Mid Murray Council

Tourism, Heritage & Maritime Operations Sustainability report

Management Review

Tranche 1 – Maritime Operations - 2025

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1. Executive summary

This report is a management review of Mid Murray Council's maritime operations for the purpose of delivering Council's strategic objectives and driving financial and operational sustainability.

Whilst there has been a level of consultation conducted to date, comprising of a workshop with the Mid Murray Heritage & Maritime Committee and an Elected Member Briefing, a more comprehensive engagement process will be required should changes to the maritime operations be considered and proposed, including with key stakeholders. It should be noted that the Mid Murray Heritage & Maritime Committee have not made any formal recommendations to Council on this matter and subject to Council's position, the Committee will be engaged to consider the management review.

Given the size of Council's tourism operations, the sustainability review of the department has been divided into manageable tranches. Tranche 1 focuses on Council's maritime assets and operations, and the associated volunteer workforce, as this is the most significant and impactful area of Council's operations. It also considers the value of tourism to the Mid Murray economy and community and what role Council tourism services have in supporting the tourism economy.

1.1 Key findings

The annual economic and community benefit to the region from Council's maritime operations is circa $1.225 million. This is 1.32 times greater than Council's net investment in the original 2024/2025 budget for the entire tourism portfolio of $924K. It is also four (4) times greater than the actual cost of operating Council's vessels of $297K for 2024/2025, including capital renewal of $208K and staff costs of $145K.

Feedback received from the Mid Murray Heritage & Maritime Committee as part of the consultation process identified Council's governance structures and bureaucracy as an issue with vessel operations, volunteer recruitment and retention, private funding / grant opportunities and commercial decision making. As result, the Mid Murray Heritage & Maritime Committee are supportive of Council considering and investigating the outsourcing of vessel operations to a not-for-profit entity. To that end however, the Mid Murray Heritage & Maritime Committee also feel it important that PS Marion and PW Mayflower are not split and those vessels continue to operate out of Mannum. They further stated that PS Canally may present a viable proposition for an alternative operational model, and that Council's heritage vessels should continue to operate for the benefit of tourism in the region.

Competitive neutrality is also an issue that needs to be considered, and while there is currently limited immediate risk, the establishment of commercial operations in the region may necessitate further consideration of Council's operations.

Work has been undertaken on cultural change given the significant past history of the operations and changes that have occurred over recent years, such as the departure of longstanding key personnel. Positive results have been achieved with barriers broken down and benefits realised, across both operations and management. That said, challenges remain and there is still further work to be done in this area that will benefit those involved and the outcomes delivered.

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There are a number of options presented for Council's consideration within Section 7 of this report. These include:

1. Maintain ownership of the three (3) boats with two (2) sub options
2. Own – lease and divest operations with five (5) sub options
3. Divest with two (2) sub options

Should Council determine to continue with full ownership and operations of the three (3) heritage vessels, consideration will need to be given to the organisational structure to ensure there is appropriate resourcing and sufficient knowledge within the business to manage the boats effectively. The same level of consideration will be required should Council continue to operate the vessels through a transition period to alternative operating models.

Council's tourism staff are supported by 156 volunteers across the region. Many have specialised skills which are paramount to the operation of and sustainability of Council's maritime operations.
Volunteers have provided 15,192 hours to Council's operations during 2024/2025 valued at $708K.

It is unlikely that a net zero cost to Council for the operations of the heritage vessels is achievable. Based on the 2025/26 cruise schedule analysis within this report, Council would need to consider and determine whether the maritime assets of Council and the benefits they provide to the greater tourism economy and community are worth the investment of $197K in 2025/2026.

To allow for operational variation and unforeseen events the investment should be considered at $250K, with no additional staff resources included.

There are a number of matters that would need to be considered if the decision is made to consider outsourcing the operations of Council's heritage vessels. These are explored in further detail within Section 7 of this report, and include:

- What level of funding would Council consider acceptable to divest operations to an incorporated not-for-profit organisation of for-profit business?
- What level of ongoing capital renewal would Council consider to be acceptable to maintain its heritage assets?
- What level of ongoing staff support would Council consider appropriate in the handover period, short term operational period and long term?

Subject to Council's decisions, an outsourcing model may cost Council circa $200K per annum depending on the terms and conditions of any lease/arrangement entered into with interested parties. That potential cost of $200K per annum compares to the estimated deficit for the 2025/2026 cruise schedule outlined in Section 6 of $197K. The contingency element contained within that summary may realise a $50K saving to Council, should the contingency be required.

1.2 Sustainability recommendations

Whilst there are a number of options for Council to consider that are explored within Section 7 of this report, it's management's recommendation that the leasing of Council's maritime assets and the divestment of operations is the most appropriate course of action. This could include the following options:

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Own – lease and divest operations

a. Divest operations of PS Marion and PW Mayflower as a joint entity *
b. Divest operation of PS Canally as a single entity
c. Divest operations of all three (3) vessels as single entities
d. Divest operations of all three (3) vessels as a joint entity
e. Divest PS Marion and PS Canally operations but retain PW Mayflower as part of the Mannum Dock / VIC tourism experience.

It is recommended that further investigation on the viability of the above options and an assessment of potential interest be undertaken, along with consultation and engagement with key stakeholders , with reports to be provided to the Mid Murray Heritage & Maritime Committee and Council was this work has been undertaken.

2. Introduction

2.1 Purpose

To review Council's tourism, heritage and maritime operations and assets with the objective of delivering Council's strategic objectives and driving financial and operational sustainability.

2.2 Scope

Given the size of Council's tourism operations, it has been decided to break down the review into three (3) tranches.

Tranche 1 will focus on Council's maritime assets and operations, and the associated volunteer workforce, as this is the most significant and impactful area. It will also consider the value of tourism to the Mid Murray economy and community and what role Council tourism services have in supporting the tourism economy.

Tranche 2 will consider Council's heritage assets, visitor servicing, the Mannum markets, tourism marketing and the non-maritime volunteers.

Decisions made during Tranche 1 will impact on the sustainability review of the other tranches. As a result, consideration will need to be given to the impact of any decisions and recommendations on the broader operations of Council and the Mid Murray tourism sector. For example, should Council determine to continue (or not) Council's maritime operations with three (3) vessels, there will be and impact on tourism staffing, maritime knowledge and other functions such as marketing and volunteer management.

It is important to consider the overall scope of Council's tourism operations. Although each component may be considered individually, they are all managed and operated by tourism staff and should be considered interrelated and impacted by change to any of the individual elements.

2.3 Background

The Mid Murray region has a broad tourism offering, encapsulating the River Murray Dark Sky Reserve, the best of river life, holiday lifestyle, cultural experiences, a thriving art sector, heritage

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and houseboat and heritage riverboat experiences. As a provider of tourism experiences, Council plays an important role within the industry and in the development of wider tourism strategy.

The region is renowned for its significance in the development of River trade and Paddle Vessels along the Murray Darling Basin. Mannum, being the birthplace of the first paddle steamer, still draws visitation based on this history and the experience of heritage riverboat cruises being offered, with Council's three (3) heritage riverboats drawing significant attention and interest.

Supporting the region's diverse tourism sector is a Strategic Goal of Council's *Strategic Plan 2024-2028*, including promoting and leveraging the region's iconic tourism attractions and experiences to drive visitation.

An overview of Council's tourism function is below:

To support the delivery of Council's tourism-related strategic objectives, Council owns, manages, operates and delivers a number of tourism and heritage assets, programs and operations. These include:

Maritime assets:

- PW Mayflower
- PS Marion
- PS Canally

Heritage assets:

- Mannum Dock Discovery Centre
- Morgan Landseer Museum
- Port of Morgan precinct including Pendles Tea Rooms

Visitor servicing:

- Mannum Visitor Information Centre
- Arnold Gallery
- Morgan Information Office and craft shop
- Mannum Riverside Markets

Council's tourism department also undertakes the following functions:

- Marketing - including the *Explore Mid Murray* website and App, social media, and creation and maintenance of Australian Tourism Data Warehouse listings
- Volunteer management

Council relies heavily on volunteers to support its tourism operations, with 156 volunteers involved across the tourism function. Volunteers are both Council's most valuable asset, and also a significant risk given the importance of their contributions, skills and the general age of the cohort. A loss of skills and knowledge as the cohort ages and are unable to be involved in the future will have a significant impact on Council's maritime operations.

Council's overall involvement as a provider of tourism product delivers both economic and community benefit and it is important to consider the overall benefits of this rather than just the financial impact to Council.

In the past, tourism, heritage and maritime operations and assets of Council have been seen as separate to Council's operations and were managed in a piecemeal manner with limited management control and strategic direction. This has also been compounded in the past by a negative Council perception and attitude in sections of the operations.

Work has been undertaken on cultural change given the significant past history of the operations and changes that have occurred over recent years, such as the departure of longstanding key personnel. Positive results have been achieved with barriers broken down and benefits realised, across both operations and management. That said, challenges remain and there is still a great deal of work to be done in this area that will benefit those involved and the outcomes delivered.

2.4 Strategic importance of sustainability in financial and operational management

Council is reviewing all of its functions across the organisation, including its tourism, heritage and maritime operations, to drive financial sustainability to deliver sustainable operations and a return on investment for ratepayers and the broader Mid Murray community.

Sustainability is not all about the financial returns on investment. Other factors include:

- Staff and volunteer satisfaction, harmony and collaboration
- Recruitment, selection and training of staff and volunteers – particularly younger volunteers
- Reducing unproductive processes
- Cost reduction and income generation options
- Value of tourism efforts to the broader community and economy
- Risk
- Barriers to commercial operations

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2.5 Consultation

As noted, this is a management review of Council's operations. Whilst there has been a level of consultation conducted to date, comprising of a workshop with the Mid Murray Heritage & Maritime Committee and an Elected Member Briefing, a more comprehensive engagement process will be required should changes to the maritime operations be considered and proposed, including with key stakeholders. It should be noted that the Mid Murray Heritage & Maritime Committee have not made any formal recommendations to Council on this matter and subject to Council's position, the Committee will be engaged to consider the management review.

Further consultation will involve, but not limited to:

- Mannum Operations Group
- Canally Operations Group
- Mid Murray Heritage & Maritime Committee
- Elected Members
- Volunteers
- Staff
- Partners, such as Rockford Australia
- Broader Mid Murray community

3. Governance and strategic framework

3.1 Role of the Mid Murray Heritage & Maritime Committee

The Mid Murray Heritage & Maritime Committee was established in 2022, pursuant to Section 41 of the *Local Government Act 1999* (the Act). The Committee replaced two previous S41 committees

- The Mannum Dock Museum of River History Board
- Port of Morgan Heritage and Tourism Board

Consisting of two elected members plus the Mayor as ex-officio, Council's Designated Person Ashore and six community representatives the Committee's strategic pillars are:

1. Risks
2. Business
3. Marketing
4. Assets
5. Volunteers

and progress has been made within each strategic pillar since 2022.

The Committee is established for the purposes of:

- Supporting Council to develop and achieve its strategic and commercial objectives in relation to its heritage and maritime assets, as well as the broader tourism sector.
- Providing expertise and evidence-based advice to Council on the management of its heritage and maritime assets to ensure their ongoing sustainability.

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- Supporting the recruitment, retention and recognition of volunteers involved in the heritage, maritime and tourism activities of Council, including the training and education of these volunteers.
- Assisting Council with the promotion of heritage and maritime opportunities to drive tourism outcomes and raise awareness of the area's cultural heritage, with special emphasis on the history of the River Murray.
- Considering draft budgets and proposed schedules for fees and charges specific to the operation of Council's heritage and maritime assets.

Council has not delegated any of its powers to the Committee. Accordingly, all decisions of the Committee constitute recommendations to Council.

The committee has developed a strategic priorities document and this is attached at **Appendix 1**

3.2 Additional committees

There are two operational committees related to Council's maritime operations, being the Mannum Operations Group (MOGS) and the Canally Operations Group (COG). Membership consists of volunteers and paid staff, and these Committees make recommendations to the Mid Murray Heritage & Maritime Committee.

Management of the Committees, task control, agenda and meeting note preparation is a time consuming function of staff in both sites. The purpose, structure and composition of these Committees along with productivity / benefit analysis should be undertaken to ensure there is substantive reason and benefit from the investment of time.

A decision to either make all Committees productive working groups or cease the formal approach should be consider. If these Committees are for consultation alone, there are potentially more effective ways to engage the volunteer workforce without costly face to face meetings and time delays.

The Mid Murray Heritage & Maritime Committee, through consultation, suggested that a small group of key volunteers could meet with the Tourism Manager or staff on a regular basis to maximise the effectiveness of decisions and the time taken to get things done.

4. Sustainability of key maritime assets

4.1 PW Mayflower

PW Mayflower is the oldest paddle wheeler in South Australia. Acquired by the Mannum Dock Museum in 2014 through the generous donation of Pam O'Donnell and Robert O'Callaghan, the Mayflower has been lovingly restored by volunteers. After two and a half years of meticulous work, the vessel was re-commissioned at the All Steamed Up event in Mannum on 19 November 2016 by His Excellency, The Honourable Hieu Van Le AC, Governor of South Australia.

A summary of the PW Mayflower operations is as follows:

- Operates under a set cruise schedule, four (4) days per week on Tuesdays, Thursdays, Saturdays and Sundays

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- Three (3) crew required - all volunteers
- One (1) wharfie required – mostly a paid staff member from the VIC
- Max 208 cruising days per year = 416 cruises
- Passengers 2023/2024 - 4,422 over 342 cruises
  Passengers 2024/2025 - 4,464 over 306 cruises

Financial performance

PW Mayflower	
2024/25 operating result	
Income	$106,306
Expenses	$41,163
Operating result - surplus	$65,143
Staff wage allocation	$31,000
Net operating result - surplus	**$34,143**
Capital renewal costs	
2024/25 capital investment	Nil
10-year annual capital investment	$14,000

PW Mayflower is currently sustainable and able to cover future capital investment and staff time.

Operational challenges
PW Mayflower is turnkey ready and diesel operated. Able to operate with only three crew, four days per week, she presents a far greater ability to be sustainable longer term.

PW Mayflower's sustainability is impacted by the following, but to a lesser extent than the steamers:

- Key personnel availability / sickness – Captains, Pursers, Deckhand
- Weather and heat policies, particularly wind
- Essential machinery maintenance / breakdown
- Ineffective marketing
- Wider economic impacts
- Confines of bureaucracy (contractor registration, WHS, training, Safework, AMSA regs)
- AMSA and Safework regulations

Sustainability strategies

- Attract experienced Captains that already hold an AMSA CoC (unrestricted or restricted)
- Finalise the recognition of CIRA Heritage Masters with AMSA – completed June 2025
- Should roster issues continue consider a paid workforce for PW Mayflower. It should be noted that the Mid Murray Heritage & Maritime Committee are vehemently opposed to this as they feel it will create a divide between the groups and boats.
- More focused and refined marketing is required across traditional and modern platforms
- This vessel is currently financially sustainable and would be an attractive proposition should Council determine to investigate alternative ownership and operational models, either singularly or in conjunction with PS Marion. It should be noted that the Mid Murray Heritage & Maritime Committee would prefer to see both PW Mayflower and PS Marion remain as a packaged deal.
- PW Mayflower should not be discounted from being run by Council in addition to the Mannum Dock and VIC offering to maintain a maritime offering and a revenue generating opportunity within Council's operations.
- Investigate alternative ownership and operational models outside of Local Government

4.2 PS Marion

Paddle Steamer Marion, is a beautifully-restored heritage vessel built in 1897. She was brought back to life in 1994 thanks to the tireless efforts of volunteers who dedicated many thousands of hours to its restoration. Today, she stands as one of the last steam-driven, wood-fired, overnight passenger-carrying paddle steamers in the world and the pride of the Mid Murray heritage vessel fleet.

A summary of the PS Marion operations is as follows:

- Operates under a variable cruise schedule developed in advance
- Commercial relationship with Rockfords Australia for cruises
- 11 crew required – all volunteers
- Aim for 50 cruising days per year
- Passengers 2023/2024 - 1,254
  Passengers 2024/2025 –-1,750

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Financial performance

PS Marion	
2024/25 operating result	
Income	$157,743
Expenses	$130,216
Operating result - surplus	$27,527
Staff wage allocation	$77,000
Net operating result - deficit	**$49,473**
Capital renewal costs	
2024/25 capital investment	$178,000*
10-year annual capital investment	$38,000

* $47K covered by Rockfords sponsorship

PS Marion is currently not sustainable and able to cover future capital investment and staff time.

Operational challenges
There are several key components that impact operations, causing a decrease in cruise days and passenger numbers:

- Key personnel availability / sickness – Captains, Mates, Engineers, Firemen
- Crew volunteer availability
- Weather and heat policies
- Adequate supplies of wood (wood seeking, cutting and transportation is a physical task that older volunteers are finding difficult
- Essential machinery maintenance / breakdown
- Ineffective marketing
- Wider economic impacts

- Bureaucracy restrictions (contractor registration, WHS, training, AMSA registration)
- Reliance on older engineers to maintain the vessel
- AMSA and Safework regulations

Sustainability strategies

- Continue to develop / maintain the relationship with Rockford Australia
- Regular cruise schedule should be developed - maintain regular two-hour cruises on the first Saturday of each month
- Develop weekend overnight cruises each month (two-day one night) to attract passengers who are full-time workers
- Seek assistance from booking agencies – commissions will be charged
- Continue to provide experience to trainee engineer workforce
- Attract younger more physical volunteers for wood duties
- Attract experienced Captains that already hold an AMSA CoC (unrestricted)
- Continue to aim for 50 cruise days per annum
- Investigate alternative ownership and operational models outside of Local Government
- Investigate the hull being replaced with steel for longevity and cost reduction. Heritage now considers modernisation of part of heritage assets more viable to maintain heritage value for future generations – circa $250K.

4.3 PS Canally

The historic paddle steamer PS Canally, was built in 1907 in Koondrook near Echuca, Victoria, the PS Canally was fitted with a steam locomotive engine in 1912 and primarily traded wool from Echuca up the Murrumbidgee River for 10 years.

After her initial trading years, the Canally moved into South Australian waters, where she transported dried fruits between Berri and Morgan from the Riverland settlements. By the 1950s, she had been repurposed as a barge and eventually sank at Boundary Bend after years of neglect.
A dedicated team of volunteers has been restoring the Canally to her former glory at the Port of Morgan over the past sixteen years.

A summary of the PS Canally operations is as follows:

- Not currently cruising
- Survey almost completed
- Anticipated commencement in 2026
- To operate under a set cruise schedule with variations to meet opportunity. Cruise schedule developed in advance
- Eight (8) crew required – all volunteers
- Aim for 50 cruising days per calendar year which may be overly ambitious
- Additional funds required for restoration completion

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Financial performance

PS Canally	
2024/25 operating result	
Income	$854
Expenses	$36,691
Operating result* - deficit	$35,837
Staff wage allocation	$37,000
Net operating result - deficit	**$72,837**
Capital renewal costs	
2024/25 capital investment	$30,000
10-year annual capital investment	$12,000

* Vessel not operating yet so no revenue for ticket sales

PS Canally is currently not operating and therefore not sustainable and able to cover future capital investment and staff time.

Operational challenges

There are several key components that may impact operations, causing a decrease in cruise days and passenger numbers:

- Ongoing mechanical issues requiring additional budget through 2025/2026
- Key personnel availability / sickness – Captains, Mates, Engineers, Firemen
- Crew volunteer availability
- Potential reliance on Mannum based volunteers impacting existing operations
- Cruise schedules conflicting with PS Marion
- Weather and heat policies
- Adequate supplies of wood

- Essential machinery maintenance / breakdown
- Ineffective marketing
- Wider economic impacts
- Bureaucracy restrictions (contractor registration, WHS, training, AMSA registration)
- Reliance on older engineers to maintain the vessel with minimal living in the near vicinity
- AMSA and Safework regulations

Sustainability strategies

- Resolve current mechanical issues to “fit for purpose” level not “optimum level”
- Continue to provide experience to trainee engineer workforce
- Thorough investigation into the plausibility of a fortnightly cruise schedule
- Include PS Canally in the RAA experience program and Fareharbour booking system
- Investigate alternative ownership and operational models outside of Local Government

The Mid Murray Heritage & Maritime Committee stated through consultation that the PS Canally operations is likely to be successfully outsourced and would possibly be the first of Council’s fleet to undertake that process. The lower costs of maintenance and hull repairs for a “new” vessel would be an attractive proposition.

The Mid Murray Heritage & Maritime Committee also stated through consultation that the proposed schedule of cruising is likely too ambitious and the Canally Operations Group would be wise to set a regular weekend per month for cruising, performing more cruises per day and maximising passenger numbers. The demands on volunteers and draw of volunteers from Mannum may be detrimental to the overall fleet operation.

5. Maritime support functions and their sustainability

5.1 Marketing and promotion

Current marketing strategies and effectiveness

Effective marketing of commercial operations requires a focused and strategic approach, encompassing specific media to reach designated target markets group and most profitable prospects. There are opportunities to improve this in relation to Council’s maritime operations and increase revenue.

What Council currently do is summarised below:

- Individual marketing budgets are allocated across each major experience
- A broader marketing budget exists for regionwide initiatives such as regional guides, website, App and signage.
- Insufficient target market analysis makes this approach difficult to manage and execute and evaluate.
- Fractured budget lines often lead to underspend of marketing dollars which may have a negative impact on the business and revenue generation.
- Tourism staff do their best to work across digital and traditional marketing activities, however have limited formal training.

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Marketing sustainability strategies

- Identify and define key target markets for the promotion of Council's maritime assets
- Develop a comprehensive marketing plan for Council's maritime operations
- Upskill staff in social media marketing

5.2 Volunteer management

Volunteer support and contributions

Council's tourism staff are supported by 156 volunteers across the region. Many have specialised skills which are integral to the operation of and sustainability of Council's maritime operations.

Volunteers have provided the following hours during 2023/2024 and 2024/2025:

Volunteer function	2023/2024	2024/2025
PW Mayflower	3,067.5	2,869.25
PS Marion	6,199	7,411.25
PS Canally	743 plus 360 hours for shipboard safety training	2,583.50
Mannum Dock Discovery Centre (Tuesday Group) – 70% maritime	3,197 2,238	3,325.5 2327.85
Total hours	12,607	15,192

Value of volunteer hours to Council's maritime operations based on Volunteer SA/NT average of $46.62 per hour is a follows:

- 2023/2024 - $588,000
- 2024/2025 - $708,000

In addition to the extensive volunteer program, 12 participants in the Mannum Dock / Mannum Community College community program also assist with maritime jobs on Tuesday mornings.

Volunteering has benefits for both the organisation and individuals. From a Council perspective this includes:

- Source of labour to support operations
- Specialised skills to repair and maintain heritage equipment, buildings and other assets
- Increased community spirit and goodwill to Council
- Support to paid staff
- Extensive knowledge and skill base from a broad range of backgrounds and occupations

For volunteers it includes:

- Sense of purpose
- Keeping active and connected

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- Meeting new people and creating friendships
- Gain skills necessary for future employment
- Sense of belonging and mental wellbeing undertaking worthwhile activities
- Centrelink requirements

Volunteer management is a complex process within the Local Government sector with the requirements of the organisation significant in relation to WHS obligations.

Through the consultation with the Mid Murray Heritage & Maritime Committee, feedback was provided on the challenges with Council's processes and requirements, which can create challenges with recruitment and retention of suitable volunteers and dissatisfaction within the groups.

A recent survey of volunteers showed the main areas of discontent within the group were:

- Paperwork
- Online training
- Communication
- Rules

Whilst 95% of the group were happy to recommend other volunteers to Council, there is a percentage of turnover with new starters due to the above issues. This has an ongoing impact on the remaining group and Council's operations.

More positive areas of feedback from the volunteer survey include:

- Feeling like a member of a team when volunteering
- Feel supported by Council staff
- Satisfaction, meeting new people and creating friendships
- Adequately rewarded

Another challenge is the management of volunteers. Council has not, until recently, had a dedicated employee for volunteer management, with individual areas of the business managing their volunteers as part of their normal roles. With this change of focus it is hoped that Council can improve its management of volunteers.

Volunteer recruitment and retention
There is currently no formal volunteer recruitment and retention program within Council. Each department utilising volunteers does their own thing, which can become fragmented, inconsistent and unsustainable. This has recently changed with a Volunteer Co-ordinator appointment to assist in this space.

Training and engagement programs
Volunteers come to Council with extensive skills and work experience and generally want to volunteer within their skillset. Many existing volunteers did not work with technology, nor within the current focus on people management where training, WHS, risk management, EEO, anti-discrimination policies etc are a key element of the workplace. Although there has been some positive progress in this space, there is room for improvement and further engagement required.

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As the next generation of retirees look to volunteerism, their embedded culture of policy and procedure will also benefit Council's workforce. This is a cultural and generational shift that should naturally occur.

Specialised training for steam engineers has been successful to date with many working toward their operational hours to be able to apply to AMSA for a steam engineer recognition.

It is recommended that Council look to streamline training expectations for general volunteers and look at different ways to transfer knowledge for specialised functions.

Long term sustainability of volunteer support
Long-term sustainability of volunteer support within a commercial operation and Local Government setting depends on strategic integration, clear roles, and ongoing recognition. Volunteers must feel valued, with training, support, and opportunities for meaningful contribution. Aligning volunteer efforts with organisational goals fosters mutual benefit and community ownership. To support this Council should focus on dedicated coordination, policy frameworks, and partnerships.

Council's commercial operations can enhance sustainability by embedding volunteerism into their social responsibility ethos. Continuous recruitment, retention initiatives, and adaptive planning are key to addressing demographic and societal changes. A strong culture of appreciation, communication, and flexibility ensures volunteer engagement remains robust and enduring.

As there is a distinct shift away from volunteering for younger adults, the tourism function continues to rely on retirees to fill the volunteer workforce. As this cohort becomes more aged it will be difficult to replace them.

5.3 Tourism staff

Council currently employs the following tourism staff on contracts:

Tourism Manager	1.0 FTE
Tourism and Cruise Co-ordinator (technical) Mannum	0.8 FTE
Tourism and Cruise Co-ordinator Mannum	0.8 FTE
Tourism and Cruise Co-ordinator Mannum	0.8 FTE
Tourism and Cruise Co-ordinator Morgan	1.0 FTE
Tourism and Heritage Admin Assistant Morgan	0.4 FTE
Handyman Mannum (Employment assistance scheme)	0.2 FTE
Total	**5.0 FTE**

A restructure of tourism staff was undertaken in late 2023. Duties across the Tourism and Cruise Co-ordinators were streamlined to ensure the continuity of service levels. An increase of 0.2 FTE in Morgan was included to manage increasing workloads and there is a likely need to further increase by 0.2 FTE when and if PS Canally commences cruising.

In addition to the operational functions contained within this review, staff also facilitate the following tasks:

- Visitor Servicing (beyond the VIC and VIO)
- Volunteer management

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- Marketing and promotion
- Tourism development
- Industry liaison and assistance
- WHS compliance
- Contractor compliance
- Facilities management
- Other meetings and administration

A gap in organisational knowledge relating to the maritime industry has been an identified which presents a challenge and risk to Council. If Council continues maritime operations provision for a further FTE to fill the knowledge gap, such as a part-time Maritime Operations Co-ordinator with specialised knowledge of the river, boats, WHS and AMSA regulation should be considered and investigated. Due to workloads of the tourism operation this should be additional to current staff levels. Whilst it is also possible to train for knowledge gain, given the specialised skills required, this is not considered an effective solution within the short term.

Council's tourism staff currently do not cost wages to each functional area of operations. A detailed analysis of time would be required for wages to be fully allocated, however to inform this review an exercise has been undertaken with the following estimated percentages for 2024/25:

Functional area	Approx value per year
PW Mayflower	$31K
PS Marion	$77K
PS Canally	$37K*
Total	**$145K**

* will increase when cruising commences

6. Economic impact of Tourism on the Mid Murray region

6.1 Contribution of tourism to the local economy

The following data has been provided by Reginal Development Australia Murraylands and Riverland (RDAMR) and is included in **Appendix 2** for further information.

Total value of tourism to Mid Murray Council area:

2022/2023
- 265 jobs
- $113 million - $72 million sales plus $41 million flow on benefit.

2023/2024
- 269 jobs
- $109 million - $69 million sales plus $40 million flow on benefit

Please note that Council's maritime operations contribute to both areas.

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Council is reliant on other agencies' assessment of the value of tourism to the local economy, and more broadly the overall economic position of the region. Assigning the value of tourism to the local economy can be managed a lot more reliably if Council officers are equipped with an economic benefit measurement tool and visitor tracking tool. Spendmapp is commonly used by Councils in South Australia and has proven to be successful in providing reliable data that can be used for visitor expenditure and local economic forecasting. Visitor tracking tools vary and may be worth some level of consideration for the future.

6.2 Financial and community performance of maritime assets

Financial performance is an important indicator of sustainability; however, it should not be the only factor considered. Other elements include, but are not limited to:

- Value to the wider tourism, retail and hospitality industry by way of flow on sales by visitors. A good summary video showing how the visitor economy works is available by following this link Tourism SA provide tourism benefit metrics
- Value of direct sales to local and regional businesses because of the operation
- How does the local community value Council's maritime operations
- Lifestyle value and benefit to Council derived by volunteers undertaking meaningful tasks.
- Job creation for future generations

A number of these are difficult to quantify in monetary terms.

Volunteerism

Providing community with volunteer opportunities has a significant benefit to both the organisation and individuals. The assessment of mental and social value is difficult; however the number of hours Council volunteers put into its maritime operation (15,000+) is significant and a genuine measure of its importance and value to community.

The current Volunteer SA/NT value for volunteer contribution is calculated at $46.62 based on the value volunteers would have received if they continued to work in their pre-retirement paid capacity. For the purposes of this exercise the value of volunteer contribution includes both value of service to Council and the mental wellbeing and social value to volunteers.

Value of volunteer hours provided to the maritime operation based on Volunteer SA/NT average of $46.62:

- 2023/2024 - $588,000
- 2024/2025 - $708,000

73% of volunteer hours within the tourism area are maritime related.

Re-investment of staff wages

The tourism team consist of seven staff (two (2) full time, three (3) @ 0.8FTE, one (1) @ 0.4 FTE and one (1) @ 0.2 FTE). All but one (1) FTE reside in Mid Murray area and as such a conservative portion of their wages are re-invested within the regional economy. If 20% of the tourism wages estimated

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against the maritime assets were re-invested locally the amount of $29K flow on benefit to the local economy is achieved ($145K x .20). As per RDA principles contained in Appendix 2

Local and regional spending
Council policy encourages local and regional spending, and the tourism arm of Council supports that strategy where possible. The 2024/2025 operating expenditure for maritime assets totaled $208K.

Assuming a conservative estimate of 25% local and regional spend, the amount of $52K flow on benefit to the local economy has occurred across the past year.

Tourism staff have also further focused on minimising spending and increasing profits during 2024/2025, closing the gap between operational expenses and operating income.

Vessels
Whilst income and expenditure budgets for the three (3) heritage vessels already take into account part of their economic benefit to region, there is strong evidence to support visitors coming into region primarily because of the boats.

The measurement of their impact to our local economies is difficult to measure because Council doesn't have economic tracking tools in place so for the purpose of this report the Tourism SA economic benefit matrix for tourism benefit has been used.

2024/25 value of boats
According to SA Tourism Commission at year ended 31 Dec 2024:

- Day trip visitors spend $138 per day
- Overnight visitors spend $202 per night

Value of Council's vessels based on passenger numbers are as follows:

Mayflower	$616K*
Marion	$255K*
Canally	$nil
Total	**$871K**

* 4,464 day trip passengers x $138 = $616K
* 212 overnight passengers x $202 = $43K and 1,538 day trip passengers x $138 = $212K

As a conservative estimate 50% of people travel specifically to cruise, and the value to the tourism economy is estimated at $436K

For the purposes of this report, that amount includes income received by Council.

Passenger numbers 2024/2025

PW Mayflower passengers	4,464 (155 cruise days)
PS Marion passengers	1,750 (51 cruise days)
PS Canally passengers	Nil
Total passengers	6,214

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6.3 Overall maritime value to community and economy

Overall tourism budget:
Council budgeted for an operating deficit of $811K for all elements of tourism in 2024/2025 of which $595K was staff wages.

A further budget for capital renewal amounting to $138K provided an overall net investment for tourism of $949K. The net actual spend on tourism for 2024/2025 was $923K.

Operationally the business unit has aimed to reduce the gap between its net investment in operational tourism budget and wages. This will continue to be a priority for the tourism department going forward.

Maritime specific:
The 2024/2025 net budget for maritime operations (including capital renewal) was a $134K deficit. The actual operational and capital renewal spend for 2024/2025 amounted to a deficit $152K due largely to additional capital costs for PS Marion and better than anticipated income.

It is important to note that $47K of PS Marion's extraordinary expenses was covered by the Rockford Sponsorship fund.

Staff wages of $145K were maritime related, however are not costed within budget lines.

This resulted in a total net expenditure (actual) of $297K for the maritime operations for 2024/2025.

Adding all values from the financial and community performance of maritime assets section above provides an estimate of the value of Council's maritime assets to the local community and economy.

Volunteerism	$708,000
Re-investment of staff wages	$29K,000
Local and regional spending	$52,000
Vessels	$436,000
Total	**$1,225,000**

The value of $1.225 million annual economic/community benefit to the region is 1.32 times greater than the overall net cost of all tourism services in 2024/2025 of $924K.

It is also four (4) times greater than the 2024/2025 actual cost of operating Council's vessels of $297K, including capital renewal ($208K) and staff time ($145K).

6.4 Financial analysis of cruise operations

The full year performance of Council's tourism and maritime operations are included at **Appendix 3**, with a summary below. Please note that the following figures do not yet include year-end adjustments, including staff provisions and stock on hand.

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Council's original 2024/2025 tourism budget was adopted as follows:

Net operating budget	$810,973	actual $ 714,312
Capital Renewal	$138,000	actual $ 209,244
Total Net budget	***$948,973 deficit***	***actual $ 923,556 deficit***

This included Council's 2024/2025 maritime budget adopted as follows:

Expenditure PW Mayflower	$40,016	actual $ 41,000
Income PW Mayflower	$94,000	actual $ 106,000
Capital renewal PW Mayflower	$18,000	actual $ nil
Expenditure PS Marion	$99,485	actual $ 130,000
Income PS Marion	$157,500	actual $ 158,000
Capital renewal PS Marion	$120,000	actual $ 178,000
Expenditure PS Canally	$55,421	actual $ 37,000
Income PS Canally	$2,100	actual $ 1,000
Capital renewal PS Canally	$0	actual $ 30,000
Total maritime budget	***$99,322 deficit***	***actual $151,000 deficit***

Past year's performances have been impacted by Covid-19 and the 2022/23 River Murray flood and therefore have not been included in this report.

A review of costs associated with PS Marion was undertaken in late 2022 which resulted in significant increases of passenger fares for overnight cruises. This analysis occurs annually post budget adoption.

This review has also led to discussions with sponsor, Rockford Australia, relative to the cost of Rockford Steam Powered Dinner Cruises. As these cruises are sold out two years in advance increased charges commenced in 2025.

Owing to the success of PW Mayflower, the model of regular short cruising with minimal add ons clearly works. PS Canally cruise schedules are being developed around this model and PS Marion has begun regular cruises from 2025. This is a significant opportunity for PS Marion that should be explored further in 2025/2026.

It is recommended that PS Marion cruises include regular monthly cruising and regular two-day weekend cruises to attract a new and potentially younger audience who currently work full-time. This must however be balanced with the vessels traditional offerings.

In these financially challenging times people are limiting discretionary spending, and we have found bookings for overnight cruises on PS Marion have suffered.

PS Marion short cruises have continued to maintain reasonable numbers. Whilst it would be sensible to limit all three vessels to short cruises, the amenities of PS Marion are unique and further investigation to more profitable overnight cruising is warranted in order to continue offering unique and authentic holiday experiences. The opportunity for weekend only, overnight cruises is

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being explored with a rollout in 2025. This will open up a new market for full-time workers from Adelaide to enjoy the authentic heritage paddle steamer without having to take leave.

Based on budgets and cruise schedules for 2024/2025, both PS Marion and PS Canally look (on paper) to be capable of delivering sustainable operations. This is highly dependent on cruising at least 50 days per year. A 65% markup on cruise costs has been applied to determine passenger ticket pricing for all but transit cruising.

PW Mayflower is turnkey ready, and diesel operated. Able to operate with only three (3) crew, four (4) days per week, she presents a far greater ability to be sustainable in the long term.

PW Mayflower can cruise without minimum numbers and reputationally has an advantage over the steamers, however is more likely to be impacted by competitive neutrality issues.

A maritime asset register, valuations and Vessel Management Plans were developed in 2024 with the assistance of Council's Co-ordinator Asset Management. These documents are crucial to future sustainability, budget setting and asset renewal.

The Maritime Asset Management Plans articulate the value and useful life of individual and specialised heritage components (particularly relative to the steam vessels) and enable the inclusion of depreciation and or capital renewal within Council's financial management of the maritime assets. Insurance Valuations received in August 2023 are as follows:

- PS Marion $1,300,000
- PS Canally $945,000
- PW Mayflower $425,000

In the event of catastrophic breakdown to a major component it is unlikely Council will have the funds to replace such an item. Council's volunteers inspect and maintain these components to the best of their ability. In the event of total loss of a vessel, it is unlikely that the boats would be restored or replaced, without private investment and support.

The partnership with Rockford Australia provides a maintenance fund for the PS Marion with an ambition to retain at least $50K for unforeseen major costs.

6.5 Analysis of 2025/2026 cruise schedules

A preliminary analysis of cruise schedules for 2025/2026 has been undertaken for the purpose of this report, however a full analysis is still required to set cruise prices and this will be undertaken in due course.

PW Mayflower

Expected to continue with its existing cruise schedule – four (4) days per week, two (2) cruises per day. Assumption of 50% capacity – 4,200 pax @ Senior pricing.

Income	$126K
2025/2026 budgeted expenditure	$41K
Staff wages	$33K
Capital renewal	$14K

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Depreciation	$14K
Overall surplus	**$24K**

Based on this analysis the PW Mayflower is sustainable, however early mechanical issues have already caused the vessel to be inactive for four (4) weeks which has increased expenditure and decreased income.

PS Marion
Introduction of regular (set date) short cruises and weekend escapes, plus continued ad hoc cruise schedule including Rockfords, short cruises, day cruises, and overnight cruises. Assumption of 65% capacity for most.

Income	$160K
2025/2026 budgeted expenditure	$120K
Staff wages	$80K
Capital renewal	$38K
Depreciation	$46K
Overall deficit	**$124K**

Based on this analysis the PS Marion is not sustainable. It should also be noted that cruises for the start of 2025/2026 financial year have been far less successful than the start of 2024/2025.

PS Canally
As discussed within this report, the PS Canally is not yet able to cruise, and the original cruise schedule is considered ambitious. Both of those aspects make it difficult to predict key metrics, however the following is provided as an estimate based on a full year of cruising.

Monthly set weekend cruises – three (3) cruises per day. Assumption of 50% capacity - 1,800 pax @ Senior pricing. Private charters are possible.

Income	$60K
2025/2026 budgeted expenditure	$100K*
Staff wages	$45K
Capital renewal	$12K
Depreciation	Nil as vessel not completed
Overall deficit	**$97K**

*2025/2026 budgeted expenditure has been aligned with PS Marion and may not be realised.

Based on this analysis the PS Canally is not sustainable.

All vessels
Considering the net results from each vessel, the overall cost to Council is as follows:

PW Mayflower	$24K
PS Marion	$124K
PS Canally	$97K
Total deficit	**$197K**

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Sustainable operation of Council's maritime assets will require the consideration of the following:

- Sound business operations and leadership – a commercial approach
- Enabling reasonable tourism industry / transport initiatives such as reducing costs for unsold cabins on PS Marion
- Investment in marketing and promotion beyond current levels
- Reduction of bureaucratic processes currently restricting business opertions
- A whole of Council approach to owning and operating boats
- Investigation of alternative operational models if the above cannot be achieved in-house.

Careful consideration must be given to the impact of maritime pricing on demand for tickets. Whilst every effort must be made to cover costs it should not be the aspiration of Council to overprice tickets as this will impact customer uptake.

Costs have spiraled upwards over the past couple of years, driving increased pressure on cruise prices. Cost savings have been identified throughout the tourism operations to absorb price increases where possible.

Council will need to consider the level of acceptable costs to the community in running a maritime operation that stimulates the local economy and business as it is unlikely that a net zero cost to Council for the operations of the heritage vessels is achievable. Based on the 2025/2026 cruise schedule analysis above, Council would need to determine that the maritime assets of Council and the benefits they provide to the greater tourism economy and community are worth the public investment of $197K in 2025/2026. That investment includes the cost of staff wages and average capital renewal for all three (3) vessels along with depreciation for PW Mayflower and PS Marion.

To allow for operational variation and unforeseen events the investment should be considered at $250K, with no additional staff resources included.

6.6 Visitor spending trends and economic benefits

Without using economic data programs such as Spendmapp, data on spending trends is not easily accessible to Council.

It is however noted that visitors to Mid Murray are currently local, regional, intrastate and interstate visitors. There is growth for the Regional Tourism Organisations to pursue in the International markets, however Council are best served focussing on those who already come.

Murray River Lakes and Coorong Tourism Association (MRLCTA) key statistics for year ended December 2023 (latest data available) **are as follows:**

Visitation
Majority of visitation is intrastate, interstate and the region is predominantly a self-drive market. This has not changed over the years.

- 75 per cent of overnight visitors were from intrastate
- 23 per cent from interstate
- 2 per cent from overseas.
- 75 per cent of overnight visitors to the Murray River Lakes and Coorong are overnight leisure visitors (Holiday + VFR).

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- Victoria at 10 per cent is the Murray River Lakes and Coorong biggest interstate overnight domestic markets.
- Regional South Australia contributes 37 per cent of visitors to the Murray River Lakes and Coorong.
- 40 per cent of visitors come from Adelaide.

Growth has been across all areas - day trips, overnight intrastate and interstate, however the last five (5) years has been tricky as COVID-19 and the 2022/23 River Murray floods have distorted the 'normal' but as a region we can see expenditure growing.

Destination Riverland (DR) key statistics for year ended December 2023 (latest data available) **are as follows:**

Majority of visitation is intra state, interstate and we are predominantly a self-drive market. This has not changed over the years.

- 71 per cent of overnight visitors were from intrastate
- 27 per cent from interstate
- 2 per cent from overseas.
- 89 per cent of overnight visitors to the Riverland are overnight leisure visitors (Holiday + VFR).
- Victoria at 13 per cent is the Riverlands biggest interstate overnight domestic markets.
- Regional South Australia contributes 26 per cent of visitors to the Riverland.
- 47 per cent of visitors come from Adelaide.

The two key Regional Tourism Organisations results are similar and should be used by Council in devising its marketing plan and target market definition for maritime assets

Mannum Visitor Information visitation data
Visitation data from the Mannum VIC reasonably aligns to MRLCTA and DR regional data:

Origin	2023/2024	2023/2024 (%)	2024/2025	2024/2025 (%)
SA – local	1,424	11.61	2180	12.10
SA	5,716	46.60	8946	49.67
VIC	1,385	11.29	2156	11.97
NSW / ACT	909	7.41	1357	7.53
QLD	767	6.25	1194	6.63
WA	611	4.98	885	4.91
TAS	203	1.65	253	1.40
NT	138	1.13	73	0.41
Overseas	1,113	9.07	967	5.37

6.7 Role of council-operated tourism services in supporting local businesses

As outlined within the background for Council's sustainability review, there are many more contributing factors to consider beside financial return to Council. The below is an overall summary of tourism operations and not just related maritime operations.

Tourism
The Mid Murray region, particularly the towns of Mannum and Morgan, benefit from the community ownership and operation of various maritime and tourism-related assets. Key attractions include

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the PS Marion, PW Mayflower, and PS Canally vessels, as well as the Mannum Visitor Centre, Mannum Dock Discovery Centre, Morgan Visitor Outlet, Morgan Old Wharf Craft Shop, and Morgan Landseer Museum. These initiatives not only preserve the region's rich maritime heritage but also generate significant economic and social benefits for the local community.

Tourism revenue
Tourism is a major economic driver for the region, and the maritime operations are a central component of this sector. The operational boats, along with the visitor centers and museums, attract a diverse range of tourists, including history enthusiasts, families, and interstate visitors. The experiences offered, such as river cruises and museum tours, are unique selling points that differentiate Mannum and Morgan (to come) from other destinations. As a result, the region benefits from increased visitor numbers, which translates into higher spending at local accommodations, restaurants, and retail outlets. Using the local visitor servicing outlets to encourage additional and unplanned spending increases the benefit to community. If a VIC can give someone four things to do in a region, that person will likely spend an extra night in region.

Economic benefits
Community ownership and operation of these maritime and tourism assets have substantial economic benefits for Mannum, Morgan, and the wider Mid Murray region. The tourism generated by these attractions supports local businesses, creates jobs, and stimulates investment in the area. With Council's preference to purchase locally, a substantial amount of operational costs are reinvested into local and regional businesses.

Job Creation
The operation and maintenance of the heritage vessels, visitor centers, and museums require a range of skilled and unskilled labor. Jobs and volunteering opportunities (within the tourism team) are created in areas such as vessel operation, tour guiding, maintenance, administration, and retail. Additionally, the seasonal nature of tourism provides opportunities for casual and part-time employment, within the wider business community which is particularly valuable in regional areas where job opportunities can be limited. This is greatly benefited by referrals from visitor servicing outlets such as the Mannum VIC and Morgan VIO. By owning and operating these assets, the community ensures that the economic benefits remain within the local economy rather than being siphoned off by external operators.

Support for local businesses
The influx of tourists, driven by tourism and maritime operations, supports a wide range of local businesses. Accommodation, from bed and breakfasts to larger hotels, benefit from increased bookings. Restaurants and cafes see higher patronage, particularly from visitors looking for unique local flavors. Retail outlets experience a boost in sales. The Morgan Old Wharf Craft Shop, for example, provides a direct link between tourists and local artisans, helping to sustain and promote traditional crafts. The overall effect is a more vibrant and resilient local economy.

Preservation of cultural heritage
The community-led management of maritime and heritage operations ensures the preservation of significant historical assets. The PS Marion, PW Mayflower, and PS Canally are iconic paddle steamers that represent the region's rich riverboat history. These vessels are not merely static exhibits but are operational, offering cruises that allow visitors to experience the river's past in a

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tangible way. This active preservation helps maintain the cultural identity of Mannum and Morgan, whilst providing a unique attraction for visitors.

The Mannum Dock Discovery Centre and the Morgan Landseer Museum further support this heritage preservation by showcasing the historical significance of the river trade and the development of these towns. These centers act as educational hubs where visitors can learn about the riverboat era, maritime engineering, and the broader history of the Mid Murray region. Community ownership of these facilities ensures that local narratives and historical perspectives are prioritised and preserved.

The inclusion of Arnold Gallery and Pendles Tea Rooms for exhibition / meeting space, and the Morgan Old Wharf Craft Shop provide a tangible connection to culture and community, including providing local artisans with outlets for sale and display of their works.

Community engagement, social benefits and volunteerism
Beyond the economic impact, community ownership and operation of these assets deliver significant social benefits, enhancing the quality of life for residents and fostering a strong sense of community.

One of the most significant social benefits is the high level of community engagement and volunteerism associated with these operations. The PS Marion, PW Mayflower, and PS Canally, as well as the visitor centers and museums, rely heavily on volunteers for their day-to-day maintenance and operations. These volunteers, many of whom are retired residents, bring a wealth of knowledge and passion to the roles. Their involvement not only ensures the smooth running of these operations but also fosters social cohesion and provides a sense of purpose for those involved. Volunteerism in this context builds strong community bonds, as people from different backgrounds and age groups work together towards a common goal.

Cultural identity and pride
The community ownership of these assets strengthens the cultural identity of Mannum, Morgan, and the broader Mid Murray region. By taking responsibility for the preservation and promotion of their own history, residents develop a stronger connection to their heritage and a greater sense of pride in their community. This pride is evident in the way the community volunteers their time to the operational elements, and rallies around events such as markets, river festivals, paddle steamer cruises, and other supported events, which attract visitors and foster a celebratory atmosphere. These experiences not only boost tourism but also reinforce the community's unique cultural identity.

Educational opportunities
The visitor centers and museums offer educational opportunities for both locals and visitors. Schools in the region benefit from having access to high-quality educational resources and programs that are tailored to the local context. These facilities provide hands-on learning experiences that bring history to life for students, deepening their understanding of their heritage. The preservation of history and culture through these educational programs ensures that future generations will continue to value and uphold the region's heritage. Whilst there is growth to be realised in this space, particularly in Morgan, the Mannum Dock Discovery Centre is well established and additionally provides a community program with Mannum Community College

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where students earn SACE points and gain valuable work skills from working alongside volunteers on Tuesday mornings.

Environmental sustainability
Community ownership also promotes environmental sustainability. The operation of historical vessels and the maintenance of heritage sites are managed with an emphasis on conservation and sustainability. For example, the restoration and operation of the PS Marion, PW Mayflower, and PS Canally are conducted with an eye towards minimizing environmental impact, ensuring that the river ecosystem is protected. This is a core role of Council's appointed Designated Person Ashore. Additionally, the visitor centers and museums include educational content on environmental stewardship, raising awareness about the importance of preserving the natural environment alongside cultural heritage.

Challenges and opportunities
While the benefits of community ownership are significant, there are also challenges that need to be addressed to ensure the long-term sustainability of these operations. Funding is a perennial issue, as maintaining and operating historical vessels and heritage sites is costly. However, these challenges also present opportunities for innovation and collaboration. Grant funding, partnerships with government and private entities, and the development of new revenue streams, such as events and merchandising, can provide the financial support needed to sustain these operations. Moreover, expanding marketing efforts to reach a broader audience can help increase visitor numbers and ensure the ongoing viability of these community assets.

Summary
The community ownership and operation of the Mid Murray Tourism, Heritage and Maritime assets offer profound benefits to the Council region, particularly Mannum and Morgan. These initiatives preserve the region's rich cultural heritage, drive economic growth, foster social cohesion, and promote environmental sustainability. Through active community involvement, the region not only safeguards its past but also builds a prosperous and vibrant future.

7. Options, key challenges and risks

7.1 Options analysis

There are a number of options for Council consideration in relation to the future operations of Council's maritime operations. These include:

1. **Maintain ownership of the three (3) boats**
   a. Council continues to support the operations of three (3) heritage vessels, with a further review on the sustainability of the vessels to be undertaken in 2028
   b. Static display

2. **Own – lease and divest operations**
   a. Divest operations of PS Marion and PW Mayflower as a joint entity *
   b. Divest operation of PS Canally as a single entity
   c. Divest operations of all three vessels as single entities
   d. Divest operations of all three vessels as a joint entity.
   e. Divest PS Marion and PS Canally operations but retain PW Mayflower as part of the Mannum Dock / VIC tourism experience.

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3. **Divest**
    a. Cease investment, ownership and operation of all vessels
    b. Cease investment, ownership and operation of part of the fleet

The Mid Murray Heritage & Maritime Committee supported Council's consideration of Option 2 through consultation, however have not officially made recommendation to Council. They further stated that PS Marion and PW Mayflower should not be split.

7.2 Opportunities and risks associated with options

Maintain ownership of the (3) three boats	**Opportunities**	**Risks**
a. Council continues to support the operations of three (3) heritage vessels, with a review on the sustainability of the vessels to be undertaken in 2028.	• Limited negative publicity • Security in operations for volunteers and staff • Focus on performance • KPIs to be set with clear measures of success • Retain existing volunteer base, economic value and community benefit	• Significant financial investment • Insufficient staff resources – additional knowledge required • Limited opportunity for grants and private funding • Bureaucratic processes limiting commercial operation • Competitive neutrality • Volunteer dissatisfaction with bureaucracy
b. Static display	• Reduced financial investment • Access to boats is still available • A range of different offerings can be explored	• Doesn't negate costs of insurance, maintenance and slipping – limited savings • Potential negative publicity • Loss of volunteers
Own – lease and divest operations.	**Opportunities**	**Risks**
a. Divest operations of PS Marion and PW Mayflower as a joint entity	• Potentially seen as a reasonable opportunity given success of Mayflower • Creation of an NFP from existing interested parties and stakeholders • Replicates other models (Oscar W and Industry) • Reduces competitive neutrality risk • Ticketing and sales commissions can remain with Mannum VIC	• Potential negative publicity • Inability to attract EOIs • Stakeholder capability to be successful • Some administration support likely still required if NFP formed from within existing stakeholders • Potential ongoing costs to Council

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	• Volunteer, WHS, Procurement and other bureaucratic obligations are outsourced. • Ability for new operator to attract grant and private funding • Retain benefits of volunteering and tourism economy to community • MMHMC prefer these vessels to remain together	• Council's obligations if operations are unsuccessful • May require Council funding during transition or in the future to maintain operations external to Council • Ability to negotiate vessels remaining in Mannum if private investor sourced
b. Divest operation of PS Canally as a single entity	• MMHMC feel this is worthy of consideration and likely to be successful • Potentially seen as a reasonable opportunity given Canally is in brand new condition • Creation of an NFP from existing interested parties and stakeholders • Replicates other models (Oscar W and Industry) • Reduces competitive neutrality risk • Ticketing and sales commissions can remain with Morgan VIC • Volunteer, WHS, Procurement and other bureaucratic obligations are outsourced. • Ability for new operator to attract grant and private funding • Retain benefits of volunteering and tourism economy to community • High level of support and energy for PS Canally in Morgan	• Potential negative publicity • Inability to attract EOIs • Stakeholder capability to be successful • Some administration support likely still required if NFP formed from within existing stakeholders • Potential ongoing costs to Council • Council's obligations if operations are unsuccessful • May require Council funding during transition or in the future to maintain operations external to Council

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c. Divest operations of all three vessels as single entities (individually)	• May be considered a viable business for Mayflower and Canally • Private support for operating Marion through philanthropic donations • Reduces competitive neutrality risk • Ticketing and sales commissions can remain with Mannum VIC and Morgan VIO • Volunteer, WHS, Procurement and other bureaucratic obligations are outsourced. • Ability for new operator to attract grant and private funding • Retain benefits of volunteering and tourism economy to community	• Potential negative publicity • Not a preferred option of the MMHMC • Potential for three agreements for Council to negotiate and manage • Potential ongoing costs to Council • Council's obligations if operations are unsuccessful • May require Council funding during transition or in the future to maintain operations external to Council
d. Divest operations of all three vessels as a joint entity (collectively)	• Single agreement • Reduces competitive neutrality risk • Ticketing and sales commissions can remain with Mannum VIC and Morgan VIO • Volunteer, WHS, Procurement and other bureaucratic obligations are outsourced. • Ability for new operator to attract grant and private funding • May be attractive to an NFP backed by a philanthropic supporter • Retain benefits of volunteering and tourism economy to community	• Potential negative publicity • Unlikely to be considered a viable business proposition due to split location and financial performance • Not a preferred option of MMHMC • Potential ongoing costs to Council • Council's obligations if operations are unsuccessful • May require Council funding during transition or in the future to maintain operations external to Council
e. Divest PS Marion and PS Canally operations but retain PW Mayflower as part of the Mannum Dock / VIC tourism experience.	• Retain the most sustainable vessel as part of Council offering • Cost savings • Less work and maintenance	• Potential negative publicity • Potential conflict between Mannum and Morgan • Competitive neutrality risk for Mayflower remains

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	requirements for staff and volunteers • Revenue supports running of MDDC • Private support for operating Marion and /or Canally through philanthropic donations • Reduces competitive neutrality risk • Marion and Canally Ticketing and sales commissions can remain with Mannum VIC and Morgan VIO • Volunteer, WHS, Procurement and other bureaucratic obligations are outsourced for Marion and Canally • Ability for new operator to attract grant and private funding • Retain benefits of volunteering and tourism economy to community	• Does not reduce need for staff knowledge about the river, vessels and AMSA compliance. • Retain volunteer, WHS, Procurement and other bureaucratic obligations for Mayflower. • Not a preferred option of MMHMC • Potential ongoing costs to Council • Council's obligations if operations are unsuccessful • May require Council funding during transition or in the future to maintain operations external to Council • Loss of volunteers
Divest	**Opportunities**	**Risks**
a. Cease investment, ownership and operation of all vessels	• Significant cost savings • Reduces competitive neutrality risk • If a buyer is found ticketing and sales commissions could potentially remain with Mannum VIC and Morgan VIO. • Minimal volunteer, WHS, Procurement and other bureaucratic obligations. • Ability for new operator to attract grant and private funding • Increases opportunities for staff to focus on tourism opportunities for the broader region	• Potential negative publicity and reputational damage • Not a preferred option of MMHMC • Reduces the value of tourism offering and reasons to visit Mannum and Morgan • Potential loss of connection with history of steamers and river trade • Sourcing a "buyer" for these assets • Loss of vessels to Mannum or Morgan if relocated • Volunteer dissatisfaction • Potential loss of benefits of volunteering and tourism economy to community • Loss of all volunteers

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b. Cease investment, ownership and operation of part of the fleet	• Cost savings • Maintains a connection with the vessels • Reduces competitive neutrality risk	• Potential negative publicity and reputational damage • Not a preferred option of MMHMC • Negates only part of responsibilities • Loss of some volunteers

The Mid Murray Heritage & Maritime Committee stated through consultation that Council's heritage vessels should continue to operate for the benefit of tourism and community in the region.

Should Council determine to continue with full ownership and operations of the three (3) heritage vessels, consideration will need to be given to the organisational structure to ensure there is appropriate resourcing and sufficient knowledge within the business to manage the riverboats effectively. The same level of consideration will be required should Council continue to operate the vessels through a transition period to alternative operating models, with the following needing to be considered:

- An additional part-time employee to provide necessary knowledge and skills to reduce risk
- Other sustainability strategies highlighted throughout this report will need to be explored further to streamline the business.
- Some functional losses to the remaining tourism portfolio may result in Tranche 2
- Staff and volunteer psycho-social impact will require assessment and intervention.
- Competitive neutrality obligations will continue to present risk to future operations
- Council may wish to consider the level of acceptable investment in its maritime operation that contributes to the local economy and businesses.

There are a number of matters that would also need to be considered if the decision is made to outsource the operations of Council's heritage vessels and operations. These include:

- What level of funding would Council consider acceptable to divest operations to an incorporated not-for-profit organisation or for profit business?
- What level of ongoing capital renewal would Council consider to be acceptable to maintain its heritage assets?
- What is the position of Council if there are no EOIs received?
- What is the position of Council should an external provider require financial assistance if the operations are not successful – eg cover of operational losses, annual top up etc?
- Would Council consider taking back the operation of the vessels should the divestment approach fail?
- What existing facilities would Council consider appropriate for an external party to access as part of an agreement, such as wharves, workshops, sheds, wood yards, plant and equipment?

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- Would Council seek to recover utility costs associated with facility occupation?
- What level of ongoing staff support would Council consider appropriate in the handover period, short term operational period and long term?
- How would Council's ongoing responsibility for WHS and governance be managed?
- Retention of ticket sales for commission (online and face to face)?

7.3 Potential costs of divestment to a not-for-profit

As stated above, an agreement between parties would likely determine the level of ongoing cost to Council if a decision to divest is made. It is almost certain that as the owners of vessels, there would be an expectation that there would be an ongoing commitment to the costs associated with ownership. The following table outlines the potential ongoing costs, subject to negotiation:

	PW Mayflower	PS Marion	PS Canally	Total
Insurance boat	$11,500	$35,500	$22,000	$69,000
Insurance tender	NA	$2,500	$2,500	$5,000
Capital renewal	$14,000	$38,000	$12,000	$66.000
Depreciation	$14,000	$46,000		$60,000
Annual cost	**$39,500**	**$122,000**	**$36,500**	**$200,000**

Canally depreciation will be included once the vessel is completed.

The potential cost of $200K per annum compares to the estimated deficit of the 2025/2026 cruise schedule depicted in Section 6 $197K. The contingency element contained within that summary may realise a $50K saving to Council, should the contingency be realised.

7.4 Summary of operational agreements between other heritage vessel operations and Councils

A summary of how alternative operational models for heritage riverboats is operating as follows:

- Both heritage vessel operations are functioning under formal agreements with their local councils, with each arrangement reflecting unique characteristics and stages of development.
- One partnership is still in the early stages of implementation. While progress is being made, some areas of uncertainty remain. The operational freedom provided under the agreement is seen as beneficial, enabling flexibility for new initiatives.
- The other operation is governed by a deed of agreement and has been in place for a longer period. This group is broadly satisfied with the arrangement, although future financial sustainability is a concern and discussions with Council are ongoing.
- In both cases, the local councils retain ownership of the vessels and contribute to major costs such as insurance and capital renewal (e.g. slipping).
- Operational responsibilities are largely undertaken by the community-based groups, with limited administrative support provided by councils. Support, where available, tends to be informal or transitional.
- Governance varies slightly, with one group operating under multiple lease agreements (covering vessel, infrastructure, and support assets) and the other under a deed. Some areas within lease documents have presented interpretive challenges.
- Reporting obligations typically include maintenance, financial updates, and general communication such as minutes and annual reports.
- Volunteer workloads have increased for both groups under the terms of their current arrangements.

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- One group has begun long-term planning in anticipation of future funding needs, while both maintain access to external grants and community contributions.
- Feedback from both parties suggests that having clearly defined, balanced agreements with shared expectations is important to the success and sustainability of such partnerships

7.5 Mid Murray Heritage & Maritime Committee risks and SWOT analysis

The Mid Murray Heritage and Maritime Committee identified risks within its strategic pillars – this document is attached as **Appendix 4**

7.6 Competitive neutrality

Competitive neutrality is the principle that government-owned businesses should not have a competitive advantage or disadvantage simply because they are publicly owned. This principle aims to ensure fair competition between public and private businesses by removing any artificial advantages or disadvantages arising from government ownership. Council does have the advantage of volunteer labour on its heritage vessels, which is a risk concern for Council. Whilst there is no immediate threat due to lack of competition, this must always be front of mind. Many Councils develop initiatives that are handed over to private enterprise when they are seen to be successful.

7.7 Changing visitor demographics and tourism trends

Visitors are looking for genuine and engaging tourism experiences while travelling, and the younger age demographic for more sustainable tourism operations. Visitors still want to engage with locals and will act on favourable referrals.

Tourism in South Australia is evolving, with notable shifts in visitor demographics and travel behaviours. Here's an overview of the current trends:

Visitor Demographics and Travel Patterns

Domestic Travel Growth: In 2024, South Australia welcomed 7.6 million domestic overnight trips, a 3% increase from the previous year. These visitors spent a total of 25.9 million nights in the state, marking a 1% rise.
tourism.sa.gov.au

International Visitor Dynamics: While international visits decreased by 3% to 440,000 in 2024, the expenditure from these visitors grew by 3%, indicating higher spending per visitor.
tourism.sa.gov.au

Regional vs. Urban Spending: Adelaide saw a 6% increase in visitor expenditure, reaching $5.8 billion. In contrast, regional areas experienced a 15% decline in visitor spending, totalling $4.0 billion.
tourism.sa.gov.au

Emerging Travel Trends

Experience-Driven Travel: Travellers are increasingly seeking unique and immersive experiences, such as cultural events, local cuisine, and nature-based activities. This shift emphasises the importance of offering authentic and diverse experiences to attract visitors.

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Sustainable and Local Engagement: There's a growing preference for sustainable tourism and supporting local communities. Visitors are more inclined to engage in eco-friendly activities and patronise local businesses, contributing to the regional economy.

Future Outlook
Tourism Research Australia's forecasts suggest that international tourism in Australia will surpass pre-pandemic levels by 2025. Domestic tourism is expected to continue its upward trajectory, with spending already exceeding pre-pandemic figures.
data.sa.gov.au - tra.gov.au

For regions like Mid Murray, these trends highlight opportunities to capitalise on the growing demand for authentic, sustainable, and experience-rich travel. By aligning offerings with these preferences, local tourism can thrive in the evolving landscape. Marketing that reaches the right audiences, with the right motivations will provide success into the future. As such a properly formulated marketing plan should be developed for “Explore Mid Murray”

7.8 Bureaucratic processes

Owning and operating a commercial activity within the bounds of Local Government bureaucracy can cause issues with the fundamental principles of business management and productivity. Whilst Council operates the vessels directly, these bureaucratic processes are not likely to be removed. Focus should shift to evaluating and streamlining processes within Council that impact the productivity of commercial operations but maintain the integrity of Council’s legislative requirements.

This has been underway for some time with further work to be done. As an example, enabling volunteers to enter volunteer timesheets into Skytrust instead of this only being undertaken by a staff member is saving Council’s tourism staff approximately 12 hours per week. This time is better spent on business operations.

It is therefore recommended that further tourism staff productivity savings through streamlining bureaucratic processes and implementation of better systems continue.

The Mid Murray Heritage & Maritime Committee recognise the need for Council’s bureaucracy, however feedback provided during the consultation is that this is the main reason for operational, volunteer, private funding and commercial challenges. The Mid Murray Heritage & Maritime Committee are therefore supportive of Council investigating the outsourcing of vessel operations to a not-for-profit entity.

It is easy to create Committees within Local Government and often this is a fallback position to ensure consultative requirements are met, however they can be difficult to manage and to ensure they are not absorbing available and resources delivering outcomes.

Committee structures in place potentially delay decision making within the operation and need to be restructured so they are productive, and results focused. Whilst Council does much of its business through committees, the Mid Murray Heritage & Maritime Committee suggested through consultation that this is at times a dysfunctional method and a barrier to commercial operations. The Mid Murray Heritage & Maritime Committee suggested if Council retained ownership and operation of the vessels, that a smaller group of four key vessel volunteers work directly with the Manager to progress matters of importance.

8. Recommendations, future strategies and operational improvements

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8.1 Recommendations

Whilst there are a number of options for Council to consider that are explored within Section 7 of this report, it's management's recommendation that the leasing of Council's maritime assets and the divestment of operations is the most appropriate course of action. This could include the following options:

Own – lease and divest operations

a. Divest operations of PS Marion and PW Mayflower as a joint entity *
b. Divest operation of PS Canally as a single entity
c. Divest operations of all three (3) vessels as single entities
d. Divest operations of all three (3) vessels as a joint entity
e. Divest PS Marion and PS Canally operations but retain PW Mayflower as part of the Mannum Dock / VIC tourism experience.

It is recommended that further investigation on the viability of the above options and an assessment of potential interest be undertaken, along with consultation and engagement with key stakeholders , with reports to be provided to the Mid Murray Heritage & Maritime Committee and Council when this work has been undertaken.

8.2 Future strategies and operational improvements

The following are provided for consideration to improve the maritime operation whilst under Council's ownership and operational management, including any transition period.

Changing ethos

- Improve the understanding of the community and stakeholders of both the value of tourism and Council's maritime assets to the region, as well as the need for sustainability and a commercial approach to operations.

Monitoring economic data

- It is recommended the Council invests in Spendmapp, an economic benefit tracking tool and investigates options for visitor tracking rather than being reliant on external data.

Maritime assets

General Maritime

- Consider the operation as commercial rather than community service.
- Continue to evaluate operating costs against revenue generated
- Develop strategies to ensure the maritime business of Council is recognised as a whole of Council responsibility
- It is recommended that PS Marion cruises have a solid injection of regular monthly cruising and two-day weekend cruises to attract a new and potentially younger audience who currently work full-time. This must be balanced with the vessels' traditional offerings.

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- Careful consideration must be given to the impact of maritime pricing on demand for tickets. Whilst every effort must be made to cover costs it should not be the aspiration of Council to overprice tickets.
- Actively promote the success stories of Council's heritage vessels to the community and ratepayers of Council
- Package local and regional product with maritime operations
- Review marketing and promotion, target markets, and conversion

PW Mayflower sustainability strategies

- Attract experienced Captains that already hold an AMSA CoC (unrestricted or restricted)
- Finalise the recognition of CIRA Heritage Masters with AMSA
- Additional promotions are required across traditional and current platforms

PS Marion Sustainability strategies

- Continue to develop / maintain the relationship with Rockford Australia
- Maintain regular two (2) hour cruises on the first Saturday of each month
- Develop weekend overnight cruises each month (two (2) day (1) night) to attract passengers who are full-time workers
- Continue to provide experience to trainee engineer workforce
- Attract younger more physical volunteers for wood duties
- Attract experienced Captains that already hold an AMSA CoC (unrestricted)
- Continue to aim for 50 cruise days per annum
- Investigate alternative ownership and operational models outside of Local Government

PS Canally Sustainability strategies

- Resolve current mechanical issues to "fit for purpose" level not "optimum level"
- Continue to provide experience to trainee engineer workforce
- Thorough investigation into the viability of a fortnightly cruise schedule
- Consider an increase FTE in the paid staff at Morgan
- Include PS Canally in the RAA experience program and Fareharbour booking system

Volunteers

- Continue to recruit and train volunteers
- Provide volunteers with an easier pathway to be involved
- Look to reduce paperwork and bureaucratic processes
- Appoint / allocate a Council volunteer management position for support
- Create a closed Facebook Group for all Council tourism volunteers to promote communication and region wide involvement
- Provide volunteer management support services for tourism staff, reduce paperwork for new volunteers, and find better ways to engage volunteers in training exercises.

Staff

- Continue a multi-skilling approach and support training with targeted training
- Upskill staff to run the "business" of boats and museums
- Consider strategies for staff replacement and succession planning
- Consider further restructuring of tourism team

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- Equip Council officers with an economic benefit measurement tool such as Spendmapp and investigate options for visitor tracking
- There is an identified gap in organisational knowledge relating to the maritime industry which presents a challenge and risk to Council. If Council continues maritime operations, it is recommended that a provision be made for a further FTE to fill the knowledge gap, such as a part-time Maritime Operations Co-ordinator with specialised knowledge of the river, boats, WHS and AMSA regulation should be investigated. Due to workloads of the tourism operation this should be additional to current staff levels. Whilst it is also possible to train for knowledge gain, this is not considered an effective solution within the short term.

Process improvement

- Evaluate processes within Council that impact productivity to streamline service delivery and further enhance the value the sector brings to the Mid Murray region.

Committees

- Review purpose, structure and composition of Committees along with undertaking a productivity / benefit analysis

9. Implementation and monitoring

Subject to Council's decision making on next steps, the development of action plans for key changes, along with performance metrics and reporting framework will be developed before changes are implemented. This will necessitate wide consultation with staff, volunteers and external stakeholders.

Similarly impacts of decisions made by Council relative to maritime operations should be evaluated for possible impact to the other tourism and heritage functions of Council within Tranche 2 including the interim impact of staff and volunteers.

Appendices

Appendix 1 MMHMC strategic priorities 2022-2026

Appendix 2 RDA tourism economic data for MMC

Appendix 3 MMHMC Finance report for all tourism functions 2024/2025

Appendix 4 MMHMC Risks and SWOT analysis

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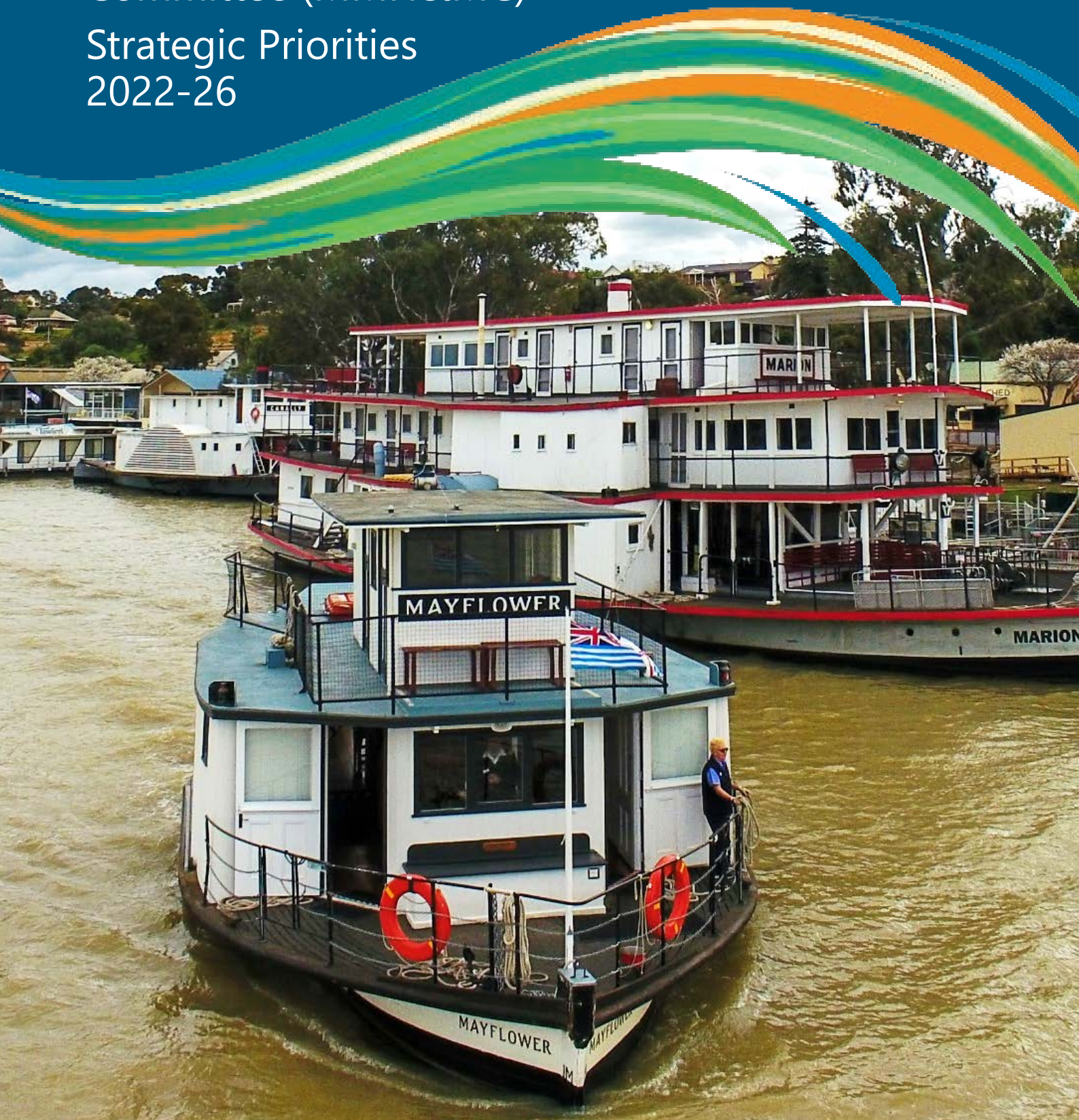
Appendix 1

Mid Murray Council

Mid Murray Heritage & Maritime Committee (MMH&MC)

Strategic Priorities 2022-26



(Developed September 2022 to be reviewed annually)

Overarching Goal

To provide the framework for the long term sustainable operations of Mid Murray Council's heritage and maritime assets.

Background

The Mid Murray Heritage & Maritime Committee was established in 2022, pursuant to Section 41 of the Local Government Act 1999. The Committee replaced two previous Section 41 Committees namely;

- The Mannum Dock Museum of River History Board
- Port of Morgan Heritage and Tourism Board

The Committee consists of three elected members plus the Mayor as an ex-officio member and six community representatives, chosen for their diverse and complimentary range of experience and skills that enable the committee's objectives to be fulfilled.

Conducting its first official meeting in June 2022, the initial term of the committee ends in November 2022, followed by a four year term concluding concurrent with Local Government Elections in November 2026

The Committee is established for the purposes of:

- Supporting Council to achieve its strategic objectives in relation to its heritage and maritime assets, as well as the broader tourism sector.
- Providing expertise and evidence-based advice to Council on the management of its heritage and maritime assets to ensure their ongoing sustainability.
- Supporting the recruitment, retention and recognition of volunteers involved in the heritage, maritime and tourism activities of Council, including the training of these volunteers.
- Assisting Council with the promotion of heritage and maritime opportunities to drive tourism outcomes and raise awareness of Mid Murray's cultural heritage, with special emphasis on the history of the River Murray.
- Developing draft budgets and proposed schedules of fees and charges specific to the operation of Council's heritage and maritime assets.
- Identifying and assisting with the development of sponsorship and partnership opportunities.
- Assisting with product development.

The committee meets bi-monthly and makes recommendations to Mid Murray Council for further consideration.

Areas of responsibility

The principal areas of responsibility are divided between Mid Murray vessels, museums and other heritage and maritime assets. Responsibility extends to other assets and activities that are deemed complementary to the committee's scope.

Whilst the principal areas of responsibility and assets are located at either Mannum or Morgan, the committee represents the whole Mid Murray Council area and takes a holistic approach to collaboration and promotion.

MMH&MC Key Functional Areas

Vessels

PS Marion

PS Canally

PW Mayflower

Museums

Mannum Dock Discovery Centre

Morgan Landseer Museum

Other

Port of Morgan precinct

Complementary tourism assets

Reports to Mid Murray Council

Links to Mid Murray Cultural Heritage and Tourism Strategy 2020

Whilst the Mid Murray Cultural Heritage and Tourism Strategy 2020 was not officially adopted by Mid Murray Council, the Mid Murray Heritage & Maritime Committee members resolved that several of the strategic recommendations contained within that document are worthy of inclusion into its list of strategic priorities.

It was noted that whilst only being two years old, the report was outdated in several areas.

Some recommendations from the Strategy document have already been achieved and as such are not included within this document.

The Mid Murray Heritage & Maritime Committee workshopped its strategic priorities based on and around the Mid Murray Cultural Heritage and Tourism Strategy 2020. Committee members noted the following priorities not specifically mentioned in the Cultural and Heritage Strategy

- Vessel Maintenance Plan
- Museum Management Plan
- Sponsorships and Partnerships outside of Government

All three are included within this plan.

Links to other key Strategic Documents

Mid Murray Council Strategic Plan - Our Plan 2020-24

Our Growth

4. Develop our diverse tourism sector
    4.4 Promote, develop and leverage our iconic tourism attractions to drive visitation

5. Our cultural and natural environment assets are leveraged in a sustainable manner
    5.3 Develop and protect our maritime heritage

South Australian Regional Visitor Strategy 2025

Murray River Lakes and Coorong priorities

Marketing

Strengthen the regions position as a vibrant destination with a diverse range of experiences on offer including nature and water based experiences.
Maximise the regions promotions to the self-drive and boating tourism markets.
Boost the promotion of heritage and cultural tourism experiences in the region

Experience and supply development

Develop new on-water experiences

Destination Riverland priorities

Marketing

Increase alignment and collaboration of regional, council and town level marketing activities for greater impact

Experience and supply development

Extend the range of family friendly soft adventure, water and nature based activities in the region
Improve signage outside of major towns that are located on the edge of the highways and interpretive signage within region

South Australian Visitor Economy Sector Plan 2030

Marketing

Base channel selection and messaging on a strong understanding of the consumer, driven by reliable market insights and research.

Experience and supply development

Develop linkages between experiences to create clusters
Encourage and create opportunities for cross-promotion within regions linking experiences and providing recommendations to maximise visitor engagement

Collaboration

Facilitate engagement across private and public sectors to identify investment opportunities and attract private investment into South Australia.

Industry Capability

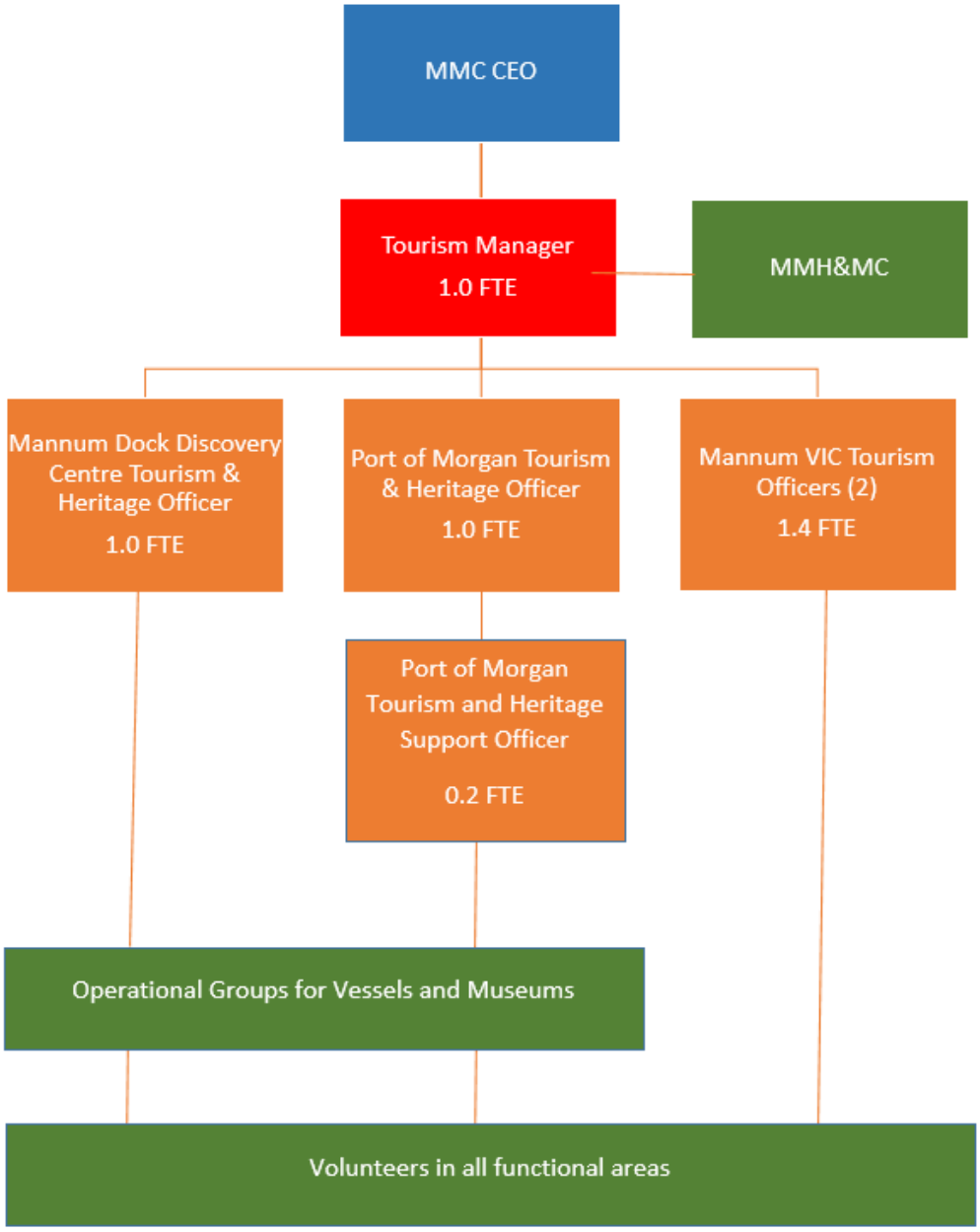
Utilise accurate, relevant and concise research insights to inform business decisions.

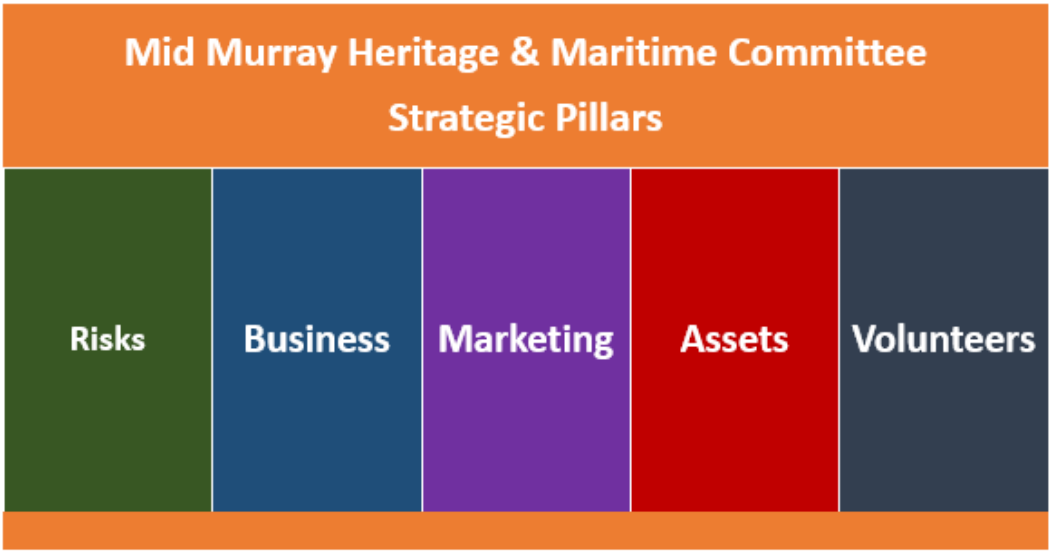
Mid Murray Council Tourism Staff

Mid Murray Council tourism staff report through to the Chief Executive Officer.

Through the Tourism Manager, tourism staff provide support services to the Mid Murray Heritage & Maritime Committee, provide reports and deliver operational support in line with both Council and Mid Murray Heritage & Maritime Committee strategy.

Current tourism staff structure (2022)





Strategic Pillar 1: Risk Management

The operation of heritage and maritime assets present ongoing and complex risks that may impact the delivery of sustainable tourism operations, such as the necessity for a qualified workforce to ensure cruising viability of the vessels. It is our intent to evaluate and continually monitor risks to ensure any negative impact on business is minimised or eliminated where possible. The importance of risk management to this operation, supports it being one of the five key pillars within this strategy.

TASKS	PRIORITY LEVEL	RESPONSIBILITY
Risk Analysis 1.1.1 Evaluate and document risks across the organisation. 1.1.2 Create a SWOT analysis document 1.1.3 Review the risk matrix annually, set actions and make changes to priority areas. 1.1.4 Identify new and or emerging risks.	High	Mid Murray Heritage & Maritime Committee Tourism Manager WH&S co-ordinator
Risk Control 1.2.1 Implement risk mitigation strategies to control or eliminate risk that will impact business 1.2.2 Inform Council of the budget requirements to manage risks	High	Mid Murray Heritage & Maritime Committee Tourism Manager WH&S co-ordinator

How will we measure success?

- Identified actions are implemented
- Control measures are implemented
- Business is not impacted by identified risks

Strategic Pillar 2: Business Planning and Operations

Through its ownership of Heritage and Maritime Assets Mid Murray Council provide a commercial tourism operation that is backed by Council investment. Well thought out and implemented business plans and commercial operation using a combination of "Commercial" and "Local Government" methodology / accountability is therefore paramount to business success and to minimise Council impact.

TASKS	PRIORITY LEVEL	RESPONSIBILITY
Develop a Business Plan 2.1 Formulate a business plan that covers the Council's heritage and maritime assets The business plan links to other strategic documents developed by Mid Murray Heritage & Maritime and Council. The business plan enables business and relationship development both internally and externally	High	Tourism Manager Director Corporate Services Mid Murray Heritage & Maritime Committee
Sponsorship and Partnerships outside of government 2.2.1 Actively pursue sponsorships and partnerships from commercial and community partners to minimise financial burden on ratepayers 2.2.2 Seek grant funding as a means to delivering key projects 2.2.3 Formulate mutually beneficial business relationships with the wider tourism industry, suppliers and business partners	Medium	Tourism Manager Director Corporate Services Mid Murray Heritage & Maritime Committee
Product Development 2.3.1 Recognise the value of "the river experience" focus on making attractions as interactive and experiential as possible. 2.3.2 Prioritise the development of the Mannum-Morgan river experience to maximise the attraction of the riverboats and museums of all towns. 2.3.3 Engage with the tourism industry regionally to create partnerships that are mutually beneficial	Medium	MMH&MC Tourism Manager Tourism staff Museum Operations Groups MRLCTA

2.3.4 Engage with Local Government bodies along the Murray River corridor for a broader "River Trail Network"		
Experience development 2.4.1 Benchmark successful models implemented elsewhere to create memorable experiences, which visitors are more likely to remember and share with friends through social media 2.4.2 Develop new experiences, of traditional and non-traditional nature, within the heritage and maritime assets 2.4.3 Develop and manage events within the heritage and maritime assets 2.4.4 Provide venues for non-traditional events and activities within the heritage and maritime assets 2.4.5 Develop partnerships with complimentary tourism businesses and assets	Medium	MMH&MC Tourism Manager Tourism Staff
Finance Plan 2.5.1 Develop a financial management plan for Council's Heritage and Maritime Assets. 2.5.2 Consider revenue generating strategies to reduce the financial exposure of Council. 2.5.3 Consider fee structures for all vessels cruises, museum entry and saleable items to balance profit and increase visitation 2.5.4 Develop retail sales opportunities in the consumer facing outlets. 2.5.6 Consider e-commerce capability to allow purchasing product online including vouchers for the experience-based products on offer.	High	MMH&MC Director Corporate Services Tourism Manager
Value add 2.6 Identify the value of flow on benefit to the broader Council region, and communicate that benefit to stakeholders, ratepayers and businesses.	Medium	MMH&MC Tourism Manager

The Working River Place the Mid Murray cultural, heritage and maritime tourism attractions as an important and vibrant component of a seamless river tourism experience from the Murray Mouth to Renmark. Provide for road travel, river travel and walking trails according to the assets existing (or to be developed). Adopt a long-term culture, heritage and maritime tourism vision for its' place in the tourism sector, which will guide decisions relating to use and development of tourism assets.	Future consideration Not endorsed at this time	
Tourism Resourcing Consider an additional resource be brought into the team to not only support cultural, heritage and maritime tourism but provide capacity to develop new opportunities Consider employing a shipwright/Captain/Engineer with the knowledge of boats to assist with both maintenance, slipping and Captain/Engineer issues across Mannum and Morgan.	Future consideration Not endorsed at this time	

How will we measure success?

- Identified actions are implemented
- Business and financial plans are developed
- Improved cost efficiency and sustainability
- Increased product and experience development
- Increased sponsorship and grant income
- Increased awareness of heritage and maritime operations by ratepayers and businesses
- Drive visitation to increase revenue
- Reduced costs through improved efficiency

Strategic Pillar 3: Marketing

Marketing the business of Mid Murray's heritage and maritime assets, and all associated activities to the right market segments is a fundamental pillar to business success. A well thought out, targeted and creative marketing strategy, that integrates well within regional marketing activity, utilising both traditional methods and digital technology, will directly benefit the Mid Murray's business activity and indirectly benefit its communities.

TASKS	PRIORITY LEVEL	RESPONSIBILITY
Identify Target Markets and develop Marketing Plan 3.1.1 Collaborate with Regional Tourism Bodies to identify key target markets for the Mid Murray region and particularly the Mid Murray Heritage and Maritime assets 3.1.2Analyse existing customer demographics 3.1.3 Develop key demographics for the target markets (who the customers are, where are they from, how old they are, how they purchase travel, what motivates and inspires them, how our product meets their expectations) 3.1.4 Highlight and focus on innovative approaches to marketing not just traditional activities such as brochures 3.1.5 Develop a marketing plan to capture strategic marketing directives including marketing to visitors but also "internally" to the local community	High	Mid Murray Heritage & Maritime Committee Tourism Manager Tourism Staff MRLCTA Destination Riverland Commshake
Leverage Marketing Partnerships 3.2.1 Improve the promotion of Council's Cultural, Heritage and Maritime tourism assets through leveraging marketing partnerships with the two RTOs which, together, encompass its region, and in turn providing content for promotion via SATC's digital marketing assets	Medium	Tourism Manager
Content Creation 3.3.1 Continue to recognise the importance of investing in visual and compelling digital content creation to enable collaborative marketing with the two RTO's and the SATC.	Medium	Tourism Manager Murray River Lakes and Coorong Tourism Alliance (MRLCTA) Destination Riverland Commshake Tourism Staff
Enhance visitor data and statistics	Medium	Tourism Manager Tourism staff
3.4.1 Broaden the identification of visitor characteristics and statistics 3.4.2 Align the data sets that are captured across Mannum and Morgan. 3.4.3 Correlate information to inform both target markets and decisions on asset development which will provide a good evidence based on performance rather than community opinion.		• VIC • VIO • Museums • Cruises • Craft Shop Identified local business SATC data for MRLCTA and DR regions ATDW take up rates

How will we measure success?

- Identified actions are implemented
- Key target markets identified and documented
- Marketing Plan developed that guides the business
- Business growth
- Increased visitation, locally and regionally
- Online review platform ratings and reviews

Strategic Pillar 4: Asset Management

All assets owned and operated by Mid Murray Council within the heritage and maritime portfolio will be managed professionally, maintained and presented well and used to create memorable experiences for our clients to share with their friends and relatives.

TASKS	PRIORITY LEVEL	RESPONSIBILITY
Vessel Management Plans 4.1.1 Review and implement all vessel management plans 4.1.2 Review and implement all vessel procedural documentation	High	MMH&MC Mannum and Morgan Operations Groups Tourism staff
Vessel Maintenance Plans 4.2.1 Develop 5 year rolling cycle maintenance plans for each vessel. 4.2.2 Provide cost estimations for maintenance activity for Council forecasted budgeting	High	MMH&MC Mannum and Morgan Operations Groups Tourism staff
Museum Management Plans 4.3.1 Develop a museum management plan for each museum 4.3.2 Creatively rename "museums" to a more attractive proposition for a younger demographic	Medium	MMH&MC Mannum and Morgan Museum Groups Tourism staff
Maximise Existing Assets 4.4.1 Maximise use of existing assets as a higher priority than developing new assets (subject to a ROI analysis) 4.4.2 Increase interactivity of experiences and optimise resources to support the commercial opportunities for the three heritage vessels (e.g. user friendly online booking systems). 4.4.3 Utilise existing assets to stage nontraditional activity such as events, cocktail evenings, high teas, exhibitions	High	MMH&MC Mannum and Morgan Operations Groups Mannum and Morgan Museum Groups Tourism staff
Asset Management Plan 4.5.1 Create a Cultural, Heritage and Maritime Tourism Asset Management Plan to provide direction and clarity on the various heritage, maritime and cultural tourism assets under Council management.	High	MMH&MC Mannum and Morgan Operations Groups Mannum and Morgan Museum Groups Tourism staff
Infrastructure Improvements 4.6.1 Consider the identified infrastructure improvements within the Mid Murray Cultural and Heritage Tourism Strategy which are intended to increase visitation.	Low	MMH&MC Manager Infrastructure Grants Officer

How will we measure success?

- Identified actions are implemented
- Vessels and buildings are well maintained
- Vessel and Museum plans are developed and inform budgeting processes
- Increased usage of heritage and maritime assets for no-traditional purposes

Strategic Pillar 5 Volunteer Management

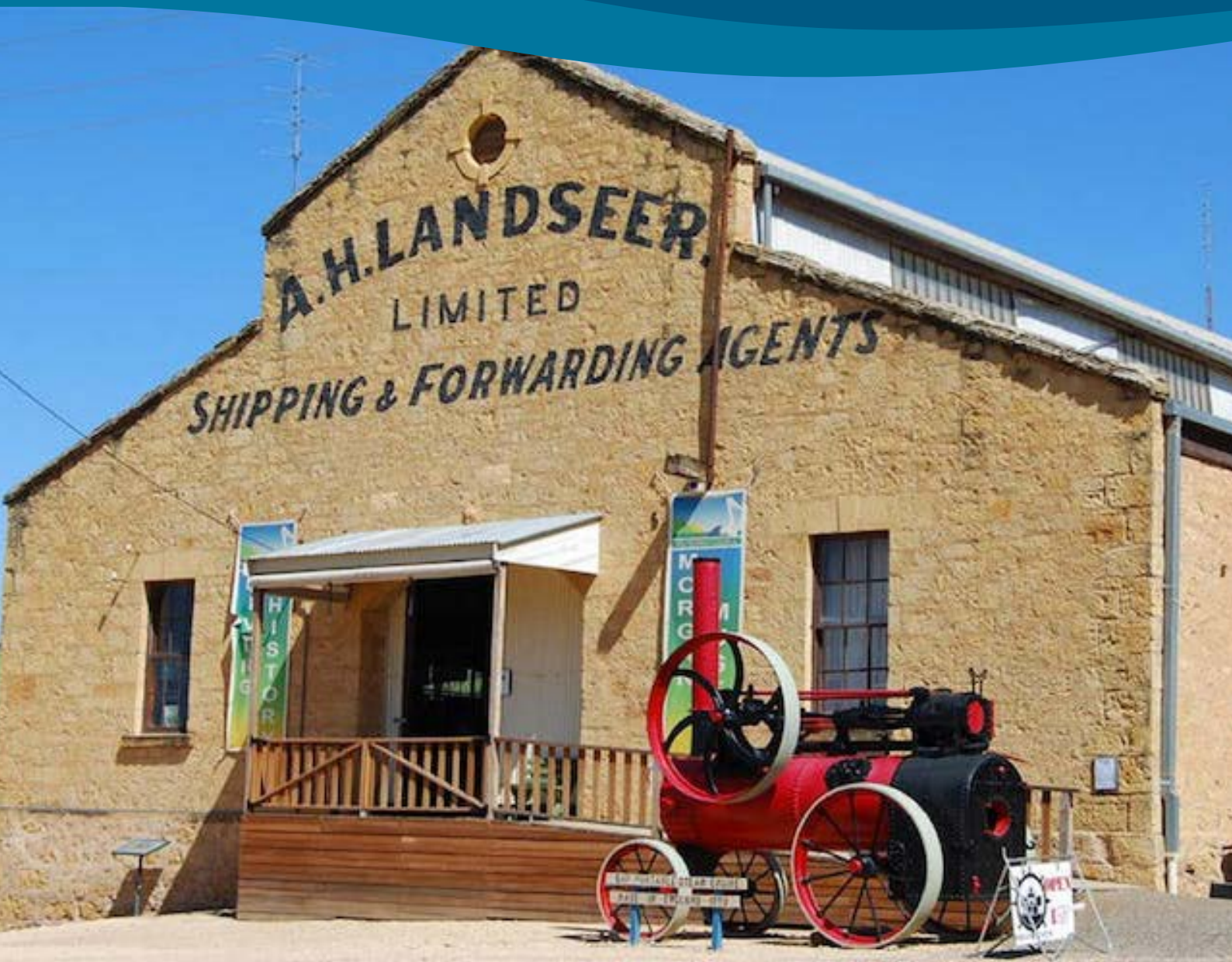
Volunteers are fundamental to the operation of Mid Murray council's heritage and maritime assets. They also present a significant risk as numbers decline due to age resulting in skills and knowledge being lost. Our volunteer management program will seek to ensure volunteers are well trained and respected within a positive culture that builds us to become "a volunteer of choice organisation". Our succession plan will ensure that we retain volunteer numbers and skills into the future.

TASKS	PRIORITY LEVEL	RESPONSIBILITY
Volunteer Organisation of Choice 5.1.1 Create a culture of "volunteer importance" within the organisation 5.1.2 Communicate our volunteer aspirations to the community	Medium	MMH&MC Tourism Staff and volunteer leaders Community Development Staff
Volunteer Training and Development 5.2.1 Mentor volunteers and develop confidence in learning new things 5.2.2 Recognise areas for skill development and deliver training programs 5.2.3 Maintain levels of qualification within the paid or volunteer workforce, to ensure cruising viability of the vessels	High	MMH&MC Tourism Staff and volunteer leaders WHS staff
Volunteer Recruitment, Retention and Recognition 5.3.1 Develop systems for volunteer recruitment 5.3.2 Work with MMC to streamline volunteer acceptance and induction processes – make it easy for people to volunteer with MMC 5.3.3 Recognise contribution and reward equitably Deliver equitable recognition celebrations across the region 5.3.4 Recognise volunteer skills and knowledge obtained from life experiences Avoid micro managing volunteers with sufficient skills and training to undertake tasks asked of them 5.3.5 Engage with and consult volunteers on matters of importance that impacts on them	High	MMH&MC Tourism Staff and volunteer leaders Community Development Staff WHS staff

5.3.6 Reach out for and appreciate volunteer feedback in areas of heritage and maritime assets		
Collaboration 5.4.1 Collaborate with other volunteer based organisations with similar risks to find creative solutions to common problems. 5.4.2 Facilitate regular meetings between towns, inter-town volunteer participation and fostering the use of digital platforms for inter-town communication.	Medium	Tourism Manager Community Development Staff

How will we measure success?

- Identified actions are implemented
- Volunteer numbers increase
- Volunteer satisfaction levels and culture is high
- Volunteers are well trained and engaged
- Risks associated with volunteering are reduced


A.H.LANDSEER
LIMITED
SHIPPING & FORWARDING AGENTS

Mid Murray Council area

Tourism value

In 2023/24 , the total tourism sales in the Mid Murray Council area was $69.1m, the total value added was $39.8 million.

Tourism are key industries and major contributors to Australia's economy. However it has not been well represented in economic profiles in the past, because it actually includes parts of many different traditional industries.

The Australian Bureau of Statistics publish the "Tourism Satellite Account" which is a separate set of national accounts which look at the value and contribution of tourism in the national economy.

This dataset presents National Economics microsimulation model of the tourism satellite account at the local level, showing the value of total sales and value add, as well as annual estimates of employment and FTE employment for the tourism sector.

Understanding the current role of your tourism sector is important if you are looking at attracting visitors to your area, and as information for businesses looking to locate in the area.Tourism data should be viewed in conjunction with broader industry data in the Value added, Output and Employment by industry (Total) topics, as well as tourism Workforce characteristics.

Data source

National Economics (NIEIR) - Modelled series

Current area: Mid Murray Council area

Current benchmark: South Australia

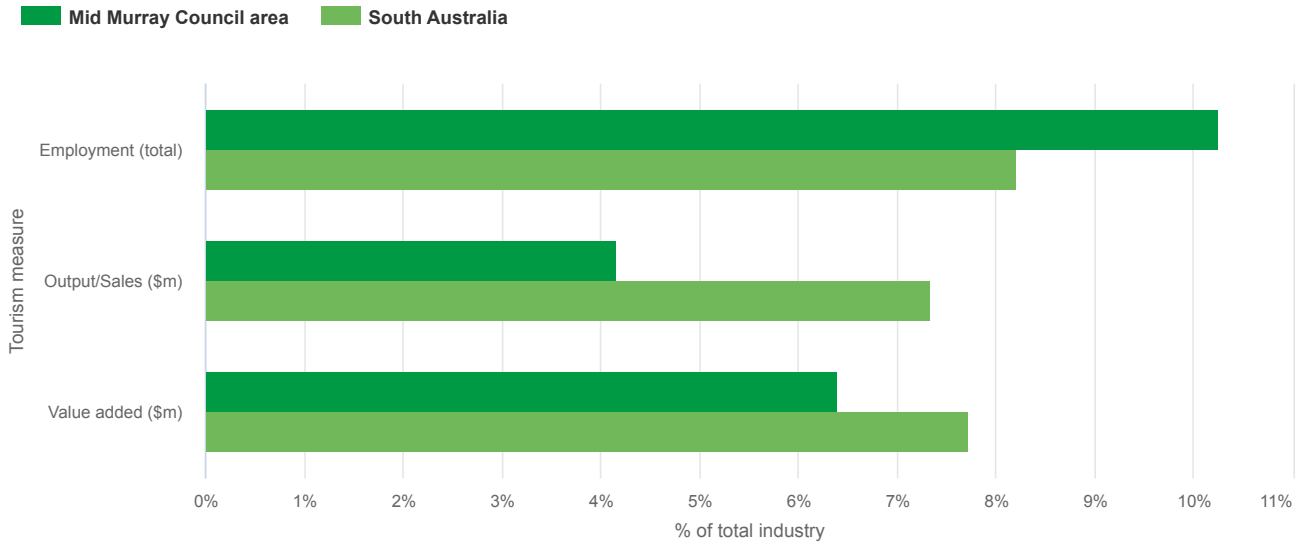
Comparison year: 2022/23

Value of tourism

Mid Murray Council area	2023/24				2022/23				Change
Measure	Mid Murray Council area	% of total industry	South Australia%	Mid Murray Council area as % of South Australia	Mid Murray Council area	% of total industry	South Australia%	Mid Murray Council area as % of South Australia	2023/24 to 2022/23
Employment (total)									
- Direct	139	5.3	4.7	0.3	136	5.4	4.7	0.3	+2
- Indirect	131	5.0	3.5	0.4	128	5.1	3.4	0.4	+2
- Total	269	10.3	8.2	0.3	265	10.5	8.1	0.3	+5
Output/Sales ($m)									
- Direct	27.05	1.6	3.1	0.3	28.43	1.7	3.0	0.4	-1.4
- Indirect	42.01	2.5	4.2	0.4	44.15	2.6	4.0	0.4	-2.1
- Total	69.06	4.2	7.3	0.4	72.58	4.3	7.0	0.4	-3.5
Value added ($m)									
- Direct	16.63	2.7	3.4	0.4	17.18	2.7	3.2	0.4	-0.6
- Indirect	23.19	3.7	4.4	0.4	23.96	3.8	4.2	0.5	-0.8
- Total	39.82	6.4	7.7	0.4	41.15	6.5	7.4	0.5	-1.3

Source: National Institute of Economic and Industry Research (NIEIR) ©2025. Compiled and presented in economy.id by .id (informed decisions). Data is based on 2018-19 constant prices for all years. NIEIR data are inflation adjusted each year to allow direct comparison, and new data releases normally adjust previous years' figures to a new base year.
Please refer to specific data notes for more information

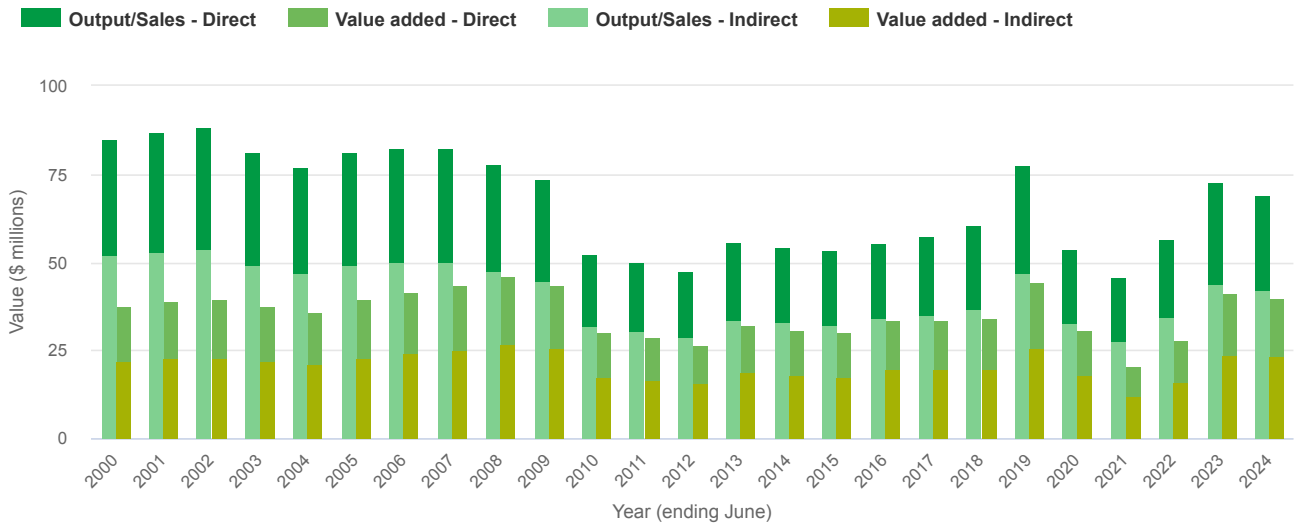
Value of tourism 2023/24



Source: National Institute of Economic and Industry Research (NIEIR) ©2025. Compiled and presented in economy.id by .id (informed decisions).

Value of tourism

Mid Murray Council area



Source: National Institute of Economic and Industry Research (NIEIR) ©2025. Compiled and presented in economy.id by .id (informed decisions).

Tourism employment

Mid Murray Council area

Source: National Institute of Economic and Industry Research (NIEIR) ©2025. Compiled and presented in economy.id by .id (informed decisions).

Appendix 3

Mid Murray Heritage & Maritime Finance Report

For the period ending 30/06/2025

Type Description	COA	Description	Original Budget	Current Budget	YTD Budget	YTD Actual	Variance ($)	Variance (%)	Comments
PS CANALLY - INCOME & EXPENDITURE									
Operating Income	3450503	Inc MMHM PS Canally	-$2,100.00	-$500.00	-$500.00	-$854.63	-$354.63	70.93%	Only income is from sponsorships & donations. Boat not yet operational.
Operating Expenditure	3450330	MMHM PS Canally Exp	$55,421.00	$44,800.00	$44,800.00	$36,690.55	-$8,109.45	-18.10%	Insurance under original budget, Skipper training incomplete, Fuel & other materials under budget.
PS CANALLY		**SURPLUS/DEFICIT**	**$53,321**	**$44,300**	**$44,300**	**$35,836**	**-$8,464**	-19.11%	Expenditure controlled but boat not operational
PS MARION - INCOME & EXPENDITURE									
Operating Income	3450505	Inc MMHM PS Marion.	-$102,500.00	-$147,000.00	-$147,000.00	-$157,743.00	-$10,743.37	1.19%	Very good performer
Operating Expenditure	3450350	MMHM PS Marion Exp	$99,485.00	$114,752.00	$114,752.00	$130,216.01	$15,464.01	13.48%	Higher crew expenses, Catering costs & fuel expense
PS MARION		**SURPLUS/DEFICIT**	**-$3,015**	**-$32,248**	**-$32,248**	**-$27,527**	**$4,721**	-14.64%	
PW MAYFLOWER - INCOME & EXPENDITURE									
Operating Income	3450510	Inc MMHM PW Mayflower	-$94,000.00	-$99,425.00	-$99,425.00	-$106,305.50	-$6,880.50	6.92%	Strong sales for May & June
Operating Expenditure	3450355	MMHM PW Mayflower Exp	$40,016.00	$38,400.00	$38,400.00	$41,162.54	$2,762.54	7.19%	Large fridge repair bill in June
PW MAYFLOWER		**SURPLUS/DEFICIT**	**-$53,984**	**-$61,025**	**-$61,025**	**-$65,143**	**-$4,118**	6.75%	
MMHM MORGAN - INCOME & EXPENDITURE									
Operating Income	3450520	Inc MMHM Landseer Museum	-$8,247.00	-$8,247.00	-$8,247.00	-$8,374.39	-$127.39	1.54%	Close to budget
Operating Income	3450525	Inc MMHM Morgan Craft Shop	-$31,446.00	-$45,930.00	-$45,930.00	-$53,033.09	-$7,103.09	15.47%	Good sales in last quarter
Operating Income	3450530	Inc MMHM Morgan VIC	-$14,795.00	-$500.00	-$500.00	-$346.55	$153.45	-30.69%	Photocopying & printing
Operating Expenditure	3450317	MMHM Morgan Employ Costs	$185,617.74	$184,642.74	$184,642.74	$183,633.17	-$1,009.57	-0.55%	Close to budget
Operating Expenditure	3450360	MMHM Pt Morgan Depreciation	$65,167.00	$65,167.00	$65,167.00	$65,166.96	-$0.04	0.00%	Close to budget
Operating Expenditure	3450365	MMHM Pt Morgan Landseer Museum Exp	$21,000.00	$25,000.00	$25,000.00	$17,514.56	-$7,485.44	-29.94%	Savings on Advertising & other materials
Operating Expenditure	3450370	MMHM Pt Morgan Building Maint Program Exp	$0.00	$5,000.00	$5,000.00	$1,901.85	-$3,098.15	-61.96%	Minimal maintenance completed
Operating Expenditure	3450375	MMHM Pt Morgan Craft Shop Exp	$39,749.74	$35,649.74	$35,649.74	$43,569.53	$7,919.79	22.22%	Higher costs of good sold, Stock take not yet included
Operating Expenditure	3450380	MMHM Pt Morgan Heritage Rail Exp	$3,094.00	$3,094.00	$3,094.00	$1,176.35	-$1,917.65	-61.98%	Savings achieved
Operating Expenditure	3450385	MMHM Pt Morgan VIC Exp	$18,300.00	$14,000.00	$14,000.00	$10,159.56	-$3,840.44	-27.43%	Savings on Electricity, Plant hire, Phone & Advertising
Operating Expenditure	3450390	MMHM Pt Morgan Gen Op Exp	$19,000.00	$22,200.00	$22,200.00	$20,600.19	-$1,599.81	-7.21%	Savings on Other materials
MMHM MORGAN		**SURPLUS/DEFICIT**	**$297,440**	**$300,076**	**$300,076**	**$281,968**	**-$18,108**	-6.03%	
MMHM MANNUM MARKETS - INCOME & EXPENDITURE									
Operating Income	3450535	Inc MMHM Mannum Markets Stalls Catering etc	-$12,000.00	-$10,000.00	-$10,000.00	-$9,471.90	$528.10	-5.28%	No markets in Dec & Jan, small markets May & june
Operating Income	3450536	Inc MMHM Mannum Markets Donations	-$3,093.00	-$3,093.00	-$3,093.00	-$2,993.40	$99.60	-3.22%	Close to budget
Operating Expenditure	3450410	MMHM Mannum Markets Exp	$9,578.00	$8,000.00	$8,000.00	$7,993.52	-$6.48	-0.08%	Close to budget
MMHM MANNUM MARKETS		**SURPLUS/DEFICIT**	**-$5,515**	**-$5,093**	**-$5,093**	**-$4,472**	**$621**	-12.20%	

Mid Murray Heritage & Maritime Finance Report

For the period ending 30/06/2025

Type Description	COA	Description	Original Budget	Current Budget	YTD Budget	YTD Actual	Variance ($)	Variance (%)	Comments
MMHM MANNUM MUSEUM & VIC - INCOME & EXPENDITURE									
Operating Income	3450545	Inc MMHM Mannum Museum Admission Fees	-$25,000.00	-$22,000.00	-$22,000.00	-$23,873.27	-$1,873.27	8.51%	Income between original budget & revised budget
Operating Income	3450555	Inc MMHM Mannum VIC	-$35,700.00	-$59,250.00	-$59,250.00	-$66,114.68	-$6,864.68	11.59%	Higher income on Souvenir sales
Operating Expenditure	3450420	MMHM Mannum Museum Gen Op Exp	$53,086.00	$43,968.00	$43,968.00	$33,477.70	-$10,490.30	-23.86%	Savings on Other materials
Operating Expenditure	3450425	MMHM Mannum VIC Gen Op Exp	$29,656.00	$51,156.00	$51,156.00	$54,950.57	$3,794.57	7.42%	Higher expenditure on Souvenirs & Licences
MMHM MANNUM MUSEUM & VIC		**SURPLUS/DEFICIT**	**$22,042**	**$13,874**	**$13,874**	**-$1,560**	**-$15,434**	-111.24%	
MMHM MANNUM - INCOME & EXPENDITURE									
Operating Income	3450515	Inc MMHM Rockford Wines Sponsorship	-$55,000.00	-$7,000.00	-$7,000.00	$0.00	-$7,000.00	-100.00%	Sponsorship not received before year end
Operating Income	3450540	Inc MMHM Mannum Vehicle Hire	-$337.00	$0.00	$0.00	$0.00	$0.00		No longer provided
Operating Income	3450547	Inc MMHM Mannum Donations Sponsorship	-$6,100.00	-$4,300.00	-$4,300.00	-$4,562.97	-$262.97	6.12%	Slightly better than revised budget
Operating Income	3450550	Inc MMHM Mannum Other	-$2,750.00	-$6,828.00	-$6,828.00	-$20,179.99	-$13,351.99	195.55%	Higher interest received, Contra funds Inland Rivers Association ($13,001)
Operating Expenditure	3450315	MMHM Mannum Employ Costs	$408,606.47	$405,905.47	$405,905.47	$391,355.83	-$14,549.64	-3.58%	Close to budget
Operating Expenditure	3450320	MMHM Committee Exp	$1,312.00	$812.00	$812.00	$290.42	-$521.58	-64.23%	Savings made
Operating Expenditure	3450395	MMHM Mannum Dep	$78,206.00	$78,206.00	$78,206.00	$78,206.04	$0.04	0.00%	On budget
Operating Expenditure	3450400	MMHM Mannum Building Maint Program Exp	$4,500.00	$14,000.00	$14,000.00	$10,207.74	-$3,792.26	-27.09%	Minimum maintenance completed
Operating Expenditure	3450405	MMHM Mannum Dry Dock Maint Exp	$2,000.00	$2,000.00	$2,000.00	$2,177.65	$177.65	8.88%	Close to budget
Operating Expenditure	3450415	MMHM Mannum Motor Vehicle Exp	$6,702.00	$5,500.00	$5,500.00	$4,978.49	-$521.51	-9.48%	Savings made
Operating Expenditure	3450430	MMHM Mannum Gen Op Exp	$63,544.00	$48,066.00	$48,066.00	$54,356.89	$6,290.89	13.09%	Contra funds Inland Rivers Association ($13,001)
MMHM MANNUM		**SURPLUS/DEFICIT**	**$500,683**	**$536,361**	**$536,361**	**$516,830**	**-$33,531**	-3.64%	
MMHM NATURAL DISASTER - INCOME & EXPENDITURE									
Operating Income	3450590	Inc Natural Disaster MMH&MC Income	$0.00	-$19,925.32	-$19,925.32	-$36,630.19	-$16,704.87	83.84%	Insurance recoveries
Operating Expenditure	3450666	Natural Disaster MMH&MC Expense	$0.00	$20,874.00	$20,874.00	$15,009.43	-$5,864.57	-28.10%	Savings on contractors
MMHM NATURAL DISASTER		**SURPLUS/DEFICIT**	**$0**	**$949**	**$949**	**-$21,621**	**-$22,569**	-2379.04%	
MMHM OPERATING-INCOME & EXPENDITURE		**SURPLUS/DEFICIT**	**$810,973**	**$797,195**	**$797,195**	**$714,312**	**-$96,883**	-10.40%	
MMHM CAPITAL INCOME & CAPITAL EXPENDITURE									
Capital Renewal Expenditure	**3450628**	MMHM Mannum Build Renewal Exp	$0.00	$1,150.00	$1,150.00	$1,150.00	$0.00	0.00%	On budget
Capital Renewal Expenditure	**3450630**	PS Marion Cap Renewal Exp	$120,000.00	$178,183.65	$178,183.65	$178,343.52	$159.87	0.09%	Slipping & Hull Maintenance
Capital Renewal Expenditure	**3450632**	PW Mayflower Cap Renewal Exp	$18,000.00	$0.00	$0.00	$0.00	$0.00		
Capital Renewal Expenditure	**3450634**	PS Canally Cap Renewal Exp	$0.00	$52,500.00	$52,500.00	$29,750.62	-$22,749.38	-43.33%	Works almost complete
Capital Renewal Expenditure Total			**$138,000**	**$231,834**	**$231,834**	**$209,244**	**-$22,590**	-9.74%	
EXPENDITURE		**SURPLUS/DEFICIT**	**$138,000**	**$231,834**	**$231,834**	**$209,244**	**-$22,590**	-9.74%	
MMHM TOTAL OPERATING & CAPITAL			**$948,972.95**	**$1,029,028.28**	**$1,029,028.28**	**$923,556.13**	**-$119,472.52**	-10.25%	

MMHMC Risks and SWOT analysis

The Mid Murray Heritage and Maritime Committee identified risks within its strategic pillars – please note many risks have or are being attended to.

Risk Matrix

MMHMC Strategic Pillar	Risk
2,4	Increased water flows and levels may impact maritime operations and vessel safety
2	Drought conditions with reduced river flow and levels will impact maritime operations
2,5	Loss of volunteer knowledge and experience
2,3,4,5	Financial losses should MMC reduce financial investment
2,3,4,5	Claims of competitive neutrality impacting the future of oeprations
2,4	Unpredicted maintenance costs
2,3,4	Breakdowns reduce income and reputation
2,4	Failure to maintain vessels – high risk aspects such as boilers causing serious damage
2	WHS and risks identified elsewhere (outside our control) may impact or suspend operations
2,3,5	The local community not seeing the value of our heritage vessels
2,4,5	Inability to recruit new volunteers (younger, skilled, qualified)
2,5	Failure to make it easy for people to volunteer with us. Reduce bureaucracy
2	Future health pandemics or worldwide impacts such as war, global financial crisis
2,5	Global economic impacts that affects retirees income
2	Cost of fuel reducing visitor and passenger numbers
4	Accessing sources of sustainable timber for boat repairs and operations
2	Environmental perception of burning wood as fuel
2,4,5	Reduced steam engineers and qualified crew members
2,3	Market relevance for museums – interaction required
2,3,4	Local Government amalgamations
2,3	Inability to attract younger people to experience our products
2,3	Interaction with local traders (knowledge, referrals and support of our operations)
2,3	Interaction with local residents (knowledge, referrals and support of our operations)
2,4	Loss or reduced sponsorship
2	Negative perception of Local Government as the “owner”
2,3	Towns not championing themselves as a “tourism destination” and providing support services
3	Signage at town entrances to motivate and promote the product
3	The structural integrity of the Randell Dry Dock damaging reputation
2	Climate change
2,3,4	Failure to plan = plan to fail - resulting in poor business performance, asset integrity and reputation
2	Reluctance of tourism industry operators to link product to a Council body
4,5	Inability for the Chamber of Inland Rivers to be effective

2,3	Failure to measure and communicate the value of tourism to stakeholders, community etc
2,3	Incorrectly targeted marketing "missing the mark"
2,3	Unsuitable berthing for PS Canally risks reputation and vessel once cruises commence.
2	Media coverage of high river levels, detract visitors

SWOT analysis

Strengths

2 Business
- Heritage vessels are historically significant and a unique experience
- MMC support
- Prime locations that we operate from
- Rockford's sponsorship
- Mannum's close proximity to Adelaide – day trippers
- Staff with solid knowledge and experience

3 Marketing
- The attraction of the river itself
- Heritage vessels are historically significant and a unique experience
- Historic building and experiences within museums
- MMC support
- Solid knowledge of both Mannum and Morgan by the Adelaide market
- Staff with solid knowledge and experience

4 Assets
- MMC support
- Rockford's sponsorship
- Staff with solid knowledge and experience

5 Volunteers
- Solid volunteer involvement
- MMC support
- Staff with solid knowledge and experience

Opportunities

2 Business
- Develop new and improved experiences
- Events within our spaces
- Nontraditional activity within our spaces
- Create our own itineraries and coach people up from Adelaide
- Collaborate with other LG bodies along the river
- Expand on support received from Rockfords (sponsorship, marketing, slipping, referral)
- Renewed interest when Canally comes online for cruises
- Attract other sponsors
- Incentivise and integration of our product with private operators
- Work with Mannum Community College – pathways for students and education
- Accessing grant funding

3 Marketing
- Improve marketing to attract new demographics and key existing markets
- Use social media to its full potential
- Develop a sub-regional brand and digital marketing strategy
- Collaborative marketing campaigns
- Renewed interest when Canally comes online for cruises
- Morgan's Riverboat Hall of Fame.

4 Assets
- Work with other steam and heritage organisations and experiences
- Collaborate with other LG bodies along the river

	• Expand on support received from Rockfords (sponsorship, marketing, slipping, referral) • Master planning of the Port of Morgan precinct • Morgan's Riverboat Hall of Fame. • Accessing grant funding 5 Volunteers • Work with other steam and heritage organisations and experiences • Work with Mannum Community College – pathways for students and education • Accessing grant funding
Weaknesses 2 Business • No current ten year plans in place • No volunteer co-ordination position • Distance to travel for volunteers and clients (particularly Morgan) • Online booking facility • Cruise expectation of some demographics can be higher than our service delivery and product • Not utilising our area and assets to their full potential – ie. Events, Arts • No competitive/reasonable priced transport from Adelaide for passengers • Need access to a moderately modern vehicle for transportation of passengers. 3 Marketing • Online booking facility • Weak marketing efforts not targeted to key markets • Cruise expectation of some demographics can be higher than our service delivery and product • Town entrances are not inviting – need a WOW factor • Not enough income/support/funding to improve advertising and marketing 4 Assets • No current ten year plans in place • Vessel maintenance plans not yet developed	**Threats** 2 Business • Decreases in financial contribution and support from MMC • Loss of qualified steam engineers and crew members • AMSA training requirements for steam engineers are inhibitive financially • Not investing in reinventing our museums and product • Lack of room for growth on our current sites • Volunteer dissatisfaction • Monetary Inflation • Pandemics • Other towns becoming more attractive to visitors that are on the main arterial highway 3 Marketing • Decreases in financial contribution and support from MMC • Not investing in reinventing our museums and product • Lack of child friendly attractions to entice younger families to visit and stay longer • Other towns becoming more attractive to visitors that are on the main arterial highway 4 Assets • Decreases in financial contribution and support from MMC

5 Volunteers • Ageing volunteer workforce • Not being able to attract younger volunteers with skills and qualifications • Not being able to attract volunteers of any age • No volunteer co-ordination position • Distance to travel for volunteers and clients (particularly Morgan)	• Loss of qualified steam engineers and crew members • Slipping issues • Ageing and physical ability of shipwrights with wooden boat experience. 5 Volunteers • Loss of qualified steam engineers and crew members • AMSA training requirements for steam engineers are inhibitive financially • Volunteer dissatisfaction • Monetary Inflation • Pandemics