

STRATEGIC PLANNING REVIEW AND FUTURE DIRECTIONS PART A OF THE 2030 REGIONAL TRANSPORT PLAN



Part A Supporting Technical Report

Friday 23rd July 2021



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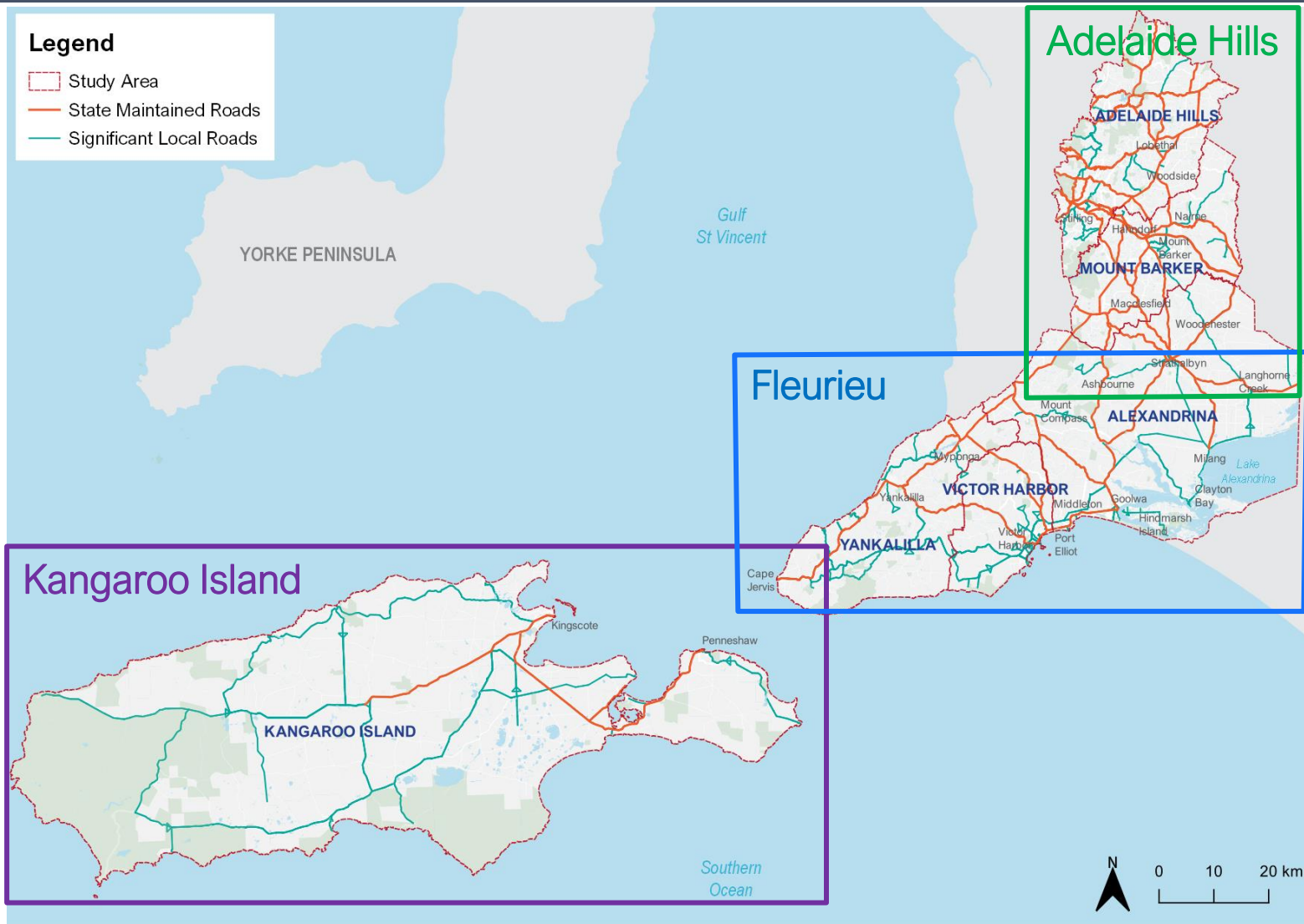
Southern & Hills
Local Government Association



BACKGROUND AND STRATEGIC OVERVIEW

01

STUDY AREA



STUDY SCOPE AND APPROACH

- Reviewed the **relevant planning documents**
- Held key **stakeholder discussions** about existing and future economic development and transport infrastructure plans
- Researched **transport demand and movement patterns** in the study area for freight, tourism and community access (commuter) routes

VISION AND KEY OBJECTIVES

VISION: Regional Economic Development for Freight, Tourism and Community Access with a Safe and Efficient Transport System

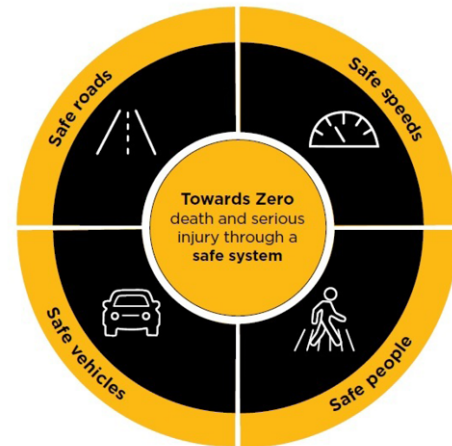
REGIONAL ECONOMIC DEVELOPMENT



TRAFFIC AND FREIGHT MOVEMENT EFFICIENCY



REGIONAL TRANSPORT SAFETY (ROAD AND CYCLING)

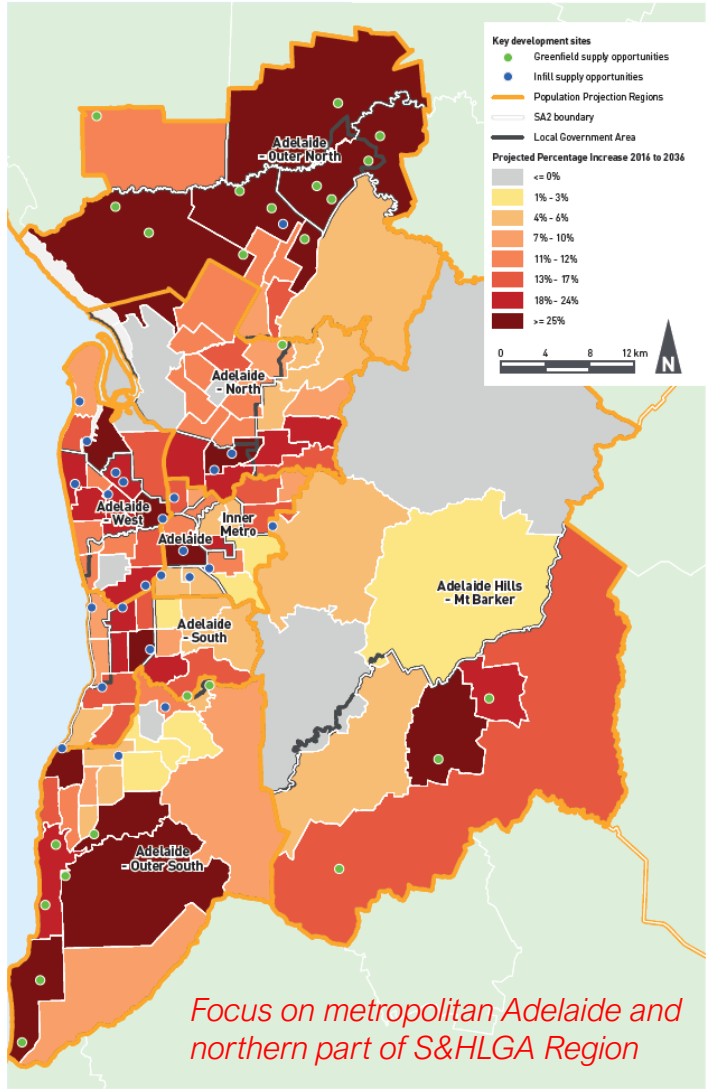


20-YEAR STATE INFRASTRUCTURE STRATEGY



PRIORITY 23: IMPROVE THE SAFETY OF THE ROAD NETWORK

A significant proportion of the State’s road network is in poor condition that compromises safety and does not have appropriate treatments to improve safety. Road maintenance programs need to be more fully funded and should incorporate safe-system principles to fund treatments that will improve road safety and contribute to lowering the road toll.



SA CLIMATE CHANGE ACTION PLAN 2021-2025

South Australian Government **Climate Change Action Plan 2021–2025**



Issued on 16 December 2020

4. Low emissions transport

A modern, low emissions transport system will improve productivity, reduce congestion and improve air quality as well as reduce greenhouse gas emissions.

Key objectives:

- Support the uptake of low and zero emissions vehicles and fuels
- Align transport and urban planning with low emissions transport outcomes
- Increase the use of public transport and active travel

Support the uptake of low and zero emissions vehicles and fuels

Low and zero emissions vehicles, such as plug-in electric and hydrogen-powered vehicles, provide a significant opportunity to reduce transport emissions. Global sales of electric passenger vehicles are growing as technologies improve, costs reduce and countries announce plans to ban diesel and petrol vehicles. The shift to low emissions fuels, including hydrogen, is also spreading to heavy transport such as trucks and buses.

Battery and hydrogen electric vehicles are likely to be cheaper to run and maintain, lowering the costs of transport for businesses and households. There are economic opportunities in the manufacture and recycling of batteries, electric vehicles and their components, and in low emissions fuels such as hydrogen.

This Action Plan is relevant for the S&H LGA Region with the emerging market for private electric vehicles to provide more electric charging stations in regional areas.

CLIMATE CHANGE ADAPTION PLAN FOR THE REGION



Climate Change Adaptation Plan

for the Adelaide Hills, Fleurieu Peninsula
and Kangaroo Island Region



Overview

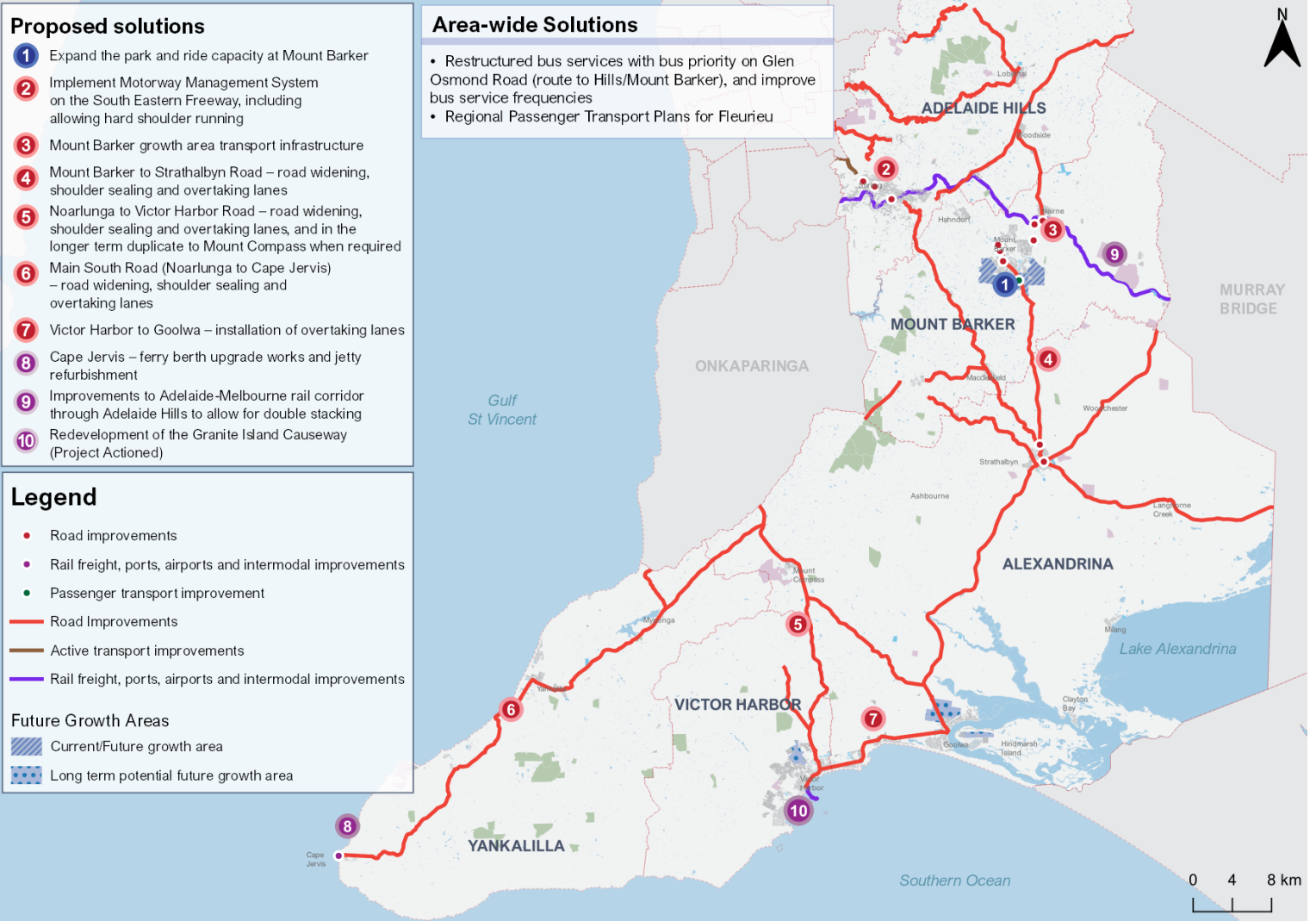
- All six Councils in the Region contributed to and supported the policies in the plan prepared in 2016.
- Provides a range of adaption options to address the impacts of climate change on the community, the built environment and government assets, including infrastructure for roads and ports.
- The policies were developed well before the 2019-2020 bushfire disasters in the Adelaide Hills and on Kangaroo Island that had a significant effect on tourism, economic development and logging.

Priority Adaptation Options related to transport

- Identify points of vulnerability in the road network by developing a roads database.
- Design road infrastructure for increases in extreme events, such as bushfires, storms and floods.
- Apply more frequent bitumen resealing and use of alternate road sealing surfaces to protect against stormwater damage.

INTEGRATED LAND USE AND TRANSPORT PLAN

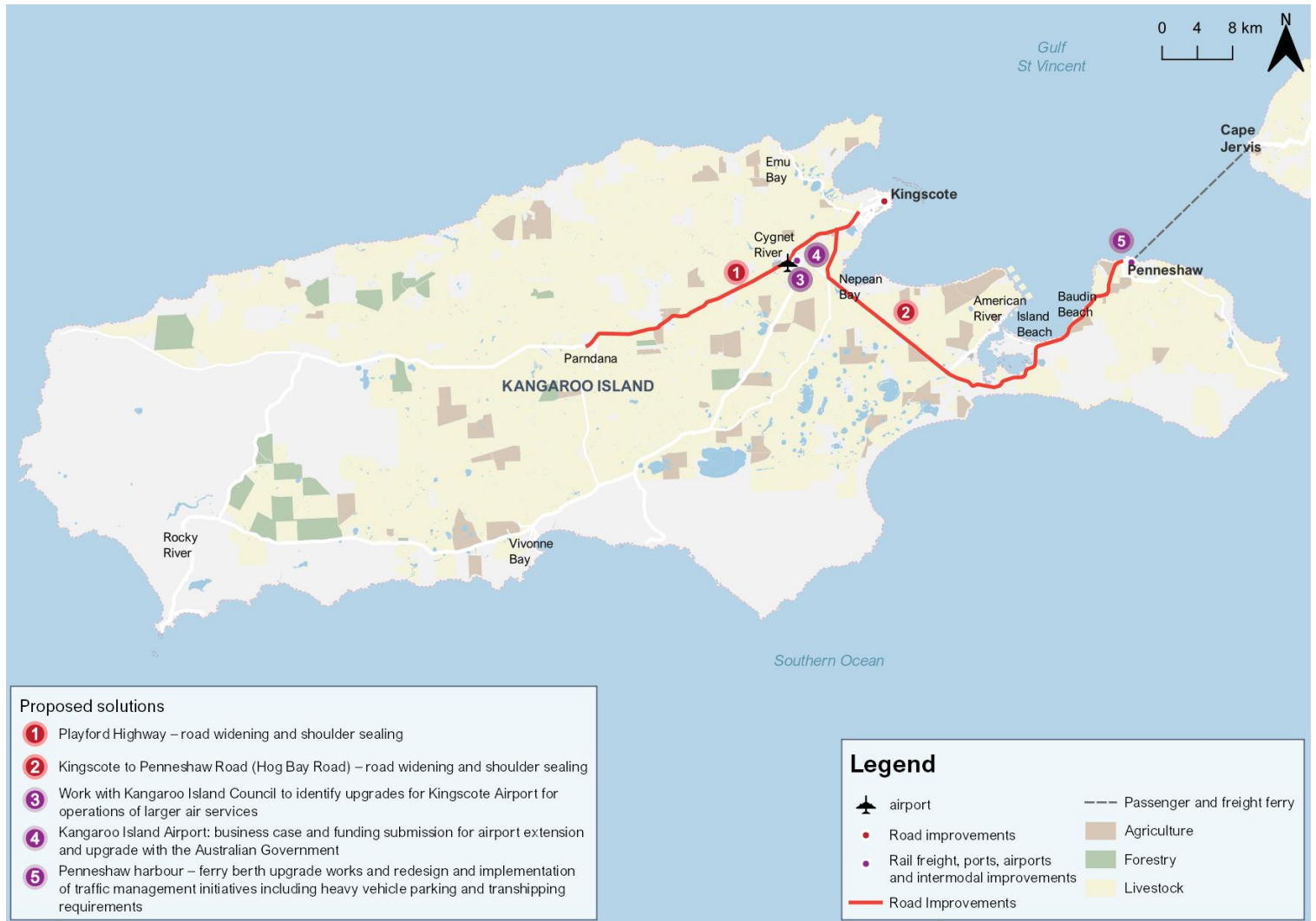
The Integrated Land Use and Transport Plan (ITLUP, 2015) prepared by the former Department of Planning, Infrastructure and Transport was prepared in 2015. It is no longer State Government policy, but many of the initiatives for the S&H LGA Region have been actioned or are still relevant to be implemented. The proposed solutions in ITLUP within the S&H LGA Region are shown on this summary plan for the Adelaide Hills and Fleurieu region.



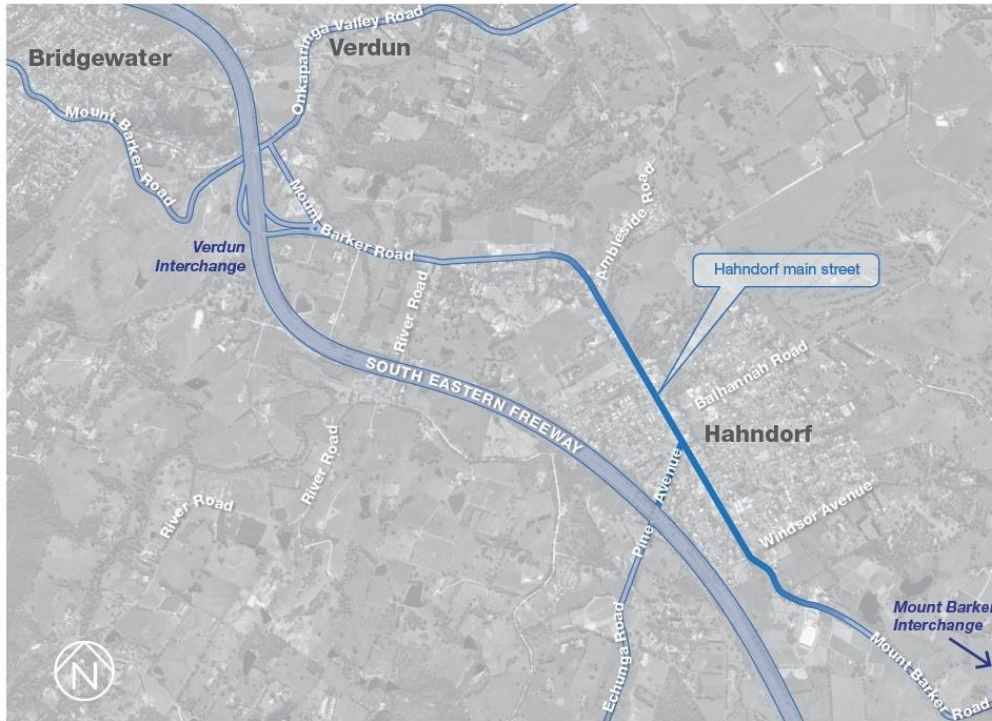
INTEGRATED LAND USE AND TRANSPORT PLAN

The Integrated Land Use and Transport Plan (ITLUP, 2015) prepared by the former Department of Planning, Infrastructure and Transport was prepared in 2015. It is no longer State Government policy, but many of the initiatives for the Region have been actioned or are still relevant to be implemented.

The proposed solutions in ITLUP within the Region are shown on this summary plan for Kangaroo Island.



OTHER STRATEGIC STATE ROAD PLANNING



Related to the DIT Hahndorf Traffic Study is the Hahndorf Main Street Revitalisation project by Mount Barker District Council

Council endorsed the masterplan in November 2020
The scope of the project includes:

- Upgraded footpaths
- New pedestrian lighting
- New streetscape furniture (including seats, banner signs, public art and bins)
- Additional landscaping
- Provision for smart technology (ie, sensors and WiFi)

Hahndorf Township Strategic Traffic Planning Study – January 2019



The strategic traffic study was released in April 2021 for consultation from 29 April - 7 June. The three interchange options are shown on the following pages.

HAHNDORF
MAIN STREET
REVITALISATION

DETAILED CONCEPT
MASTERPLAN

Mount Barker District Council

August 2020

Rev 0



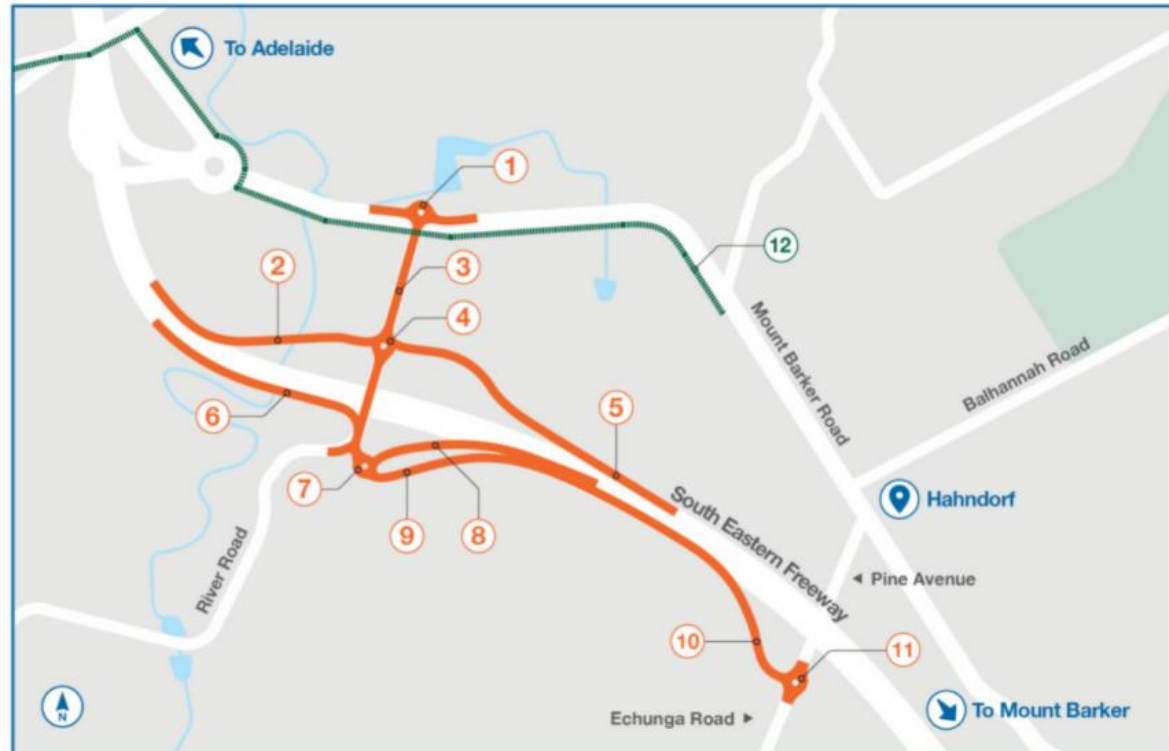
HAHANDORF TOWNSHIP INTERCHANGE OPTION 1

River Road - Option 1

Includes a full interchange at River Road and a new link road connecting Echunga Road and River Road.

The key benefits of this option are that it provides direct access for motorists travelling in all directions, significantly improving emergency service access and creating alternate routes for vehicles that currently pass through the Hahndorf main street.

- 1 New roundabout
- 2 New eastbound off-ramp for access from freeway
- 3 River Road upgrade
- 4 New roundabout
- 5 New eastbound on-ramp for access to freeway
- 6 New westbound on-ramp for access to freeway
- 7 New roundabout
- 8 New westbound off-ramp for access from freeway
- 9 New junction to Von Doussa Road
- 10 New road linking Echunga Road and River Road
- 11 New roundabout
- 12 Shared use path

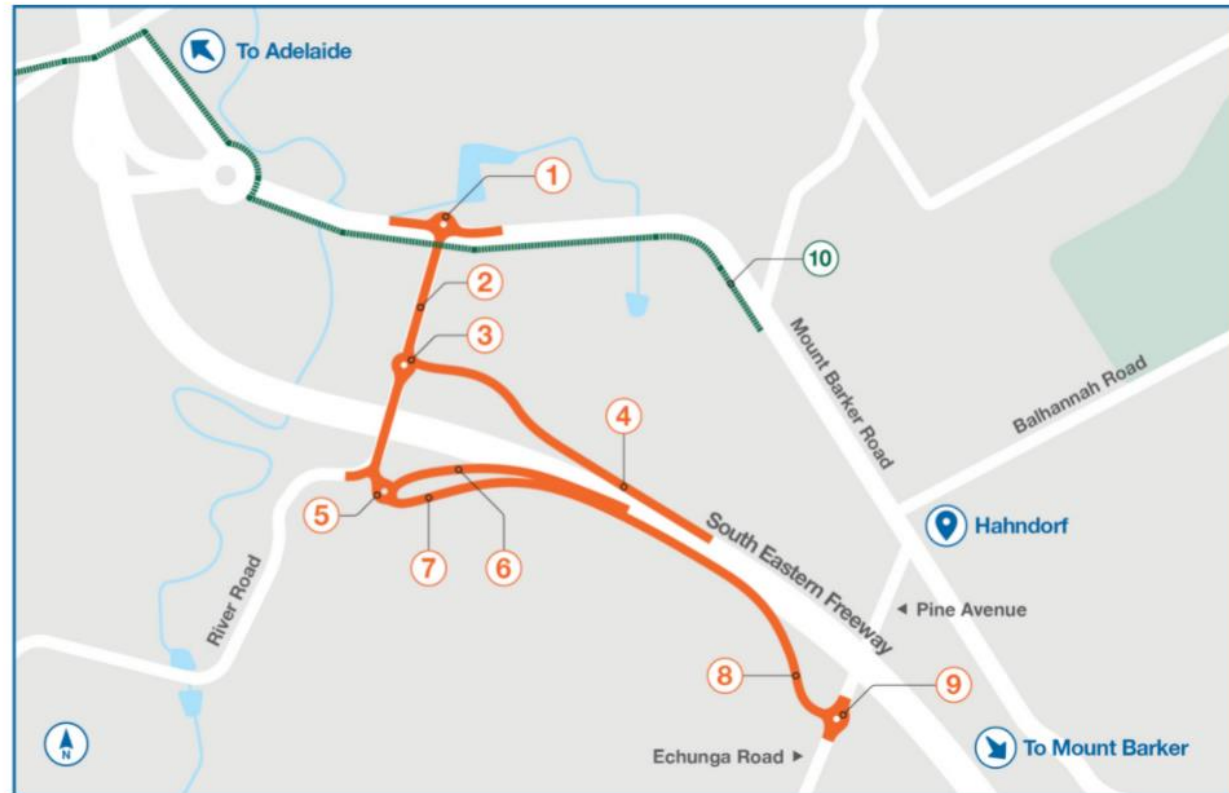


HAHNDORF TOWNSHIP INTERCHANGE OPTION 2

River Road - Option 2

Includes a half interchange at River Road and a link road connecting Echunga Road and River Road. The key benefits of this option are that it provides direct access for motorists travelling south, north and east, and provides alternate routes for vehicles that currently pass through the Hahndorf main street.

- ① New roundabout
- ② River Road Upgrade
- ③ New roundabout
- ④ New eastbound on-ramp for access to freeway
- ⑤ New roundabout
- ⑥ New westbound off-ramp for access from freeway
- ⑦ New junction to Von Doussa Road
- ⑧ New road linking Echunga Road and River Road
- ⑨ New roundabout
- ⑩ Shared use path

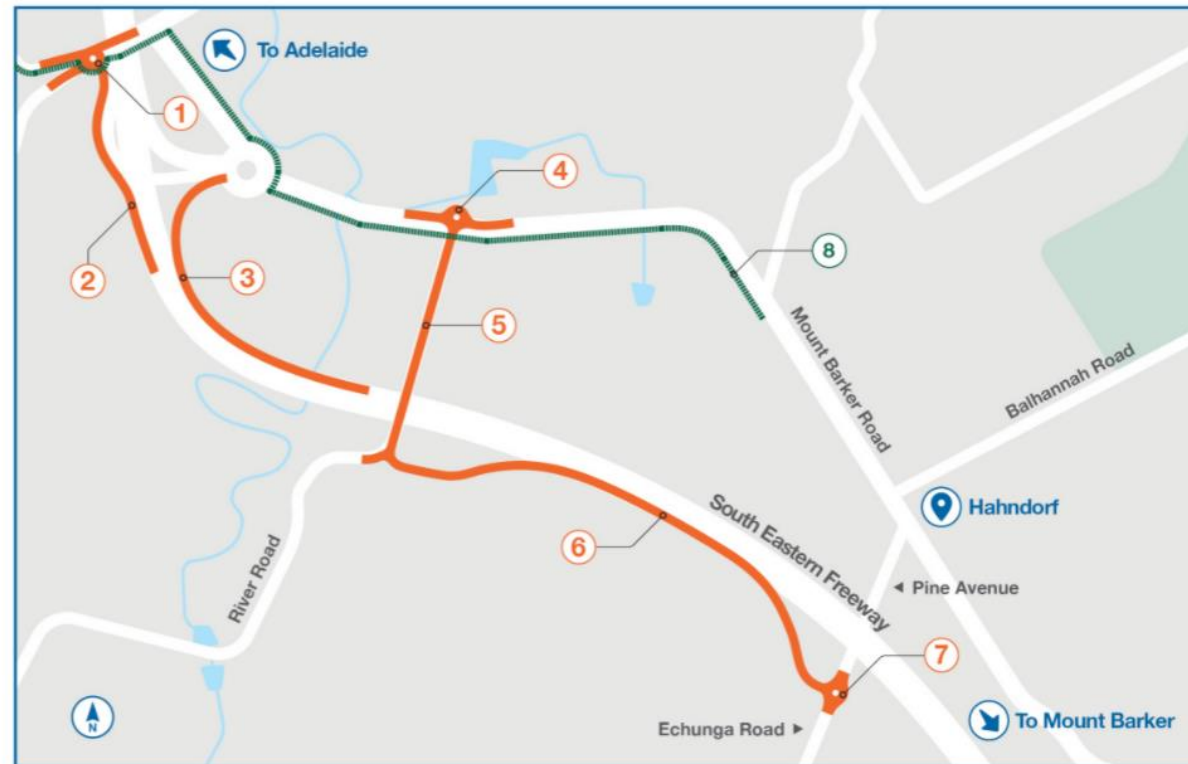


HAHANDORF TOWNSHIP INTERCHANGE OPTION 3

Verdun Interchange - Option 3

Includes upgrading to a full interchange at Verdun with a link road connecting Echunga Road and River Road. The key benefits of this option are improved access for motorists travelling east and alternate routes for some vehicles that currently pass through the main street. However, this option does not remove all unnecessary trips through Hahndorf.

- 1 New roundabout
- 2 New westbound off-ramp for access from freeway
- 3 New eastbound on-ramp for access to freeway
- 4 New roundabout
- 5 River Road upgrade
- 6 New road linking Echunga Road and River Road
- 7 New roundabout
- 8 Shared use path



OTHER STRATEGIC STATE ROAD PLANNING



The GlobeLink scoping study was prepared for the former Department of Planning, Transport and Infrastructure. In January 2020, the State Government abandoned all of the transport options, including the long-term road links that would have provided benefits for traffic congestion and safer freight movements on the South Eastern Freeway. The report includes statistics for freight demand to Adelaide for State-wide analysis that are not relevant for the S&HLGA Region.

Road options: Despite the safety and efficiency benefits, making a new road stack up would require integrated land use planning and significant development to increase demand.

BCR and NPV calculations for the three shortlisted road options provided sobering results. The appraisal assumes a four-lane, national standard motorway grade connections and uses direct conventional benefits, reflecting national and SA Government economic appraisal guidelines.



Alternate M1 route – ‘Short South’

BCR: 0.20 NPV: -\$1,006 million
 ‘+ planning’ BCR: 1.26

This option proposes a new 25 km road, with two lanes in each direction connecting the South Eastern Freeway at Mount Barker to the North-South Corridor (South Road) at St Marys in the south of Adelaide. The road includes motorway connections, with tunnelling through the Adelaide Hills, before connecting into the planned North-South Corridor, providing connectivity to Adelaide Airport, Outer Harbor and Adelaide’s industrial north. The capital expenditure for construction of the road is \$1.4bn, with operational costs of \$23m per annum.

The alignment of the road avoids residential areas, seeking to minimise safety and amenity impacts on existing communities, and, to the extent possible, avoid construction complexities through the Adelaide Hills.



*Specific alignment to be determined



Alternate M1 route – ‘Short North’

BCR: 0.12 NPV: -\$1,694 million
 ‘+ planning’ BCR: 0.80

This option proposes a new 37km road connecting the South Eastern Freeway at Mount Barker to Grand Junction Road at Hope Valley, in Adelaide’s north. The proposed new road will have two lanes in each direction, providing connection from the south-east of the state to the industrial north of Adelaide. The capital expenditure for construction of the road is \$2.1bn, with operational costs of \$34m per annum.

The alignment of the road avoids residential areas, seeking to minimise safety and amenity impacts on existing communities, and avoid construction complexities through the Adelaide Hills.



*Specific alignment to be determined



Cross Road Tunnel – M1 to North-South Corridor

BCR: 0.09 NPV: -\$12,950 million

This option proposes to construct a new, dedicated 16.6km tunnel connection between the South Eastern Freeway east of Crafers and the North-South Corridor. The proposed tunnel would incorporate boring from past Crafers to the intersection at the South Eastern Freeway and Cross Road, and a cut and cover construction below Cross Road to the North-South Corridor. By starting the tunnel east of Crafers, the slowest and most dangerous sections of the South Eastern Freeway are avoided. The capital expenditure for construction of the road and tunnel is \$18.2bn, with operational costs of \$43m per annum.



*Specific alignment to be determined

Despite the need for road transport improvements between the South Eastern Freeway and Adelaide’s motorway network identified in the problem and opportunity statement, each road option struggled to achieve a positive BCR or NPV; because of low levels of forecast demand.

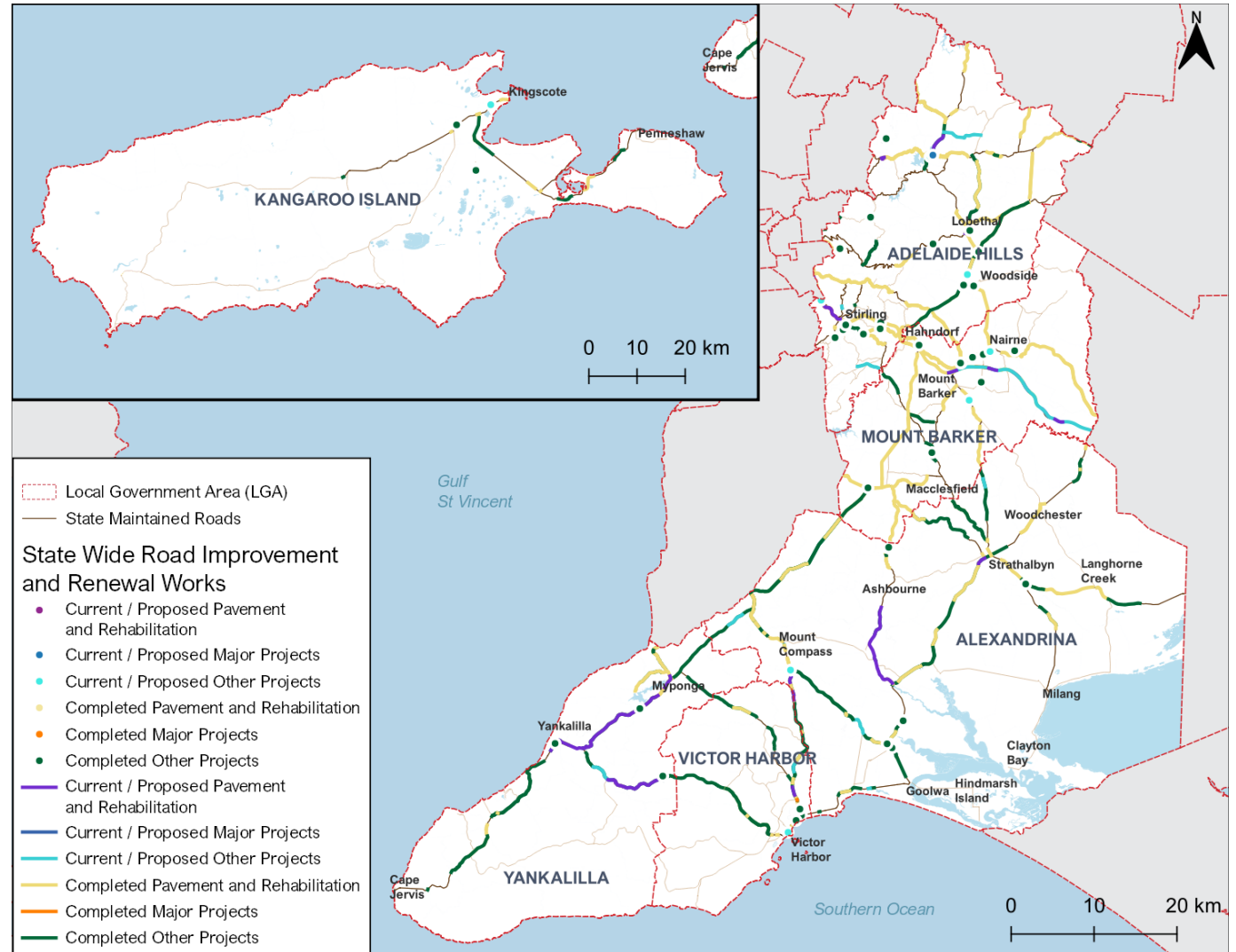
Transport project benefits accrue largely via time and vehicle operating cost savings, reflecting faster, more direct and efficient journeys. This sees the scale of benefits driven by freight and passenger journeys. Fewer journeys sees lower benefits, in turn making net benefits difficult to achieve.

EXISTING ROAD UPGRADE PROJECTS IN THE REGION

The Department for Infrastructure and Transport (DIT) has a program of works for road upgrade projects in the Region on the State-maintained roads that includes:

- Pavement and rehabilitation to sections
- Shoulder treatments
- Major upgrades with road widening and intersection design changes

The completed, current and proposed projects in the Region are shown on this plan as of December 2020.



OTHER ROAD UPGRADE PROJECTS IN THE REGION



dit.sa.gov.au

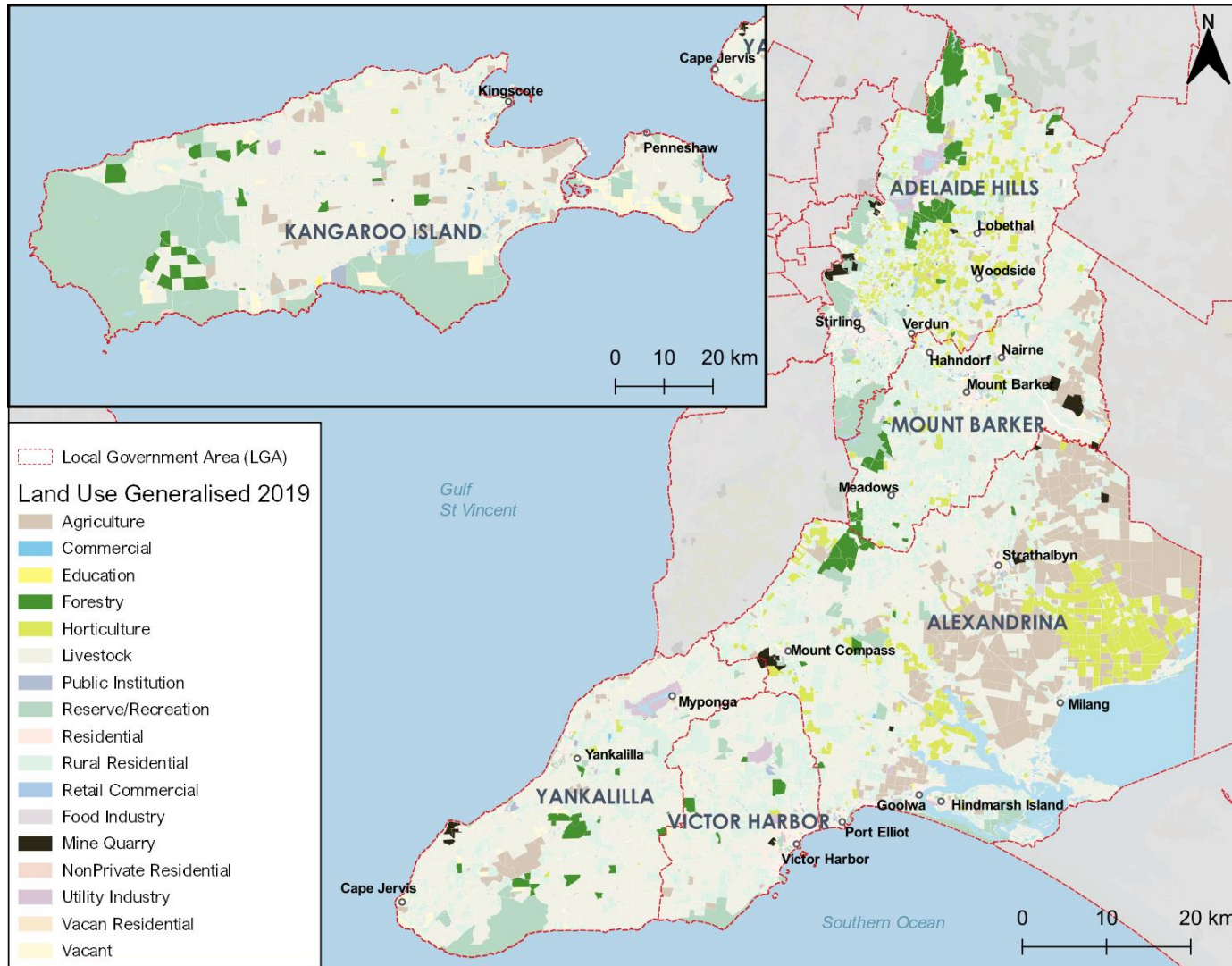
Follow us on:

Australian Government BUILDING OUR FUTURE

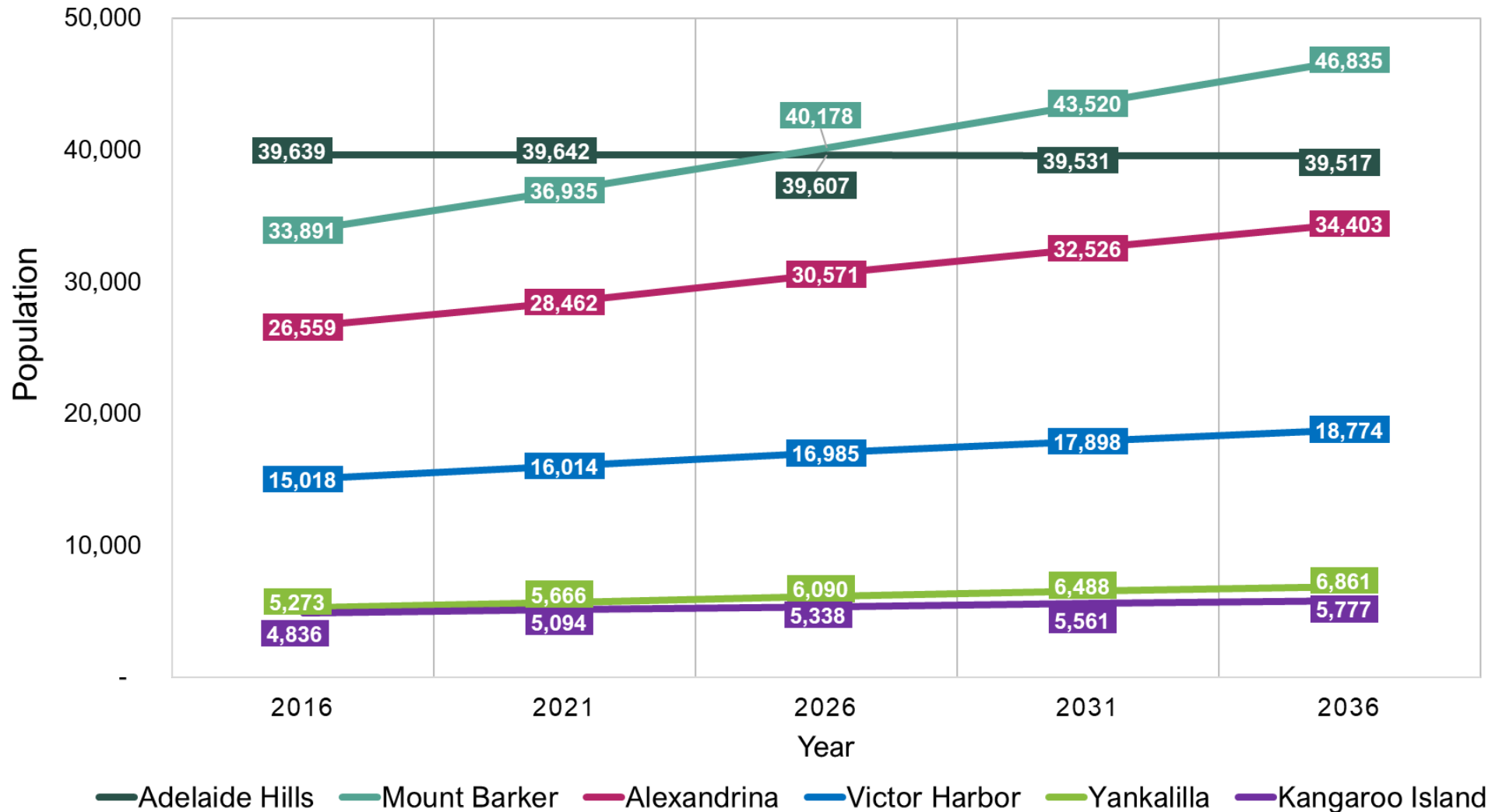
Government of South Australia BUILDING WHAT MATTERS



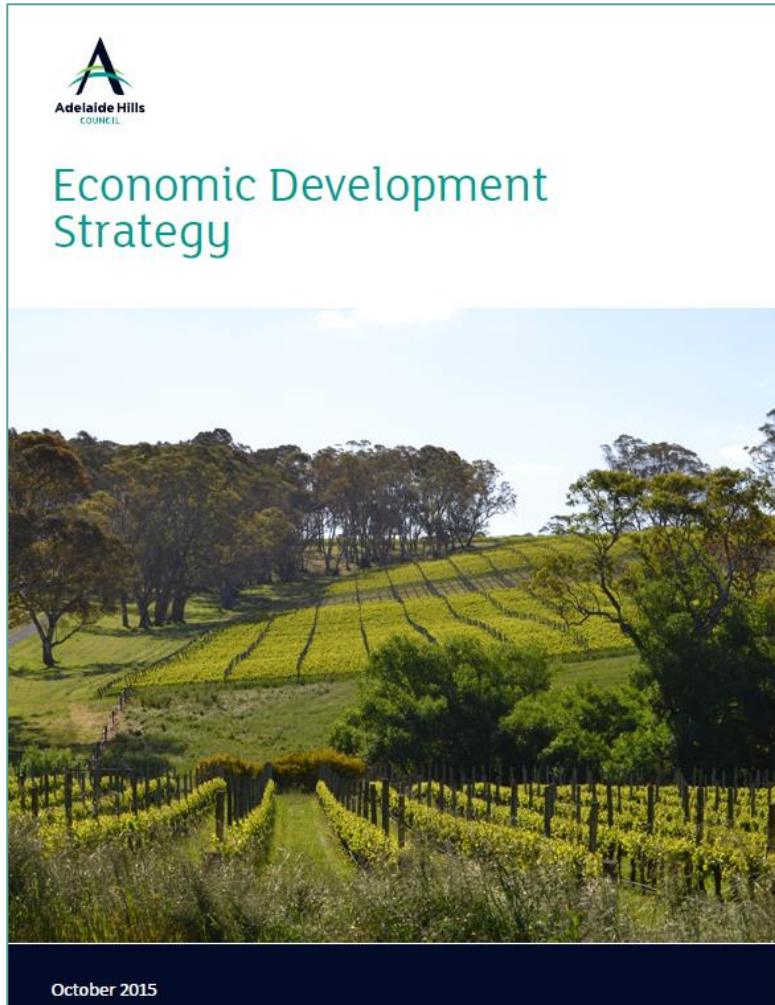
LAND USE IN THE SOUTHERN & HILLS LGA REGION



FORECAST POPULATION GROWTH IN THE REGION



ECONOMIC DEVELOPMENT – ADELAIDE HILLS



- Need for a B-Double or large transport vehicle route through the northern Adelaide Hills
- Proposed **freight route** through northern Adelaide Hills via Lobethal to reduce number of trucks on South Eastern Freeway and Portrush Road
- **Tourism** is a key driver for economic growth
- Need for tourist route upgrades as new attractions and businesses develop
- Bus/coach parking and public toilets in tourist areas, such as Birdwood, Crafers and Stirling
- Peak period **traffic congestion and safety** for commuters on the South Eastern Freeway
- Need for higher frequency peak bus services
- Need for expanded park-and-ride facilities
- Encourage a local taxi-style transport service

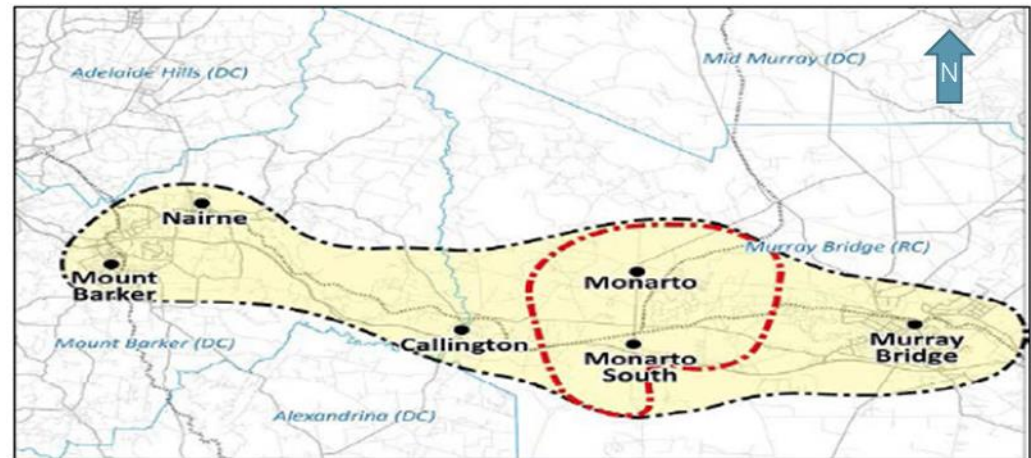
ECONOMIC DEVELOPMENT – MOUNT BARKER

Economic Development Strategy



- Provide sufficient land for employment with effective access to freight networks
- Increase tourism activity and the benefits by adding value with food and wine
- Enhance and develop regional tourism product
- Add value to existing industries in the agricultural sector and tourism and for export growth
- Invest in improving road access to major industrial parks and business operators

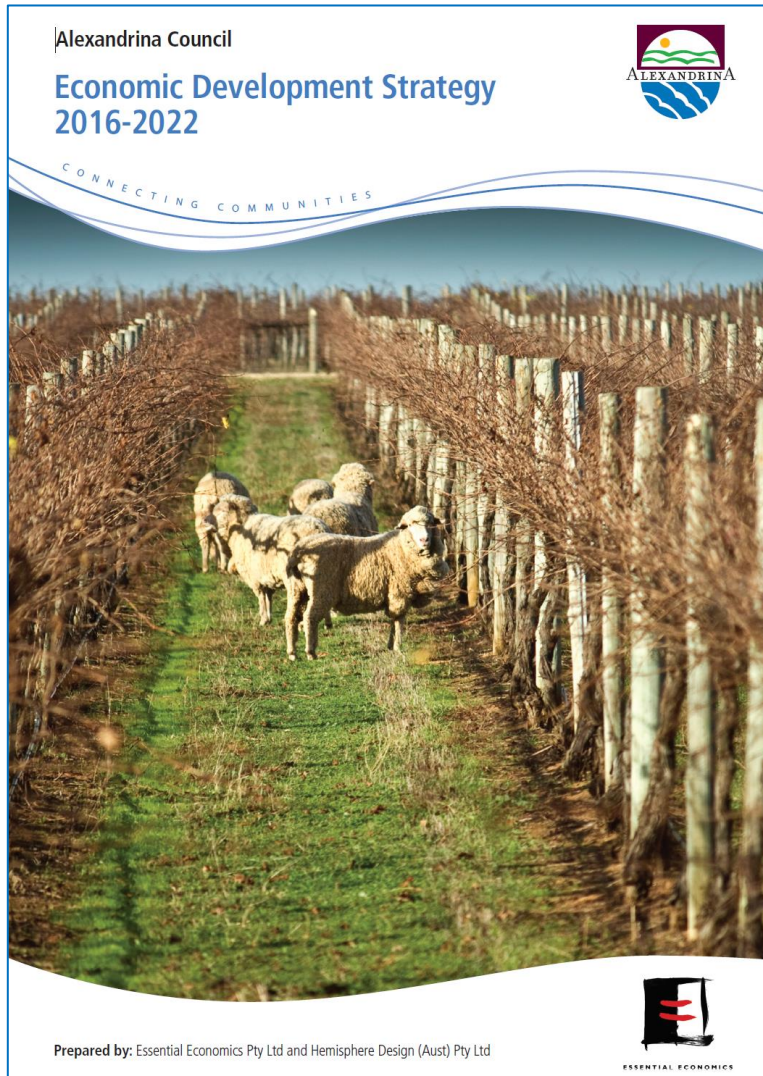
Mount Barker/Murray Bridge Economic Corridor



Version: Final
Adopted: 2014
Review: 2019

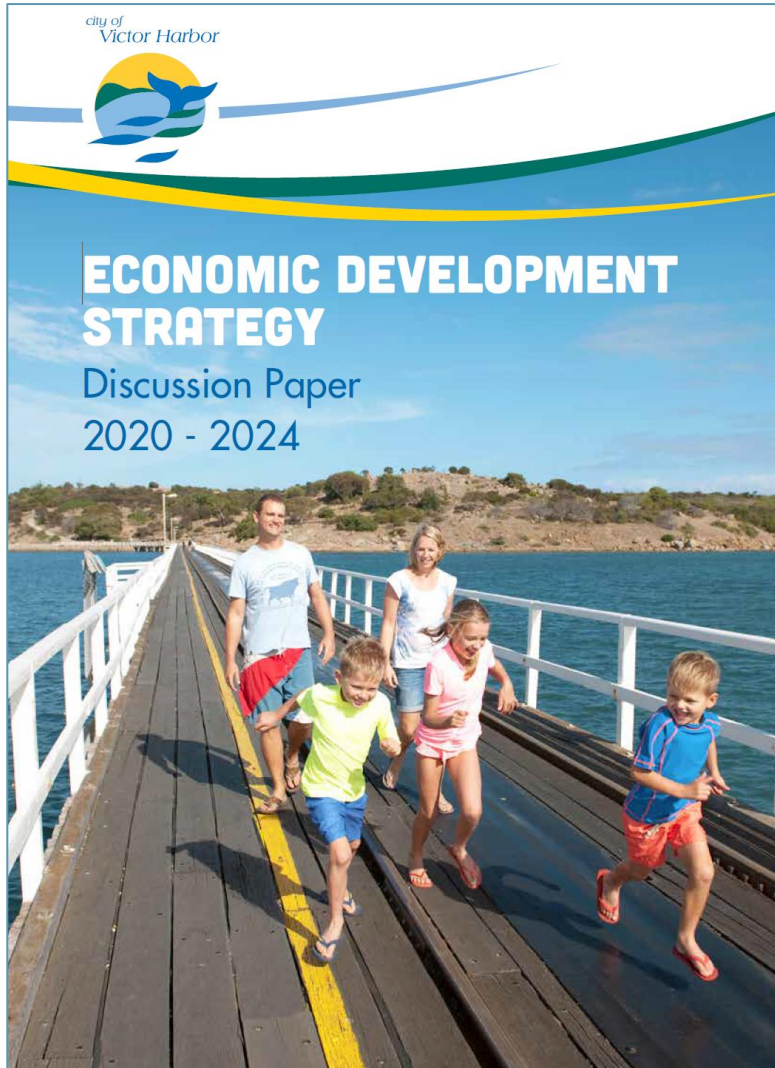


ECONOMIC DEVELOPMENT - ALEXANDRINA



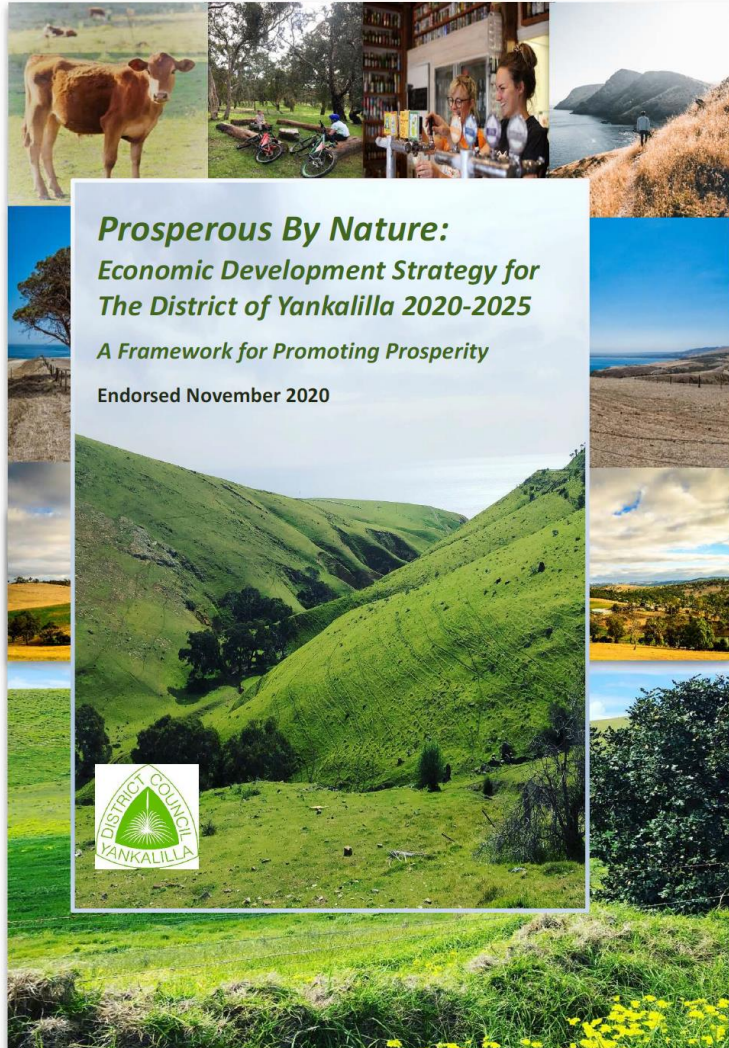
- Connectivity between townships within Alexandrina Council and to the major towns of Victor Harbor, Mount Barker and Murray Bridge
- Accessibility to metropolitan Adelaide
- Continued improvement to roads, particularly roads that cater for heavy vehicles.
- Agriculture is a significant industry in Alexandrina with a need to ensure businesses can continue to transport their goods safely and efficiently
- With limited public transport, most trips are by private vehicle
- Improved bus services to improve connections between towns in Alexandrina and with the regional centres located beyond the municipality
- Improved road signage, particularly to the key tourism assets in Alexandrina

ECONOMIC DEVELOPMENT – VICTOR HARBOR



- High reliance on **tourism revenue with \$163M**, followed by agriculture at \$37M and building and construction at \$25M in the 2015/2016 budget
- Undertake a review of all major entrance corridors into Victor Harbor and identify short term amenity improvements
- Develop a masterplan for the Adelaide Road entrance corridor
- Research opportunities for Victor Harbor to be a cruise ship destination including a needs and opportunity assessment
- \$31M provided by the State Government for the Granite Island Causeway and associated infrastructure that enables water-based activity **(committed DIT project for 2021)**

ECONOMIC DEVELOPMENT – YANKALILLA



- Improve access to the community centres of Yankalilla and Normanville via Main South Road
- Freight and tourism require efficient road access to Cape Jervis for the ferry to Kangaroo Island
- Need to enhance Myponga through streetscaping and become a tourism gateway
- Poor standard of some roads is a constraint to the district's economic development for farmers transporting produce and safety issues for residents
- Sections of road are needed for 26m B-double access for the farming community
- Normanville and Cape Jervis Road is identified as a 'blackspot' in need of upgrading with the Council providing land to support the intersection redesign
- Yankalilla has a relatively low income and elderly population who would benefit with regular bus services to Seaford with trains to Adelaide and other destinations in the Region

ECONOMIC DEVELOPMENT – KANGAROO ISLAND



From previous State Government, June 2016

- **Tourism** with agriculture is key revenue generator for the economy on Kangaroo Island
- Kangaroo Island produces local art for sale for visitors locally, interstate and overseas
- **Agriculture and primary industry** is based on a wide variety of produce including potatoes, figs, Ligurian honey, canola, prime lambs and shellfish
- The food and beverage industry is at the heart of the Kangaroo Island experience

Economics for Local Residents and Businesses

- Cost of housing and living for permanent residents and businesses on Kangaroo Island is significantly higher than on the mainland due to the transport and freight cost
- Small business, shops and trades are essential for economic growth on Kangaroo Island
- Plantation logging is a new, emerging industry



REGIONAL FREIGHT

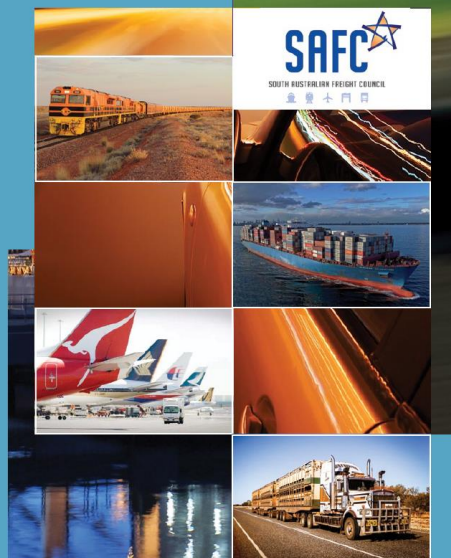
- Regional Freight Policy Overview
- Existing Freight Network in the Region
- Regional Freight Demand

02

SOUTH AUSTRALIAN FREIGHT COUNCIL

South Australia's
Freight Transport
Infrastructure

Moving Freight 2019
"Towards a 20 Year State
Infrastructure Strategy"



July 2019

- A **safe and efficient freight transport network** requires government and community acceptance.
- **Infrastructure network planning** is needed to provide long term confidence and certainty.
- The State's infrastructure assets, policies and regimes must facilitate a **multi-modal balance**.
- With **lower budgets** for regional road maintenance, **an Accelerated Maintenance Regime** is needed.
- South Australia requires an urgent increase in maintenance spending on the **economic corridors** that provide crucial links for communities and their markets.
- **Lack of survey data** and statistics about freight movements, demand and travel markets

KANGAROO ISLAND PLANTATION TIMBERS



- | SILVICULTURAL LEGEND | TOPOGRAPHIC LEGEND |
|--|---|
| KIPT E.nitens | Key |
| KIPT E.globulus | Major Rd |
| KIPT P.radiata | Minor Rd |
| KIPT Mxed Species | Grid 10km |
| Private / Other | Coastline / River |
| National Parks | |
| Wilderness Protection Area | |
| Conservation Parks | |
| Aquatic Reserves | |

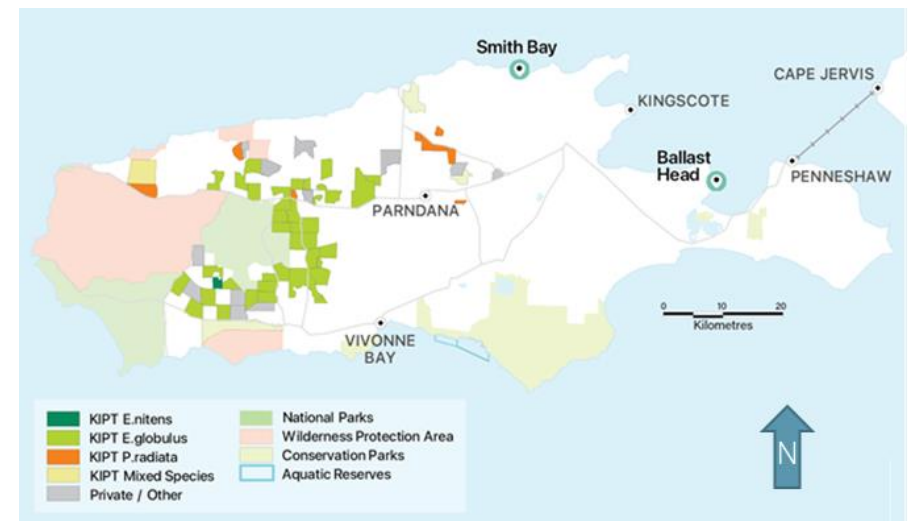


KANGAROO ISLAND PLANTATION TIMBERS

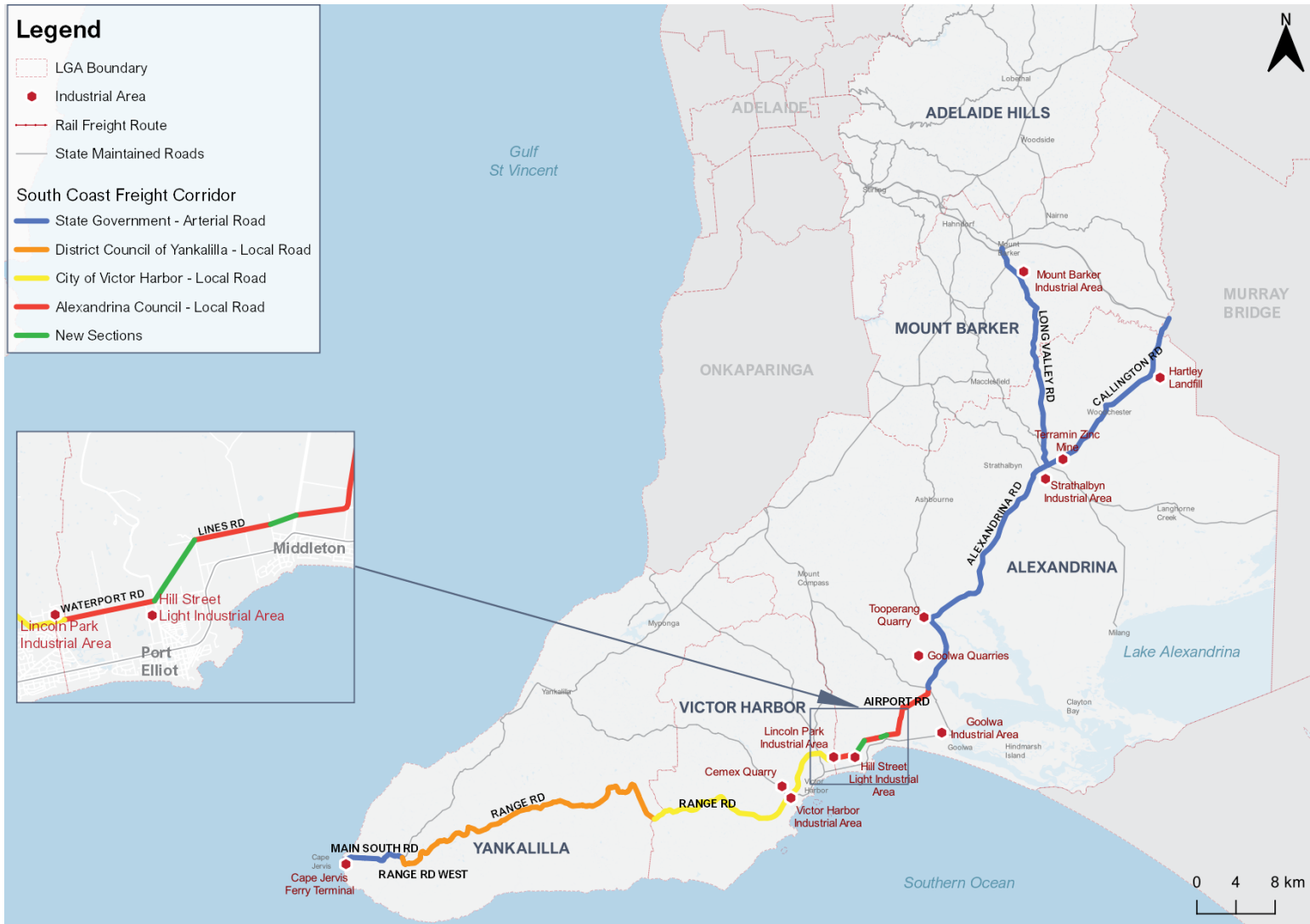
- Smith Bay port was very controversial
 - 100% privately funded port for construction
 - Environmental impacts on access to Smith Bay
 - Risk to the nearby abalone (aquaculture) farms
- Need for improved road access to timber plantations
- Without a new port for logging activity, timber is trucked to Penneshaw to be shipped to the mainland.



In June 2021, the State Government rejected the application for the Smith Bay port proposal.



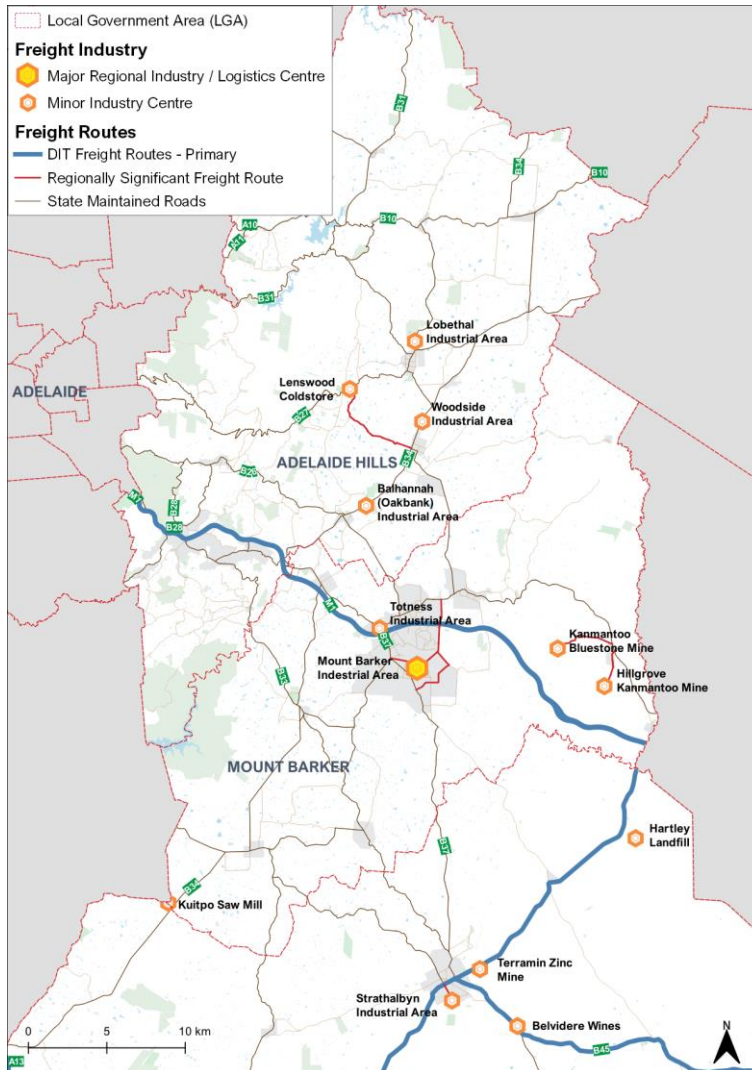
SOUTH COAST FREIGHT CORRIDOR PLAN



REGIONAL FREIGHT ROUTES



REGIONAL FREIGHT ROUTES (ADELAIDE HILLS)



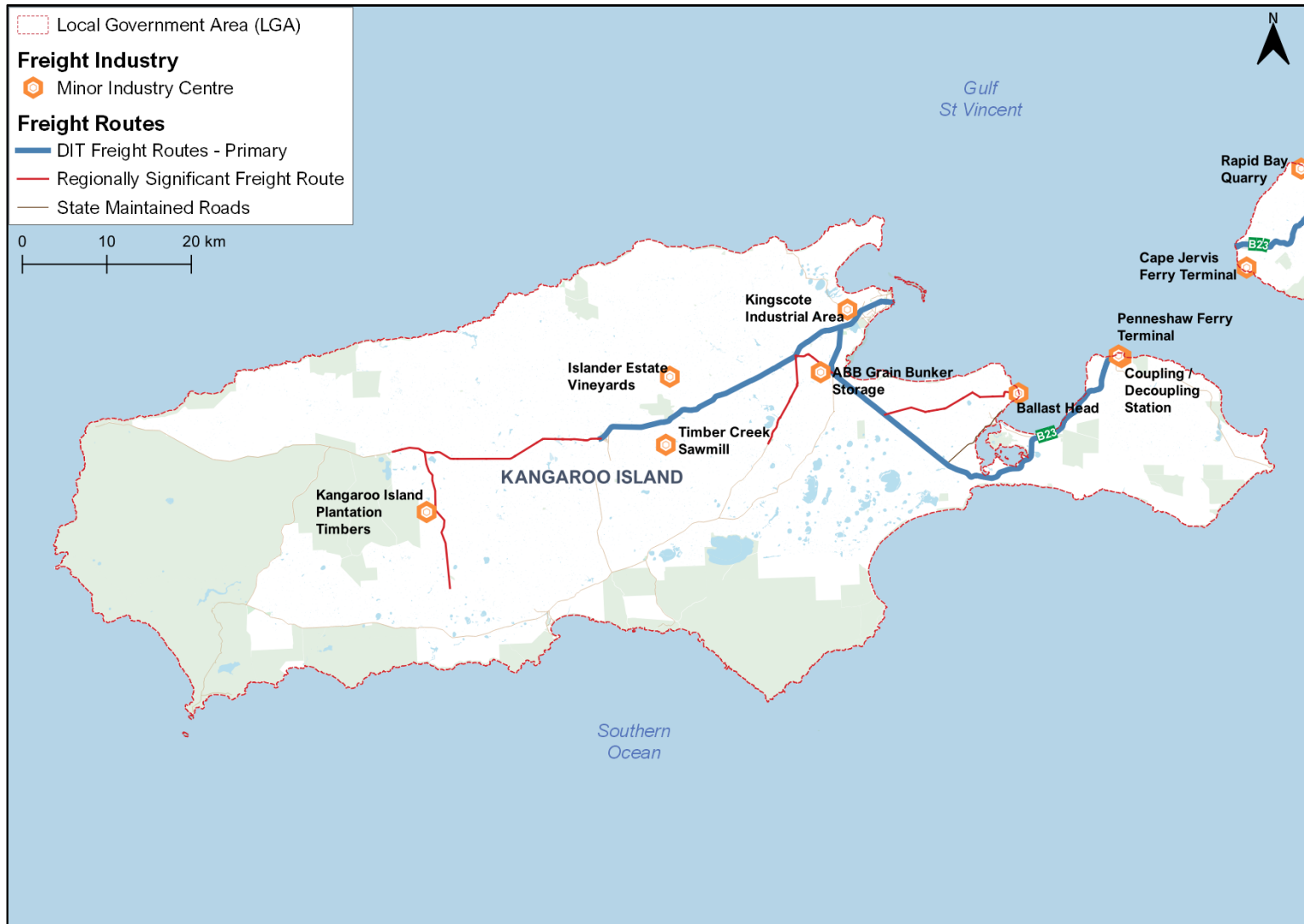
The Adelaide Hills region is crossed east-west with the South Eastern Freeway which is the key freight route between Adelaide and Melbourne. With the high traffic volumes on the freeway, it has significant traffic congestion and road safety issues, in particular west of Mount Barker.

The Mount Barker Industrial Area is the only major regional industrial and logistics centre in the entire Region.

REGIONAL FREIGHT ROUTES (FLEURIEU PENINSULA)

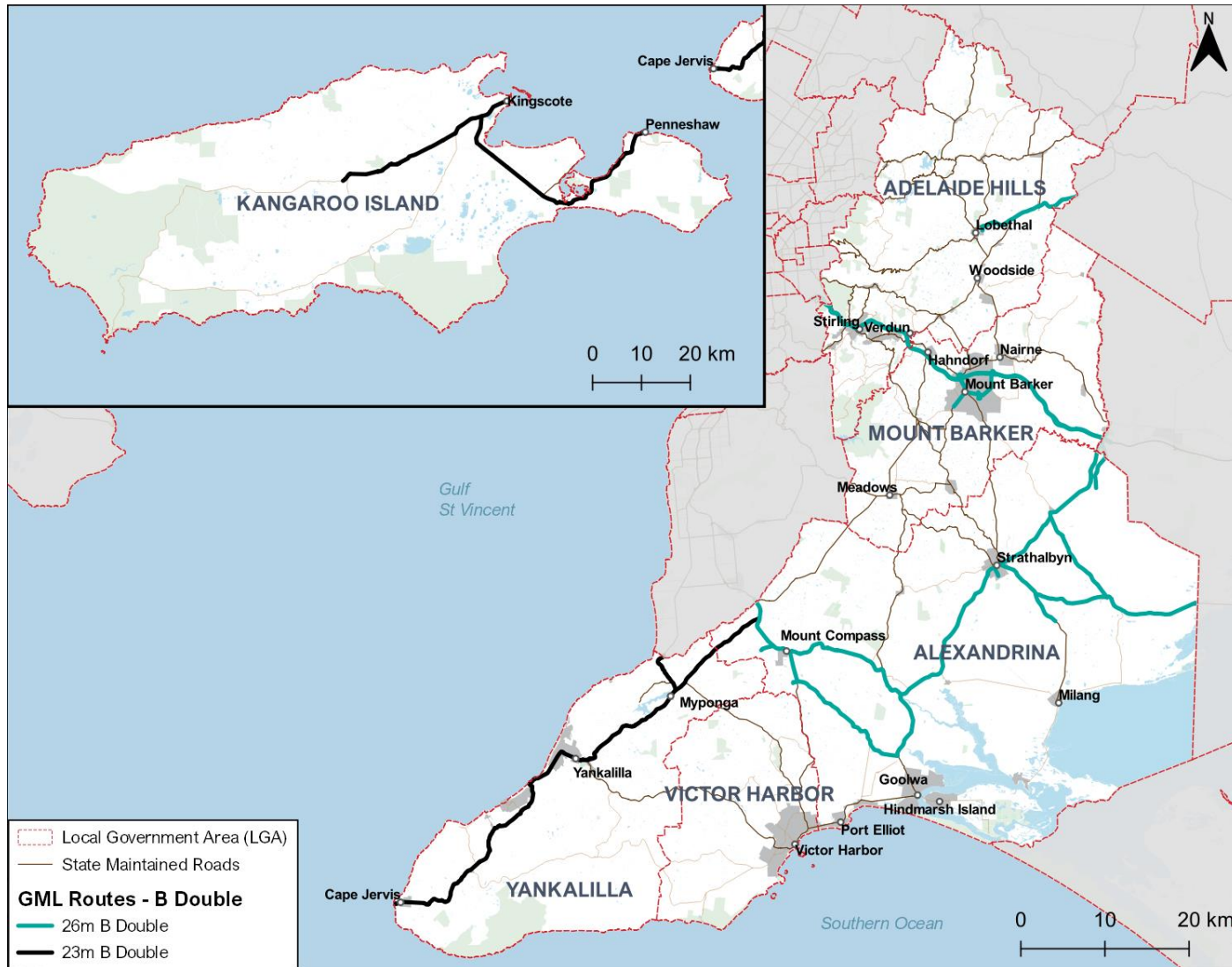


REGIONAL FREIGHT ROUTES (KANGAROO ISLAND)

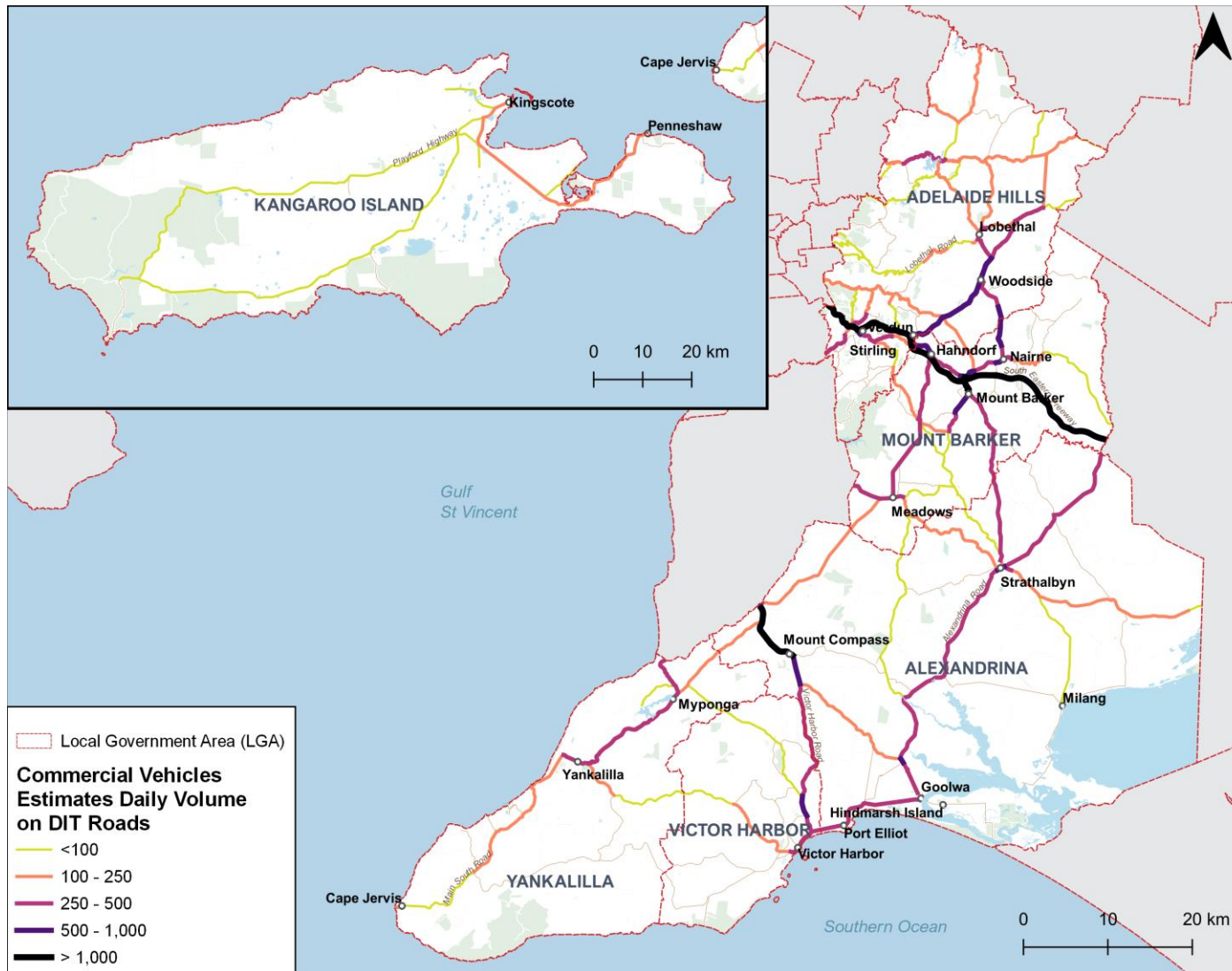


EXISTING GML B-DOUBLE ROUTES

GML:
General
Mass
Limits



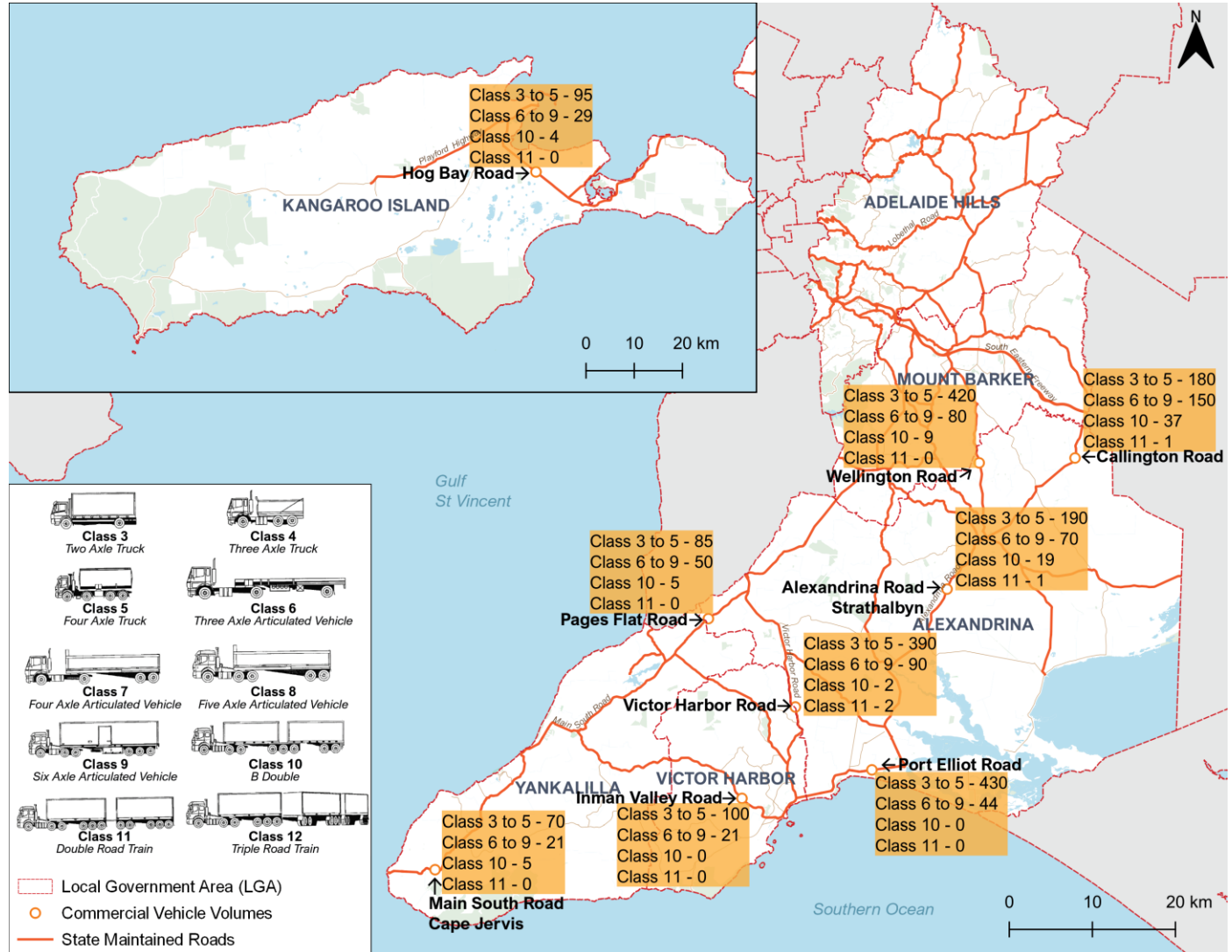
EXISTING COMMERCIAL VEHICLE VOLUMES



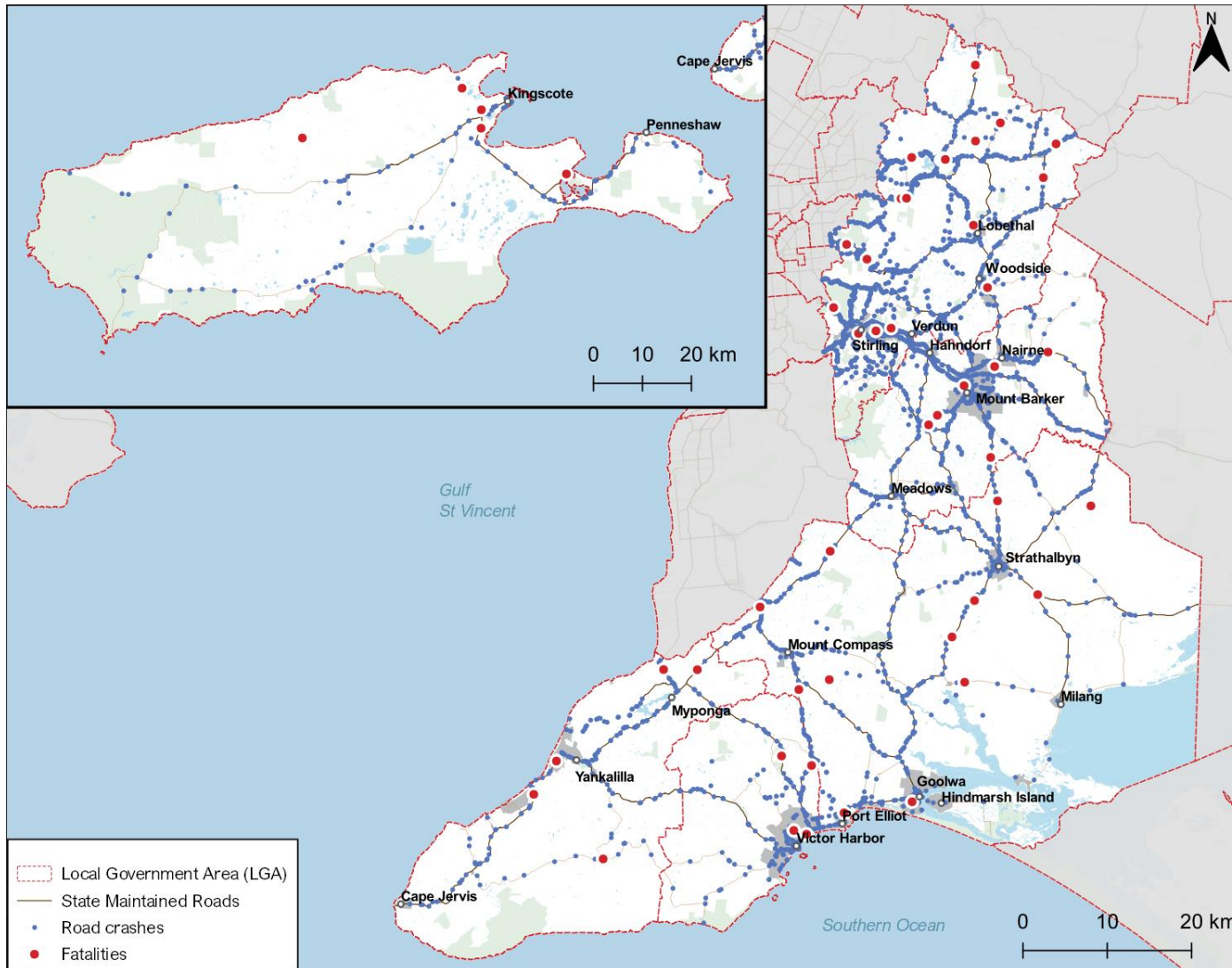
EXISTING COMMERCIAL VEHICLES BY CLASS

The number of commercial vehicles at key locations on the State-maintained roads are grouped by Austroads vehicle classes 3 to 11 for trucks and heavy vehicles are shown here.

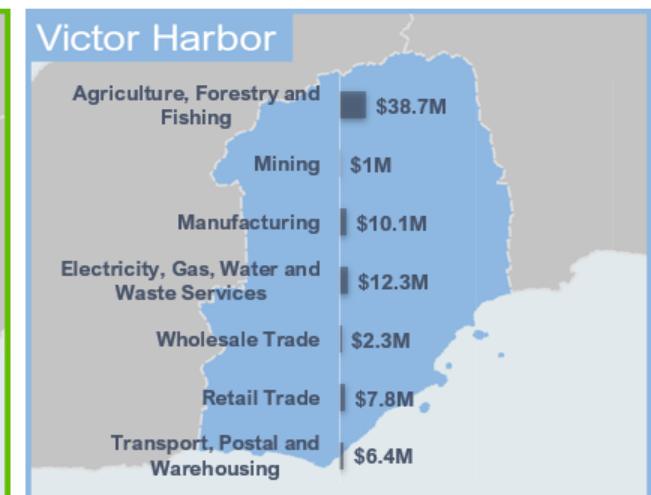
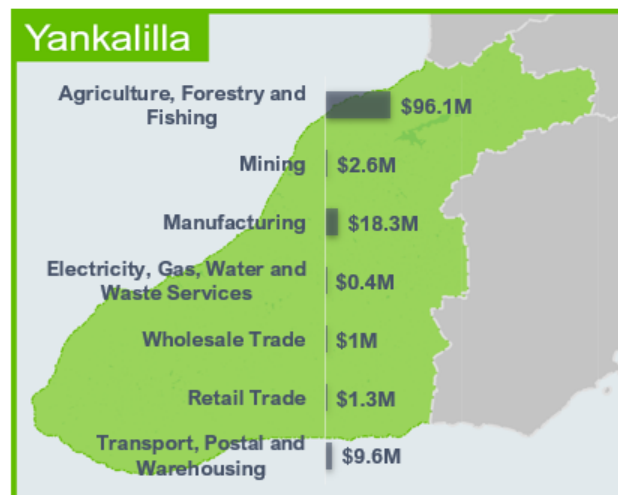
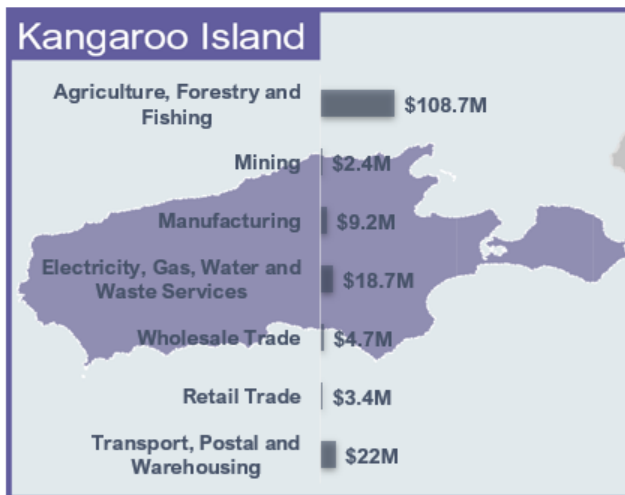
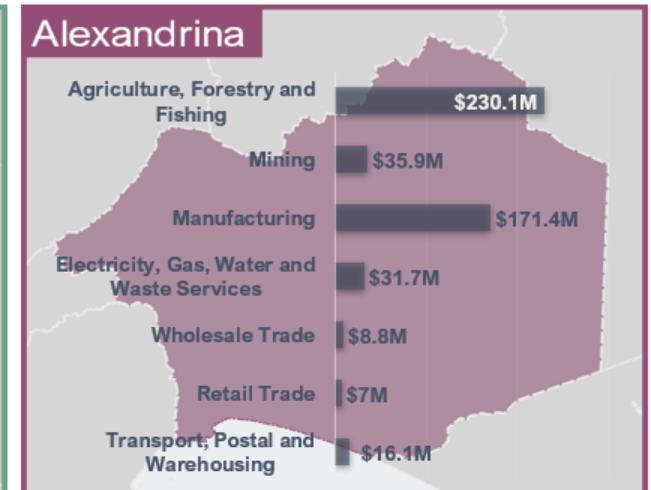
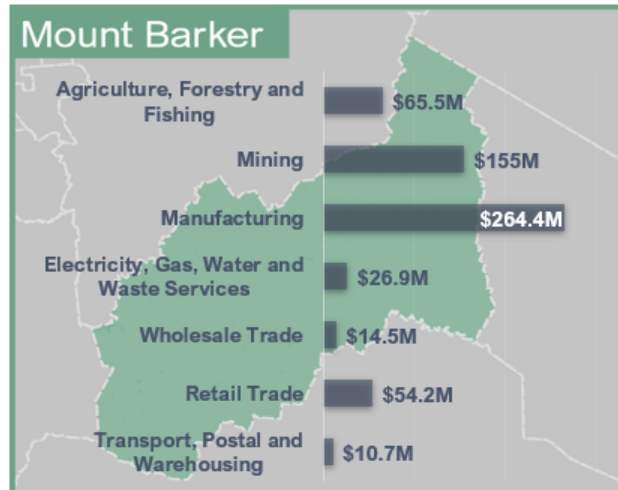
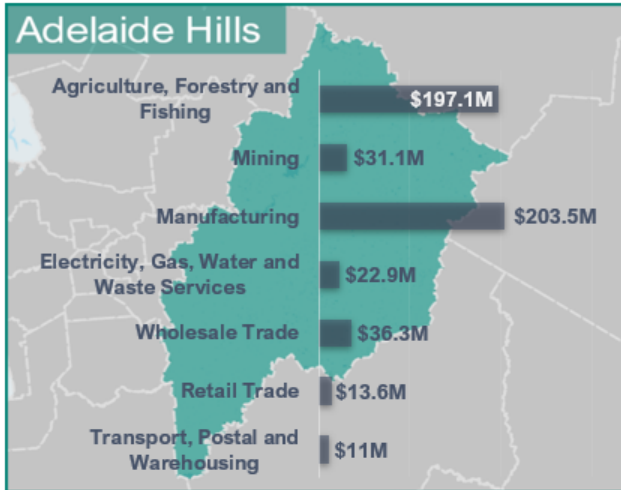
Only 26 heavy vehicles per day were in the classified counts on the road leading to Cape Jervis and 55 heavy vehicles per day on Main South Road north of Myponga. The B-Double routes in Mount Barker have the largest daily volume of heavy vehicles in the Region.



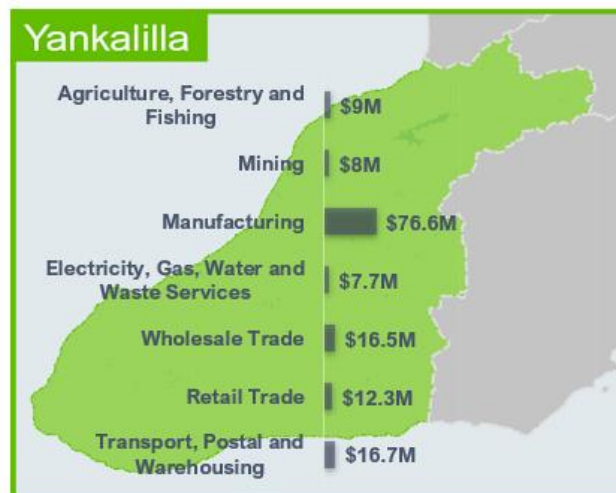
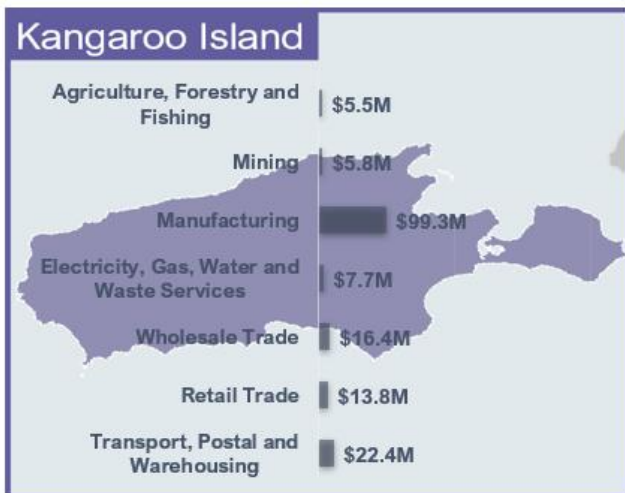
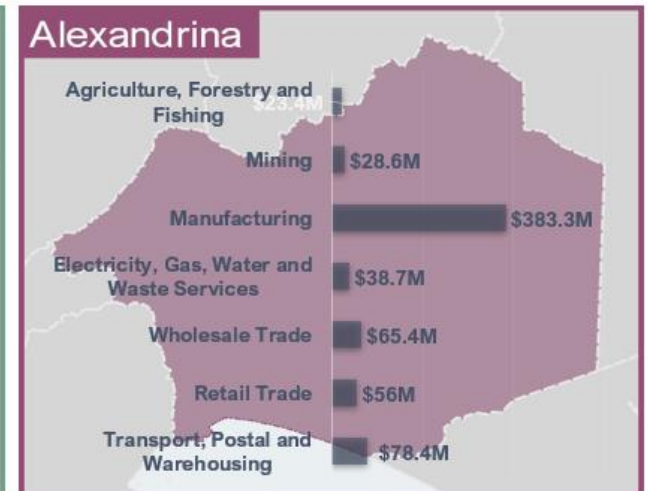
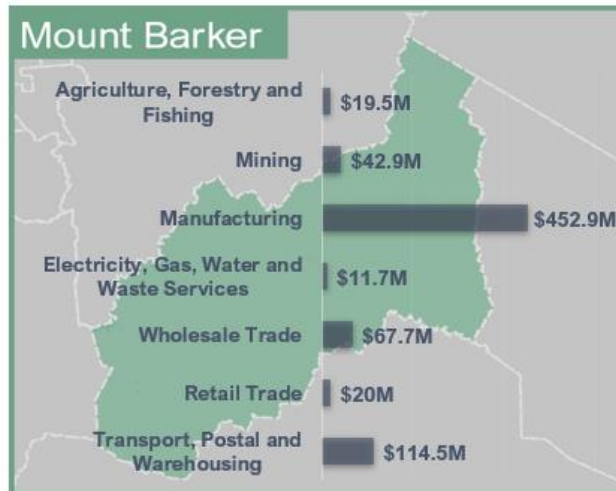
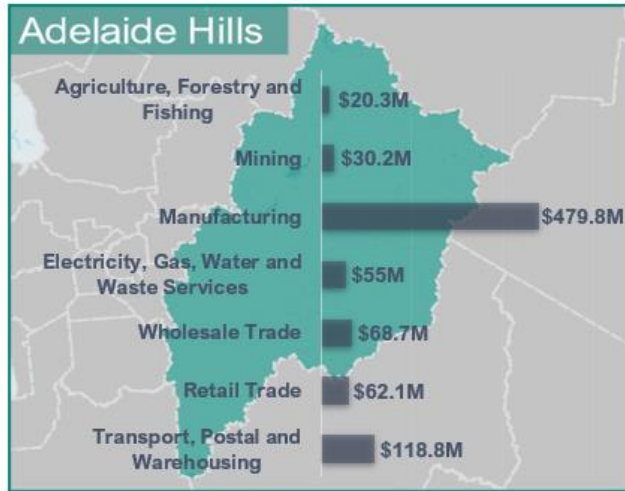
EXISTING ROAD CRASH STATISTICS



EXISTING FREIGHT DEMAND WITH VALUE OF EXPORTS



EXISTING FREIGHT DEMAND WITH VALUE OF IMPORTS



REGIONAL TOURISM

- Regional Tourism Strategies
- Existing Tourism Routes in the Region
- Regional Tourism Demand

03

STATE TOURISM PLANS



No focus on local access or the transport system in the State tourism or visitor economy sector plan

Only reference to transport:
Road trips are **designated routes** encompassing multiple experiences, landscapes, views and accommodation options



REGIONAL TOURIST MAP WITH KEY ATTRACTIONS



REGIONAL TOURISM PLANS AND DRIVE ROUTES

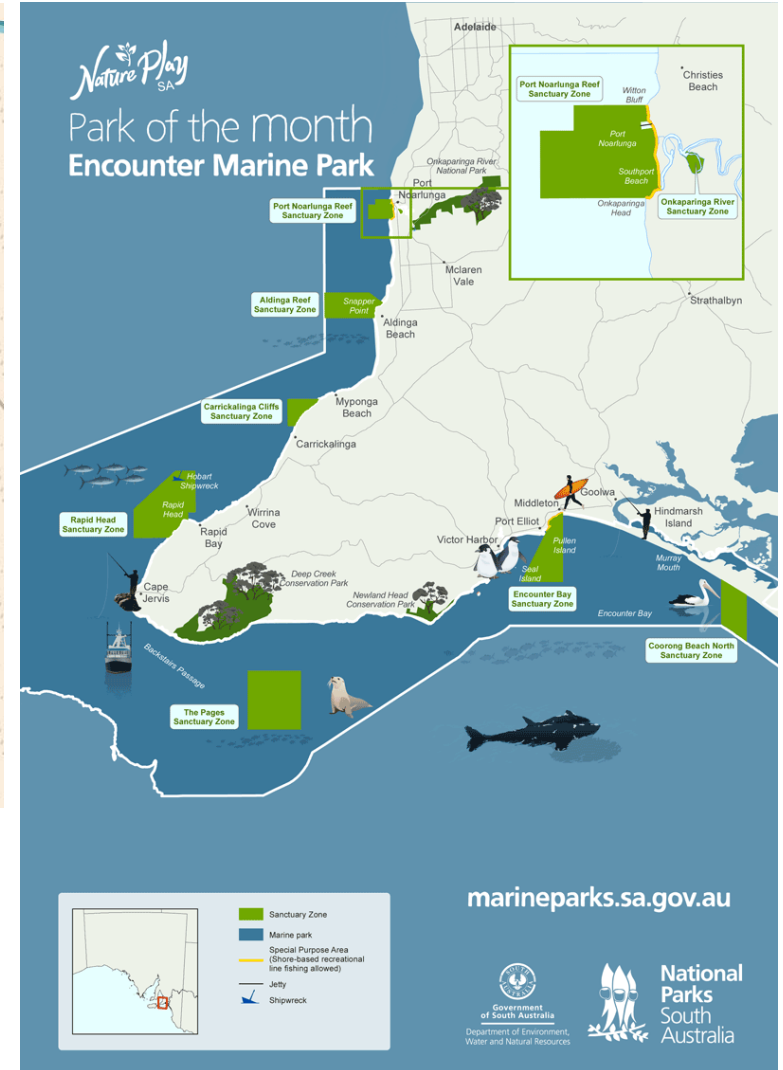
Adelaide Hills
Regional Strategic Tourism Plan
2015-2020



TOURIST DRIVE ROUTES

- Route 50 South Coast Tourist Drive
- Route 52 Hills and Seascape Discovery
- Route 55 Hills and Lake Tourist Drive
- Route 56 Victor Harbor Highlights
- Route 60 McLaren Vale Tourist Drive
- Cape Jervis – Yankalilla
- Myponga – Willunga
- Langhorne Creek – Strathalbyn
- Currency Creek – Goolwa
- Middleton – Port Elliot
- Victor Harbor – Kangaroo Island

FLEURIEU TOURISM REGION



Visitor information centres are located in Strathalbyn, Goolwa, Victor Harbor and Yankalilla.



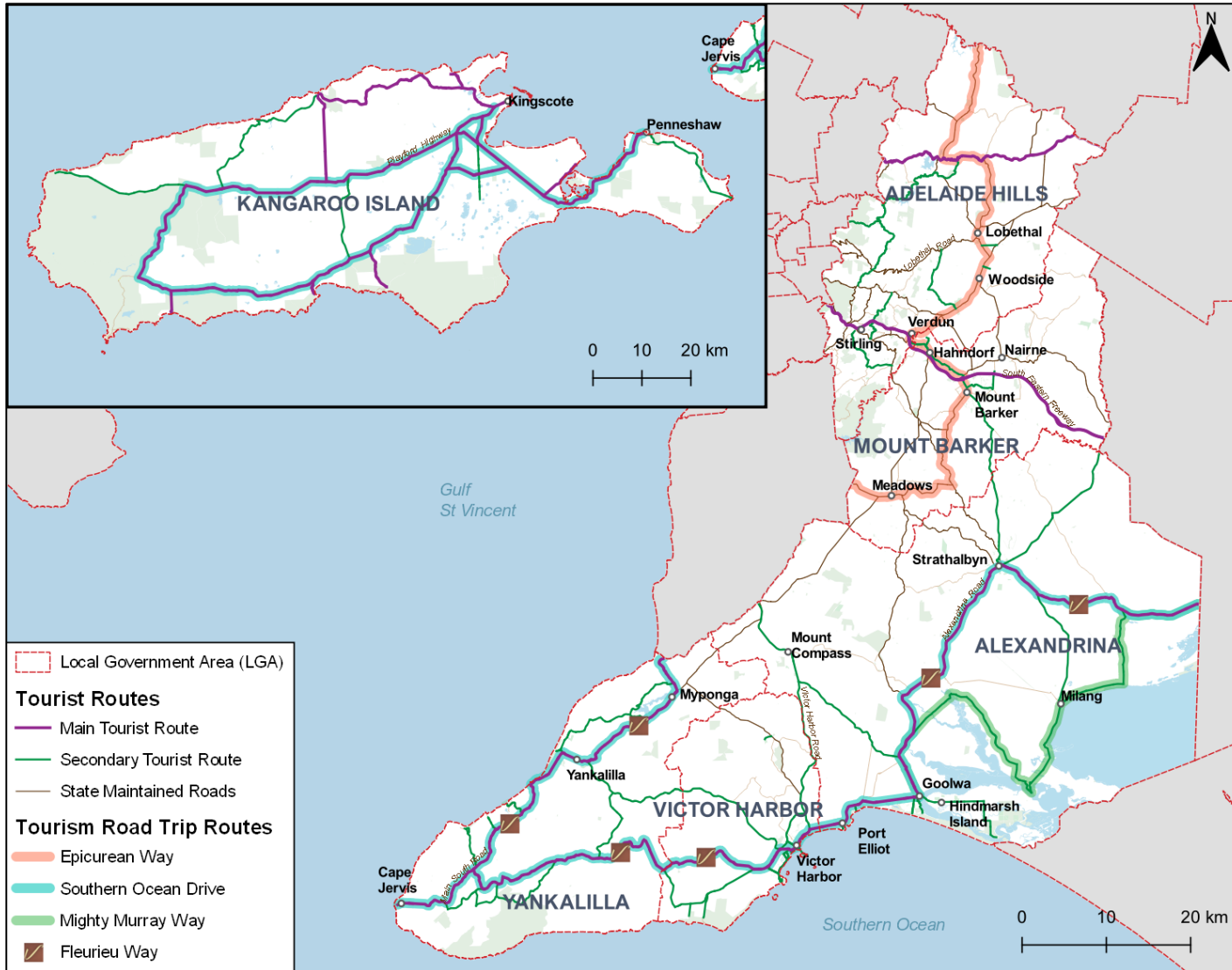
REGIONAL TOURISM ATTRACTIONS



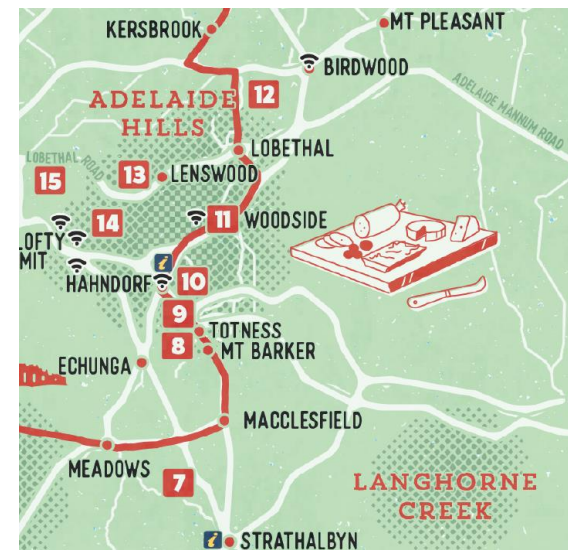
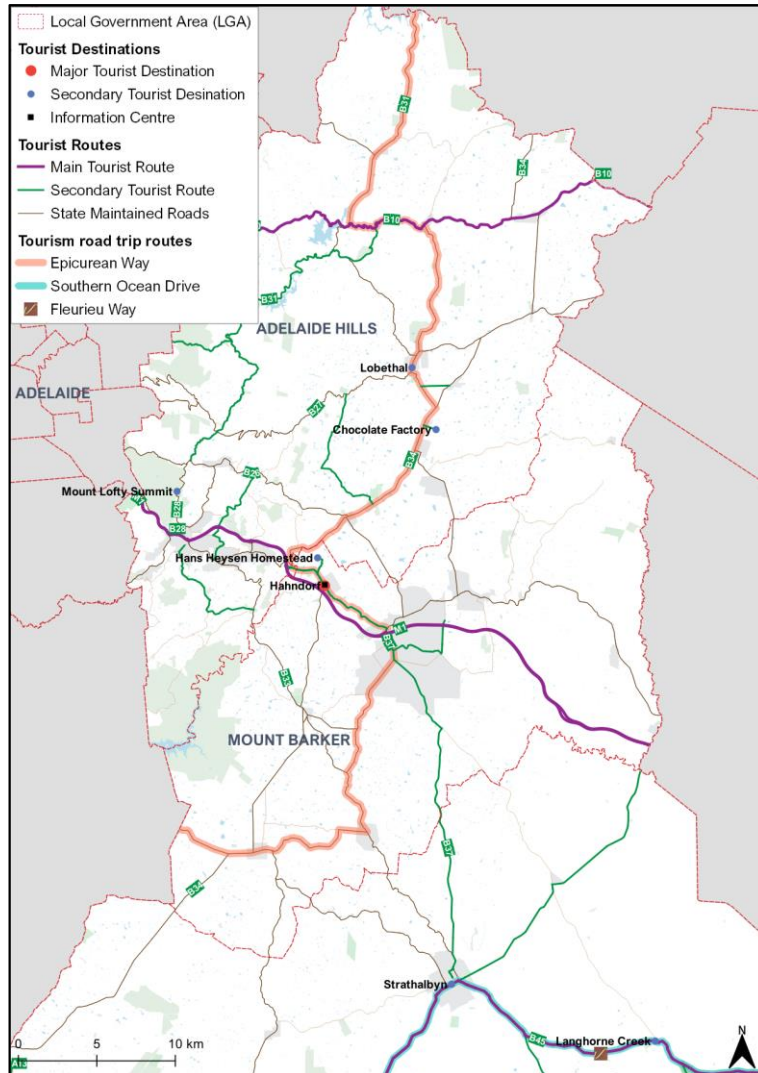
STATE MAINTAINED ROAD REST AREAS IN THE REGION



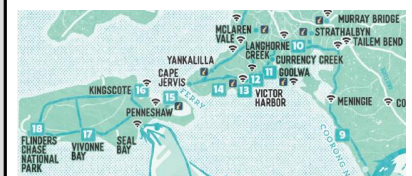
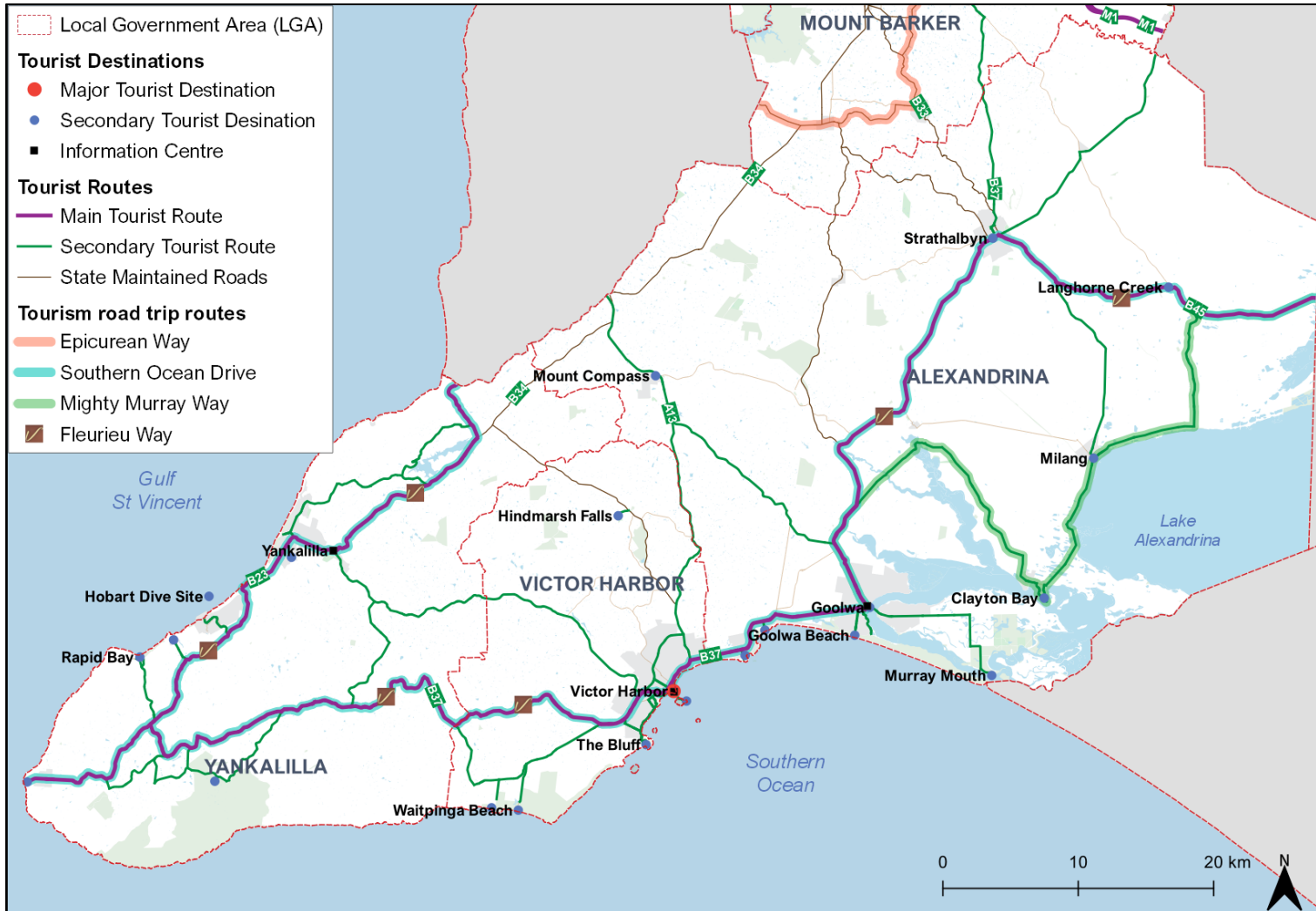
EXISTING TOURISM ROUTES



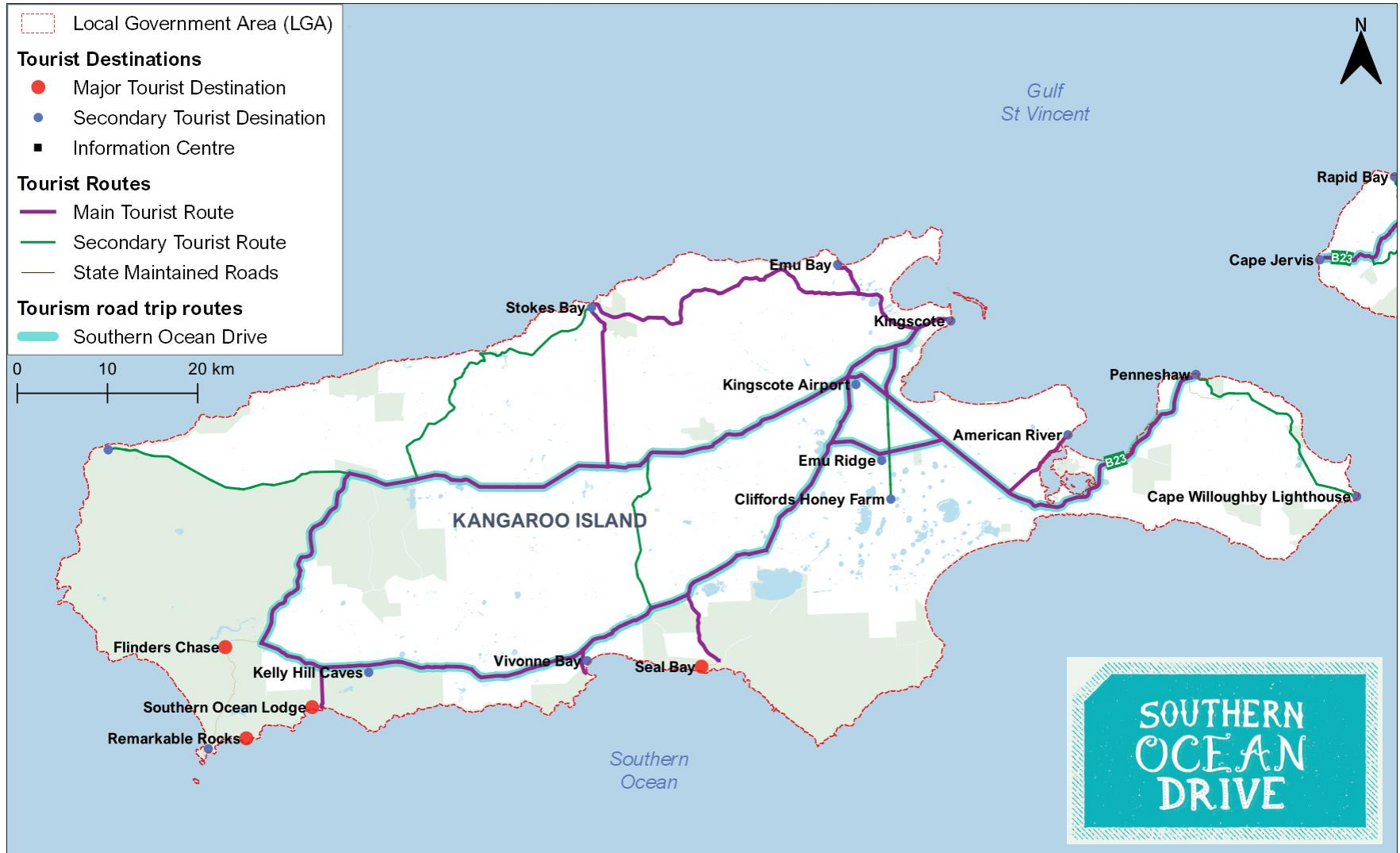
EXISTING TOURISM ROUTES (ADELAIDE HILLS)



EXISTING TOURISM ROUTES (FLEURIEU PENINSULA)

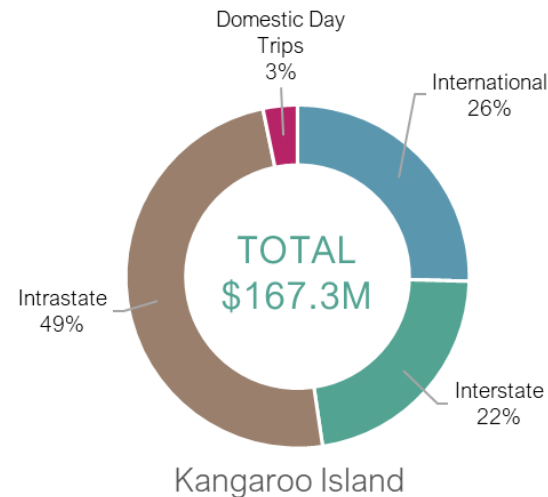
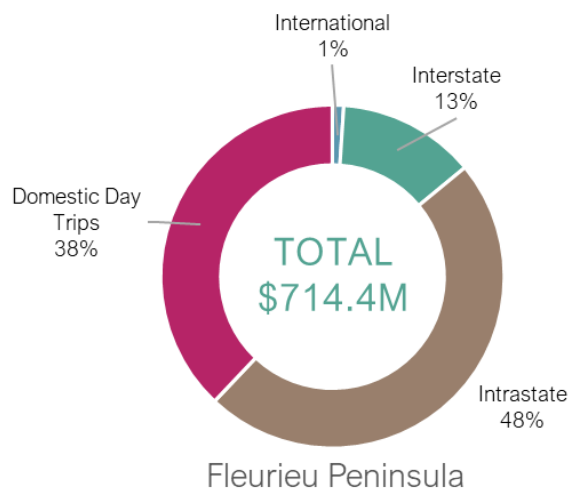
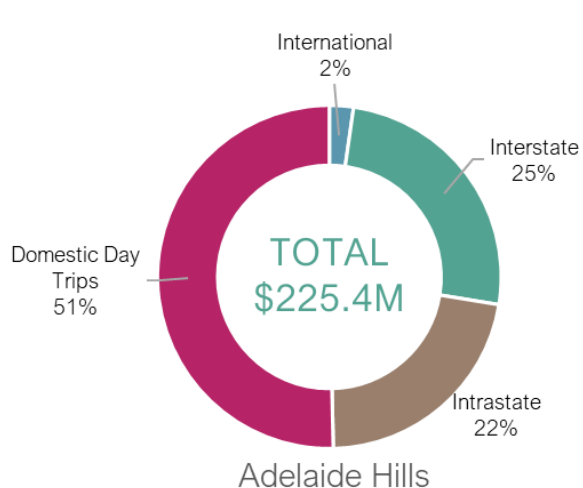


EXISTING TOURISM ROUTES (KANGAROO ISLAND)



TOURISM CONSUMPTION BY VISITOR TYPE

2018-2019

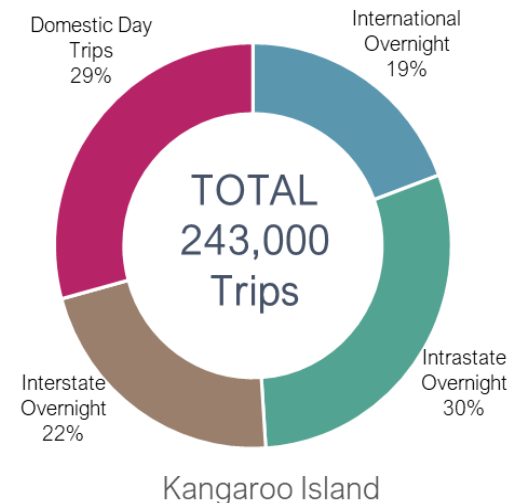
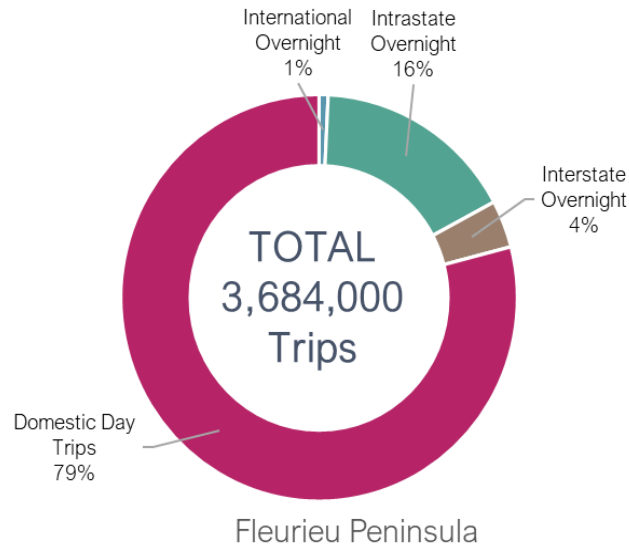
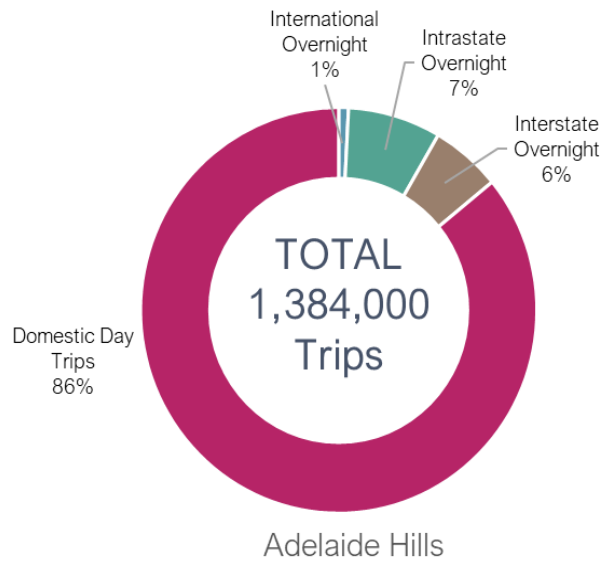


Source: <https://www.tra.gov.au/Economic-analysis/Economic-Value/Regional-Tourism-Satellite-Account/regional-tourism-satellite-account>

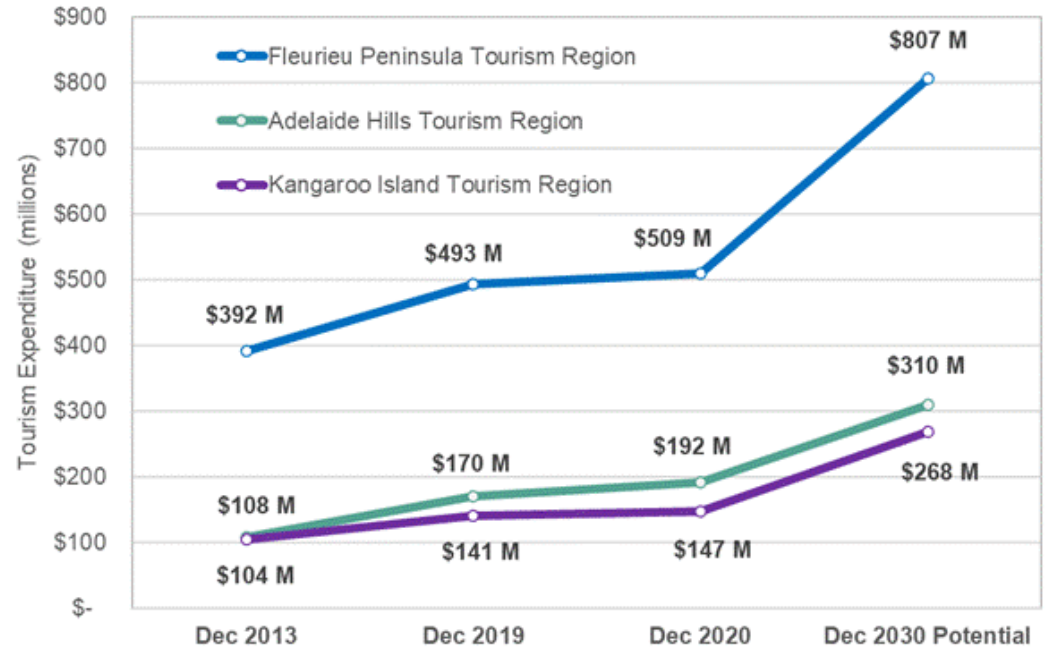
VISITOR TRIPS BY TOURISM REGION

Annual Visitor Trips – Average from December 2017 to December 2019

Number of Trips	Adelaide Hills	Fleurieu Peninsula	Kangaroo Island
Overnight Visits	194,000	771,000	172,000
Domestic Day Trips	1,189,000	2,912,000	71,000
International Day Trips	182,000	95,000	40,000
Total Trips	1,565,000	3,778,000	283,000



TOURISM EXPENDITURE IN THE REGION



Fourth most recognised tourist spot in Australia, over 205,000 people visit Kangaroo Island each year, making it one of the most popular destinations in South Australia.

TOURISM MARKETS & DEMAND (ADELAIDE HILLS)

ADELAIDE HILLS

STATE

South Australia

TOURISM REGION

Adelaide Hills

POPULATION

76.0K

REGIONAL GRP

\$2.4bn

BUSINESSES

773



2018–19
Change on
2017–18

TOURISM CONSUMPTION

Total tourism consumption \$225.4M ▲ 4.5%

TOURISM GROSS REGIONAL PRODUCT (GRP)

Direct \$71.8M ▲ 3.5%

Indirect \$76.4M ▲ 2.1%

Total tourism GRP \$148.2M ▲ 2.8%

Tourism's direct share of GRP 2.8% n/a

TOURISM GROSS VALUE ADD (GVA)

Direct \$69.3M ▲ 4.6%

Indirect \$59.7M ▲ 1.7%

Total tourism GVA \$129.0M ▲ 3.3%

Tourism's direct share of GVA 2.9% n/a

TOURISM EMPLOYMENT (PERSONS)

Direct 1K ▲ 0.7%

Indirect 430 ▲ 1.7%

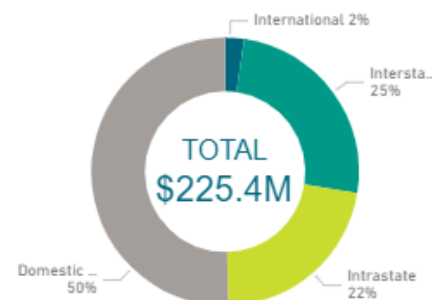
Total tourism employment 2K ▲ 0.9%

Tourism's direct share of employment 5.4% n/a

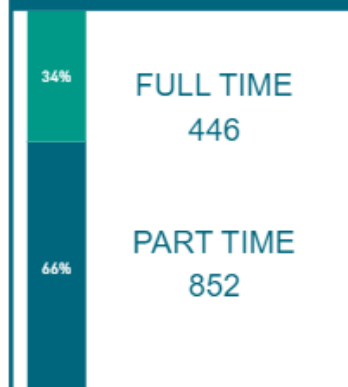
DIRECT GVA BY INDUSTRY



TOURISM CONSUMPTION BY VISITOR TYPE



EMPLOYMENT BY TYPE



TOURISM MARKETS & DEMAND (FLEURIEU)

FLEURIEU PENINSULA

STATE

South Australia

TOURISM REGION

Fleurieu Peninsula

POPULATION
101.9K
REGIONAL GRP
\$2.5bn
BUSINESSES
836

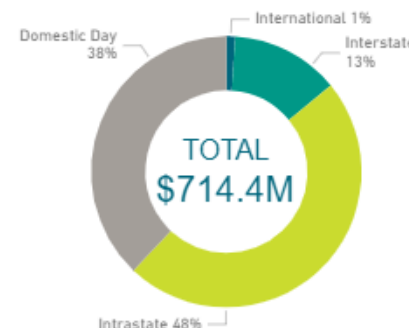


	2018–19	Change on 2017–18
TOURISM CONSUMPTION		
Total tourism consumption	\$714.4M	▲ 2.2%
TOURISM GROSS REGIONAL PRODUCT (GRP)		
Direct	\$208.4M	▲ 5.5%
Indirect	\$227.9M	▲ 1.9%
Total tourism GRP	\$436.3M	▲ 3.6%
Tourism's direct share of GRP	7.7%	n/a
TOURISM GROSS VALUE ADD (GVA)		
Direct	\$199.3M	▲ 7.1%
Indirect	\$177.8M	▲ 2.2%
Total tourism GVA	\$377.2M	▲ 4.7%
Tourism's direct share of GVA	7.9%	n/a
TOURISM EMPLOYMENT (PERSONS)		
Direct	3K	▼ 1.9%
Indirect	1K	▲ 1.7%
Total tourism employment	5K	▼ 0.9%
Tourism's direct share of employment	12.6%	n/a

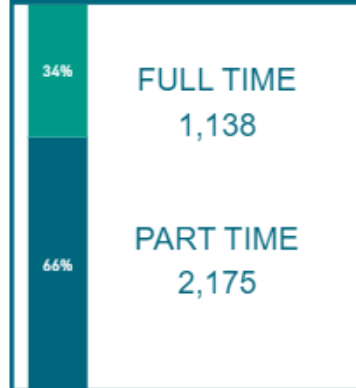
DIRECT GVA BY INDUSTRY



TOURISM CONSUMPTION BY VISITOR TYPE



EMPLOYMENT BY TYPE



TOURISM MARKETS & DEMAND (KANGAROO ISLAND)

KANGAROO ISLAND

2018-19

STATE

South Australia

TOURISM REGION

Kangaroo Island

POPULATION

4979

REGIONAL GRP

\$237.3M

BUSINESSES

115



2018-19 Change on 2017-18

TOURISM CONSUMPTION

Total tourism consumption \$167.3M ▼ 4.1%

TOURISM GROSS REGIONAL PRODUCT (GRP)

Direct \$68.5M ▲ 1.9%

Indirect \$47.9M ▲ 1.5%

Total tourism GRP \$116.4M ▲ 1.8%

Tourism's direct share of GRP 26.7% n/a

TOURISM GROSS VALUE ADD (GVA)

Direct \$62.0M ▲ 1.4%

Indirect \$37.4M ▲ 1.1%

Total tourism GVA \$99.4M ▲ 1.3%

Tourism's direct share of GVA 26.1% n/a

TOURISM EMPLOYMENT (PERSONS)

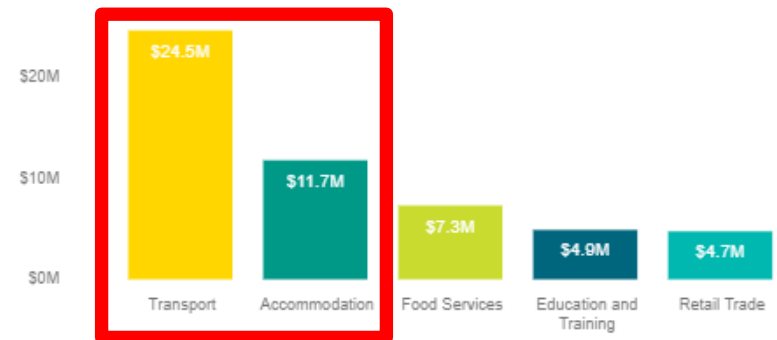
Direct 910 ▼ 0.3%

Indirect 266 ▲ 1.0%

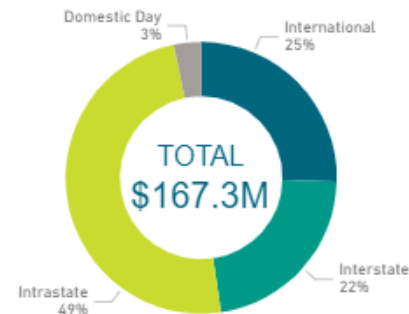
Total tourism employment 1K ▲ 0.0%

Tourism's direct share of employment 38.4% n/a

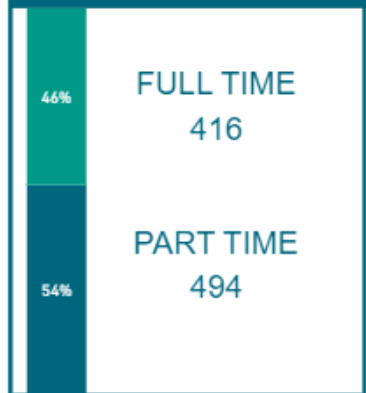
DIRECT GVA BY INDUSTRY



TOURISM CONSUMPTION BY VISITOR TYPE

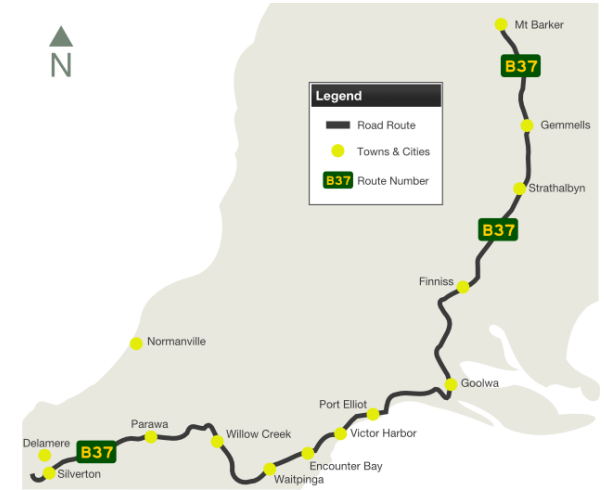


EMPLOYMENT BY TYPE



TOURISM ROUTE BRANDING IN THE REGION

- Maintain a consistent, easy to identify brand, such as the *Fleurieu Way*
- Use signage that combines the Southern Ocean and Fleurieu Way designations
- Use **B37** route markers as part of branding



PCH is California Route 1



COMMUNITY ACCESS

- Overview of Local Government Planning
- Existing Community Access Routes
- Demand for Community Access (Commuter Travel)

04

ADELAIDE HILLS COUNCIL

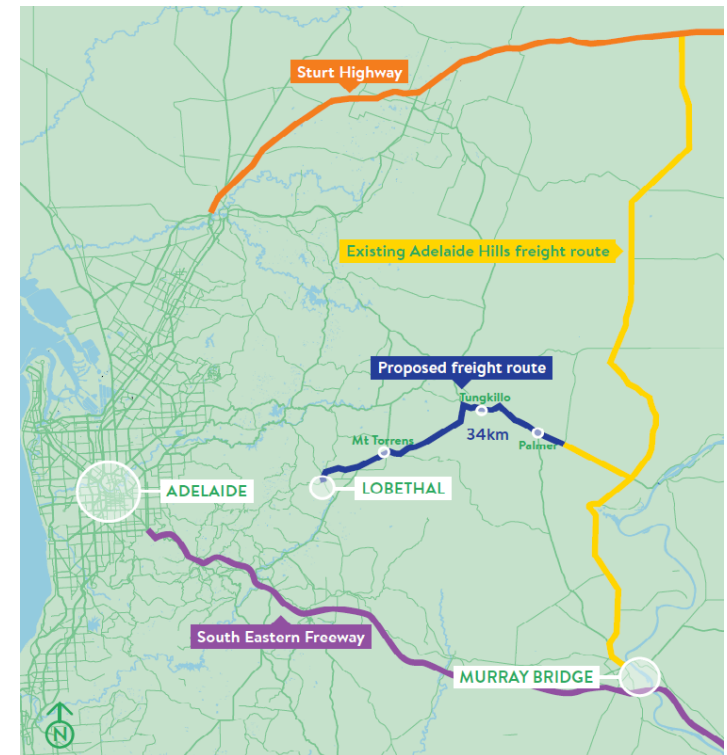
- Peak period traffic congestion and safety on the South Eastern Freeway is addressed with a managed motorway upgrade between Crafers and Stirling
- In 2019, DIT completed the upgrade for 34 km of the road network between Palmer and Lobethal to enable South Australia's Restricted Access Vehicle (RAV) network to be extended from the existing Adelaide Hills freight route.



The freight route was upgraded to accommodate Higher Productivity Vehicles (HPV) up to 26m B-Double and Performance-Based Standards Level 2A (PBS L2A) heavy vehicle combinations.

The works on the freight route upgrade included:

- junction upgrades to enable HPVs to undertake safe turning movements
- upgrade of existing culverts and bridge structures
- safety improvements with road widening, shoulder sealing, hazard protection and vegetation removal
- upgrading slow vehicle turnouts.



MOUNT BARKER DISTRICT COUNCIL



Strategic Asset Management Plan 2020



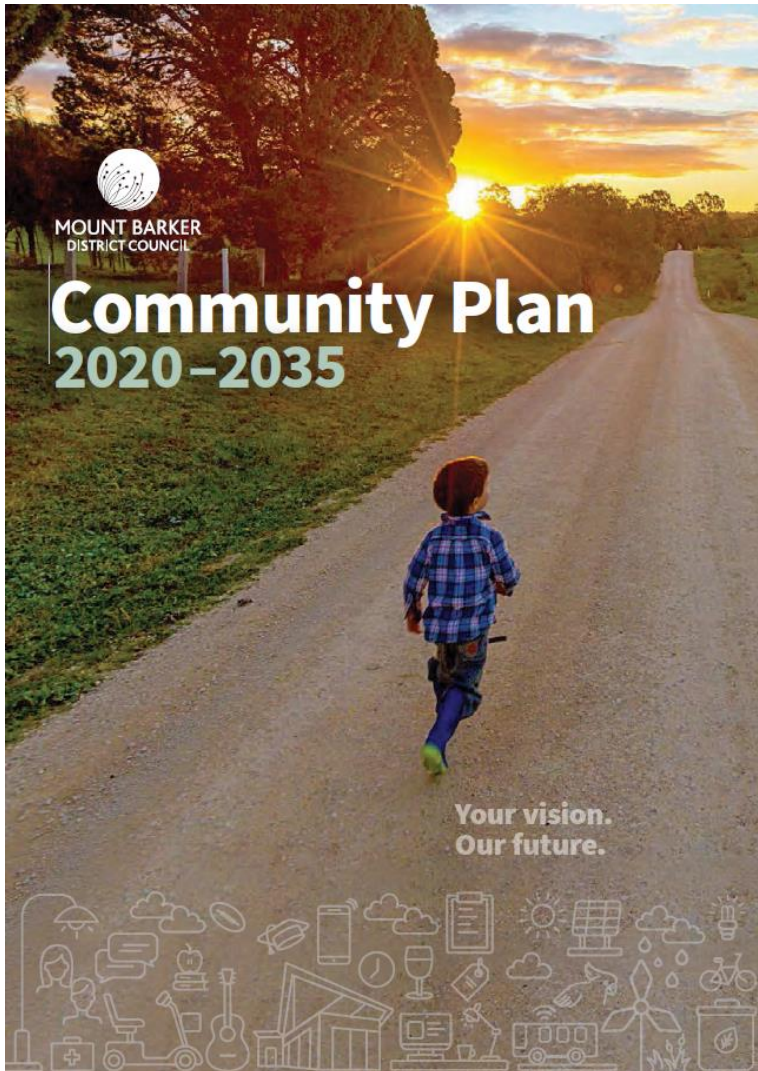
Transport

We have an extensive suite of assets that provide the community with safe and accessible transport. This includes 368 km of sealed roads, 455 km of unsealed roads, 159 km of footpaths, 320 km of kerb and channel, and 268 bridges, floodways and culverts. In addition, the district contains approximately 159 km of roads that are owned and maintained by the Government of South Australia.



Transport assets are monitored every 4 years through a scheduled condition assessment program. 97% of our sealed roads are in fair condition or better. However, the unsealed road assets are not performing as well: 41% are in poor or very poor condition; this is a slight improvement from 2018, when 43% were in poor or very poor condition. 95% of footpaths and 91% of bridges and culverts are in fair condition or better.

MOUNT BARKER DISTRICT COUNCIL



Community Wellbeing

CW Goal 5

Mobility and accessibility

Transport solutions, infrastructure and trails allow people to move to, from and within the district in a convenient, efficient and accessible manner.

CW Objective 5.1 Support and advocate for expanded public transport infrastructure and services to all parts of the district and for a fast and efficient public transport service to Adelaide.

CW Objective 5.2 Enable safe and direct pedestrian, bicycle and mobility scooter movements to, from and through urban areas and public spaces.

CW Objective 5.3 Apply a strategic, planned and consistent approach to the provision, development and maintenance of roads and footpaths.

CW Objective 5.4 Provide and advocate for flexible and diverse transport options that promote and enable accessibility and connectivity.

CW Objective 1.2 Further develop and improve the integrated cycle and pedestrian trail network.

Measuring our progress

Indicator	Measure
Volunteering	More opportunities to participate in meaningful community volunteering
Education	Greater diversity of education opportunities in the district
Housing	Increasing availability of quality, low-footprint and affordable housing
Transport	Better public transport, more pedestrian and cycle ways and safer roads
Community	Higher quality facilities and more accessible community and services facilities– library, recreation, sport, arts and crafts

HEYSEN BOULEVARD IN MOUNT BARKER

- Incomplete road network to residential growth areas in southern suburbs of Mount Barker
- Limits residential development and bus network
- Would provide a southern bypass of town centre

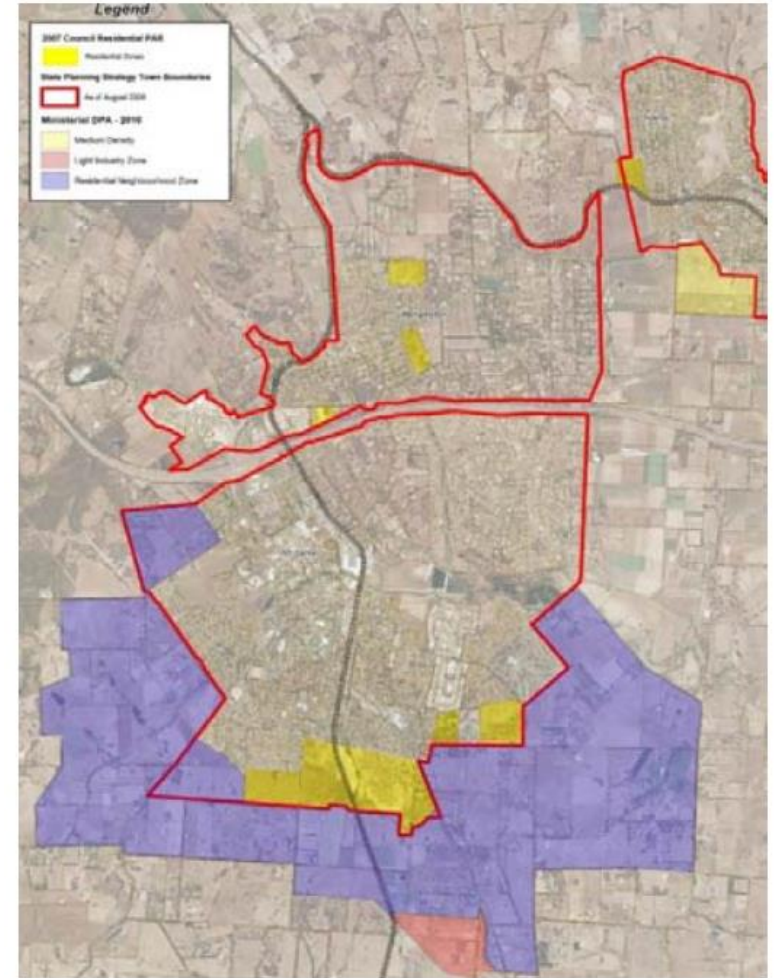
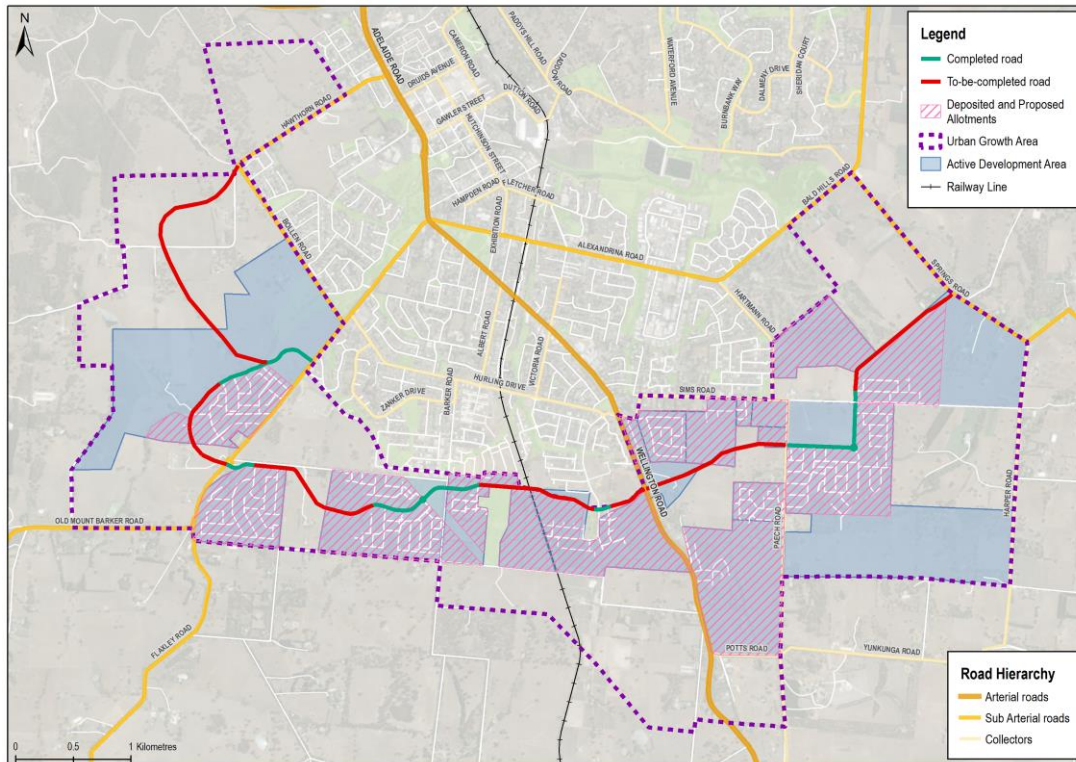


Figure 3: Mount Barker Ministerial Development Plan Amendment (DPA) zoning

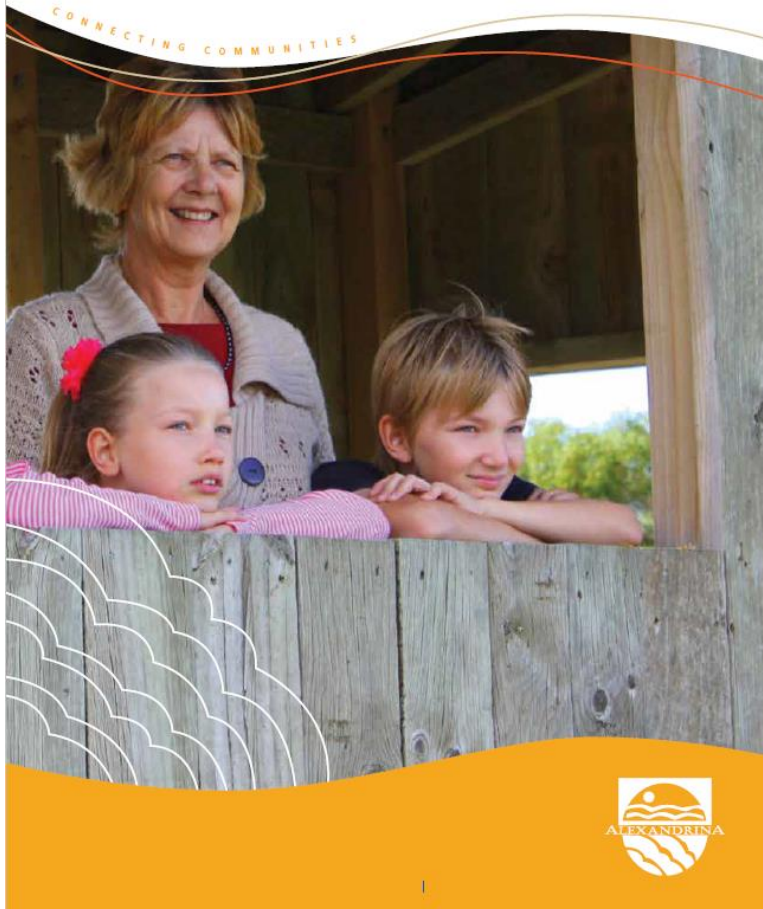
MOUNT BARKER TOWN CENTRE CATALYST PROJECT

- In December 2020, Mount Barker District Council announced Burke Urban as the developer to design and build the new community town square project with a new library, innovation hub and civic office.
- The project will generate significant private investment with over 4,000 m² of office space, a hotel, residential units and a market shed for artisans and food and beverage outlets.
- When completed, this site will be a major attraction for local trips in Mount Barker.



ALEXANDRINA COUNCIL

Alexandrina Council
Community Strategic Plan
2014-23



Emphasis: Region to Region – Connecting Communities Safely

- Establish Fleurieu Regional Transport Taskforce (Hills and Southern Fleurieu working groups)
- Arterial road upgrades (Priority: Goolwa to Strathalbyn Road; Woodchester and surrounds)
- Centralised coordination for volunteer, sole trader 'movers' and community buses (ie. My 'School' Bus town-to-town)



Emphasis: Regions to City – Choices for Residential & Youth Growth

- 30 Year Greater Adelaide Plan Bypass – Strathalbyn (Consultation by State Govt pending)
- Public transport feeds to Mount Compass and Strathalbyn Transit Oriented Developments
- Off-road and green corridor recreation trails (land and water)



Emphasis: Fleurieu Experiences – Regional Economic & Environmental Stimulus

- 30 Year Greater Adelaide Plan Bypass – Goolwa North-Middleton-Port Elliot (Consultation by State Govt pending)
- Renewable Powered Light Rail – Mount Barker-Strathalbyn-Goolwa-Victor Harbor (with service linkage to possible Aldinga-Seaford rail)
- Hybrid mobility support in townships (designing for individual movement trends)

Fleurieu Transport and Trails Network

Additional Footpath Expansion

Fleurieu Trails Network*

- Langhorne Creek Red Trail
- Beyond Bike Track
- Angas River Shared Path, Strathalbyn
- Milang cycling/walking tracks
- Encounter Bikeway extension

ALEXANDRINA COUNCIL

Alexandrina Council

Infrastructure & Asset Management Plan 2016-25



Roads & Bridges \$7.3 million

is proposed to be spent on the road network including \$5.7 million on sealed road expansion and renewals.

A further \$1.3 million will be spent on unsealed road resheeting and \$0.3 million on bridges. Sealed road works will include:

- Strathalbyn streetscape revitalisation
- Goolwa Wharf precinct related projects (subject to funding)
- Goolwa Beach Master Plan (subject to funding).

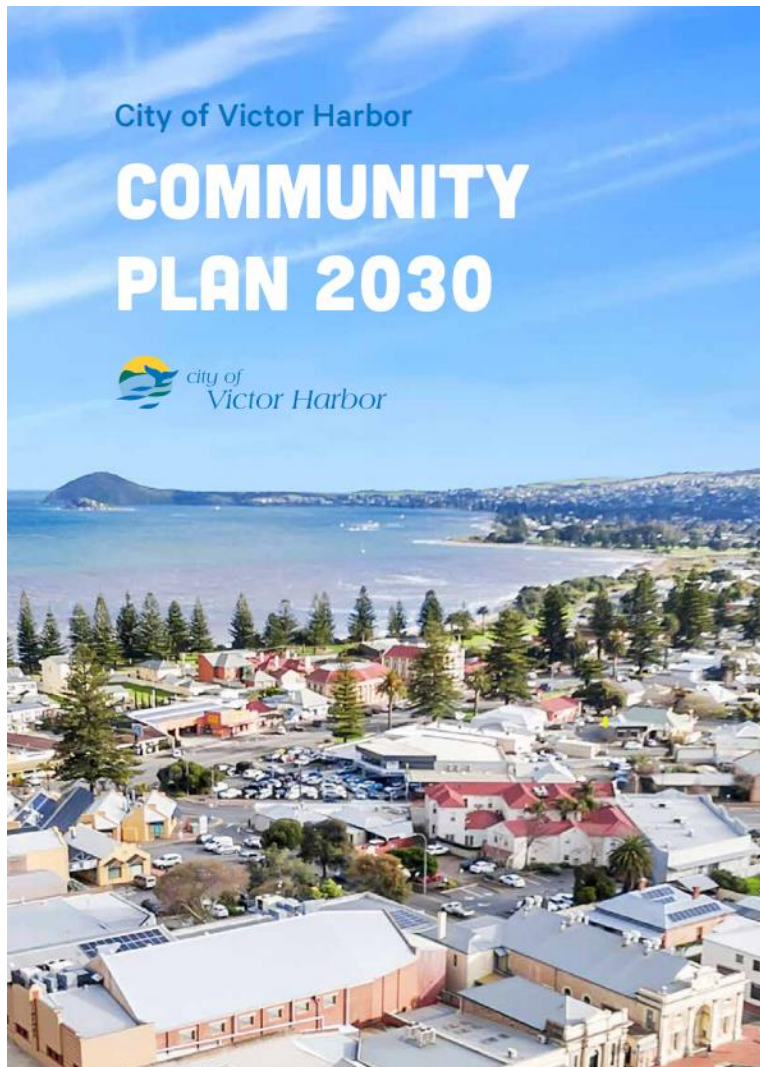
Asset Class	Surface Type	Length (kms)
Rural Collector and Distributor Road	Sheeted	46.44
	Sealed	227.65
Rural Local & Access Road	Sheeted	700.54
	Sealed	73.85
Urban Collector and Distributor Road	Sealed	40.25
Urban Local & Access Road	Sheeted	11.10
	Sealed	185.53
Unformed Roads	Natural formation	1.20
Car park	Sheeted and Sealed	111 (No.)
Footpath, Shared Path, Pram Ramps	Sealed	91.51
Total Road, Footpath & Car park Assets		

Asset Class	Surface Type	Length (kms)
Rural Collector and Distributor Road	Sheeted	46.44
	Sealed	227.65
Rural Local & Access Road	Sheeted	700.54
	Sealed	73.85
Urban Collector and Distributor Road	Sealed	40.25
Urban Local & Access Road	Sheeted	11.10
	Sealed	185.53
Unformed Roads	Natural formation	1.20
Car park	Sheeted and Sealed	111 (No.)
Footpath, Shared Path, Pram Ramps	Paved and Sealed	91.51

- Detailed asset management and renewal program
- Road network infrastructure includes roads, bridges and car parks
- Significant funding for streetscape projects



CITY OF VICTOR HARBOR



- Population forecast to grow to 17,900 by 2030
- Need for improved transport networks, particularly for the Victor Harbor to Adelaide Road as it is very important to the local economy as a major commuter, tourist and freight route
- Provide for better roads and footpaths as a priority
- Improve the management of car parking and traffic in the town centre
- Consider other sources to fund road infrastructure

Recent Local Infrastructure Projects from DIT

- Victor Harbor roundabout upgrade in city centre
- Granite Island Causeway upgrade for safety and to promote tourism



DISTRICT COUNCIL OF YANKALILLA

DISTRICT COUNCIL OF YANKALILLA STRATEGIC PLAN

2030 VISION

FOUR YEAR FOCUS 2020-2024



A strategic management plan of the District Council of Yankalilla.



- Yankalilla is the gateway between Kangaroo Island and Adelaide with an increase of 5,200 vehicles per day comprising 12% heavy vehicles
- Yankalilla has many unsealed roads that limit efficient access for farmers to get to markets
- Safety and amenity issues along Main South Road through Yankalilla and Normanville
- High volume and high-speed traffic environments have likely caused under 290 road traffic accidents from 2013–17 comprising 45% with some injury, 25% serious injuries and 3 fatalities
- Yankalilla relies on cost effective road infrastructure with a low ratepayer basis
- Issues with safe and efficient road access to the ferry services at Cape Jervis
- Public and private transport infrastructure is funded and provided by others (SeaLink)
- Poor quality public transport access to Adelaide

KANGAROO ISLAND COUNCIL



1	2	3	4	5
INFRASTRUCTURE	COMMUNITY	ECONOMY	ENVIRONMENT	ORGANISATION
A built environment focused on essential and Community services.	Communities and Individuals empowered to improve the quality of Island life.	Re-establish a strong and diverse economy.	Our environment is maintained, enhanced and protected.	Leadership to deliver positive social, financial and environmental outcomes.



KANGAROO ISLAND COUNCIL

Strategic Plan

September 2020 **2020-2024**

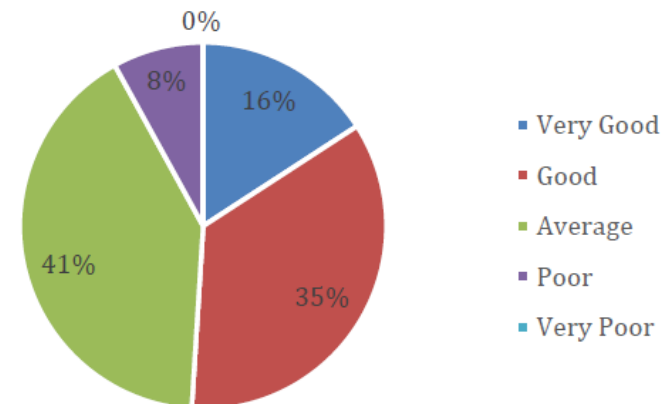
Roads and Assets 1.1 Develop and maintain our roads and physical assets to acceptable standards.	1.1.1	Deliver the Infrastructure and Asset Management Plan 2019-28.	2024
	1.1.2	Secure at least \$2M per annum Local Road Sustainability funding.	Annual
	1.1.3	Develop joint asset management plans with government agencies for roads and marine infrastructure.	2023
	1.1.4	Obtain funding to undertake a road safety audit and plan – to achieve national safety standards (including signage) for all Island roads.	2024
	1.1.5	Review the 2005 Kingscote Community Wastewater Management System Extension Plan to prioritise the extension works.	2022
	1.1.6	Seek financial assistance from State Government to complete the Emu Bay boating facility upgrade project.	2024

KANGAROO ISLAND COUNCIL



- Ferry crossing should be upgraded to National Highway status as it is a critical link for movement
- No freight movement statistics available
- Need for local road network to be upgraded for larger trucks and safer visitor trips, including interstate and high proportion of international tourists prior to 2020
- Improve road access and address car parking issues for the ferry services at Penneshaw
- Improve road access to Kangaroo Island airport

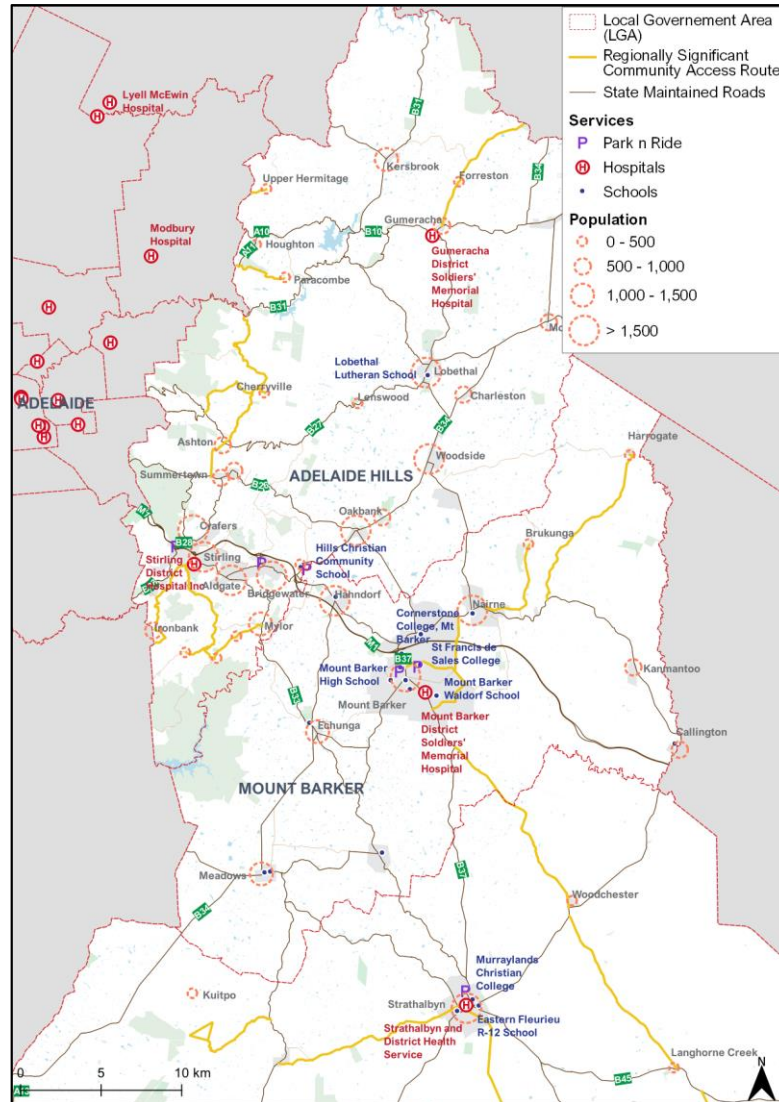
Asset Condition of Sealed Roads



COMMUNITY ACCESS ROUTES



COMMUNITY ACCESS ROUTES (ADELAIDE HILLS)



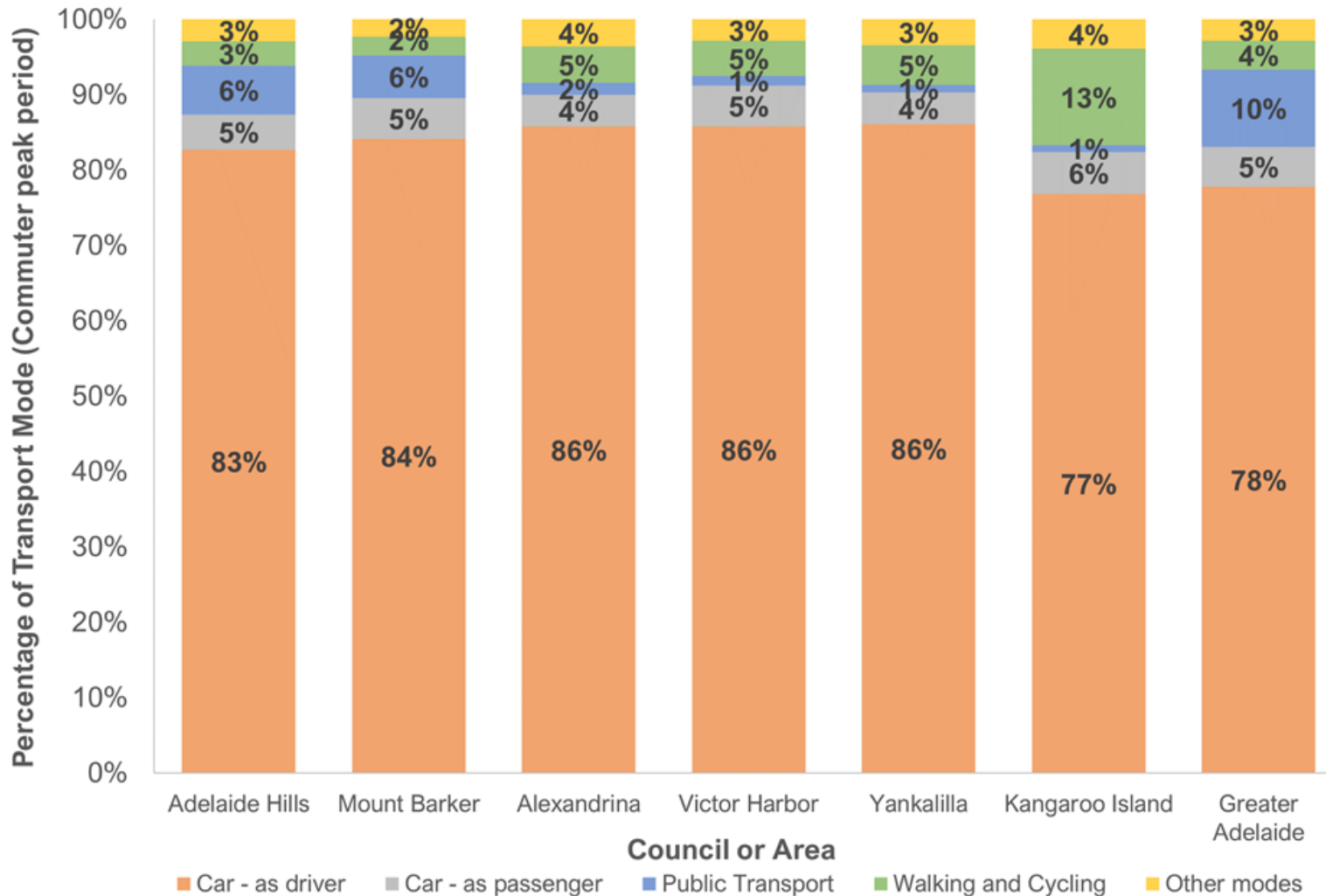
COMMUNITY ACCESS ROUTES (FLEURIEU PENINSULA)



COMMUNITY ACCESS ROUTES (KANGAROO ISLAND)



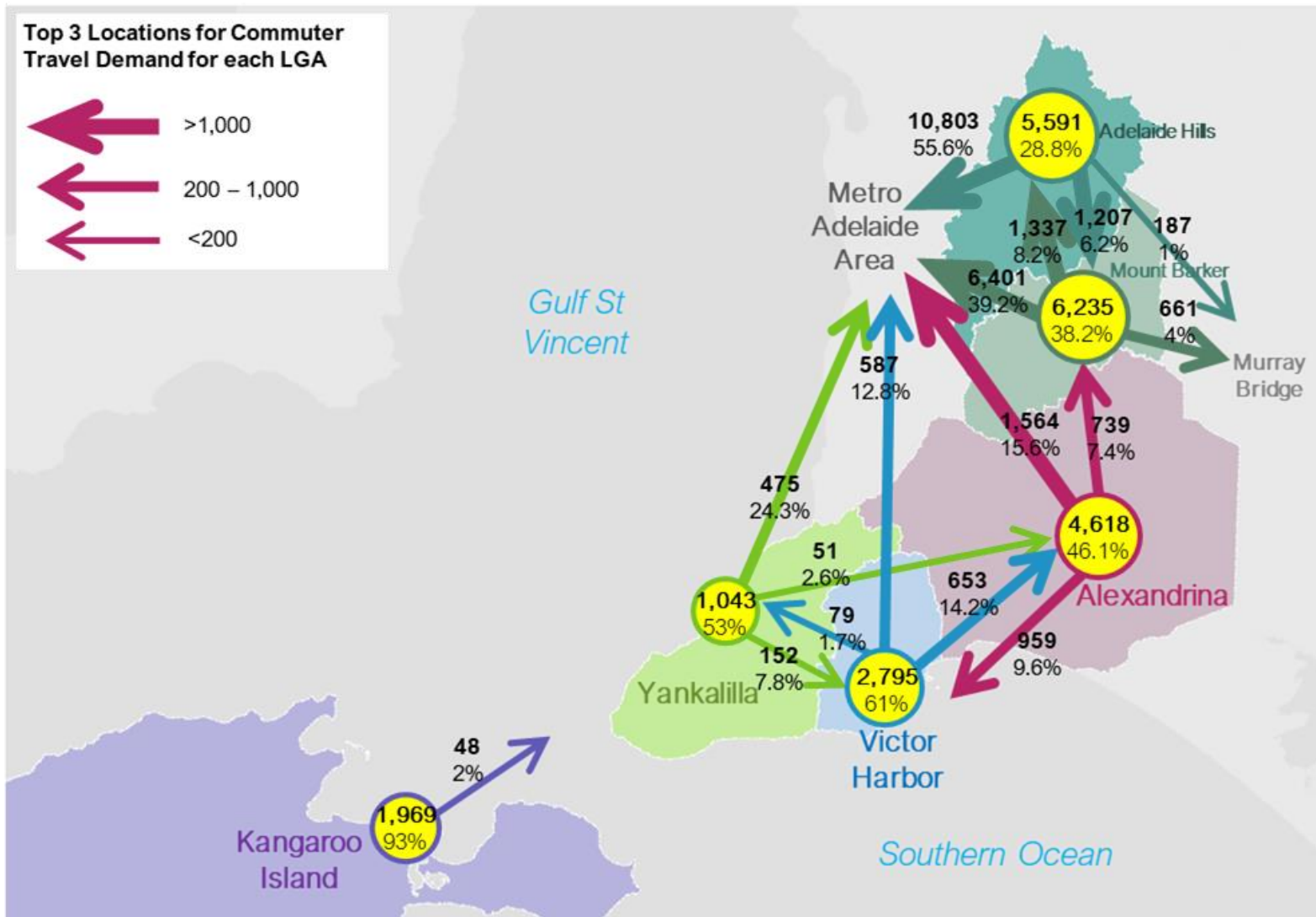
MODE SHARE COMPARISON FOR EACH COUNCIL



Private vehicle mode share usage is about 90 per cent for all Councils except for Kangaroo Island with 83 per cent. Cycling usage is highest on Kangaroo Island at 13 per cent. Public transport usage is very low at 1 to 6 per cent.

Journey to Work Mode Statistics from the 2016 ABS Census

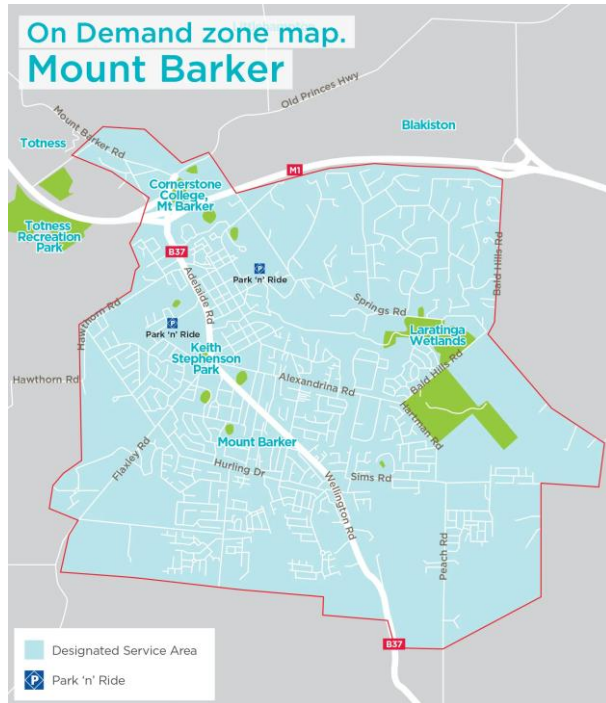
TOP 3 DESTINATIONS FOR COMMUTERS BY COUNCIL



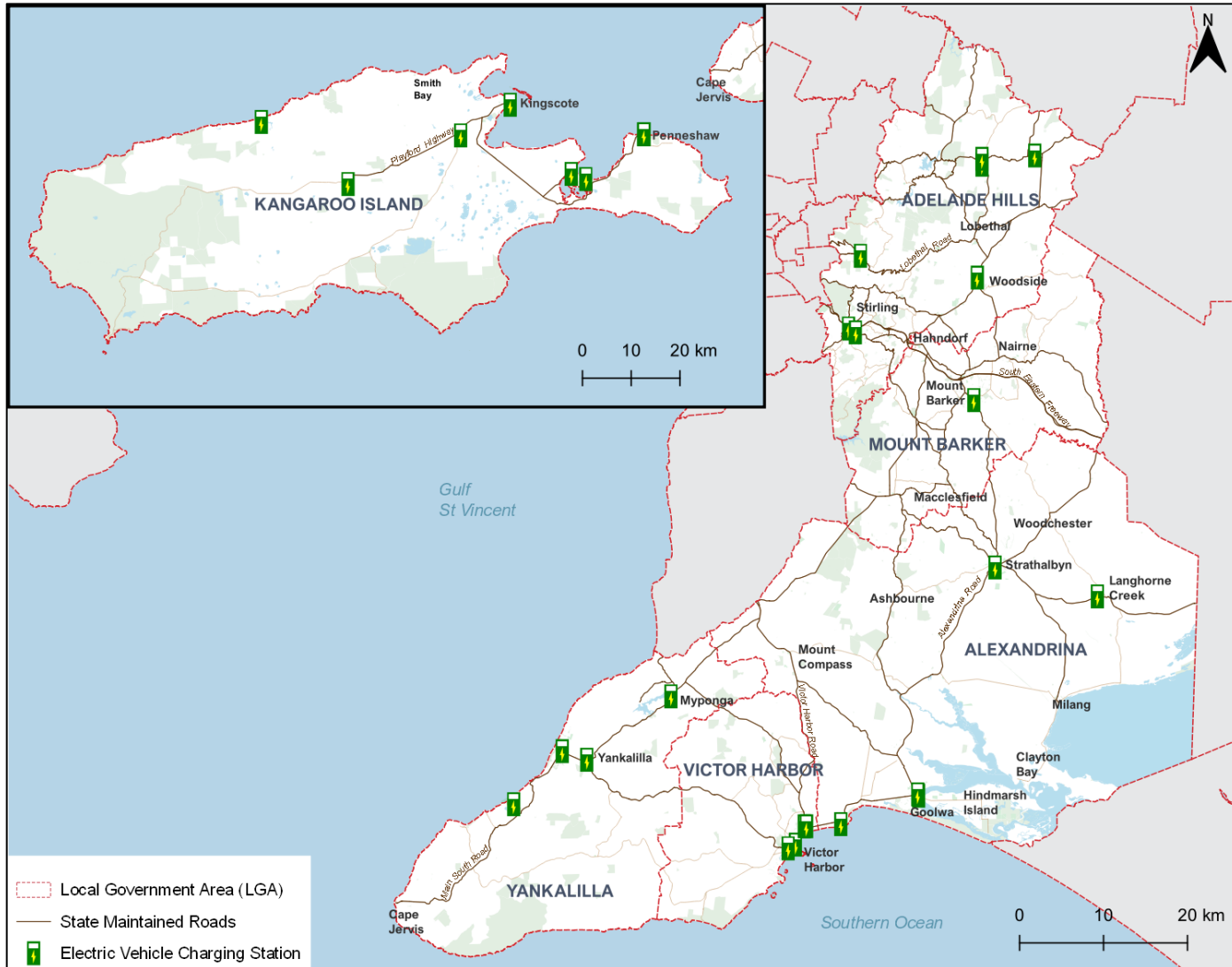
OTHER TRANSPORT MODES

05

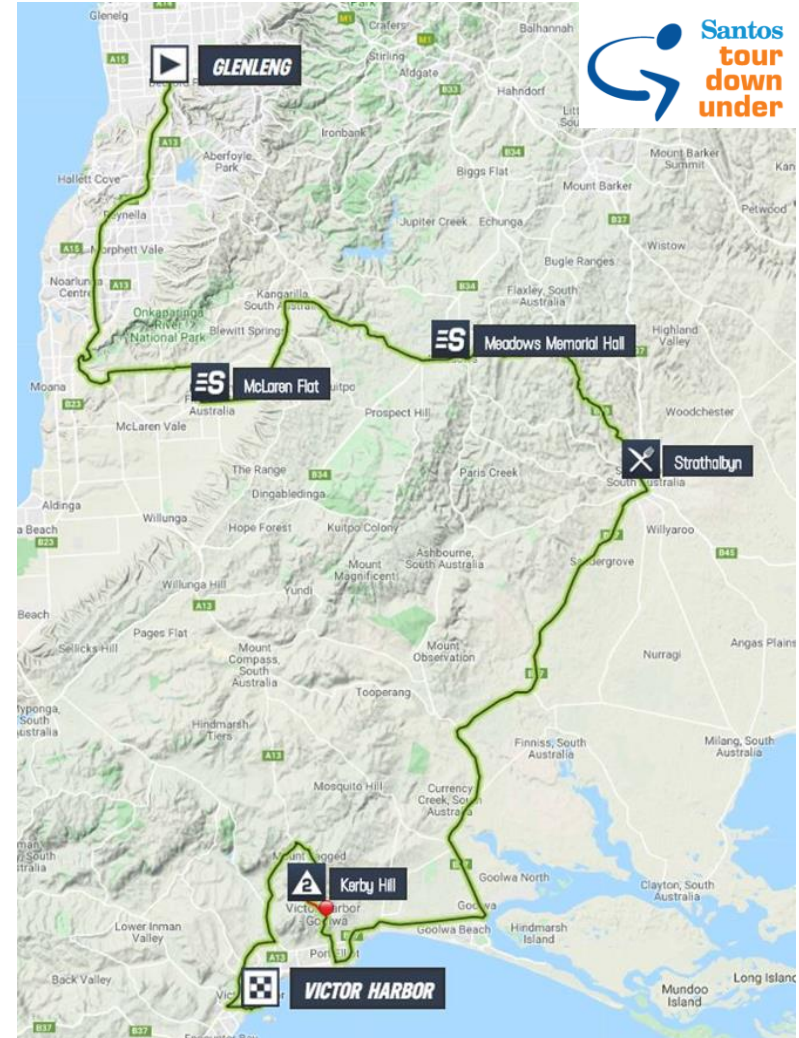
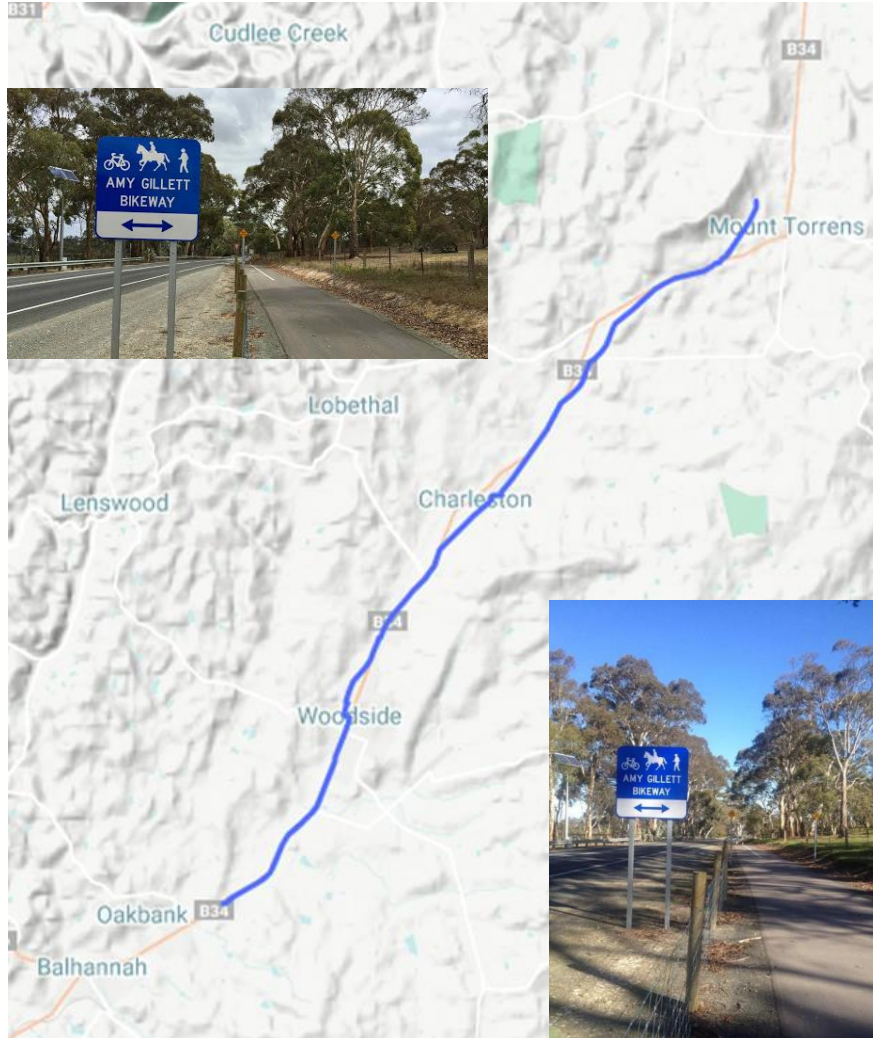
REGIONAL PUBLIC TRANSPORT



ELECTRIC VEHICLE CHARGING STATIONS IN THE REGION



REGIONAL CYCLING



ORGANISED CYCLING TOURS IN THE REGION



Day Tour Strathalbyn to Langhorne Creek return

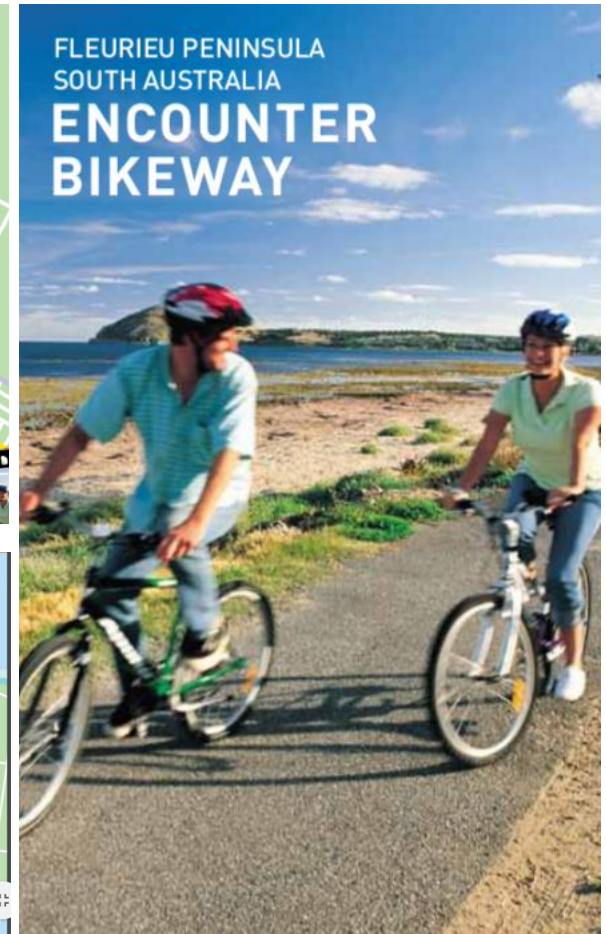
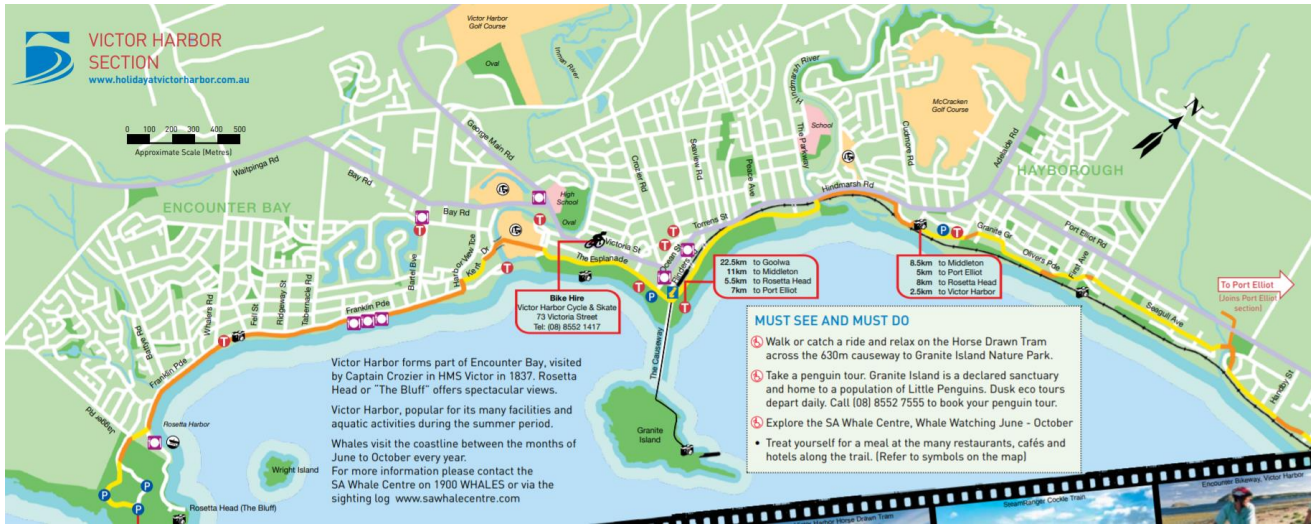


This cycling tour is a three-day organised activity with the camping equipment provided.

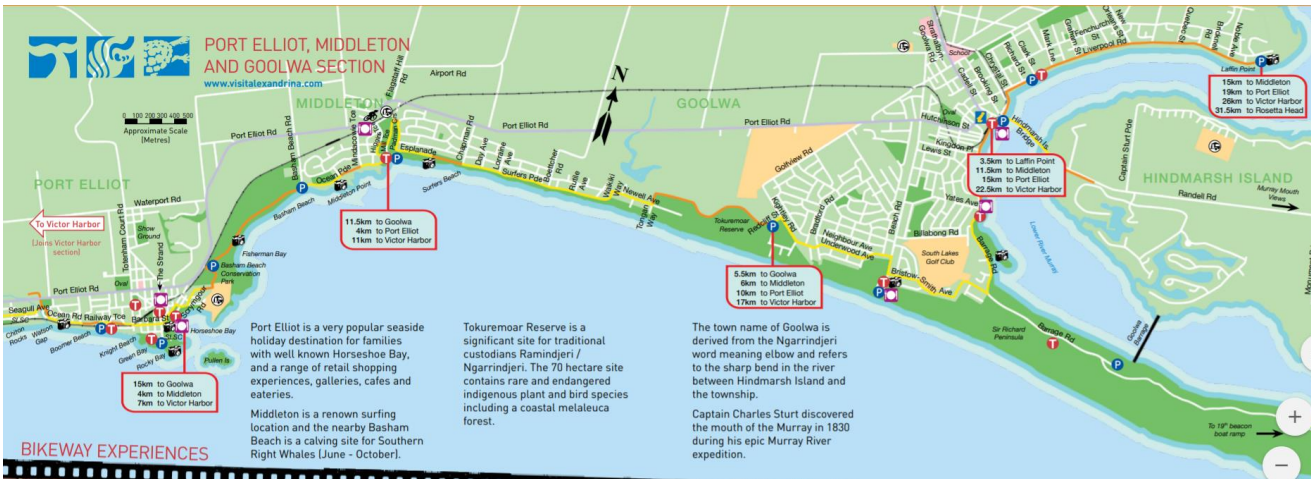
The day routes are:

- Day 1 Strathalbyn to Milang via Langhorne Creek (45 km)
- Day 2 Milang - Port Elliot via Currency Creek, Goolwa and Middleton (50 km)
- Day 3 Port Elliot - Victor Harbor (25 km)

REGIONAL CYCLING



FLEURIEU PENINSULA SOUTH AUSTRALIA ENCOUNTER BIKEWAY



ENCOUNTER BIKEWAY
VICTOR HARBOR TO GOOLWA
COASTAL BIKEWAY

REGIONAL CYCLING ROUTES



REGIONAL CYCLING DEMAND FROM STRAVA DATA



SEA TRANSPORT IN THE REGION

- SeaLink and KI Connect with regular ferry services between Cape Jervis and Penneshaw
- SeaLink provides connecting coach services to Adelaide via Yankalilla; also a postal service
- KI Connect was considering local ferry services between Kingscote and American River
- Potential for ferry services between KI and Holdfast Bay
- Future for cruise ships at Victor Harbor
- *Patronage statistics are not available from the private operators.*



POTENTIAL FOR CRUISE SHIPS AT VICTOR HARBOR



Economic Impact Assessment on the Fleurieu Region of the Construction of a Multi-Purpose Boat Landing Facility, Victor Harbor

City of Victor Harbor

Final Report

20 March 2020

Funding for this study has been provided from the Australian Government through the Building Better Regions Fund

Destination Appeal

- Victor Harbor and the Fleurieu have many attractions for tourist appeal.

Infrastructure and Facilities Required

- A launching ramp for recreational boating, commercial fishing and the Sea Rescue Squadron with two breakwaters and a hardstand area and parking facilities for coaches, boat trailers and other amenities.

Marketing and Promotional Plans

- Many cruise ship passengers book their cruise and onshore excursions up to two years in advance. The marketing and promotion of a full range of quality tourist experiences and onshore excursions to cruise ship operators is needed during the construction stage of the landing facility.

Service Delivery and Management Capability

AIR TRANSPORT IN THE REGION



Source: Tourism SA



- Kangaroo Island Airport at Kingscote was upgraded with a new terminal in July 2018
- Regional Express Airlines (REX) between Adelaide and Kingscote with a 30-minute flight
- QantasLink between Adelaide and Kangaroo Island up to 5 days a week and between Melbourne and Kangaroo Island 3 days a week from mid-December to end of January

CONCLUSIONS AND FUTURE DIRECTIONS

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CONCLUSIONS

Strategic Planning

- Adelaide Hills and Mount Barker are part of Greater Adelaide with a focus on commuter and freight traffic on the South Eastern Freeway to metropolitan Adelaide
- Fleurieu Peninsula is not well planned for in State Government plans and strategies
- Kangaroo Island is a special challenge with access to the mainland critical for growth

Key Issues

- Need for a higher quality, direct freight route between Cape Jervis and South Eastern Freeway via Victor Harbor, Strathalbyn and Callington
- Incomplete southern bypass of Mount Barker to provide road access to developing suburbs and to allow for the provision of an improved bus and cycling network
- Road safety on key routes between Cape Jervis to Adelaide via Yankalilla, Victor Harbor to Adelaide via Mount Compass and Victor Harbor to Mount Barker via Strathalbyn
- Multiple brands for the regional tourist routes are confusing for visitors
- Lack of data about freight demand and travel markets to conduct comprehensive transport planning and business case development for road network improvements

FUTURE DIRECTIONS FOR THE S&H LGA REGION

Freight Network Priority Projects

- **South Coast Freight Corridor** between Cape Jervis and Callington as a strategic freight and tourism connection between Kangaroo Island and the South Eastern Freeway.
- Consider as a secondary freight corridor for Federal Government support and funding
- Plan for a high priority to build the Middleton bypass through Alexandrina Council with consultation for support from the Council and residents
- Designate Range Road for 26m B-Double trucks as part of the freight corridor
- Improve the **road access connections to the ferry termini** for services to and from Kangaroo Island on the island at Penneshaw and Cape Jervis
- Develop the Kangaroo Island Freight Corridor from Gosse to Penneshaw, and to the ferry at Cape Jervis, as a secondary cross regional road to be gazetted for 26m B-Double trucks when the Sealink ferry capability permits
- Develop the Southern Vales Wine Freight Corridor as a secondary cross regional road to be gazetted as a 26m B-Double GML route from McLaren Vale to the South East Freeway at Mount Barker

FUTURE DIRECTIONS FOR THE S&H LGA REGION

State Government Road Network and Safety Improvements

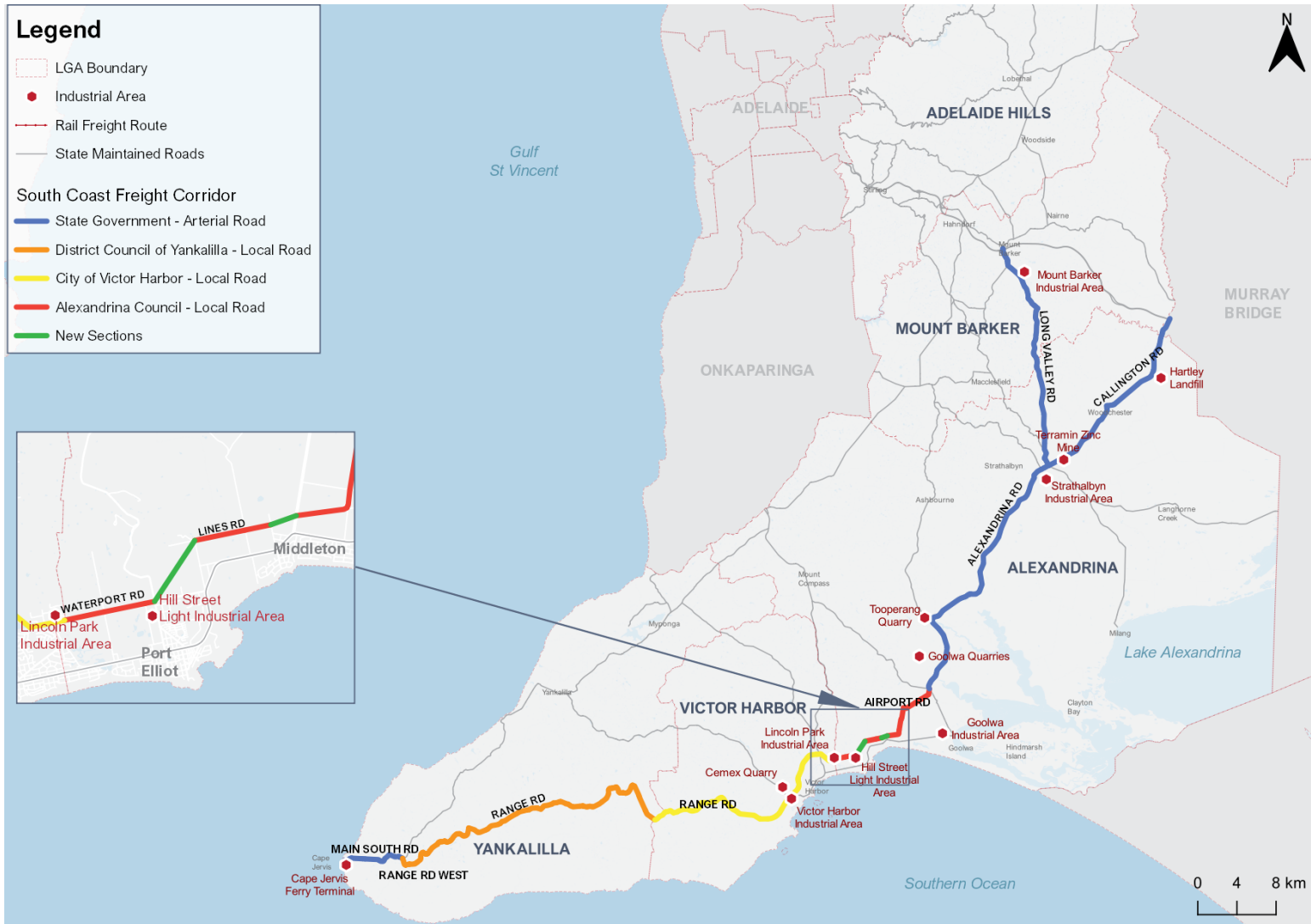
- Support the implementation of the Hahndorf road interchange project and the related upgrades to roads and streets in Hahndorf and Mount Barker by DIT
- Improve the safety of the Main South Road route through Yankalilla and Myponga as an important route between Adelaide and Cape Jervis
- Improve the safety of Victor Harbor Road through Mount Compass between Willunga and Victor Harbor

Regional Tourism Initiatives

- Promote the Fleurieu Way as the key tourism route for the Fleurieu region with consistent and integrated branding
- Establish new rest area sites for trucks and tourists with information displays throughout the region (such as at Mount Compass, Yankalilla and between Strathalbyn and Victor Harbor)



SOUTH COAST FREIGHT CORRIDOR PLAN



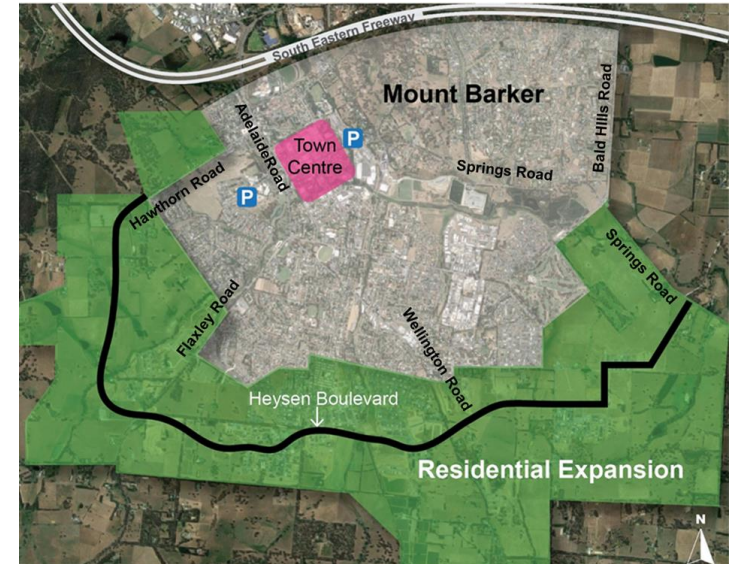
FUTURE DIRECTIONS FOR THE S&H LGA REGION

Community Access Projects

- Progressively plan and implement for the completion of the Heysen Boulevard to connect the southern suburbs of Mount Barker
- When the Middleton bypass road is connected as part of the South Coast Freight Corridor, redesignate Port Elliot Road (B37) between Waterport Road and Flagstaff Hill Road as a local collector road

Planning Requirements

- Request funding from Government for a comprehensive freight and goods movements survey to collect existing travel demand and market data that would provide the basis for transport planning and business case development of improved freight networks



FUTURE DIRECTIONS FOR THE S&H LGA REGION

