.
- Create content that showcases the winery components of the experience; including profiling local characters, stories and interactive elements of the experience (such as watch a wine maker etc).

Stage 2 (as further infrastructure developed)

- Identify key operators to develop product for the free independent traveller (FIT) market, as well as those seeking a guided experience.
- Review all online content on the website to ensure it is maintained and update as additional infrastructure elements of the experience are built and opened to the visitor.
- Investigate the opportunity to develop an online booking system for the Wine Trail or at least link to any operator who has created bookable product for the experience.
- Create a specific campaign for the Wine Trail, focusing in on the target markets.
- Continue to work with operators to create content as infrastructure is developed.
- Develop a PR and familiarisation program to invite relevant journalists and influencers to experience the Wine Trail in collaboration with RTOs and SATC.

Range of Quality Experiences and Support

The Wine Trail will need to provide services for visitors to ensure they are offered a seamless experience where the logistics of accessing trails, transport and equipment, and finding a place to stay are easily handled. The support services need to recognise the special needs of trail visitors. A Wine Trail bike friendly scheme is recommended where service and accommodation providers offer products and packages that cater for needs such as secure bike and equipment storage, clothes and equipment washing, packed lunches, opening hours convenient to trail users. Many of the European walks and rides fit this category.

Conducting a series of experience development workshops for the tourism and wine sectors along the trail will be a valuable approach to support industry development. This might engage existing operators with great on trail experiences to encourage further development and packaging of appropriate products that deliver on the brand, and bring people together to look at new opportunities the trail offers such as:

- people, equipment and luggage transport to and from trailheads and accommodation
- a range of guided and self-guided trail tours
- equipment, bike hire, repair and retail, and other user needs
- car rental services that facilitate carrying of equipment and bikes
- long stay car parking at or near trailheads.

Italy Bike Hotels

(www.italybikehotels.com) is a consortium of 70 hotels which provide quality-services according to agreed criteria to cyclists visiting different parts of Italy. They cover the different cycling clientele – road cyclists, mountain bikers, cycle tourists and sport cyclists. The fulfilment of the criteria in each hotel is audited independently. The core facilities provided by participating hotels include:

Safe and secure bike storage

1. An equipped bike workshop and repair services
2. Cycling guides
3. Information on trail routes etc
4. Laundry services
5. Balanced meals including packaged lunches
6. Some offering massage and medical support facilities.



Signage – interpretation and wayfinding

It is important that the trail identity be reinforced across its entirety as one integrated visitor experience whilst individual sections maintain their own identity. This can best be done through three components:

- A logo representing the entire trail experience co-located with individual trail names/markets (e.g. above the Riesling Trail logo on the sign shown)
- Orientation signage for the overall trail at key trailheads
- Consistent standards for way finding signage along the trail to be used by all local and state government agencies.

In general, trailhead locations (where visitors begin their trail journey) are set amidst cluttered locations (townships, car parks) that often already have existing visitor information in place (local trail mapping). This combined with the fact that trail itineraries are segmented and will require ‘digital navigation’ of some form, means there is no requirement for major trailhead map boards or wayfinding specific to the Wine Trail. Wayfinding options include:

Digital – via mapping applications using GPX routes available for public download from website/s, useable across mapping apps and platforms

Digital – website – central resource to house all mapping, downloads and guides. Inclusive inspirational content and directional/faciliatory, inclusive experiences, service and accommodation operators.

Physical: paper maps, guides and brochures available at major information nodes (VICs, cultural interpretation centres and via downloads for printout.

In situ / location: consideration may be given to inexpensive brand icon markers and Q-codes placed at relevant sites along routes (such as key direction changes) to ‘remind’ visitors they are on a ‘brand’ trail.

An integrated signage strategy and consistent design standards for infrastructure will be required to support the Wine Trail brand.

Otago Central Rail Trail

(www.otagocentralrailtrail.co.nz) provides comprehensive information about the trail and the region, equipment requirements, transport services, bike hire, tours, accommodation, food and wine, attractions and events. Itineraries are provided for trail trips of various lengths.

Design Guidelines

Whilst various elements of the trail will reflect the design intent for the region/Council area, some overall design principals can be considered particularly for new sections:

- Use of natural materials such as local stone, decomposed granite and natural surface track where appropriate in keeping with natural settings.
- Low maintenance and durable materials
- Consistent look and feel for the track and infrastructure to emphasise continuous route
- Low impact on the environment by following existing contours where possible and minimizing track excavation
- Route highlights existing views through a series of viewpoints
- Passes through a diverse range of landscapes and vegetation types to add interest for each day
- Utilises existing tracks where possible to reduce costs and environmental impact as well as tying into existing track network to support wider community.

Design guidelines will need to be prepared for the Wine Trail to ensure consistency.

Effective Governance and Coordination

There are well established management models in place for the existing sections of the Wine Trail involving local governments, industry and community representatives, with funding support from the State Government.

A Memorandum of Understanding is currently in place to facilitate the early planning and concept design of the Wine Trail between key stakeholders. As the Wine Trail concept develops and moves into the Project Delivery and Project Operation Stages a new governance model will be necessary to ensure effective coordination across the entire length of the Wine Trail.

A governance model will be required to:

- Assist coordination and collaboration across multiple government, industry and community interests
- Seek to bring alignment to trail management priorities between partners and trail construction and maintenance standards
- Facilitate collective ownership and stewardship of trail assets, knowledge and other resources
- Meet compliance and statutory obligations across multiple organisations
- Map a journey to progress new products, services and experiences to maturity
- Improve efficiency and effectiveness in asset investment and management
- Provide leadership and recommendations to agencies on a whole of region approach
- Encourage communication and sharing of information on trail trends, visitor data etc.
- Work with the regional tourism entities on trail marketing
- Enable intervention by Council and/or the over-arching governance group where maintenance standards of the overall trail are not being met.

Figure 11 provides an outline of options available at each stage of the Wine Trail development process.

The preferred model should aim to achieve the following outcomes:

1. Governance and accountability is clear and simple to initiate and administer over the longer term
2. Trails are planned and managed effectively and efficiently
3. The strengths of expertise offered by each partner in the model are recognised and the recommended model allocates responsibilities and authority accordingly
4. The visitor experience and presentation of the trail network are substantially improved or continually improving and the new model facilitates commercial tourism positioning, product development and marketing to take South Australia's wine regions forward as a trail destination
5. The trails are supported by a range of funding sources with a revenue raising mechanism to enhance cash flow to enable self-generated investment into facilities, assets and services
6. An effective control environment is in place to reduce key risks (to staff, volunteers and visitors) and each agency's operations are not adversely affected (i.e. there is no dilution of effectiveness)
7. The benefits of the new model are visible to the community and it is inclusive of user and community groups.

Ongoing funding

The lack of funding and a high reliance on government grants has characterised the development of many trails in South Australia, especially local trails. Trail development can occur in a 'stop-start' sequence dependent on successful grant applications and in some cases there has been limited provision of funds for future management and maintenance, leading to heavy reliance on volunteers.

Many trail destinations in Australia struggle to gain the necessary funding for ongoing maintenance. This is in part due to many trails that are managed by government agencies whose business models generally do not have fee for services where the fees directly hypothecate back into the trail's maintenance.

Obtaining an allocation for initial management or ongoing maintenance costs in grants has been an effective strategy. The most successful trails have also been most successful in obtaining and managing funds, whether by managing agency budget allocation; government grants; in-kind partnerships; fundraising (such as through donations, sponsorships); revenue from use, events and concession fees; earned income from sale of products and merchandise; and investment.

Typically, these successful trails will utilise a diverse range of financial and in-kind resources. The governing entities of these trails have the skills and experience to gain support and funds allocation within agencies, government, business and the community and to utilise a range of funding opportunities.

There may be statutory limitations on the types of fundraising that can be conducted by government agencies and local councils and often limitations in grant guidelines on the types of organisations that can apply for grants. Non-profit organisations (such as Incorporated Associations and foundations) have more flexibility in developing alternative funding sources, provided they have the skills and resources to manage fundraising programs.

Regardless of the preferred model, partnerships with the tourism industry are essential for the success of the Wine Trail and the delivery of linked experience products, accommodation and services. Effective partnerships and collaboration with developing the experience will assist in providing a world class trail experience, sustainable use of the regions' outstanding features and the creation of regional employment and economic opportunities associated with the trail.

Figure 11. Stages of the Wine Trail development process



The Queenstown Trails Trust

is an organisation with a purpose to raise funds for the development and growth of the trails network in Queenstown NZ (www.queenstowntrail.co.nz). It has a Board of Trustees that includes independent businesspeople and land managers. They have been very successful in helping to deliver and grow over 120 km’s of trails on mixed land tenures around Queenstown and the Wakatipu.

Trail Maintenance

Sections of the Wine Trail will likely be maintained by volunteers, contractors and council staff as per the existing trail governance organisations. e.g. the Riesling Trail Volunteer Committee conducts virtually all trail maintenance activities on the trail. Formal/ informal agreements are already in place for these maintenance activities.

Typical trail maintenance activities will include:

- Removal of excessive trail organic matter (e.g. branches, leaf litter)
- Control of vegetation encroachment – especially important to maintain a safe line of sight on trails and fire management
- Vegetation management of the trail surface and the clearance envelope
- Patching and repairs / crack sealing as required
- Rectifying / preventing erosion and water damage and water accumulation
- Maintaining the trail profile – avoiding a cupped or concave trail surface
- Providing good trail drainage, particularly at grade reversal points
- Signage maintenance / graffiti removal
- Works that ensure the trail is fit for purpose and optimise the lifecycle of the asset.

The best way to ensure trail asset management is conducted in a timely manner is to establish a trail maintenance plan agreed to amongst the Co-ordinating Committee (see previous section).

As a requirement of the Local Government Act, Councils are required to develop a long term financial plan, infrastructure and asset plan (at least 10 years) for assets, which includes trail infrastructure. Therefore councils understand and plan for the full-life of the asset including its renewal or disposal at the end of its life.

Trail Investment Priorities

Whilst it would be ideal that the trail in its entirety is funded as one, it will be necessary to prioritise the approach to investment. The purpose of this section is to provide some support to those decisions in terms of determining the investment priority for each section of trail.

The following criteria have been used to determine the relative priority for each section of trail:

- The investment will activate the Wine Trail and create brand awareness (provide quick wins)
- The investment will optimise outcomes for business, government and the community
- The investment will provide an important connecting section to underpin high quality of Wine Trail
- The investment will enable critical planning of project to progress Wine Trail.

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The sections of trail are divided into the recommended stages of development. This is based on the assessment criteria for priority investment. This also notes that outside this framework, Councils and other land managers may invest their own capital for local interconnecting or spoke trails, for community wellbeing and connectedness, and for other reasons important to the organisation and their stakeholders.

Stage 1

- Section 1A and 1C: Riesling Trail and Rattler Trail- Riverton to Tarlee
- Section 2A: Tarlee to Kapunda
- Section 2B: Kapunda to The Barossa Council boundary
- Section 3A: The Barossa Council boundary to Kroemer Crossing
- Section 3B: Kroemer Crossing to Lyndoch
- Section 3E: The Barossa Council boundary to Mount Pleasant near Birdwood
- Section 4E: Balhannah to Adelaide Hills Council boundary near Hahndorf
- Section 6B: McMurtie Road
- Section 6C: Willunga to Sellicks Beach via Aldinga.

Stage 1 Planning Only

- Section 3D: Williamstown to Mount Pleasant
- Section 3C: Lyndoch to Williamstown
- Section 5B: Mount Bold Reservoir Reserve
- Section 6A: Mount Bold Reservoir Reserve to McLaren Vale (Field Street intersection).

Stage 2

- Section 4A: Adelaide Hills Council boundary near Birdwood
- Section 4B: Birdwood to Mount Torrens
- Section 4D: Oakbank to Balhannah
- Section 5A: District Council of Mount Barker boundary near Hahndorf to Mount Bold Reservoir Reserve.

Stage 3

- Section 3D: Williamstown to Mount Pleasant
- Section 3C: Lyndoch to Williamstown
- Section 5B Mount Bold Reservoir Reserve
- Section 6A: Mount Bold Reservoir Reserve to McLaren Vale (Field Street intersection).

Risk Assessment & Mitigation Strategies

The project risks and the mitigation strategies to be adopted for the project outlined in Table 15.

Table 14. Project Risk Matrix

ITEM	RISK/S	LIKELIHOOD	CONSEQUENCE	RATING	MITIGATION STRATEGY	RESIDUAL RISK
Funding	Secure external funding for trail design and mapping for sections yet completed and capital funding for priority sections of trail	Moderate	Very high	HIGH	Ensure funding submissions meet required guidelines & highlight the importance of the project	MEDIUM
Costs	Tenders higher than estimated costs	Low	High	MEDIUM	Detailed costings to be developed in trail design and mapping. In line with Council procurement process, reconsider project scope and/or seek Council approval for budget variation	LOW
Regulations	Approvals not forthcoming from	Moderate	High	HIGH	Ensure early engagement with all these entities before commencing construction to gauge likelihood of securing approvals and any issues which will modify plans. This should be conducted design phase	MEDIUM
Timeframe	Delays	High	High	HIGH	Regular communication with Co-ordination Committee to determine priorities and ensure potential delays identified and addressed	LOW
Design changes	Site characteristics require design amendments	Low	High	LOW	Unlikely given trail mapping and design will involve detailed survey and design of sites	LOW
Landholder/ community cooperation/ opposition	Unable to secure cooperation, opposition to the project from landholders along the route or community in general	Low	High	LOW	Unlikely due to consultation during trail mapping and design, and relatively low number of private neighbouring landholders	LOW
Visitation	Estimated visitation levels not met	Moderate	High	HIGH	Detailed marketing will support visitation	MEDIUM
Trail & infrastructure maintenance	Maintenance not conducted to standards	Low	Low	LOW	Trail Maintenance Plan to detail maintenance requirements and responsibilities	LOW
Trail & infrastructure maintenance	Lack of funding for maintenance	Moderate	High	HIGH	Maintenance Plan will identify maintenance requirements - LGAs to allocate some funds	MEDIUM
Environment	Environmental damage	Moderate	Moderate	MEDIUM	Trails professionally designed and constructed	LOW

Part Three



The Benefits

Benefit Impact Assessment

This section provides an assessment of the potential benefits of the Wine Trail project to the State, the region and the communities within it.

Introduction

Cycle tourism has the potential to increase visitor spending in the State and regional economy, diversifying the tourism offering and enhancing the overall economic development of the area and support existing businesses to scale and expand. Investment in trails generates increased business activity and employment opportunities in the region.

Evidence shows that investment in trail infrastructure results in expansions to existing businesses and the development of new businesses such as cycle shops, cafes, accommodation, guided tours, bike hire companies, shuttle providers and others. Flow-on economic effects can include the effect of other local businesses and communities improving existing services and facilities because of increased use and visibility.

Research also shows that trails can deliver a range of community benefits, from inception (such as fundraising) through to use of the completed trail including community events and outdoor education, initiatives for schools and other groups. This contributes to the Government's desire to develop resilient, proud communities with a strong sense of place. This is particularly important in regional areas as they recover from the impact of Covid-19.



Economic Modelling

The economic modelling for the Wine Trail is based on:

- estimates of annual users/rides (in different categories) - several types of users are identified: locals from the 6 LGAs, intrastate visitors from elsewhere in South Australia, interstate visitors and international visitors
- The economic impacts of the trails: derived from spending by these users/visitors in the towns adjacent to the trail and other spending in the broader region; and health benefits of active recreation activities. Visitors from outside the region (particularly domestic and international overnight visitors/users) generate significant expenditure covering: food and beverage; accommodation (for overnight stayers); recreation and other services; and transport.

Wine Trail Users

Estimating Trail Visitors/Users

Trail user numbers have been estimated for a 15-year period of operations for several user categories. The user numbers are the foundation for estimating the spending in the region by trail users and the regional economic impacts of the trail (jobs and regional income generated).

A Base Case (Medium Case) has been modelled. For sensitivity analysis a Low Case (80% of the Base Case estimate) and a High Case (120% of Base Case estimates) have been calculated. Each case is presented in detail in Appendix 7.

The following chart compares total annual rides on the Wine Trail for the each of the three cases. In Year 1 total rides range from around 375,000 (Low) to 562,500 (High), with around 468,700 for the Base Case (Medium). In Year 15 total rides range from around 479,000 (Low) to 718,500 (High), with around 598,800 for the Base Case (Medium).



Figure 12. Wine Trail Projected Use – Base, Low and High Scenarios (annual)²¹



²¹ MCA Modelling & Analysis, April 2021

Estimating Visitor Spending

Spending in the region was estimated based on a range of information, including the recent Tourism Research Australia (TRA) Local Government Profiles, combined with a number of assumptions on spend rates and the mix of visitors/trail users (Refer Appendix 7). The spending occurs in areas and businesses in proximity to the trails. Average spending by locals is much lower than other visitor categories.

The following chart shows total annual spending in the trail areas by users. The three cases are shown and spending increases over time as the number of trail users (locals and tourists) increase. ²² For year 15 spending is \$90.2 million for the Base Case, \$108.3 million for the high case and \$72.2 million for the low case.



²² Spending is in constant 2021 prices

Figure 13. Wine Trail - Spending in Region- Base, Low and High Scenarios (\$m 2021 prices²³)



	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y8	Y10	Y11	Y12	Y13	Y14	Y15
Base Case - All Trail Users	\$71,912	\$73,238	\$74,563	\$75,889	\$77,214	\$78,449	\$79,683	\$80,918	\$82,152	\$83,386	\$84,750	\$86,114	\$87,478	\$88,842	\$90,206
Low Case - All Trail Users	\$57,530	\$58,590	\$59,651	\$60,711	\$61,771	\$62,759	\$63,746	\$64,734	\$65,722	\$66,709	\$67,800	\$68,891	\$69,983	\$71,074	\$72,165
High Case - All Trail Users	\$86,295	\$87,885	\$89,476	\$91,066	\$92,657	\$94,138	\$95,620	\$97,101	\$98,582	\$100,064	\$101,700	\$103,337	\$104,974	\$106,610	\$108,247

Appendix 7 presents the estimates of spending for day visitors and for overnight visitors. Total expenditure comprises: spending on trail-linked activities (including spending on bike related expenses and other spending - food and beverage etc.) in proximity to the trails; spending on accommodation (for overnight stayers) and spending on other recreational and other tourism services.

²³ MCA Modelling & Analysis, April 2021

Economic Impacts

The economic impacts of the Wine Trail are modelled for both the construction phase and the operations phase. The impacts are measured in terms of full time equivalent jobs (FTE) and the increase in regional income that is generated by trail users.²⁴

Employment

Trail Development

A total of 172.4 FTE jobs (145.8 direct jobs and 26.6 indirect/induced jobs) would be generated during the construction period for the trail segments. The direct jobs comprise 126.2 jobs in on-site construction and 19.6 jobs in materials/equipment supply.



²⁴ Regional income is the total net income generated from the activity and covers wages and salaries of employees and profits of businesses within the region. It includes income generated directly within the business and indirect income, which is generated in other regional businesses (wages and profits) from

the multiplier impacts of employee spending on the region. In the modelling of income generated, income tax and GST on spending, are both treated as leakages from the region.

Table 15. Construction Phase – Wine Trail– Jobs FTE Generated (no.)²⁵

CONSTRUCTION PHASE FTE JOBS	DIRECT JOBS	INDIRECT/ INDUCED JOBS	TOTAL JOBS
Construction Jobs (Region)	126.2	22.7	148.9
Materials & Equipment Jobs (Aust -wide)	19.6	3.9	23.5
Total Jobs - Construction Phase	145.8	26.6	172.4

There will also be an increase in regional income generated during the construction of the trail.²⁶ During construction a total of \$24.054 million in regional income would be generated (\$20.045 million direct income and \$4.009 million indirect/induced).

Operations Phase

The operations phase economic impacts of the trail are driven by the expenditure of visitors/users in towns adjacent to the trail and in the broader region.²⁷

Employment Impacts

The operation of the trails would generate a total of 305.3 direct full-time equivalent jobs in year 1, increasing to 354.1 direct FTE jobs in Year 10. Total jobs (direct and indirect/induced) are 341.6 FTE in year 1 increasing to 394.5 in year 10. Of the total jobs in year 10, day visitors (including locals) would account for 133.5 FTE jobs, and overnight visitors for 261.1 FTE jobs. On a sector basis, the jobs (FTE- direct and indirect) generated by trail users are mainly concentrated in: accommodation; food and beverage; recreational services and other visitor products and services; transport (including shuttles); and other retail.

Regional Income Impacts

The increase in regional income generated annually by the operation of the trails and visitor/user spending totals \$26.4 million in year 1, increasing to \$30.5 million in year 10.²⁸ The increase in regional income (direct and indirect/induced) generated by day visitors/users (including locals and regional users) is \$8.7 million in year 1 and \$10.1 million in year 10. Overnight users/visitors boost total regional income by \$17.6 million in year 1 and \$20.4 million in year 10.

²⁵ MCA modelling & estimates, April 2021. May be some differences due to rounding

²⁶ This assumes the construction workforce would come from the LGAs that are part of the trail.

²⁷ The spending by trail users is not the economic impact and does not represent the increase in regional income. There is a major leakage of this spending out of the region due to: the GST (10%); and a significant component of the value of services and products purchased by visitors comes from outside the region (e.g. food ingredients, soft drinks, beer, consumer products bought etc.). The model takes account of these leakages and estimates employment impacts and the increase in regional income.

²⁸ Regional income is the total net income generated from the activity and covers wages and salaries of employees and profits of businesses within the region. It includes income generated directly within the business and indirect income, which is generated in other regional businesses (wages and profits) from the multiplier impacts of employee spending in the region. In the modelling of income generated, income tax and GST on spending, are both treated as leakages from the region.

Total 10 Years

Over the 10-year period of trail operations, user spending in the region would generate a total of \$284.4 million Base Case, \$341.3 million High Case and \$227.5 million Low Case.

Table 16. Comparison of Cases – Increase in Regional Income 10 Years (\$million 2021 prices)²⁹

TOTAL 10 YEARS (\$ MILL 2021 PRICES)	BASE CASE	LOW CASE	HIGH CASE
Regional Income - Day Visitors/Users	\$94.2	\$75.4	\$113.0
Regional Income - Overnight Visitors/Users	\$190.1	\$152.1	\$228.2
Total Regional Income	\$284.3	\$227.5	\$341.2

²⁹ MCA Modelling & Analysis, April 2021

³⁰ TRC estimates, April 2021

Trail Benefits and Costs

Trail Costs - 10 Years

The estimated construction cost of the Wine Trail project is \$38.548 million, and the 10-year maintenance costs are \$5.782 million (assumed to be \$578,220 per year over 10 years) for a total 10-year cost of \$44.330 million.

Table 17. Total Costs of Wine Trail Project-10 Years (constant prices \$2021)³⁰

SUMMARY	Wine Trail DEVELOPMENT <\$2021PRICES>
Construction Cost	
Trail Construction (All Sections)	\$38,548,000
Maintenance Costs	
Annual Maintenance Cost (3%) ³¹	\$578,220
Total Maintenance (10 Years)	\$5,782,200
Total Costs 10 Years	
Total Construction / Maintenance	\$44,330,200

³¹ Annual maintenance costs are estimated at 1.5% of construction cost.

Benefit Cost Analysis

The Wine Trail

The following table and chart show the benefits and costs of the operations of the wine trail over a 10-year period. The benefits are measured by: the increase in regional income generated by trail users over a 10-year period; the estimated health benefits; and the user value. The costs include construction costs, and asset maintenance costs. For the comparison, the present value of the benefits is calculated using 3 discount rates (4%, 7% and 10%).³² For a trail project a 7% discount rate is appropriate, and the project yields a positive benefit cost ratio (BCR) of 6.3. The present value of total benefits (\$280.821 million) generated by the investment are 6.3 times the total costs of the project (\$44.330 million) over a 10-year period

Table 18. Benefits and Cost Analysis South Australian Wine Trail - 10 Year Period (Constant prices \$2021)³³

TRAIL DEVELOPMENT: 10 YEAR OPERATIONS PERIOD	DISCOUNT RATE 4%	DISCOUNT RATE 7%	DISCOUNT RATE 10%
COSTS (10 YEARS)			
Construction Costs (\$) (2021 prices)	\$38,548,000	\$38,548,000	\$38,548,000
Costs - Asset Maintenance (1.5% per year- 10 years)	\$5,782,200	\$5,782,200	\$5,782,200
Total Capital Costs	\$44,330,200	\$44,330,200	\$44,330,200
BENEFITS TO REGION (10 YEARS) -			
Regional Benefits (increase in regional income generated)	\$284,379,691	\$284,379,691	\$284,379,691
Indirect Benefits (health benefits – local & intrastate users only)	\$92,747,564	\$92,747,564	\$92,747,564
Total Benefits (2021 Prices)	\$377,127,255	\$377,127,255	\$377,127,255
Total Benefits (\$) Present Value	\$330,012,269	\$280,821,387	\$251,634,133
Net Present Value (\$)	\$285,682,069	\$236,491,187	\$207,303,933
NPV/ Costs	6.4	5.3	4.7
Benefit Cost Ratio (BCR)	7.4	6.3	5.7
Total Benefits: Present Value/Total Capital Costs			

³² A discount rate is applied to anticipated costs and benefits of a project over the duration or 'life span' of the project to convert the value of a return in the future into today's value. Hence, for instance, the returns of a multiyear project are usually referred to as discounted returns. The lower the discount rate sometimes referred to as interest rate, the higher the return value of the project's future costs and benefits. Conversely, the higher the discount/ interest rates the lower the future return value will be. The selection of the appropriate discount rate is important to ensure that future project returns are not being over- or under-estimated in today's value.

³³ MCA modelling & estimates, April 2021.

Investment attraction and regional stimulus

Increased visitation and expenditure in the region as a result of the Wine Trail will benefit existing operators and attract further investment from the private sector to develop products and services to meet the needs of visitors. This could include transport, merchandise, accommodation, food and beverages, and guiding services. An increased length of stay for existing markets will improve the occupancy rate of accommodation facilities and may result in investment in new accommodation infrastructure to meet market needs.

Critically, implementing the recommendations will ensure the profile of the Region is significantly improved as Australia's premier wine and food destination. This is aligned to the State Government's strategic goals for regional development and tourism growth.

Health and lifestyle benefits for the community

Participation in trail activities offers many social, health-related, and cultural benefits to residents and visitors alike. Developing the Wine Trail has the potential to deliver benefits in health and wellbeing for the community, environmental benefits and improvements in facilities for both the local community and visitors. Green Transport is also a high priority with younger travellers.

A report by Marsden Jacobs Associates indicates that exercise of cycling/active walking in Victorian Parks has net healthcare benefits (in terms of avoided health costs) of \$15 per hour in terms of a reduction in lifetime health costs (adjusted for injury).³⁴ For this analysis we have used a conservative figure of \$10 per hour and an average time on trails of 3 hours. Healthcare benefits are measured as the net (adjusted for injury) avoided costs to the national healthcare system (private costs and government costs) attributable to nature-based outdoor activity. This indirect health benefit is estimated at \$92.748 million over the 10-year period.

An increased profile for the region as a result of the Wine Trail is also likely to contribute towards greater regional pride within local communities. Other regional locations in Australia have successfully increased community participation and spirit through similar projects. It could be expected that the project will help to mobilise the local community and provide optimism and energy across the local economy and communities.

³⁴ Victoria's Nature-Based Outdoor Economy- Key Estimates and Recommendations, Marsden Jacobs Associates, January 2016 P10 & 21.

Conclusion

The Wine Trail project is a catalyst investment that will increase business and employment opportunities by capitalising on the profile of Australia's most popular wine regions. It will leverage the significant investment in cycling and walking track infrastructure in the region in recent years and increase the level of return to all regions and the State.

The estimated construction cost of the Wine Trail project is \$38.548 million, and the 10-year maintenance costs are \$5.782 million (assumed to be \$578,220 per year over 10 years) for a total 10-year cost of \$44.330 million.

The Cost Benefit Analysis concludes that Wine Trail project yields a positive BCR of 6.3. The present value of total benefits (\$280.821 million) generated by the investment are 6.3 times the total costs of the project (\$44.330 million) over a 10-year period.



The Wine Trail project will:

- **Increase the contribution of tourism to the State and regional economies through increased visitation and spend.**

It will increase visitor spending across the wine regions, diversifying the tourism offering and enhancing the overall economic development of the region and State. The increase in regional income generated by trail users spending over a 10-year period totals \$284.380 million (in constant 2021 prices).

The Wine Trail will activate various recovery strategies and national, state and regional tourism and economic development strategies. It addresses the opportunities identified as part of the State's economic recovery for both bushfire and COVID-19.

- **Increase business activity and employment opportunities across the region.**

THE Wine Trail project will increase employment opportunities and revitalise local businesses. The Wine Trail has the potential to create new jobs and business and support existing businesses to scale and expand. Flow-on economic effects can include the effect of other local businesses and communities improving existing services and facilities because of increased use and visibility.

The operation of the trails would generate a total of 305.3 direct full-time equivalent jobs in year 1, increasing to 354.1 direct FTE jobs in Year 10. On a sector basis, the jobs (FTE- direct and indirect) generated by trail users are mainly concentrated in: accommodation; food and beverage; recreational services and other visitor products and services; transport (including shuttles); and other retail.

- **Support community health and well being**

The indirect health benefit to the community is estimated at \$92.748 million over the 10-year period.

The broad and growing appeal of cycling trails to domestic and international visitor markets, as well as residents for recreational purposes, means that the Wine Trail has significant potential to boost South Australia's economy and generate employment and business opportunities.

Importantly, investment in the Wine Trail will raise the profile of the region as Australia's premier wine destination and will support local, state and national governments' efforts to encourage high-quality tourism experiences that attract high value visitors and generate economic and employment benefits.

The present value of total benefits (\$280.821 million) generated by the investment are 6.3 times the total costs of the project (\$44.330 million) over a 10-year period.





APPENDIX 1 – SOCIO-ECONOMIC PROFILE OF EACH LGA



Table 19. Socio-economic profile of each LGA

	Clare & Gilbert Valleys Council	Light Regional Council	The Barossa Council	Adelaide Hills Council	District Council of Mount Barker	City of Onkaparinga
Estimated Resident Population³⁵	9,470 (2020)	15,501 (2020)	25,245 (2020)	40,162 (2020)	37,744 (2020)	174,575 (2020)
Previous Figures³⁶	8,871 (2011)	13,984 (2011)	22,525 (2011)	39,699 (2011)	30,353 (2011)	163,392 (2011)
	Growth +6.8%	Growth +10.8%	Growth +12.1%	Growth +1.2%	Growth +23.1%	Growth +6.8%
SEIFA Score for Index of Relative Socio-economic Advantage and Disadvantage³⁷	976	996	987	1,072	1,012	960
	(63rd percentile in Australia)	(75th percentile in Australia)	(70th percentile in Australia)	(93rd percentile in Australia)	(80th percentile in Australia)	(51st percentile in Australia)
Median Age³⁸	46.9	39.8	43.6	44.2	38.8	40.0
Number of Businesses /Type³⁹	1,345	1,359	2,237	4,056	2,980	9,307
	Agriculture, Forestry and Fishing (492)	Agriculture, Forestry and Fishing (416)	Agriculture, Forestry and Fishing (509)	Construction (693)	Construction (598)	Construction (2,524)
Main Employment	Healthcare and Social Assistance (11.4%)	Manufacturing (13.9%)	Manufacturing (20.2%)	Education and Training (11.7%)	Healthcare and Social Assistance (13.5%)	Healthcare and Social Assistance (16.8%)
Gross Regional Product	\$598 million	\$758 million	\$1,509 million	\$1,505 million	\$1,697 million	\$5.38 billion
Tourism Businesses⁴⁰	143	101	251	414	336	1,072

³⁵ ABS.Stat beta ERP by LGA (ASGS 2020)

³⁶ <https://economy.id.com.au/>

³⁷ ABS.Stat beta SEIFA 2016 by Local Government Area (LGA)

³⁸ ABS Regional Population by Age: Interactive Map (2019)

³⁹ ABS Regional Statistics by LGA, 2019 – Economy and Industry

⁴⁰ Tourism Research Australia Local Government Area Profiles, 2019

	SA Average	Clare & Gilbert Valleys Council	Light Regional Council	The Barossa Council	Adelaide Hills Council	District Council of Mount Barker	City of Onkaparinga
Low income households (less than \$650 gross weekly income)	23.8%	24.7%	16.2%	20.7%	14.7%	18.1%	22.2%
Median weekly household income	\$1,014	\$1,129	\$1,547	\$1,358	\$1,696	\$1,242	\$1,057
High income households (more than \$3000 gross weekly income)	10.7%	8%	12.1%	9.7%	20.8%	12.4%	7.6%
SEIFA Index of Advantage and Disadvantage	956.4	976	996	987	1072	1012	960
SEIFA Index of Relative Socio-economic Disadvantage	967.9	1001	1025	1012	1080	1033	987
People with below Year 11 schooling (includes those that did not state either way)	28.8%	32.6%	28.2%	31.3%	20.3%	24.4%	27.1%
Unemployment	7.5%	3.5%	5.3%	4.6%	4.4%	5.2%	7.7%
Youth unemployment (aged 15 – 24 years shown as % of total unemployed from the total labour force)	N/A	7.2%	13.3%	10.9%	12.3%	12.5%	17.1%
Housing stress (households with mortgage repayments greater than or equal to 30% of household income)	6.6%	6.1%	8.4%	6.6%	7.7%	8.5%	8.2%
Rental stress (households with rent payments greater than or equal to 30% of household income)	10.2%	6.6%	4.5%	6.4%	3.6%	8.7%	10%

Sourced from ABS 2016 Census, based on LGA level.



APPENDIX 2 – REGIONAL TOURISM SUMMARIES

Table 20. Profile of Visitors to LGAs⁴¹

		Visitors	Nights	Average Length of Stay	Expenditure
Clare and Gilbert Valleys Council	International	3,000	18,000	6 nights	N/A
	Domestic overnight	111,000	275,000	2 nights	\$44 million
	Domestic daytrip	247,000	---	---	\$31 million
	TOTAL	361,000	294,000	3 nights	N/A (approx. \$75 million)
Light Regional Council	International	N/A	N/A	N/A	N/A
	Domestic overnight	32,000	78,000	2 nights	\$8 million
	Domestic daytrip	132,000	---	---	\$9 million
	TOTAL	164,000	83,000	3 nights	N/A (approx. \$17 million)
The Barossa Council	International	12,000	94,000	8 nights	\$8 million
	Domestic overnight	202,000	480,000	2 nights	\$114 million
	Domestic daytrip	765,000	---	---	\$77 million
	TOTAL	980,000	573,000	3 nights	\$199 million
Adelaide Hills Council	International	4,000	72,000	18 nights	\$4 million
	Domestic overnight	71,000	206,000	3 nights	\$29 million
	Domestic daytrip	598,000	---	---	\$35 million
	TOTAL	673,000	278,000	4 nights	\$67 million
District Council of Mount Barker	International	6,000	77,000	13 nights	\$5 million
	Domestic overnight	111,000	306,000	3 nights	\$51 million
	Domestic daytrip	692,000	---	---	\$57 million
	TOTAL	809,000	383,000	3 nights	\$112 million
City of Onkaparinga	International	13,000	325,000	24 nights	\$19 million
	Domestic overnight	216,000	785,000	4 nights	\$92 million
	Domestic daytrip	1,107,000	---	---	\$106 million
	TOTAL	1,336,000	1,110,000	5 nights	\$217 million

Note: N/A = Unknown, data not publishable as a result of the data at an LGA level being too small to be publishable by TRA.

⁴¹ Local Government Area Profiles, 2019 (TRA)

Table 21. TRA Cycle Tourism - Visitor profile

	Food and Wine	Cycling
Number of visitors	1.406 million international and 6.810 million domestic visitors	459,000 international and 2.111 million domestic visitors
Most popular age group participating	25-34 years for international visitors 25-34 years for domestic visitors	25-34 years for international visitors 35-44 years for domestic visitors (closely followed by 45-54 years)
Type of trip	989,000 international visitors participated in a food and wine activity whilst on holiday. 4.289 million domestic visitors participated in a food and wine activity whilst holiday.	293,000 international visitors cycled whilst on holiday. 1.463 million domestic visitors cycled whilst on holiday, however nearly half a million visitors also cycled whilst visiting friends and relatives
Number of nights	67.291 million nights by international visitors 26.305 million nights by domestic visitors	35.839 million nights by international visitors 9.570 million nights by domestic visitors
Most popular age group staying overnight	25-34 years for international visitors 25-34 years for domestic visitors (closely followed by 45-54 years)	25-34 years for international visitors 35-44 years for domestic visitors
Expenditure	\$9.329 million by international visitors \$5.358 million by domestic visitors	\$4.244 million by international visitors \$1.450 million by domestic visitors
Spend per trip and per night	\$6,633 per trip and \$139 per night for international visitors \$787 per trip and \$204 per night for domestic visitors.	\$9,253 per trip and \$118 per night for international visitors \$687 per trip and \$151 per night for domestic visitors

Clare Valley

Market Insights

- 98% of visitors are domestic and 2% are International visitors.
- 69% of domestic visitors are from within SA compared to 31% per cent from Interstate.
- 84 % of visitors to the Clare Valley are Leisure visitors (Holiday + VFR)
- Average length of stay is 1 or 2 nights for both domestic and international visitors
- The most popular age groups visiting the region are 65+ years (international) and 25-34 years and 65+ years (domestic).
- The most popular activity is to Eat out or Dine at a restaurant and or cafe. Other popular activities visiting wineries, friends or relative and visit history/ heritage buildings.
- Wine (particularly the compactness of vineyards) and scenery provides the appeal for interstate visitors

Tourism Infrastructure

- There are more than 30 cellar doors and over 237 tourism businesses in the Clare Valley. The current offering, predominantly defined by the epicurean and cellar door experiences.
- The region offers a diverse range of accommodation that supports visitors. The many restaurants, cafes, wineries, breweries, galleries and markets in the towns and villages offer visitors the opportunity to experience fresh regional produce and the local art and crafts.
- The occupancy rates of the current accommodation is 65% (above the SA regional average of 51%) and the average yield per room is \$84 (above the SA regional average of \$76).⁴²
- The Regional Visitor Strategy identifies the need for experiential accommodation linked to farms and vineyards and an increase and upgrade in available rooms stock from 3 – to 4 rooms. The region also needs a 6 star boutique offering accommodation.⁴³
- The Riesling Trail receives approximately 100,000 users. It is estimated that 40% of use is from local residents and 60% is from visitors to the region.

⁴² SA Regional Visitor Strategy 2021.

⁴³ Ibid

Barossa

Market Insights

- While the region receives 3.5 day trip visitors for every overnight visitor, overnight visitors deliver nearly two thirds of total visitor spend.
- The most popular age groups visiting the region are 65+ years (international) and 55+ years (domestic).
- The most popular activity is to eat out or dine at a restaurant and or café
- Interstate visitors resonate with the wine offering, and are attracted to festivals, bike riding and hot air ballooning. However, the destination is perceived as 'high end' for some.
- The region is made up of two local government areas (Light Regional Council and The Barossa Council). The Barossa Council receives the majority of day and overnight visitors.
- The Barossa is a highly appealing wine region for international visitors, however the volume and expenditure is low when compared to the City of Onkaparinga.
- Most visitors to Light Regional Council are day trippers. Light Regional Council receives the lowest level of visitor expenditure when compared to other Local Government Areas along the Wine Trail.

Tourism Infrastructure

- The Barossa is home to some of the world's oldest shiraz grapes and the current offering, predominantly defined by the epicurean and cellar door experiences. It is part of Tourism Australia's Ultimate Winery Experiences (part of the Signature Experience Program).
- There are over 359 tourism businesses in the Barossa.
- The occupancy rates of the current accommodation is 59% (above the SA regional average of 51%) and the average yield per room is \$105 (above the SA regional average of \$76)⁴⁴.
- The Regional Visitor Strategy identifies the need for the development of an iconic 4- 5 star accommodation product of scale that can cater for major events and conferences. The region requires 45 new and 41 upgraded rooms to meet demand by 2025.
- The Barossa Trail is a high-quality sealed cycling and walking network extending 40 kilometres from Angaston to Gawler via the four main townships of Angaston, Nuriootpa, Tanunda and Lyndoch. This offers visitors and residents the opportunity to explore Barossa's hand crafted wines, distinctive regional food, wine, unique landscapes and rich heritage on foot and by bike. This network also extends to surrounding towns such as Angaston. A comprehensive bicycle related touring map is available. Local businesses are also encouraged to display a "Bike Friendly Barossa" symbol to indicate that they support cycling and cater for cyclists.

⁴⁴ SA Regional Visitor Strategy 2021.

Adelaide Hills

Market Insights

- The most popular age groups visiting the region are 55-64 years (international) and 35-44 years (domestic).
- New South Wales and Victoria are the main interstate markets
- The most popular activity is to visit friends and relatives, closely followed by eat out or dine at a restaurant and or café.
- Authenticity and serenity of many villages including Hahndorf offer a relaxed family environment for intrastate visitors.
- For interstate visitors, many villages including Hahndorf provide an appealing point of difference.
- Adelaide Hills and particularly Hahndorf is popular with international visitors due to its close proximity to Adelaide, nature and wildlife experiences and its popular wineries.
- The region is made up of two local government areas - Adelaide Hills Council and Mt Barker. Mt Barker receives a slightly higher volume of visitors than Adelaide Hills. Both Council areas receive a large volume of day visitors and a smaller proportion of overnight visitors when compared to Barossa and the City of Onkaparinga.

Tourism Infrastructure

- The region offers a range of attractions and include the village of Woodside with several pubs, galleries, antique and second-hand shops and cafés, cellar doors and sculpture trail. There are over 50 cellar doors in the Adelaide Hills.
- The region is part of Tourism Australia's Ultimate Winery Experiences.
- The occupancy rates of the current accommodation is 58% (above the SA regional average of 51%) and the average yield per room is \$96 (above the SA regional average of \$76).⁴⁵
- The Regional Visitor Strategy identifies the need for 16 new and 22 upgraded rooms to meet demand by 2025. It also identifies the need to encourage unique accommodation linked to trails, nature, wildlife, food, beverage and wellness.

⁴⁵ SA Regional Visitor Strategy 2021.

McLaren Vale / Fleurieu Peninsula Tourism Region

Market Insights

As the Wine Trail traverses the City of Onkaparinga entering through Mount Bold and connecting to the coast at Aldinga Beach and Sellicks Beach, specific data relevant to the Onkaparinga LGA is utilised instead of the Fleurieu Peninsula tourism region.

- The City of Onkaparinga captures approximately 6.5% of the state's overall visitation and is the gateway to the Fleurieu Peninsula tourism region. Given the City's close proximity to Adelaide, it is a popular day trip destination. Over 81% of its visitors are day-trippers, with only 19% staying overnight (18% domestic and 1% international). It is acknowledged that the high number of day visitors will continue, however there is opportunity to increase overnight visitation through experience development, packaging of commissionable product and promotion and new/ improved accommodation offerings.
- McLaren Vale is part of Tourism Australia's Ultimate Winery Experiences (part of the Signature Experience Program).
- The City is also featured in two of South Australia's official touring routes, namely the Epicurean Way and Southern Ocean Drive.
- Approved luxury tourism accommodation developments for Seaview Road (large scale) and Wirra Wirra Winery (boutique, health and wellness focus forming part of a broader accommodation cluster), offer direct connections to the Mount Bold to Field Street section of the Wine Trail, as well as the McMurtrie Road connection from the Shiraz Trail.

Tourism Infrastructure

- There are approximately 1072 tourism businesses in Onkaparinga and over 80 cellar doors in McLaren Vale.
- The occupancy rates of the current accommodation is 50% (below the SA regional average of 51%) and the average yield per room is \$65 (below the SA regional average of \$76).⁴⁶
- The Regional Visitor Strategy identifies the need for 71 new and 47 upgraded rooms to meet demand by 2025. It also identifies the need to encourage unique accommodation linked to trails, nature, wildlife, food, beverage and wellness.
- The Shiraz Trail (part of the Coast to Vines Rail Trail) links McLaren Vale to Willunga (9km). It is a scenic trail, taking in views of wineries and vineyards. The villages of McLaren Vale and Willunga offer a range of restaurants, accommodation, retail stores and cafes and cellar doors. There is limited access to cellar doors along the trail, requires visitors to divert from the main trail along public roads, which is resolved by the McMurtrie Road connection. The trail currently receives around 45,000 users per annum.
- The Coast to Vines Rail Trail experienced a 33% increase in patronage in 2020 on the previous year, with over 77,000 users.

⁴⁶ SA Regional Visitor Strategy 2021.

APPENDIX 3 – STRATEGIC ALIGNMENT




Table 22. Strategic alignment

DOCUMENT	NOTES
Growth State: South Australian Government's plan for economic growth	<p>The South Australian government has outlined a plan to greatly increase the State's economy and established a growth target of 3% per annum.</p> <p>A number of policies, programs and projects established to support this growth, including nine key growth industries: tourism; health and medical industries; international education; food, wine and agribusiness; defence industry; space industries; high-tech; creative industries; energy and mining.</p>
The South Australian Visitor Economy Sector Plan 2030	<p>Six strategic priorities: marketing, experience and supply development, collaboration, industry capability, leisure and business events, promoting the value of tourism.</p> <p>Exceptional food and drink experiences and immersive nature and wildlife experiences are two of the main drivers of appeal for South Australia.</p> <p>Maintenance and development of hiking and cycle trail infrastructure to support nature-based tourism is an important enabler of the visitor economy.</p>
South Australia Recreational Trails 10-Year Master Plan 2015 - 2025	<p>Recommended action: Development of up to five prescribed regional multi use trail systems with an emphasis on horse riding, walking and easy cycling centred on regional population centres.</p> <p>The development of different levels of trails, as recommended, could be totally new developments or could be existing trails which can be upgraded, with new links created where required.</p> <p>The variety in the following is apparent: standards of trail provision; trail provision for differing trail users; trail systems and models applied; information made available to trail users i.e. leaflets/trailhead information/signage/web based information; visitor facilities; promotion/marketing/branding of trails; and trail users and cohorts.</p> <p>The greatest concentration of trail opportunities are in the areas of highest population density i.e. Adelaide and the surrounding hills, the Barossa and in some cases around other regional population centers.</p>
South Australian Regional Visitor Strategy 2025	<p>Identifies the Wine Trail Project as a cross regional globally significant asset.</p> <p>Brand pillars are: natural therapy, accessible provenance, wildlife encounters, coolest boutique capital and loves a party.</p> <p>Regional marketing priorities include showcasing regional experience strengths.</p> <p>Regional experience development priorities include nature based, food and beverage and wellness.</p> <p>Regional infrastructure priorities include trails. "The upgrade, maintenance, and development of new hiking and cycling paths throughout the regions, including in National Parks, are required to support ongoing growth in popular nature-based tourism experiences."</p> <p>Regional Response Priorities</p> <p>Clare Valley: Use the region's excellent network of trails for the development of new soft adventure, wellness, and Aboriginal tourism experiences.</p> <p>Barossa: Leverage the region's global wine and wine tourism reputation.</p>

DOCUMENT	NOTES
	<p>Barossa: Expand the region’s experiential offerings across nature and wellness.</p> <p>Barossa: Leverage the region’s cycling and walking infrastructure and intersection of key trails for investment and activation.</p> <p>Adelaide Hills: Support the development of experiences that reflect the Adelaide Hills Interpretation Plan themes of food and beverage, towns and villages, art, heritage and culture, nature and lifestyle (including soft adventure, wellness, hiking, cycling and horse riding).</p> <p>Adelaide Hills: Address infrastructure including walking and cycling trails.</p> <p>Fleurieu Peninsula: Enhance existing experiences with a focus on food and drink, adventure, nature and wildlife, arts and culture, wellness, coastal and aquatic themes.</p> <p>Fleurieu Peninsula: Develop appealing nature-based walking and cycling trail infrastructure.</p>
South Australian International Wine Tourism Strategy (2018)	<p>Although focus is international, some takeaways for the domestic market post COVID-19.</p> <p>International visitation is concentrated in three key regions; 62% visited the Barossa, 27% visited McLaren Vale and 22% visited the Adelaide Hills, with some visiting multiple regions. These three regions share a strong product offering with their proximity to Adelaide, the entry point for more than 90% of our international visitors.</p> <p>There are 200 cellar doors within an hour’s drive of Adelaide, which is just the beginning of South Australia’s wine narrative.</p> <p>New Zealand is a strong secondary market (after China, USA and UK).</p> <p>Utilise the existing ‘Great Wine Capitals Global Network’ to drive awareness, prestige and appeal.</p> <p>Utilise the existing South Australian Touring Routes, including the Epicurean Way, to facilitate trip planning and encourage visitation to, and deep engagement with, multiple wine regions.</p>
Nature Like Nowhere Else: Activating nature-based tourism in South Australia	<p>The State Government is ready to support ambitious ideas that further develop the unique appeal of South Australia.</p> <p>The State Government will activate opportunities for industry growth by driving tourism demand, coinvesting to create experiences like nowhere else, and creating an environment where nature-based tourism businesses can flourish.</p> <p>Goal is to create experiences in nature like nowhere else.</p> <ol style="list-style-type: none"> 1. Standout walking journeys across the landscape 2. Unrivalled native wildlife experiences in Adelaide 3. Marine wildlife experiences without equal 4. Cutting edge sensory experiences that leave a lasting impression
Nature Like Nowhere Else: An Action Plan for the Activation of South Australia’s Nature-based Tourism Sector	<p>Action 2: Support existing and create new nature-based tourism experiences.</p> <p>Action 4: Raise awareness of South Australia’s unique appeal.</p>
The 30-Year Plan for Greater Adelaide (2017)	<p>Policy for Barossa and McLaren Vale: Promote improvements to tourism infrastructure including transport networks, trails, cycle ways, signage, visitor information, and key gateways to towns.</p>
Regional Development Australia Yorke & Mid North Regional	<p>Regional Focus 4: Health Environments</p>

DOCUMENT	NOTES
Roadmap 2018-2028: Engineering Growth in the Yorke and Mid North	<ul style="list-style-type: none"> - Develop and create new and unique opportunities to experience natural environments, for example, physical adventure, artistic, cultural and culinary experiences. - Encourage opportunities for nature based tourism investments on public land. <p>Commitment to continue to develop and deliver high-quality community infrastructure designed to increase the standard of living for our residents, and to attract sporting events and tourism opportunities to the region.</p>
Clare & Gilbert Valleys Council Strategic Plan 2019-2029	<p>4.8. Have an open space strategy that identifies and enhances existing walking and cycling paths across the district. Goal that by 2030, a range of well planned, connected and safe pedestrian and bike corridors to encourage and support physical health and wellbeing will be in place.</p>
Clare & Gilbert Valleys Council Open Space and Recreation Strategy (2020)	<p>One of the main aspects between sport, recreation, open space and tourism is the link with the trails network and more so the Mawson (Rattler), Riesling, Heysen and Lavender Trails which run through the Council area. Linking and promoting these to and with the local trails network will remain a key strategy, as well as ensuring tourism opportunities are enhanced for visitor and resident experience whilst benefiting the community economically.</p> <p>The notion of increasing opportunities for trails and general walking and cycling networks was supported by the community.</p> <p>SR13: Capitalise the Rattler and Riesling Trails and develop a Cycle Tourism Strategy in conjunction with local businesses to make the region a Cycle Friendly destination.</p>
Clare Valley Destination Marketing + Management Plan 2019 - 2024	<p>Some of the key product gaps and opportunities include activating the Riesling Trail and the intra-inter-regional cycle, walking and horse-riding trails networks, through collaborative development and marketing initiatives.</p> <p>Priority to advocate for the connection of the Clare Valley Tourism Region to other South Australian Cycle Trails.</p> <p>Action 5.13 Advocate for and support the connection of the Clare Valley Tourism Region via the current Cycle Trail Network (Riesling, Rattler, Wakefield Trails) to other South Australian Cycle Trails – such as via the propose Adelaide Wine Country Cycle Trail.</p>
Clare Valley Tourism New Experiences and Opportunity Roadmap (2019)	<p>Trails and their connection with commercial products identified as one of two priority development areas.</p> <p>While the Riesling and Heysen Trails and Burra Passport and its associated walks/routes have potential to upgrade into hero experiences, CVTR trails generally have limited connection to activities and accommodation that support multi-day experiences that appeal to Active and Indulgent markets.</p>
Clare Valley Tourism Region New Trail Experience Project (2020) Note: No access to original document, summary has been sourced from Clare and Gilbert Valleys Council Cultural Tourism Strategy 2020-2025	<p>As a key area of opportunity the Trails Experience Project involves and audit of existing trails and the identification of trails that offer the most potential in terms of activation. A range of walks and heritage / history trails were identified to focus on moving forward.</p> <p>Relevant key objectives for the project include:</p> <ul style="list-style-type: none"> - Activate the existing trails the region has which currently provide passive recreational pursuits with limited information for tourists to engage with. - Create a variety of new “must-do” experiences for tourists that potentially lengthens stay or brings people to the region. - Identify walking trails that have unique selling points and regional stories attached to them.

DOCUMENT	NOTES
Clare and Gilbert Valleys Council Cultural Tourism Strategy 2020-2025	People come for the food, wine and recreation and happen to enjoy the heritage whilst they are in region as a complementary experience.
Regional Development Australia Barossa, Gawler, Light and Adelaide Plains	Tourism: Wine Train, Cycle Paths and Cultural Infrastructure identified as a targeted priority for 2019 – 2020.
Light Regional Council Economic Development Plan 2020-2030	Opportunities: Adelaide Wine Capital Cycle Trail and intersection of the Heysen, Kidman and Mawson Trails in Kapunda; disused rail corridors for cycle trails or as future commuter links using autonomous vehicles; Seppeltsfield Wines' Tourism Masterplan for a Global Epicurean Village; and Kapunda township tourism activation. Strategic Direction 1.8. Seek funding and advocate for the Adelaide Wine Capital Cycling Trail (now known as the Great Australian Wine Trail). Tourism identified as a future economic development growth opportunity.
Light Regional Council Tourism Plan 2018-2023 Summary	Key opportunity to further activate existing visitor experiences such as Cycle Trails. Key opportunity to initiate and collaborate with partners on key regional projects, such as a regional cycle trail connecting wine regions. Key opportunity to work with industry partners to grow share of niche visitor and interest groups, including Cruise, Agritourism, Cycle Tourism, Sports Tourism and Business Events.
Barossa, Light and Lower Northern Region Public Health and Wellbeing Plan: Part A The Plan (2014)	Commitment 3.2: Promote social interaction and wellbeing through activities, events and places. Action: Promote regional tourism. Commitment 5.3: Promote, protect and enhance the region's natural environment. Action: Promote co-planning of biodiversity protection and infrastructure for physical recreation in the region: trails, nature-based tourism. Commitment 12.1: Re-vitalise main streets and town centres. Action: Promote connections between potential economic growth sectors and health and wellbeing: local fresh food production, recreation and ecological based tourism.
Barossa, Light and Lower North Region Open Space, Recreation and Public Realm Strategy (2013)	Acknowledges the vital role tourism plays in delivering a range of economic, social and environmental benefits to the region. Opportunities exist to develop trails along disused and existing rail routes as these are direct in nature and offer opportunity for cycling and access to key townships. Themes for trails are: - Linear. Develop linear trails in places such as natural watercourses, rivers and old railways. - Linked. Where possible trails need to create linkages to other trails and destinations including neighbouring towns, sport and recreation facilities, rivers, reservoirs and tourism attractions. - Provision. Trails should meet demand for walking, cycling and horses. - Safe. Safety is a key element in trail design. Trails must be safe to use. - Secure. Long tenure of trails from State Government and councils is required. - Shared Use. Where practical trails should cater to a range of purposes including walking, cycling and horse riding.

DOCUMENT	NOTES
The Barossa Council Community Plan 2020 - 2040	<p>Five Community Themes: natural environment and built heritage; community and culture; infrastructure; health and wellbeing; business and employment.</p> <p>Goal: Support tourism development that is sensitive to the natural environment and ensures that the unique character of the rural landscape is appropriately managed and promoted.</p> <p>Goal: Encourage and support the sector to further promote and develop tourism experiences including ecological, cultural and agricultural tourism.</p> <p>Goal: Provide experiences and infrastructure that continue to support the needs of the tourism market</p>
The Barossa Council Advocacy Strategy 2020 - 2024	<p>Related strategic objectives include:</p> <ul style="list-style-type: none"> - Influence decision and policy makers. - Attract and secure funding and resources to the Barossa for major projects. - Build upon strategic partnerships. - Share the Barossa story. - Build on the strong Barossa brand by working with tourism providers and industry bodies to enhance opportunities in eco-tourism, the World Heritage bid, and new and emerging markets.
Barossa Region Cycle Tourism Strategy 2017	<p>Related strategic objectives include:</p> <ul style="list-style-type: none"> - To market and promote the region as a cycling destination to maximise visitor yield. - To diversify and optimise the economic base of the tourism industry. - To enhance the visitor experience and satisfaction by encouraging cyclists to explore the region more intimately and at a slower pace. - To improve health and wellbeing of residents and visitors through active recreation and improved connectivity between towns. - To increase environmental sustainability by replacing short car trips, with bike trips. - Improve regional and inter-regional connectivity for tourism through linking regional and state trails network.
The Barossa Council – The Big Project – Generational Community Infrastructure Investment Plan	 <p>THE BIG PROJECT Barossa Community Infrastructure Plan</p> <p>OUR BAROSSA Introducing our premium wine, food and tourism region and its unique Barossa heritage and community spirit</p> <p>RECREATION PARKS Improve park facilities, create new parks, enhance park connectivity, improve park management, create new park spaces, improve park accessibility, create new park spaces, improve park accessibility, create new park spaces, improve park accessibility</p> <p>AQUATIC STRATEGY Improve aquatic facilities, create new aquatic spaces, enhance aquatic connectivity, improve aquatic management, create new aquatic spaces, improve aquatic accessibility, create new aquatic spaces, improve aquatic accessibility</p> <p>CYCLE/LEISURE TOURISM Improve cycle facilities, create new cycle spaces, enhance cycle connectivity, improve cycle management, create new cycle spaces, improve cycle accessibility, create new cycle spaces, improve cycle accessibility</p> <p>ARTS CULTURE HERITAGE TOURISM Improve arts facilities, create new arts spaces, enhance arts connectivity, improve arts management, create new arts spaces, improve arts accessibility, create new arts spaces, improve arts accessibility</p> <p>Community Plan Corporate Plan Regional Open Space Strategy</p>
Adelaide Hills 20 Year Trail Strategy & Action Plan (2014)	<p>During community consultation, a number of priorities for trail development came to light, in particular linking Hahndorf to both Verdun and Oakbank for tourism and recreational purposes.</p>

DOCUMENT	NOTES
	<p>High priority sections of value to create or formalise important links between assets for tourism potential and/or to address existing safety concerns are identified.</p> <p>Focus needs to shift from local trails to regional trails to become significant attractions for overseas and interstate visitors (in addition to being a local recreational utility).</p> <p>Regional trail that can be promoted as a whole or in parts will be more appealing and broaden the potential user community.</p> <p>Design principles developed are: connectivity; economic innovation; regional identity; family friendly; safety; and environment.</p> <p>Strategy seeks to link or connect to existing trails, to create loops and increase useability through townships.</p>
Adelaide Hills Regional Strategic Tourism Plan 2015-2020	Regional goal to build capacity and capability: Support the sustainable development of, and investment in, existing and new tourism ventures (including events) that bring more people to the region and get them staying longer and spending more.
Adelaide Hills Council Strategic Plan 2020-24	<p>Priority B1.1 Increase accessibility to our district through the development and delivery of high priority trails and routes for all cyclists (on-road, off road, commuters, recreational) and pedestrians.</p> <p>Priority C4.3 Recognise that trails are a destination in their own right and support both commuter and recreational trail opportunities.</p> <p>Priority E1.1 Support and encourage local and international tourists to visit the Adelaide Hills</p>
Adelaide Hills Council Economic Development Strategy (2015)	<p>Opportunity identified to enhance tourism industry through building links to existing industries like food and wine.</p> <p>Action D.2.f: Investigate any program, initiative or concept as a potential business development program that Council could support or initiate. For example, creating working groups to address the best use of Mount Lofty for local business, addressing the needs of cycle tourists, or night-time decorative lighting in the towns.</p> <p>Strategic Element B.2.3 Recreational (a Mountain Bike Strategy for the Hills, safe cycle routes strategy, Adventure sports Eco-Tourism).</p> <p>Whereas horticulture and viticulture (and related wine manufacturing) are relatively well established, thereby not justifying significant intervention, the tourism industry, by virtue of its industry structure (small, diverse, distributed) can justify a much deeper involvement by government.</p> <p>Action B.1.a: Identify those parts of the local economy which differentiate it from other regional economies, and which have growth prospects beyond local autonomous growth, e.g. horticulture, viticulture (& related wine manufacturing) and tourism, and a highly skilled and qualified workforce. The World Heritage Bid is a key aspect of this Action, as it also involves working with local and State industry and community groups.</p> <p>Opportunities by Sector: Wine & Viticulture = Tourism Tourism = Wine tourism has scope for growth, Industrial tourism (micro-breweries, food production)</p>
Adelaide Hills Council Sport and Recreation Strategy 2017-2021	<p>Action: Continue to support 'non-traditional' and unstructured recreation opportunities in the region (eg. Mountain Biking). Work and partner with relevant providers.</p> <p>The Adelaide Hills Strategic Bike Plan outlines projects and activities to improve participation and the experience of local and visiting cyclists in the Adelaide Hills.</p>

DOCUMENT	NOTES
	The Adelaide Hills 20 Year Trail Strategy and Action Plan will deliver a safe and legible network of connected trails for the purpose of fitness and recreation, commuting between townships and to provide unique trails experiences to showcase the Hills.
Adelaide Hills Strategic Bicycle Plan (2016)	<p>The goal is for cycling in the Hills to be a regional experience that will draw people for individual trips, will generate repeat business, and is an integrated part of promoting visitation to the Hills. This will be achieved by: wayfinding and signage; cycling portal; tourism information; and developing partnerships.</p> <p>Guided by the following objectives:</p> <ol style="list-style-type: none"> 1. First, do no harm 2. Encourage cycling for transport purposes 3. Encourage recreational riding 4. Reduce frustration to motorists and improve the safety of road cyclists 5. Increase the commercial return from cycling in the Hills <p>Action area 1: Infrastructure is the best promotion. Develop a hierarchy of routes that form a usable network of cycling facilities (e.g. regional tourist routes). Develop lifetime cycling facilities to complement the network (e.g. connections to neighbouring Councils).</p> <p>Action area 3: Reach for “low-hanging fruit” first. Leisure cyclists, by increasing the range of cycling (tourism, school).</p> <p>Action area 5: Pedelecs (power-assist bikes) can make a real difference (e.g. target pedelec use around recreational and tourist routes for ‘non’ cyclists).</p> <p>Action area 6: Maintain and extend what you have. Maximise use of existing facilities – notably the Amy Gillett Bikeway (and nearby quiet roads forming tourist/ recreational loops) and Crafers Bikeway (as part of a City to Mt Lofty/ Cleland tourist route), but also recognising under-used road shoulders, quiet roads, etc.</p> <p>Action area 7: Infrastructure is not enough. Agree on consistent strategies for value-adding to trail/ route infrastructure, notably the Amy Gillett Bikeway.</p>
Mount Barker District Council Community Plan 2020 – 2035	<p>Community Priority Directions include activating tourism, growth infrastructure, nature connection and health community.</p> <p>CW Objective 1.2 Further develop and improve the integrated cycle and pedestrian trail network.</p> <p>EP Objective 1.3 Support industry sectors based on the regional strengths of eating and drinking and nature-based tourism.</p> <p>EP Objective 3.3 Facilitate and deliver tourism infrastructure.</p>
Mount Barker District Council Economic Development Strategy 2014 – 2019	<p>Value adding to existing industries, including tourism, will define the region’s future economic structure and contribution to the South Australian economy and its overall wellbeing and viability.</p> <p>Council will consider opportunities to optimise the advantage of having premium quality rural land in close proximity to the Adelaide CBD through encouraging greater tourism activity.</p> <p>Tourism development is one of the key opportunities for jobs and economic growth.</p> <p>Objective #2 – Investment Attraction includes a focus on tourism industry sector.</p> <p>Objective #3 - Demand Growth includes a focus on tourism.</p> <p>Objective #4 - Export Growth includes a focus on tourism.</p>

DOCUMENT	NOTES
Mount Barker, Littlehampton and Nairne Trails Plan (2010)	Links to the townships of Hahndorf and Woodside provide the opportunity to link with the Amy Gillett Trail, Pioneer Women's Trail and Heysen Trail. Adelaide Hills Council has indicated its support for working with the District Council of Mount Barker in developing trails that cross their mutual LGA boundary.
Onkaparinga Community Plan 2030	Connecting people and the spaces they enjoy, including trails, open spaces and other places to be active (identified as requiring prioritisation over the next four years). Encourage tourists to enjoy more of what's on offer in the vibrant and diverse region.
Onkaparinga Trails and Cycling Strategic Plan 2016-2021	A well-connected network will continue to build the economic value of 'premier' trails and cycle tourism products, thereby supporting local retail centres, wineries, restaurants, cafés and tourism areas. The development of cycle tourism products that target overseas and interstate visitors and showcase local attractions and business would strategically position the City of Onkaparinga and provide a competitive advantage to local businesses. The Coast to Vines Rail Trail, Patrick Jonker Veloway, Willunga Hill Climb and segments of the Tour Down Under Stage 5 are premier cycling rides that could be packaged with regional rides and local destinations to attract cycle tourists for extended stays and repeat visits. Network improvements will: - address areas of high demand and target areas that represent a high return on investment in relation to the number of new users - focus on enhancing connections that provide positive and unique experiences to significant destinations and places in addition to supporting iconic routes and locations. - focus on missing network gaps that disengage large communities and gaps that interrupt network flow.
Onkaparinga Tourism Strategic Plan 2019 – 2023	Trails and extensive cycle network identified as strengths. Cycling/Walking Trails are an opportunity for tourism investment attraction. Commitment to experience development through continuing to support and build upon council led strategies/initiatives or tourism related owned infrastructure, which strongly contribute to visitation (e.g. cycling). Commitment to establish strategic marketing relationships with neighbouring and 'feeder' destinations and regions. Benefit of working with neighbour local governments. Identify joint working and partnership opportunities, which respond to visitor demand and experience delivery, and establish new opportunities.
The shared priorities of South Australia's 11 tourism regions Regional Tourism Infrastructure March 2019	Priority #6 Improve and extend vital walking and cycling trails / Including develop an Adelaide Wine Capital Cycling Trail linking trails in four premier wine regions (Clare, Barossa, Adelaide Hills, McLaren Vale). Other priorities that would relate to the trail include #8 establishing new and enhanced experience and #7 upgrading regional accommodation.
Adelaide Wine Capital Cycle Trail Analysis of Drought Impact on Project Area	Two project member councils are drought declared – Clare and Gilbert Valleys and Light Regional Council.

DOCUMENT	NOTES
MEETING SUMMARY: SA BIKE ECONOMY DEVELOPMENT WORKSHOP – CYCLE TOURISM	<p>The opportunity arising from the ‘Adelaide Wine Capital Cycle Trail’ is that visitors will still disperse to engage small wineries and adjacent businesses in these vulnerable areas despite the impact of drought on a vintage and so improves the resilience of these communities economically and socially.</p> <hr/> <p>Self-guided ‘Gravel Adventure’ Cycling identified as a gap in Clare, Barossa, Adelaide Hills and Fleurieu. Premium ‘Mixed Adventure’ cycling identified as a gap in Adelaide Hills/Adelaide. Premium ‘Epicurean’ cycling identified as a gap in Clare, Barossa, Adelaide Hills, Fleurieu. Although new infrastructure is desirable, especially in key tourism destinations (e.g. Kangaroo Island) the priority should be placed on networking and improving existing trails. Participants worked together to identify opportunities to create a quality connected network of like trails and experiences and identified a number of options to leverage existing infrastructure for improved economic impact. Map services need to be improved online and should match hard copy maps and signage on the ground.</p> <hr/>
Mount Lofty Ranges UNESCO World Heritage Bid Project	<p>The Adelaide Hills, Alexandrina, Barossa, Mount Barker, Onkaparinga, and Yankalilla Councils are collaborating with the University of Adelaide and Regional Development Australia Barossa to pursue Stage One Commitment to the National Heritage listing of the Mount Lofty Ranges region. The Mount Lofty Ranges region is considered to be worthy of listing for its working agricultural landscapes and historic settlements on the basis of its unique history and continuing culture and practice. There are many potential positive benefits from achieving world heritage status for farmers, tourism operators and business in the region. Stage One of the process has taken five years to complete (still awaiting the decision of the Federal Government), and Stage Two (the WHS bid to UNESCO) will take another three to five years.</p> <hr/>

APPENDIX 4 – OTHER TRACKS AND TRAILS WITH POTENTIAL LINKS TO THE WINE TRAIL



Table 23. Other tracks and trails with potential links to the Wine Trail

TRAIL	TOURISM REGION	BRIEF DESCRIPTION	USE
Clare Valley Wine & Wilderness Trail (currently in development)	Clare Valley	A 100km walking/cycling trail around the Clare Valley that will begin and end at the Clare Valley Visitors Centre. The trail will showcase the region's natural beauty & premium food and wine products. The trail will travel on a network of backroads, road reserves & private property. Target completion dates are Section 1 (April 2021) and Sections 2-5 (April 2022).	Shared-use
Lavender Federation Trail	Clare Valley, Barossa, Adelaide Hills and Adelaide	A 264km walking trail which takes approximately 7 days. Travels through diverse countryside traversing the eastern flanks of the Mount Lofty Ranges. A series of spur and loop tracks connect the main trail to nearby towns and access points.	Walking
Copper Trail	Clare Valley	A 19km off-road route using mostly gravel back roads. Provides a link between the Riesling Trail and Shamus Liptrot Rail Trail. Facilities only available at either end of the route, there are none on the trail.	Cycling
Seppeltsfield Road Bike and Walking Trail (currently in development)	Barossa	A 15km separated, sealed, two-way, shared bicycle and walking trail surrounded by a density of quality tourism experiences and attractions (e.g. Information Bay, Wineries, Distillers, Local Villages, Restaurants, Attractions and Accommodation)	Shared-use
Stuart O'Grady Bikeway	Adelaide	A 23km shared-use trail that runs parallel to the Northern Expressway, linking Gawler to Port Wakefield Road. Gawler Cycle Hub and VIC co-located. Gawler Station is closest train station to Barossa. Gawler links to Barossa through the Barossa Trail. The southern trailhead will be connected with a new 16km shared path currently under construction as part of the Northern Connector to the Port River Expressway.	Shared-use
Pioneer Women's Trail	Adelaide Hills	A 22km route mainly following country roads, laneways and bush tracks. Honours the early European settlers from Hahndorf who supplied Adelaide with fresh produce. Connects to Cleland Conservation Park, Cleland Wildlife Park and Mount Lofty Summit.	Walking
Yurabilla Trail	Adelaide Hills	A 54km route which ranges from narrow single-person tracks to vehicle fire tracks. Passes many of the Adelaide Hills' top tourist attractions, including Carrick Hill, Waterfall Gully, Mount Lofty Botanic Gardens, Mount Lofty Summit and Cleland Wildlife Park. It also visits, or has connection to, picturesque towns such as Summertown, Crafers and Norton Summit, as well as wineries, pubs and other attractions.	Walking

TRAIL	TOURISM REGION	BRIEF DESCRIPTION	USE
River Torrens Linear Park Trail	Adelaide	A 30km shared-use trail which follows the river from the base of the Adelaide Hills, through the Adelaide CBD to the river mouth at the seaside and Western Suburbs.	Shared-use
Adelaide 100 (currently in development)	Adelaide and Adelaide Hills	A 100km loop walking trail that takes in the coast, waterways and hills of the city. The circuit utilises existing trails, accommodation, and services. Anticipated completion by mid-2021.	Walking, although some existing parts already designated as shared-use
Coast Park Path	Adelaide and Fleurieu Peninsula	A 70km trail along the metropolitan Adelaide coastline. The vision for the trail is to be a continuous, two-way, shared pathway. However, there are some missing sections and sections where a wider pathway are yet to be completed.	Shared-use
Patrick Jonker Veloway	Adelaide and Fleurieu Peninsula	A sealed bikeway for exclusive use of cyclists which runs alongside the Southern Expressway (first 7km) before becoming a shared-trail (remaining 12km). Links to the Coast to Vines Rail Trail.	Cycling (first section) and shared-used (second section)
Coast to Vines Rail Trail	Adelaide and Fleurieu Peninsula	A 35km trail which follows the original steam train rail corridor for the line that operated from Adelaide to Willunga. Starting in Hallett Cove, the trail meanders its way through Happy Valley, Reynella, Morphett Vale, Hackham, Noarlunga, Moana and McLaren Vale to finish at Willunga. It is the gateway to many of the region's cultural, recreational and historical attractions.	Shared-used, although some parts are designated as cycling only

APPENDIX 5 – WINE TRAIL PROPOSED ROUTES AT LGA LEVEL

Note: the Wine Trail proposed route is presented in the direction north to south.

Clare And Gilbert Valleys Council

Section 1A: Barinia to Auburn – Extension of Riesling Trail

Existing trail: Riesling Trail

Trail length: 35km

Extension length: 1km

What is required:

- road crossing on Horrocks Highway
- removal of trees and other weedy vegetation
- install drainage pipes and build trail to connect onto the existing trail on the western side of Horrocks Highway
- install warning signage at the Archer Street crossing in Auburn
- rework and stabilise sections of rubble base materials at various cuttings

Supporting infrastructure:

Off-road shared path suitable for cyclists and walkers. Car parking, drinking water tanks, public toilets, cellar doors, accommodation, retail stores, food outlets, cycle hire (standard bikes and e-bikes) and Clare VIC accessible directly from trail.

Signage and interpretation installed. Approx. 118 tourism businesses/attractions⁴⁷ accessible from the trail.

Current use:

From January to December 2020, the Riesling Trail recorded over 99,000 users. It is estimated that 60% of users are visitors and 40% are locals. In the year prior (and before COVID-19), over 78,000 users were recorded. Until recently the average annual increase of use of the trail was approximately 4%, however this increased dramatically in 2020 as a result of COVID-19 and the shift towards nature-based activities, with a 25% difference between 2020 and 2019.

Considerations:

- This project will complete the trail into Auburn and provide a safe pathway for all users as well as connect onto the Rattler Trail increasing the length of the trail and connecting it through to the Rattler Trail.
- Planning and construction of the Riesling Trail extension into Auburn will use the services of at least six local businesses.
- Friends of the Riesling Trail - a volunteer not for profit organisation/ Committee of Management Relies heavily on volunteer effort (500 hours).
- Instigated by Clear Valley Winemakers and funded by Office of Recreation and Sport and local donations.
- Strong sponsorship support through business partnership program (500 sponsors).
- Regional priorities for Clare Valley presented in the SA Regional Visitor Strategy 2025 align with and support development of the trail.
- \$160,000 of the \$320,843 was successfully funded by BBRF Round 2 in June 2020.
- Land owned by Minister for Sustainability, Environment & Conservation

⁴⁷ Excel Spreadsheet for Trail Sections by Distance Businesses Market Segment V2 (Supplied by Client)

Infrastructure requirements:

Final 1km section into Auburn, including construction of a bridge over the River Wakefield.

- Stabilise Rail corridor 2% cement, shape, compact & trim @ 300mm depth
- Sections of Rail Corridor existing path unsealed surface through cuttings
- Bridges, pine removal and road crossings

Investment required:

\$1,509,101 (Combined cost of all upgrades required to both Riesling and Rattler Trail) .

Section 1B: Auburn to Riverton – Extension of the Rattler Trail

Existing trail: Rattler Trail

Trail length: 19km

Extension length: TBA

What is required

Extension of off-road shared path following Horrocks Highway and Riverton Road. Smooth and compacted gravel surface.

Supporting infrastructure

Off-road shared path suitable for cyclists and walkers. Car parking, drinking water tanks, public toilets, cellar doors, accommodation, retail stores, food outlets, cycle hire (standard bikes and e-bikes) accessible directly from trail. Signage and interpretation installed. Approx. 118 tourism businesses/attractions⁴⁸ accessible from the trail.

⁴⁸ Excel Spreadsheet for Trail Sections by Distance Businesses Market Segment V2 (Supplied by Client)

⁴⁹ Rattler Trail Trakker Records provided by Rattler Trail Committee

Current Use: 20,672 total users were recorded on the Rattler Trail from January to December 2020. In the first quarter of 2021, users recorded at Auburn have remained similar to the corresponding time during 2020. Users recorded mid-trail and at Riverton however have increased substantially, indicating an increase in popularity and showing that more users are using the southern end of the Rattler Trail.⁴⁹

Considerations

- Strong community asset relies heavily on volunteer effort (500 hours)
- Established and managed by Riverton Community Management Committee (Volunteer) and funded by the Office of Recreation and Sport and local donations.
- Cellar doors, accommodation, retail stores, food outlets, cycle hire (standard bikes and e-bikes) and rest shelter at Rhynies old railway station.
- Approx. 50 tourism businesses/attractions⁵⁰ (when combined with Riverton to Tarlee Rail Trail). Bike hire in Auburn.
- Public toilets in local towns and nearby car parking spaces in Riverton, Rhynie and Auburn.
- Strong sponsorship support
- Regional priorities for Clare Valley presented in the SA Regional Visitor Strategy 2025 align with and support development of the trail.

Infrastructure requirements

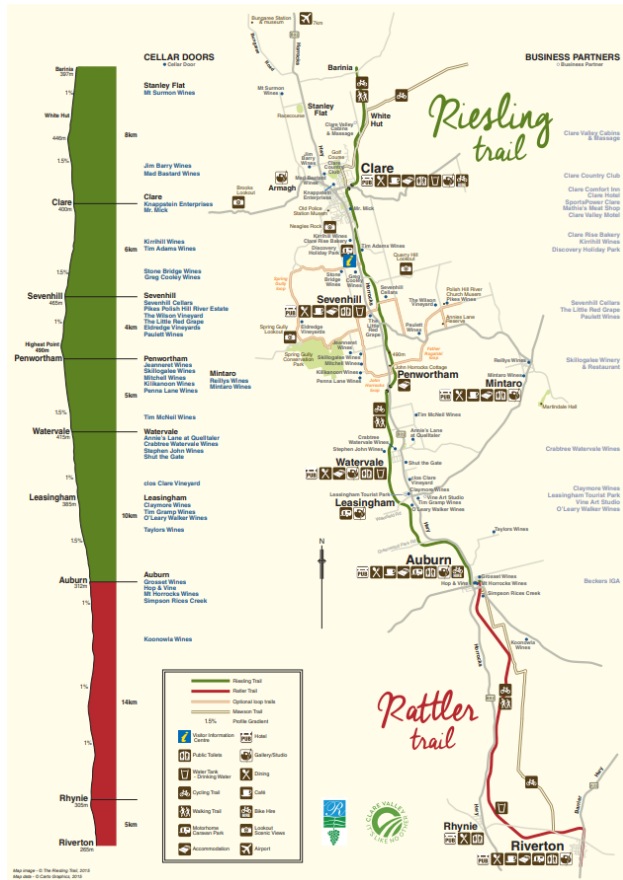
Compacted rubble – Drainage, fencing & sheeting rubble

Investment required

Combined cost of all upgrades required to both Riesling and Rattler Trail already included in the above Section 1A.

⁵⁰ Excel Spreadsheet for Trail Sections by Distance Businesses Market Segment V2 (Supplied by Client)

Section 1B: Auburn to Riverton



Source: Provided by Clare & Gilbert Valleys Council.

Section 1C: Riverton to Tarlee

Proposed link: Known as Riverton to Tarlee Rail Trail (until the boundary of Clare and Gilbert Valleys Council)

Extension length: 14.4 km

What is required:

Construction of an off road cycling and walking path within the disused rail corridor requiring preparation and construction of a new path connecting to the existing Rattler Trail in Riverton and beyond. The additional section of trail between Riverton & Tarlee with further connection to Kapunda. This section of trail will provide linkage to the Rattler Trail (Riverton) and Riesling Trail (Clare) to Kapunda (mining heritage) to the south east through to Barossa.

Supporting infrastructure

Various services at the towns of Riverton and Tarlee

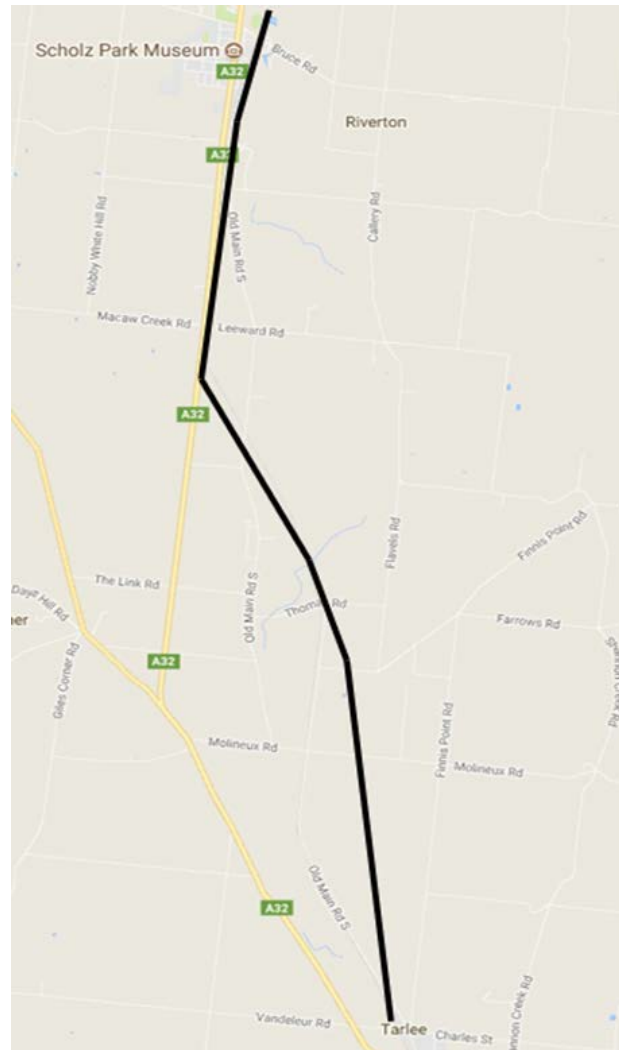
Current use

N/A

Considerations

- This section has no safe off road connection between the two towns
- Proposed connecting trail links and aligns with the Mawson Trail
- The existing Mawson Trail throughout the mid North region by-passes numerous local communities. These linkages will enable visitors using the Mawson Trail to access the small communities of Tarlee which has a Hotel and Bakery
- Land comprises of State rail corridor (redundant) and road reserves.
- Signage is necessary to direct cyclists from Tarlee to boundary of Light Regional Council Boundary

Section 1C: Riverton to Tarlee



Infrastructure requirements

- Remove of pest pines
- Removal of disused rail track & sleepers
- Weed control
- Mill & Stabilise existing ballast with 2% cement
- Shape, compact & trim @ 300mm depth
- Drainage crossing
- Signage.

Investment required = \$2,561,515



LIGHT REGIONAL COUNCIL

Section 2A: Tarlee to Kapunda

Proposed link: Proposed link

Extension length: 22km

What is required: Proposed link will utilise minor low-traffic gravel roads that link rural properties which are graded annually for general vehicle access. Surface will be similar to Mawson Trail. Toilets, shelter and access to Kapunda VIC. Signage and interpretation will be similar to Mawson Trail. On-road cycling

Supporting infrastructure

Various services at the towns of Tarlee and Kapunda

Current use

N/A

Considerations

- Connects Tarlee to Kapunda and intersects with the Mawson Trail.
- The Heyson, Mawson and Kidman Trails intersect in Kapunda and the additional of the Wine Trail will strengthen its positioning as a trail town and will support the new tourism plan and destination branding for Kapunda
- The Wine Trail presents a critical opportunity for the town and provides a critical link for visitors using the trail
- Council is seeking investment to activate the town's history with proposals for new attractions
- Northern Connector will make travel to Kapunda faster
- Kapunda Cycle Hub is currently under development. It will be located in the Town Square (corner of Main and Crase Streets). Facilities will include free Wi-Fi, seating, shelter and a drinking fountain. Public toilets are located nearby.

Infrastructure requirements

This section of trail will include formal rest shelters and view platforms and interpretive signage.

Investment required

\$773,520 (a per/km rate has been derived from the nearby Kapunda to Greenock Gravel Cycle Link estimate and applied to the Tarlee to Kapunda length).

Section 2B: Kapunda to North Para River council boundary

Proposed links:

- Swann Path Extension 2.3km
- Kapunda to Greenock Gravel Cycle Link 18km
- Greenock – Seppeltsfield – Marananga (GSM) - 15km.

Extension length: 35.3km

What is required:

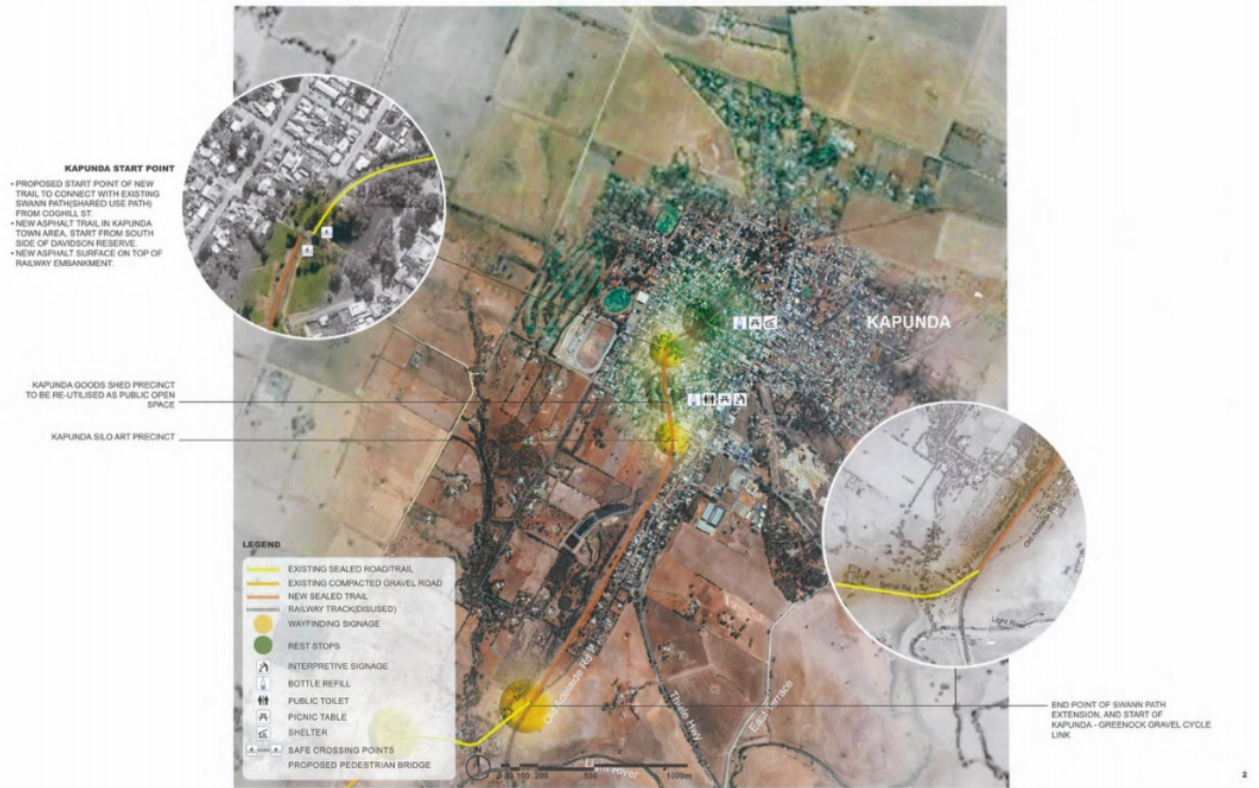
Three separate sections of trail that connect Kapunda with the Barossa combining gravel roads with sealed 2.5 metre wide shared cycleway.

Considerations

- Connects the Western Barossa and Kapunda to the existing cycle trail network in the Eastern and Southern Barossa (and beyond).
- BBRF Round 5 application recently lodged by Light Regional Council seeking \$4m from Australian Government and \$3.8m from State Government and private sector
- Estimated trail sections maintenance annual costs are Swann Path Extension \$5k, Kapunda-Greenock Gravel Cycle Link \$20k, Greenock Seppeltsfield Marananga GSM Trail \$25k
- The Benefit-cost ratio of this section of trail has been estimated at 4.35 at 7% Discount Rate.

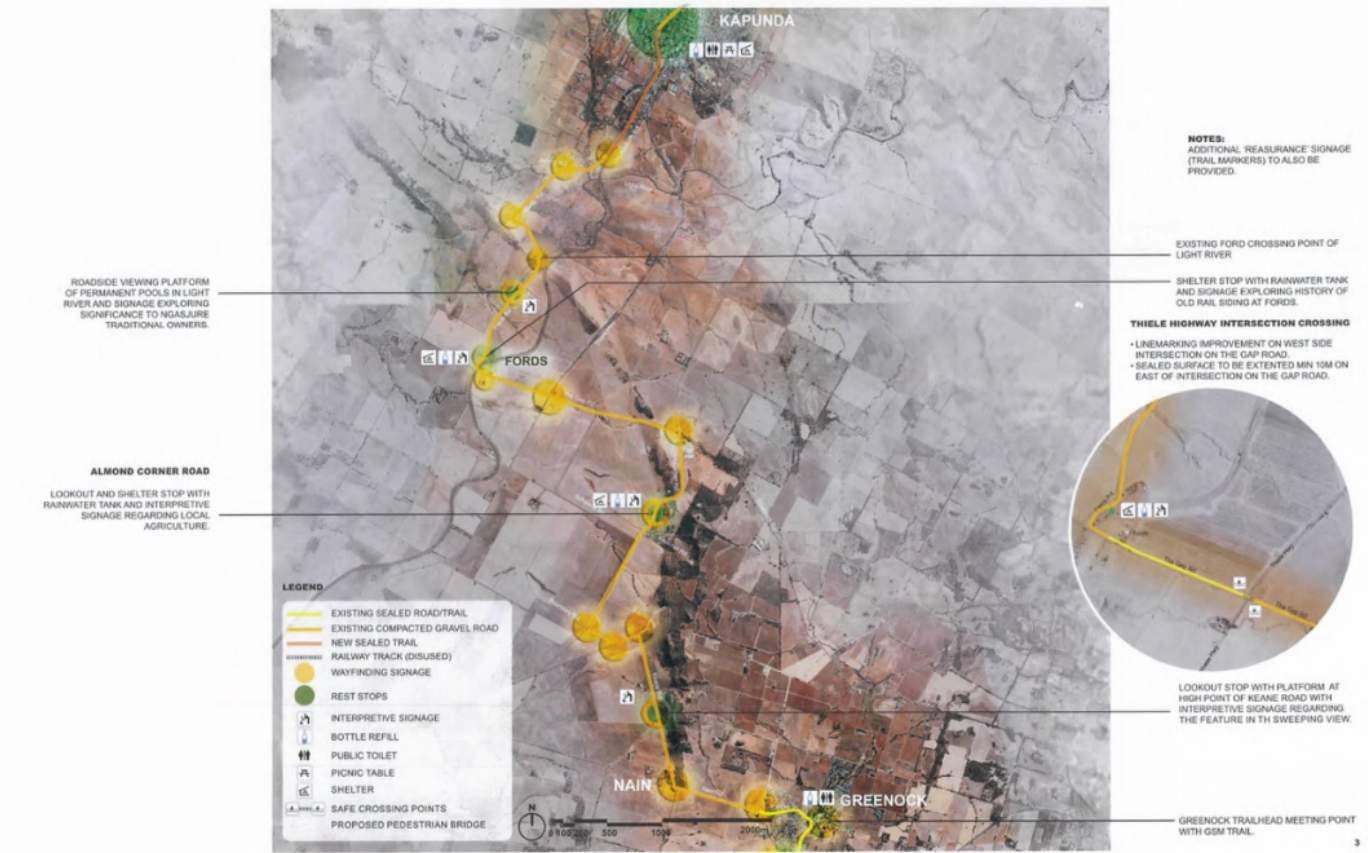
Section 2B: Kapunda North Para River boundary

SWANN PATH EXTENSION KAPUNDA - CONCEPT PLAN - WINE CAPITAL TRAIL



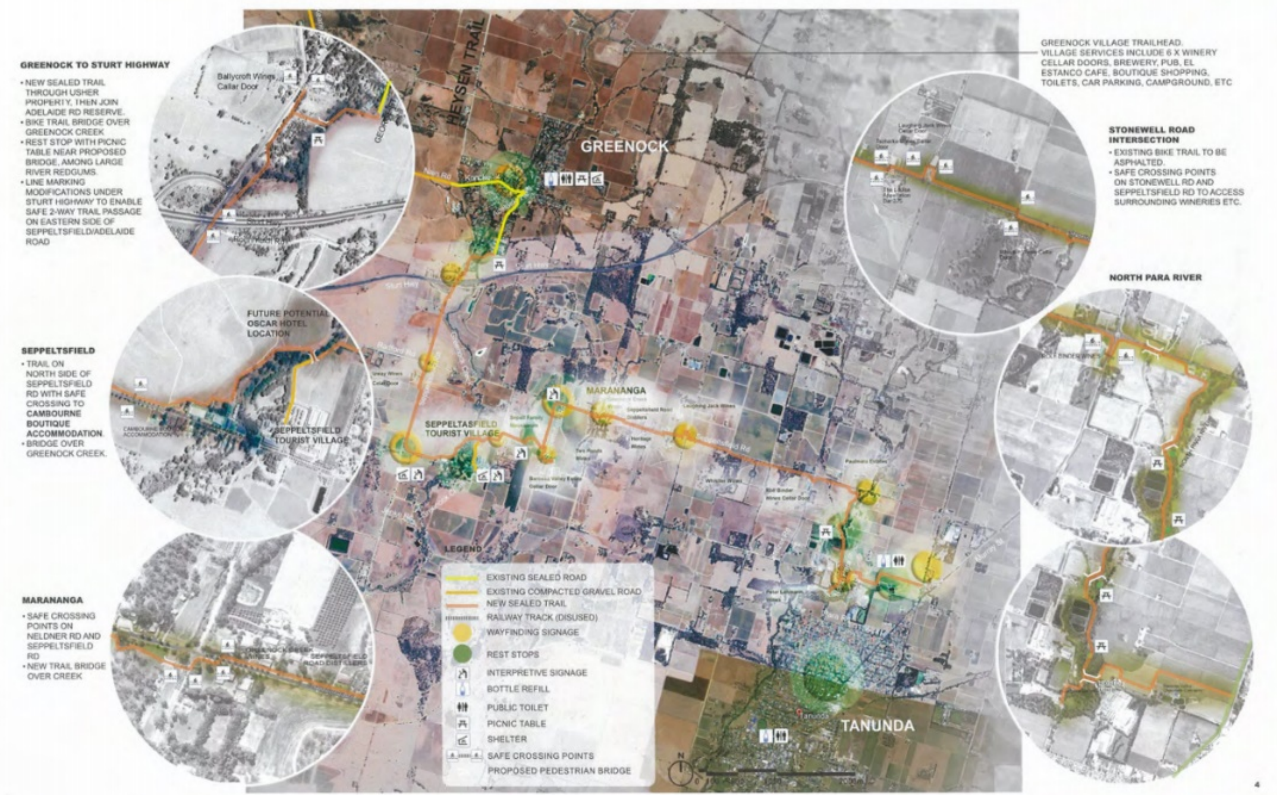
Source: Provided by Light Regional Council.

KAPUNDA - GREENOCK GRAVEL CYCLE LINK (KG GCL) - CONCEPT PLAN - WINE CAPITAL TRAIL



Source: Provided by Light Regional Council.

GREENOCK SEPELTSFIELD MARANANGA (GSM) TRAIL - CONCEPT PLAN - WINE CAPITAL TRAIL



Source: Provided by Light Regional Council

LGA 3: THE BAROSSA COUNCIL

Section 3A: North Para River council boundary to Kroemer Crossing

Proposed link: From the Barossa Council North Para River boundary, via Barossa Valley Chocolate Company to connect to the Barossa Trail at Kroemer Crossing.

Extension length: 1.6km

What is required:

Sealed surface and Signage / interpretation

Supporting infrastructure:

Car parking, public toilets, cellar doors, accommodation, retail stores, food outlets and Barossa VIC accessible directly from the Barossa Trail. Barossa Cycle Hub facilities in Tanunda include bike hire (standard hybrid bikes and e-bikes), showers, public toilets, bike maintenance station, bike accessories, drinking fountain, picnic tables and shelter. Signage and interpretation installed.

Investment required = \$429,991

Section 3B: Kroemer Crossing to Lyndoch

Existing trail: Barossa Trail

Trail length: 15km

Supporting infrastructure

Mostly an off-road sealed shared-use path, with a very small section shared with road. Car parking, public toilets, cellar doors, accommodation, retail stores, food outlets and Barossa VIC accessible directly from the Barossa Trail. Barossa Bike Hub facilities in Tanunda include bike hire (standard hybrid bikes and e-bikes), showers, public toilets, bike maintenance station, bike accessories, drinking fountain, picnic tables and shelter. Signage and interpretation installed.

Section 3C: Lyndoch to Williamstown

Proposed link:

Extension length: 8km

What is required:

Proposed link via a sealed path in the road reserve along Lyndoch Valley Road. Car parking, public toilets, cellar doors, accommodation, retail stores, food outlets and cycle hire (standard bikes). Signage and interpretation will need to be installed. Off-road shared path.

Investment required = \$3,151,172

Section 3D: Williamstown to Mount Pleasant

Proposed link: Route via Mount Crawford. Proposed link using a combination of compacted gravel path, forest access tracks and gravel roads. Mixture of off-road shared path and on-road cycling.

Extension length: 29km

What is required:

Signage and interpretation will need to be installed.

Supporting infrastructure:

Various services at the towns of Williamstown and Mount Pleasant

Current use:

N/A

Considerations

Proposed alignment subject is subject to final Council approval and endorsement by ForestrySA and SA Water.

Consultation has taken place with the necessary authorities and adjoining landowners.

Costs are indicative and will be subject to adopted procurement processes and available resources at the time of construction.

Typical cross sections of path are indicative and subject to onsite changes once the preferred alignment approved, pegged and final width are determined.

Infrastructure requirements

Signage and interpretation will need to be installed.

Investment required = \$1,098,241

Section 3E: Mount Pleasant to The Barossa Council boundary near Birdwood

Proposed link: Known as Mount Pleasant to Birdwood Rail Trail or Amy Gillett Bikeway Stage 5

Extension length: 5.2km

What is required

Supporting infrastructure: Proposed link to be constructed already known as 'Amy Gillett Bikeway Stage 5'. Sealed surface. Off-road shared path.

Investment required = \$1,170,104

Section 3A: North Para River boundary to Kroemer Crossing



Council Boundary – North Para River Via Chocolate Factory collecting Barossa Path Section Kroemer Crossing – Tanunda 1.6 kms

Source: Provided by The Barossa Council

Section 3C: Lyndoch to Williamstown

(Includes proposed alignment through the towns of Lyndoch and Williamstown)



Source: The Barossa Council



Williamstown Trail Section

2.6 kms

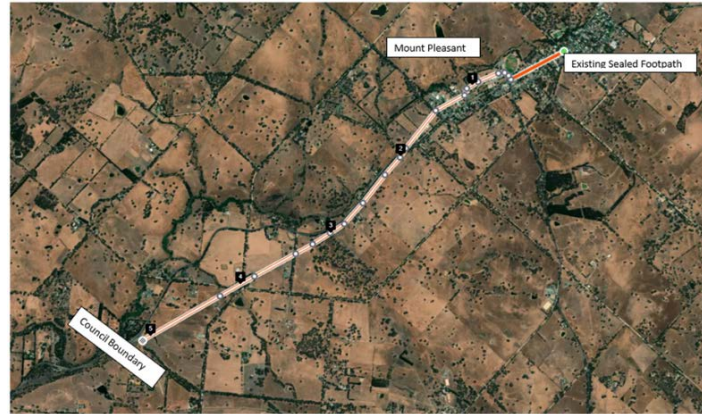
Source: The Barossa Council

Section 3D: Williamstown to Mount Pleasant



Source: The Barossa Council

Section 3E: Mount Pleasant to The Barossa Council boundary near Birdwood



Source: The Barossa Council

ADELAIDE HILLS COUNCIL

Section 4A: Adelaide Hills Council boundary near Birdwood to Birdwood

Proposed link: Known as Mount Pleasant to Birdwood Rail Trail or Amy Gillett Bikeway Stage 5

Extension length: 3.8km

Supporting infrastructure: Proposed link to be constructed already known as 'Amy Gillett Bikeway Stage 5'. Sealed surface. Off-road shared path.

Investment required

\$2,829,896 (Conceptual costing by Adelaide Hills Council based on a total cost of \$4 million between Birdwood and Mount Pleasant for the full length across both Adelaide Hills Council and The Barossa Council sections – 3E and 4A).

Section 4B: Birdwood to Mount Torrens

Proposed link: Known as Birdwood to Mount Torrens Rail Trail or Amy Gillett Bikeway Stage 4 (corner of Onkaparinga Valley Way and Bleeze Street through to Mount Torrens).

Extension length: 6km

What is required

Supporting infrastructure: Proposed link to be constructed already known as 'Amy Gillett Bikeway Stage 4'. Sealed surface. Off-road shared path.

Investment required

\$2,600,000 (This successful funding was announced in October 2020. It has taken 6 years to get this next stage underway).

Section 4C: Mount Torrens to Oakbank

Existing trail: Known as Amy Gillett Bikeway. Utilising the existing Amy Gillett Bikeway Stages 1, 2 and 3 which were developed between 2010 and 2014.

Trail length: 16km

Supporting infrastructure:

Sealed surface. Car parking, public toilets, cellar doors, accommodation, retail stores, food outlets, cycle hire (standard bikes and e-bikes). Signage and interpretation installed. Off-road shared path.

Investment required

NIL

Section 4D: Oakbank to Balhannah

Proposed Link: Proposed link from southernmost Amy Gillett Bikeway trailhead to Balhannah town utilising mixture of shared sidewalk and on-road cycling.

Extension length: 2.4 km

Supporting infrastructure: Car parking, public toilets, cellar doors, accommodation, retail stores and food outlets. Signage and interpretation will need to be installed. Mixture of off-road shared path and on-road cycling.

Current use

See information in Section 4C related to Amy Gillett Bikeway.

Investment required

\$84,384 (as no investigations have been made by Adelaide Hills Council for this section of the trail a per/km rate has been derived from the Kapunda to Greenock Gravel Cycle Link estimate and applied to the Oakbank to Balhannah length)

Section 4E: Balhannah to Adelaide Hills Council boundary near Hahndorf

Proposed link: Proposed link from Onkaparinga Valley Road to Hahndorf utilising on-road cycling route via Nepenthe and Shaw and Smith cellar doors (i.e. Jones Road).

Extension length: 5.8 km

What is required

Supporting infrastructure

Adelaide Hills cellar doors

Investment required

\$203,928 (as no investigations have been made by Adelaide Hills Council for this section of the trail a per/km rate has been derived from the Kapunda to Greenock Gravel Cycle Link estimate and applied to the Balhannah to Adelaide Hills Council boundary near Hahndorf length)

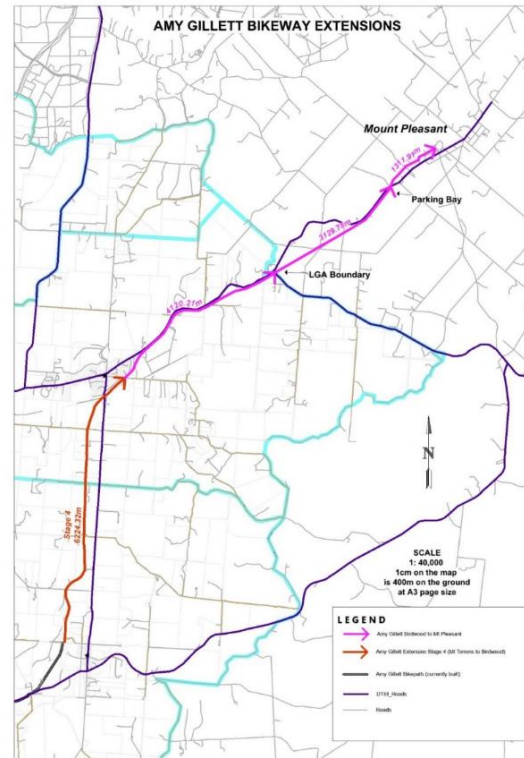
Section 4A: Adelaide Hills Council boundary near Birdwood to Birdwood

To be determined by the Adelaide Hills Council.

Section 4B: Birdwood to Mount Torrens

To be determined by the Adelaide Hills Council.

Section 4C: Mount Torrens to Oakbank

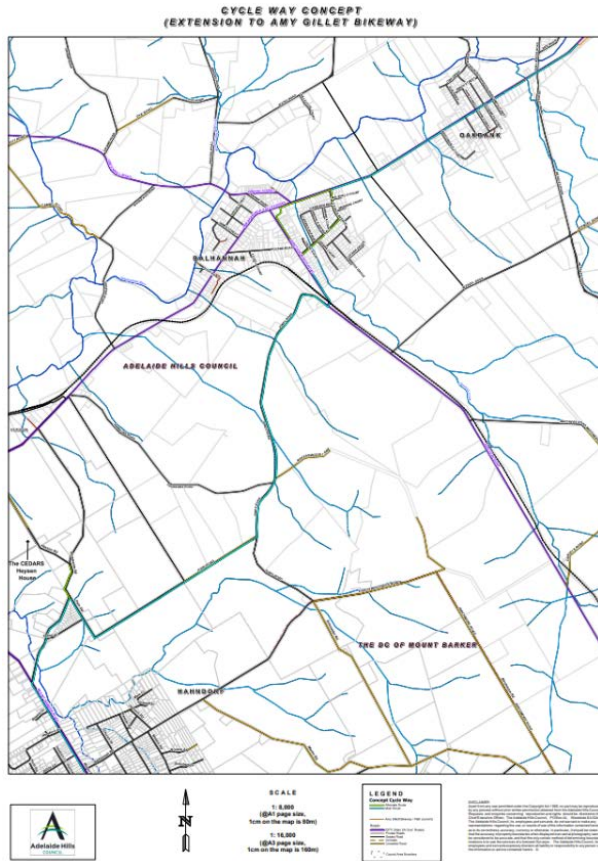


Source: Adelaide Hills Council

Section 4D: Oakbank to Balhannah

To be determined by the Adelaide Hills Council.

Section 4E: Balhannah to Adelaide Hills Council boundary near Hahndorf



Source: Adelaide Hills Council

DISTRICT COUNCIL OF MOUNT BARKER

Section 5A: District Council of Mount Barker boundary near Hahndorf to Mount Bold Reservoir Reserve

Proposed link:

Extension length: 7.5km

What is required:

Shoulder widening on existing made road

Signage

Investment required

\$1,095,000

(Ballpark costing by City of Onkaparinga using data from other projects – likely to be slightly higher as estimated over a year ago).

Section 5B: Mount Bold Reservoir Reserve

Proposed link: Connecting Hahndorf and McLaren Vale through Mount Bold Reservoir Reserve

Extension length: 17.6km

What is required:

Existing firetrack upgrades

Shoulder widening on existing made road

Supporting infrastructure: Proposed link via Mount Bold Reservoir Reserve fire tracks or other identified opportunities as required

Investment required

Detailed scoping, planning, costings and approval from SA Water is required

Nine of SA Water’s reservoir reserves have been progressively opened to provide recreation opportunities, including Mount Bold Reservoir Reserve, however with only access to a lookout, trails would offer more scope for activities to be enjoyed by the public and visitors.

The Mount Bold Reservoir Reserve section of the trail will require the District Council of Mount Barker, City of Onkaparinga and SA Water working together to progress the initiative and identify the best trail opportunities to showcase the reserve. Potentially this section of the trail may also involve the Department of Environment and Water.

Current use

Although no current user data is available for this proposed section of the Wine Trail, it is useful to look at the data from other nearby trails which feed into the area (similarly to how this section of the trail would feed into the Shiraz Trail in Section 6B).⁵¹

Coast to Vines Rail Trail (counter location in Seaford) – 77,712 users were recorded in 2020 with the highest monthly count in January of 10,088 users. 2020 has seen a 33% increase in patronage compared to 2019.

Coast Trail (counter location in Port Noarlunga) – 93,035 users were recorded in 2020 with the highest monthly count in April of 14,355 users. 2020 has seen a 51% increase in patronage compared to 2019.

Patrick Jonker Veloway – 67,998 users were recorded in 2020 with the highest monthly count in January of 8,794 users.

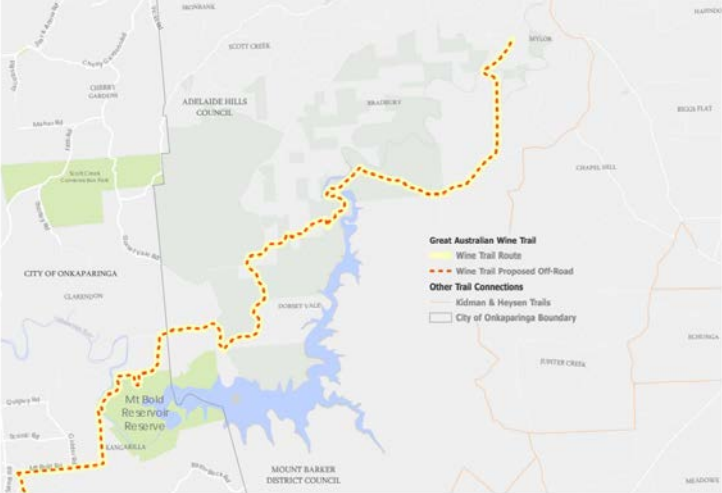
Section 5A: District Council of Mount Barker boundary near Hahndorf to Mount Bold Reservoir Reserve

ADELAIDE HILLS WINE TRAIL



Source: District Council of Mount Barker

Section 5B: Mount Bold Reservoir Reserve



Source: City of Onkaparinga

LGA 6: CITY OF ONKAPARINGA

Section 6A: Mount Bold Reservoir Reserve (City of Onkaparinga boundary) to McLaren Vale (Field Street intersection)

Proposed Link: Northern option via Chapel Hill Road (which includes the Onkaparinga River National Park, Chaffeys Road, Olivers Road and Field Street, connecting to the Coast to Vines, Flat to Vale and Shiraz Trails in McLaren Vale.

Extension length: 20.1km

What is required

Existing firetrack upgrade on SA Water land

Existing firetrack upgrade on unmade road reserve

Shared Use Path (SUP) construction (private land)

Existing firetrack upgrade on Department for Environment and Water land

SUP construction (road verge and private land)

Shoulder widening on existing made road

Supporting infrastructure

Mount Bold Reservoir Reserve

Onkaparinga River National Park

A number of restaurants, cafes, winery, brewery and distillery cellar doors including the internationally acclaimed and iconic d'Arenberg Cube

Seaview Road approved large scale luxury accommodation development

Considerations

Land management agreements may need to be undertaken

All costings are estimates based on high level assumptions, given the diversity of stakeholders involved and are likely to be slightly higher as estimated over a year ago

City of Onkaparinga's preference is for SUP wherever possible to ensure a higher level of safety for cyclists and other road users

Investment required = \$5,384,000

Section 6B: McMurtrie Road connection from existing Shiraz Trail

Existing trail: Shiraz Trail (part of the broader Coast to Vines Rail Trail).

Trail length: 3km

What is required: An opportunity exists to connect the McMurtrie Mile wine and food cluster from the Shiraz Trail. A shared use path along McMurtrie Road until Hunt Road is proposed.

Supporting infrastructure:

Within immediate access from McMurtrie Road are the cellar doors of Primo Estate, Hugh Hamilton, Mitolo, Lino Ramble, Bondar Wines, Sherrah Wines, Samson Tall, Wirra Wirra and Red Poles.

Wirra Wirra are partnering with a developer to build the first five star accommodation of scale in the McLaren Vale wine region and the first integrated winery resort of its type in South Australia. The \$30 million hotel concept has received development approval and will be built around the theme of health and wellness, targeting both international and domestic travellers. This will offer a direct trail connection.

Current use:

The Shiraz Trail currently receives around 45,000 users per annum. This will grow through the McMurtrie Road connection, expanding upon the food and wine offering.

Considerations

Potentially not as many cellar doors accessible directly from the Shiraz Trail as what visitors may assume, therefore other options to access cellar doors, cafes and restaurants would be beneficial

Land management agreements may need to be undertaken to support the preferred shared use path option

All costings are estimates based on high level assumptions, given the diversity of stakeholders involved and are likely to be slightly higher as estimated over a year ago

City of Onkaparinga's preference is for off road shared use paths wherever possible to ensure a high level of safety for cyclists and other road users. Works will require staging with priority given to existing high density wine tourism areas and key connections to McLaren Vale, Willunga and the coast.

Investment required

Total \$2,146,000

Section 6C: Willunga to Sellicks Beach via Aldinga

Proposed link: a new section of trail providing a safe route from the end of the Shiraz Trail at Willunga to Sellicks Beach via Aldinga, creating the Wine Trail's unique connection to the coast. The trail will provide commuter, recreation and tourism connections between the iconic townships as well as the cultural and environmentally significant Aldinga Scrub Conservation Park which now includes the Aldinga Washpool.

Extension length: 13.3km

What is required

A new shared use path (SUP) from the start/end point of the Shiraz Trail in Willunga along Aldinga Road which would then join the low-traffic Flour Mill Road and providing access to the thriving Aldinga township. The trail would continue via an existing SUP, which is adjacent to the Aldinga Payinthi College

(regional super school) which requires a small section to be completed to enable connection to the coast at Aldinga Beach.

In addition, a new multi-use trail from the start/end point of the existing Aldinga path network is required to connect the coastal suburb of Sellicks Beach. The trail will be located on the eastern boundary of the Aldinga Scrub Conservation Park and then join the low-traffic Cox Road which will provide access to Norman Road. Current mapping suggests a SUP adjacent Justs Road, however this may be redirected through the Washpool in the Aldinga Scrub Conservation Park. Any alignment in the Washpool is subject to agreement by the Department of Environment and Water (landowner) and relevant environmental and cultural stakeholders.

Supporting infrastructure:

The trail passes through the Aldinga township offering fabulous street art, boutiques, iconic Adelaide fashion house, cafés, restaurants, coffee roaster, provedore, bakery, ice creamery, brewery, wine bar and fully renovated pub.

The small trail section to be completed between Aldinga and Aldinga Beach creates a direct link to the coast, enabling a unique opportunity for the Great Australian Wine Trail.

In addition, the trail from Aldinga to Sellicks Beach incorporates the spectacular natural coastal attraction of the Aldinga Scrub Conservation Park including the Aldinga Washpool, which is of great spiritual and cultural significance for the Kurna people.

Considerations:

Given the proposed upgrade to Main South Road by the State Government, this section of trail will need to respond to the requirements of the upgrade.

Investment required

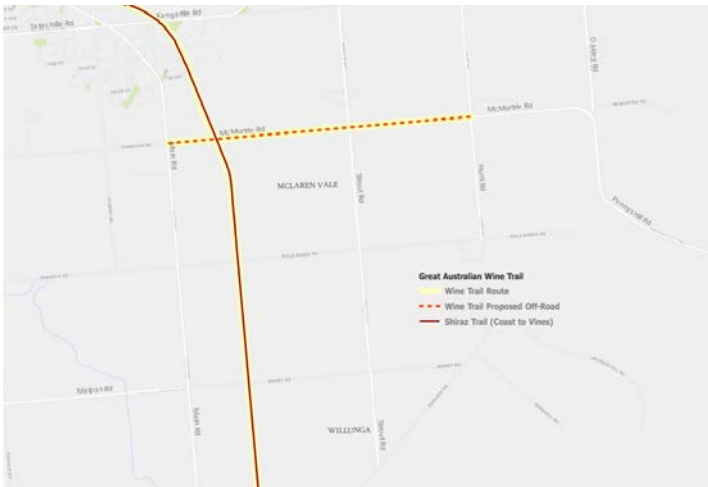
\$5,300,000 based on initial concepts which include a combination of SUP's, off road and existing on-road options. However this is still under investigation and costings may change. Updated costings are to be provided when available.

Section 6A: Mount Bold Reservoir Reserve (City of Onkaparinga boundary) to McLaren Vale (Field Street Intersection)



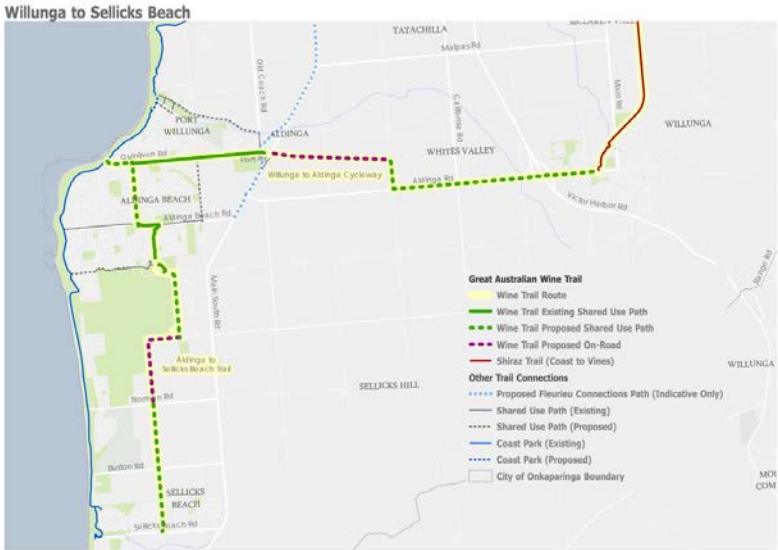
Source: City of Onkaparinga

Section 6B: McMurtrie Road connection from existing Shiraz Trail

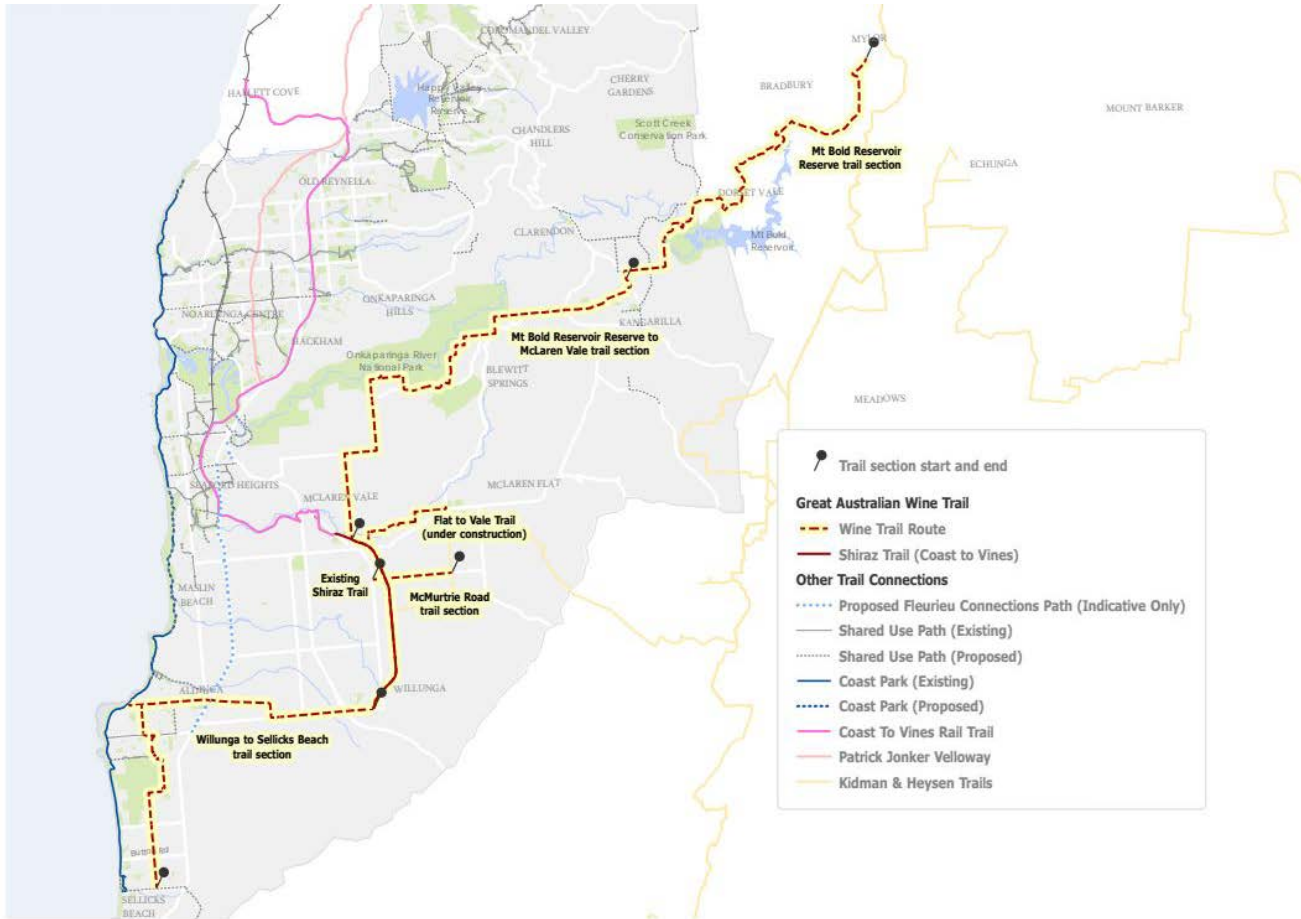


Source: City of Onkaparinga

Section 6C: Willunga to Sellicks Beach via Aldinga



Overview of all trail sections



APPENDIX 6 – ECONOMIC IMPACT ASSESSMENT

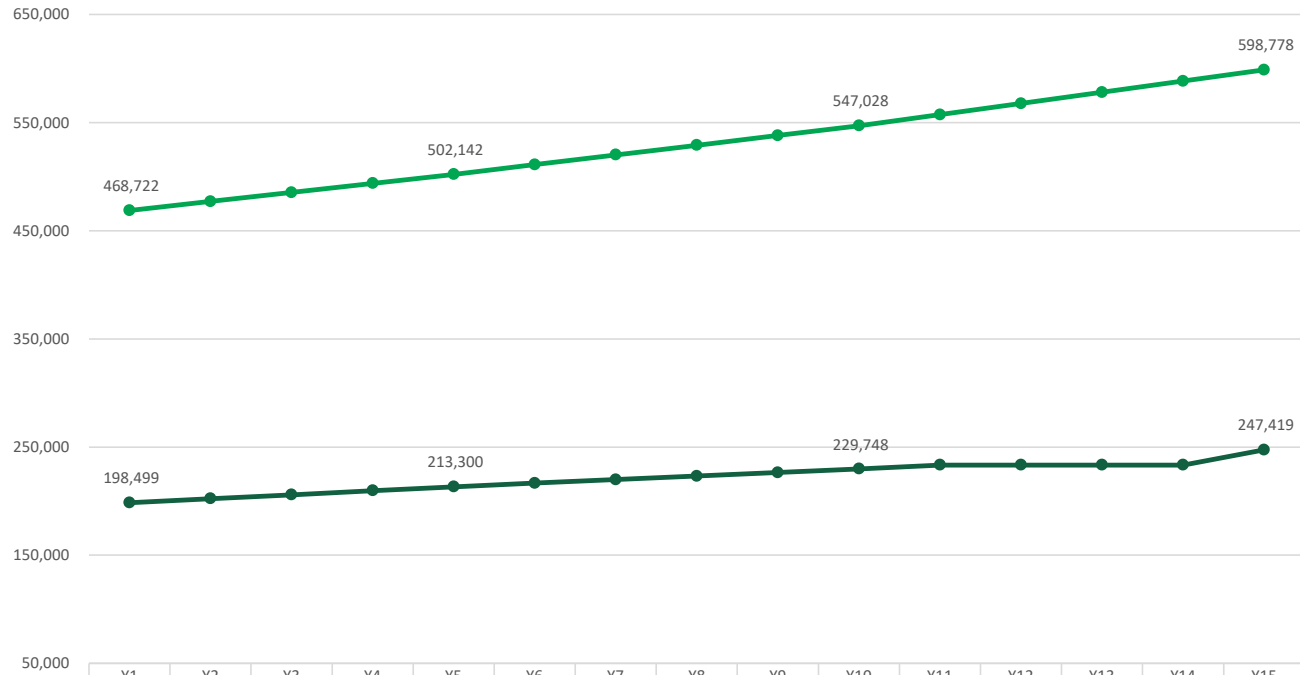
Table 24. The Wine Trail User Modelling Assumptions

Trail User	Modelling Assumptions
Local Users	
Local residents (6 LGAs)	<p>Number of bike users are estimated based on population estimates for each year.</p> <p>A study for North East Victoria study indicated that 3.9% of population ride on trails.⁵¹ This was applied to the population estimates for each LGA to derive an estimate of potential users.</p> <p>Trail users numbers were based on the assumption of the percentage of potential users, who would use the Wine Trail. This was assumed to be 40% in Year 1, increasing to 50% over time.</p> <p>Locals are assumed to use the trail an average of <u>20 times</u> per year.</p> <p>Growth over the 15 years is based on projected growth in the LGA populations and the increase in incidence of using the trail.</p> <p>User mix: 80% day visitors; 20% overnight visitors.</p> <p>Average Length of stay overnight visitors = 1 night</p>
Tourists	
Intrastate Tourist Visitors	<p>Estimates are based on the 2019 TRA visitor data for the 4 Regions: Clare Valley; Barossa; Adelaide Hills; and McLaren Vale.</p> <p>20% of intrastate visitors assumed to use the trails and average 2 rides on the trail during their visit/stay.</p> <p>Annual growth of <u>1.5%</u> per year in visitors numbers is assumed over the 15-year period.</p> <p>User mix: 60% day visitors; 40% overnight visitors.</p> <p>Average Length of stay overnight visitors = 2 nights</p>
Interstate Tourist Visitors	<p>Based on TRA visitor data for the 4 Regions: Clare Valley; Barossa; Adelaide Hills; and McLaren Vale.</p> <p>25% of interstate visitors assumed to use the trails and average 2 rides on the trail during their visit/stay.</p> <p>Annual growth of <u>1.5%</u> per year in visitors numbers is assumed over the 15-year period.</p> <p>User mix: 60% day visitors; 40% overnight visitors.</p> <p>Average Length of stay overnight visitors = 2 nights</p>
International Visitors	<p>Based on TRA visitor data for the 4 Regions: Clare Valley; Barossa; Adelaide Hills; and McLaren Vale.</p> <p>30 % of international visitors assumed to use the trails and average 2 rides on the trail during their visit/stay.</p> <p>Annual growth of <u>1.5%</u> per year in visitors numbers is assumed over the 15-year period.</p> <p>User mix: 60% day visitors; 40% overnight visitors.</p> <p>Average Length of stay overnight visitors = 3 nights</p>

⁵¹ North East Victoria Cycling Optimisation Masterplan, June 2018 - Urban Enterprise (for Tourism North East and Regional Development Victoria). This is a public document.

Figure 14. The Wine Trail Visitors/Users - Base Case (medium) Projected visitors & rides (annual)

The following are the estimates of total visitors to the trails (locals and tourists) and the total annual rides on the trail.⁵² Rides on the Wine Trail increase from around 467,000 in Year 1 to around 599,000 in Year 15.



	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	Y12	Y13	Y14	Y15
Trail Visitors - Base Case (Medium)	198,499	202,199	205,900	209,600	213,300	216,590	219,879	223,169	226,458	229,748	233,282	233,282	233,282	233,282	247,419
Rides on Trail - Base Case (Medium)	468,722	477,077	485,432	493,787	502,142	511,119	520,096	529,074	538,051	547,028	557,378	567,728	578,078	588,428	598,778

Source: MCA Modelling & Analysis, April 2021

⁵² Rides are based on the average number of rides (e.g. local residents of the 6 LGAs an average of 20 per year; and tourist visitors an average of 2 rides during their stay).

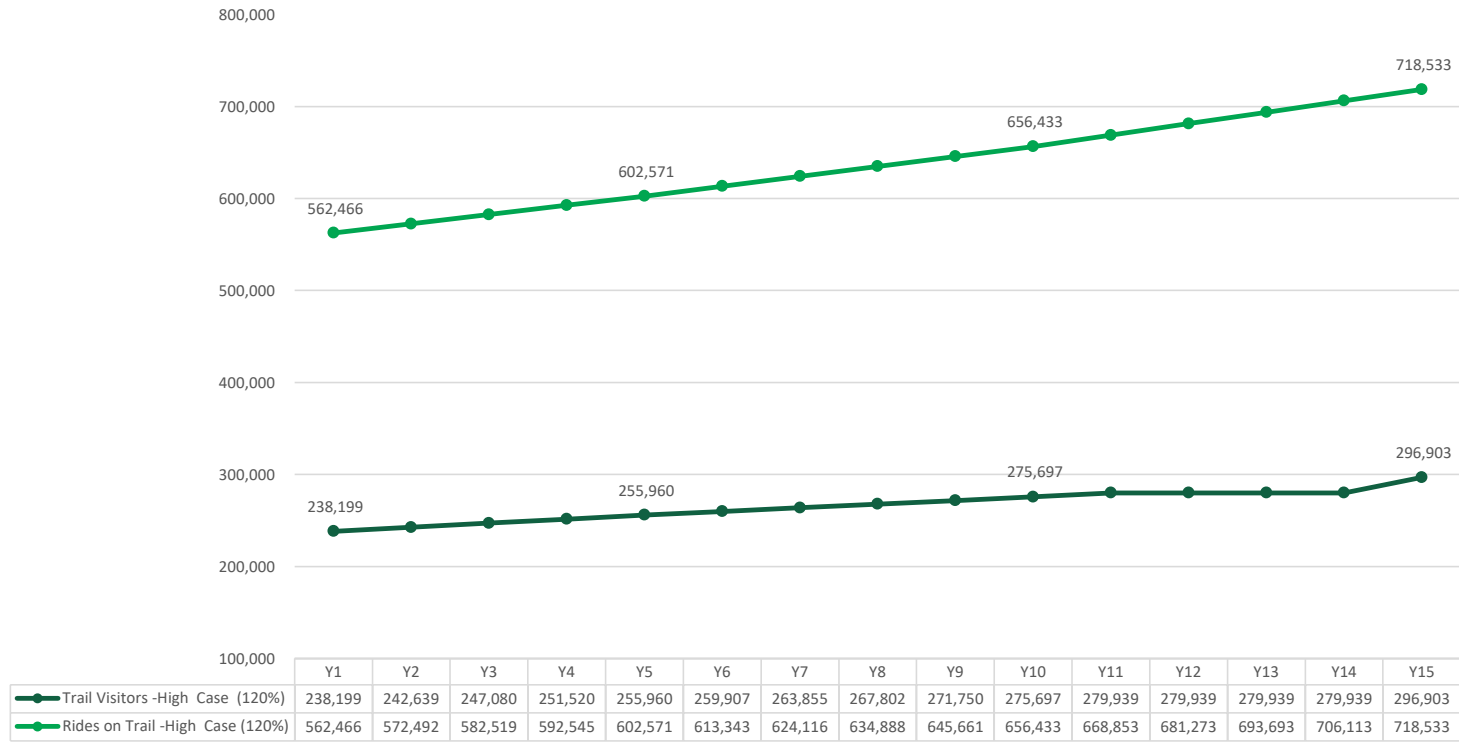
Table 25. Wine Trail Use Estimates – Base Case (Selected Years)

Base Case (Medium)												
Selected Years	Bike Riders – who use Trails				Visitors to Wine Trail				Total Rides on Wine Trail			
	Y1	Y5	Y10	Y15	Y1	Y5	Y10	Y15	Y1	Y5	Y10	Y15
Summary - Local Users									Ave 20 Rides per year			
Onkaparinga (C)	2,180	2,435	2,703	2,957	872	974	1,217	1,478	17,441	19,477	24,330	29,570
Adelaide Hills (DC)	1,546	1,545	1,542	1,541	618	618	694	771	12,368	12,357	13,875	15,412
Barossa (DC)	990	1,033	1,074	1,109	396	413	483	554	7,916	8,262	9,664	11,087
Clare and Gilbert Valleys (DC)	372	384	396	405	149	154	178	202	2,974	3,074	3,561	4,046
Light (RegC)	620	663	708	752	248	265	319	376	4,961	5,305	6,375	7,518
Mount Barker (DC)	4,254	4,432	4,603	4,786	1,702	1,773	2,072	2,393	34,031	35,459	41,431	47,856
Total 6 LGAs	9,962	10,492	11,026	11,549	3,985	4,197	4,962	5,774	79,693	83,936	97,456	115,488
Tourist Visitors									Ave 2 rides per visit			
Intrastate - Total	102,841	110,555	118,846	127,760	102,841	110,555	118,846	127,760	205,683	221,109	237,692	255,519
Interstate - Total	79,073	85,004	91,379	98,232	79,073	85,004	91,379	98,232	158,146	170,007	182,758	196,465
International - Total	12,600	13,545	14,561	15,653	12,600	13,545	14,561	15,653	25,200	27,090	29,122	31,306
Total – Tourist Visitors	194,515	209,103	224,786	241,645	194,515	209,103	224,786	241,645	389,029	418,206	449,572	483,290
Total All Users	204,476	219,595	235,812	253,194	198,499	213,300	229,748	247,419	468,722	502,142	547,028	598,778

Source: MCA Modelling & Analysis, April 2021

Figure 15. The Wine Trail Visitors/Users - High Case (120% of Base Case Projected Visitors & Rides (annual)

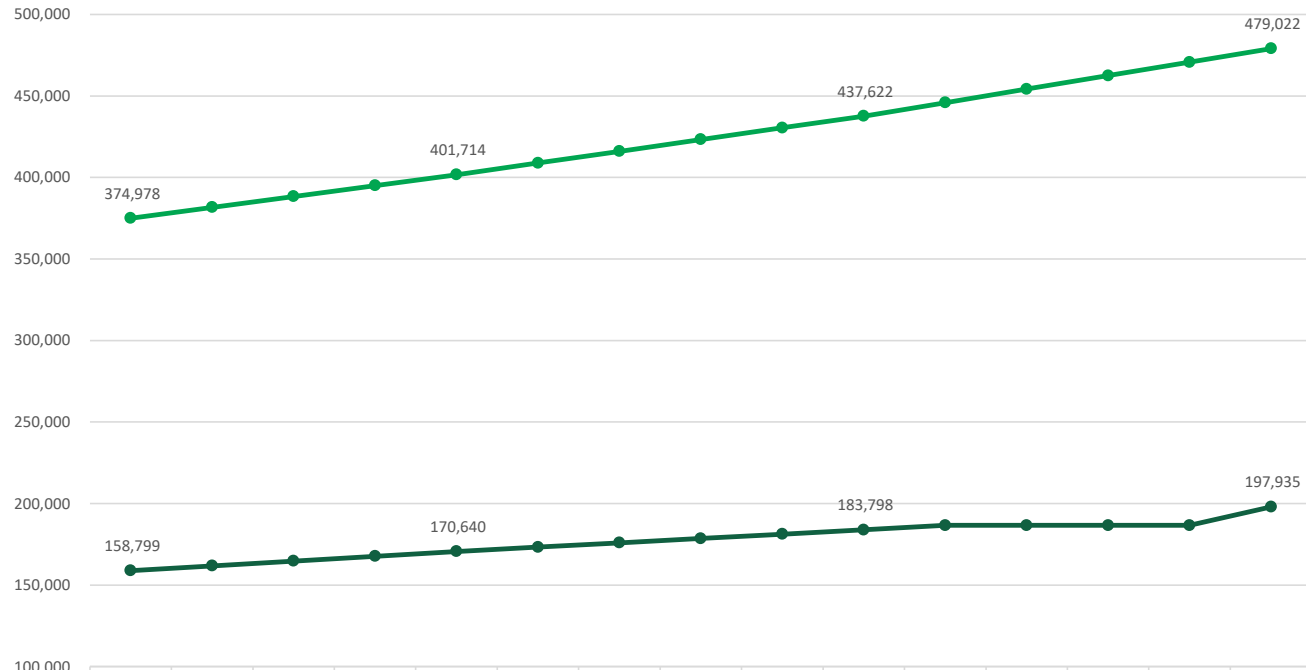
The High Case is 120% of the Base Case. The following chart shows projections for visitors and total annual rides. Annual rides on the trail increase from around 562,500 in Year 1 to 718,533 in Year 15.



Source: MCA Modelling & Analysis, April 2021

Figure 16. The Wine Trail Visitors/Users – Low Case (80% of Base Base) Projected Visitors & rides (annual)

The Low Case is 80% of the Base Case (Medium). The following chart shows projections for visitors and rides. Annual rides on the trail increase from around 375,000 in Year 1 to around 479,000 in Year 15.

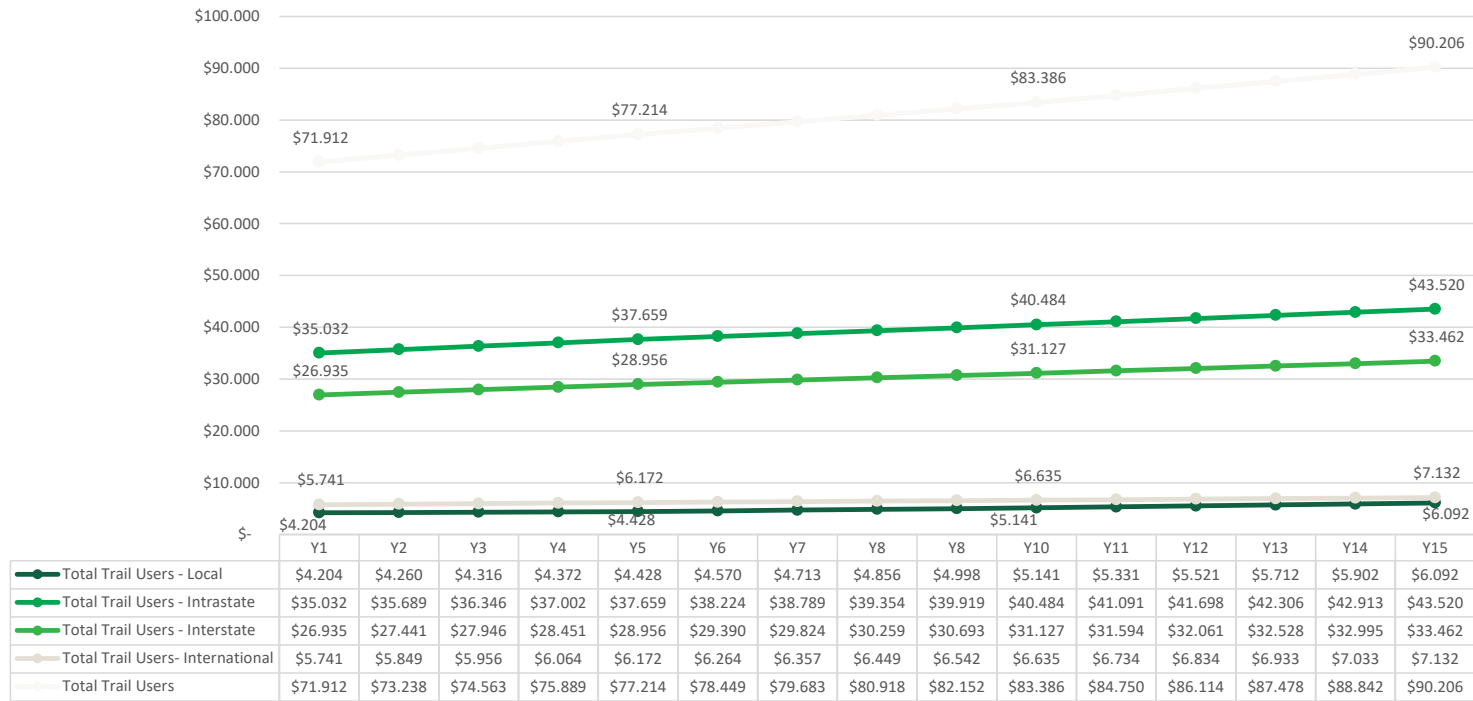


	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	Y12	Y13	Y14	Y15
Trail Visitors -Low Case (80%)	158,799	161,760	164,720	167,680	170,640	173,272	175,903	178,535	181,167	183,798	186,626	186,626	186,626	186,626	197,935
Rides on Trail -Low Case (80%)	374,978	381,662	388,346	395,030	401,714	408,895	416,077	423,259	430,441	437,622	445,902	454,182	462,462	470,742	479,022

Source: MCA Modelling & Analysis, April 2021

Figure 17. Base Case – The Wine Trail User expenditure in region by user type (\$m 2021 prices)

For the Base Case, total expenditure increases from \$71.9 million in year 1 to \$83.4 million in year 10 and \$90.2 million in year 15. The major contributors to expenditure in the region are tourist visitors (interstate and intrastate) and in year 10 account for \$31.1 million (interstate) and \$40.5 million (intrastate).



Source: MCA Modelling & Analysis, April 2021

The following shows the expenditure for total day visitors and overnight visitors. In year 10, day visitors account for expenditure of \$27.2 million and overnight visitors for \$56.2 million. Overnight visitors represent 67% of the expenditure in the areas adjacent to the trails.

Figure 18. Base Case – The Wine Trail User expenditure in region by user type (\$m 2021 prices)



Source: MCA Modelling & Analysis, April 2021

Figure 19. High Case – The Wine Trail User expenditure in region by trail users (\$m 2021 prices)

For the High Case total expenditure increases from \$86.3 million in year 1 to \$100.1 million in year 10. Trail users who are overnight visitors account for around 67% of the expenditure in the areas adjacent to the trails.

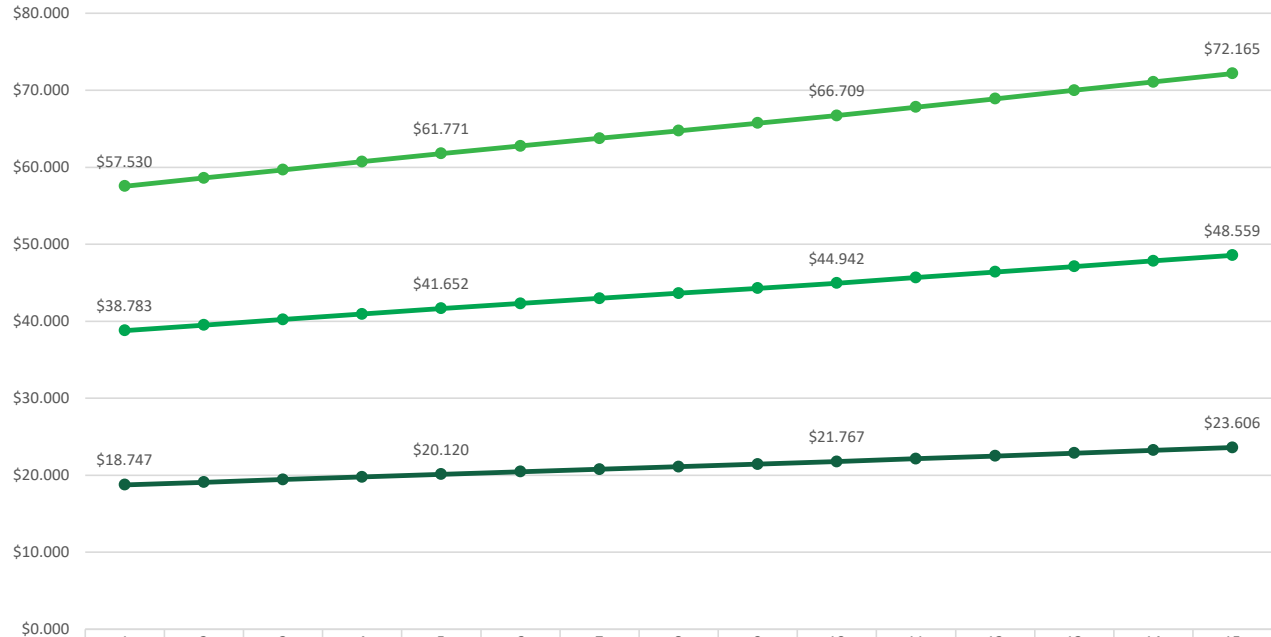


	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y8	Y10	Y11	Y12	Y13	Y14	Y15
Day Visitors	\$28.120	\$28.635	\$29.150	\$29.665	\$30.180	\$30.674	\$31.168	\$31.662	\$32.157	\$32.651	\$33.203	\$33.754	\$34.306	\$34.857	\$35.409
Overnight Visitors	\$58.174	\$59.250	\$60.326	\$61.402	\$62.477	\$63.464	\$64.452	\$65.439	\$66.426	\$67.413	\$68.498	\$69.583	\$70.668	\$71.753	\$72.838
High Case - All Trail Users	\$86.295	\$87.885	\$89.476	\$91.066	\$92.657	\$94.138	\$95.620	\$97.101	\$98.582	\$100.064	\$101.700	\$103.337	\$104.974	\$106.610	\$108.247

Source: MCA Modelling & Analysis, April 2021

Figure 20. Low Case wine trails – Total expenditure in region by the Wine Trail users (\$m 2021 Prices)

For the low case total expenditure increases from \$57.5 million in year 1 to \$66.7 million in year 10. Trail users who are overnight visitors account for around 67% of the expenditure.



	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Day Visitors	\$18.747	\$19.090	\$19.433	\$19.777	\$20.120	\$20.449	\$20.779	\$21.108	\$21.438	\$21.767	\$22.135	\$22.503	\$22.870	\$23.238	\$23.606
Overnight Visitors	\$38.783	\$39.500	\$40.217	\$40.934	\$41.652	\$42.310	\$42.968	\$43.626	\$44.284	\$44.942	\$45.665	\$46.389	\$47.112	\$47.836	\$48.559
Low Case - All Trail Users	\$57.530	\$58.590	\$59.651	\$60.711	\$61.771	\$62.759	\$63.746	\$64.734	\$65.722	\$66.709	\$67.800	\$68.891	\$69.983	\$71.074	\$72.165

Source: MCA Modelling & Analysis, April 2021

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