



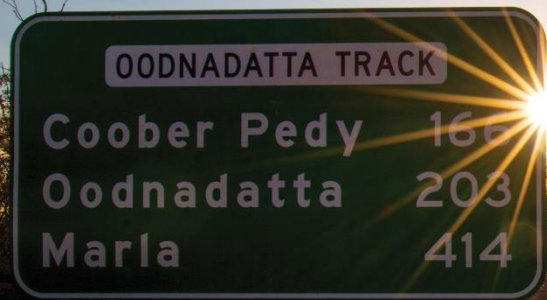
South Australian Tourism Commission

THE FUTURE OF TOURISM IN THE SOUTH AUSTRALIA

- COOBER PEDY -

December 2018





OPENING ADDRESS
CPRBTA

AGENDA

- ❑ Opening address:
 - CPRBTA
 - CE, SATC
- ❑ Performance Summary
- ❑ Recent Visitor Trends
- ❑ 2030 Target Modelling
- ❑ The Future Traveller
- ❑ Discussion (incl. break)
- ❑ Summary



OPENING ADDRESS

Rodney Harrex, CE SATC



TOURISM 2020

Set in 2013 with a target of **\$8.0b**

Visitor expenditure grow from \$5.1b to **\$6.7b**

On track to reach ambitious **target**

An **5,000** additional jobs

International target reached **2 years** early

Significant increases in **aviation** access

PRIORITY ACTION AREAS 2020

DRIVING DEMAND



WORKING BETTER TOGETHER



SUPPORTING WHAT WE HAVE



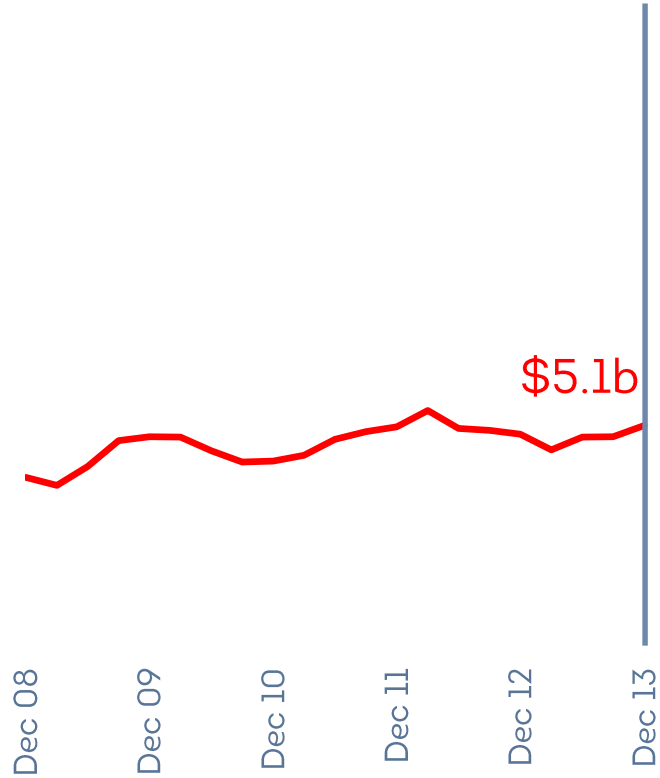
INCREASING THE RECOGNITION OF THE VALUE OF TOURISM



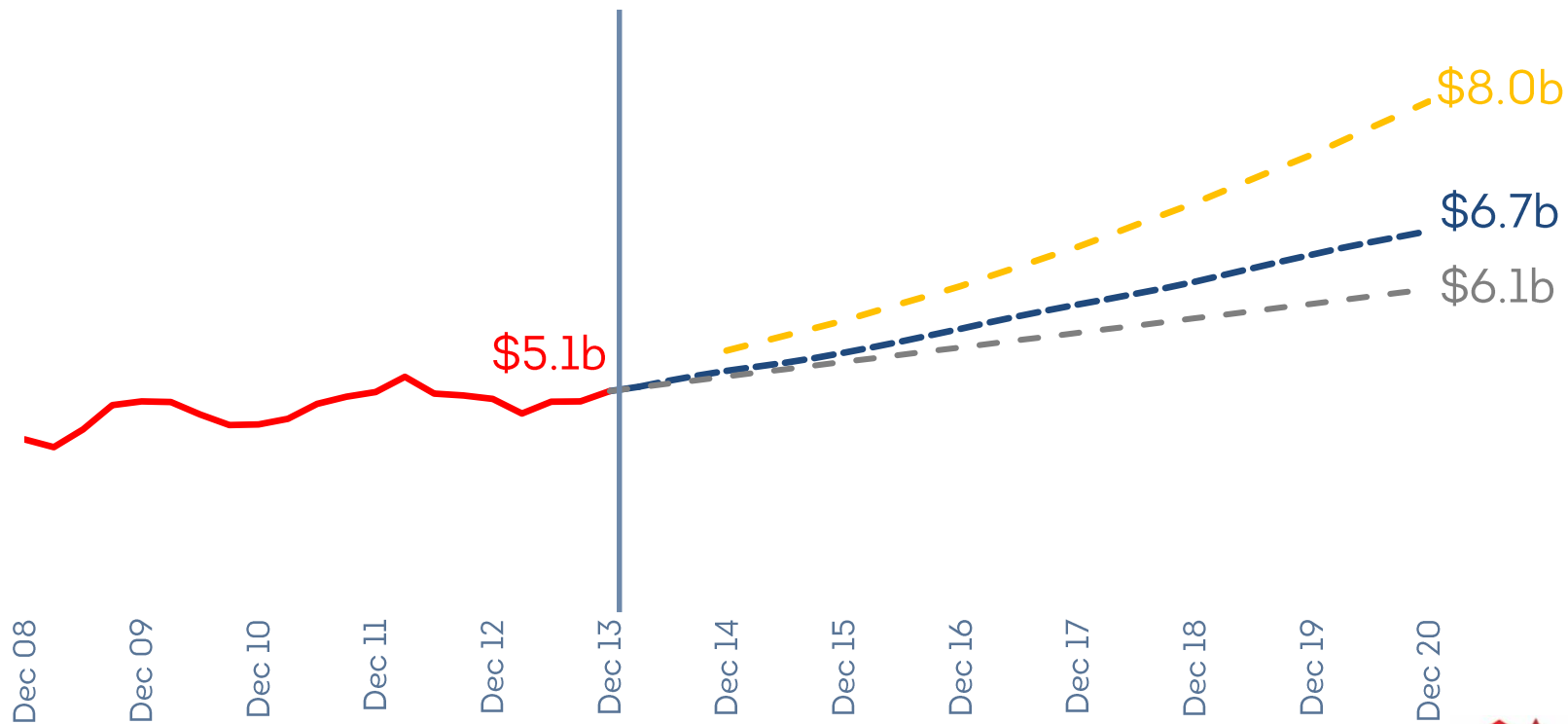
USING EVENTS TO DRIVE VISITATION



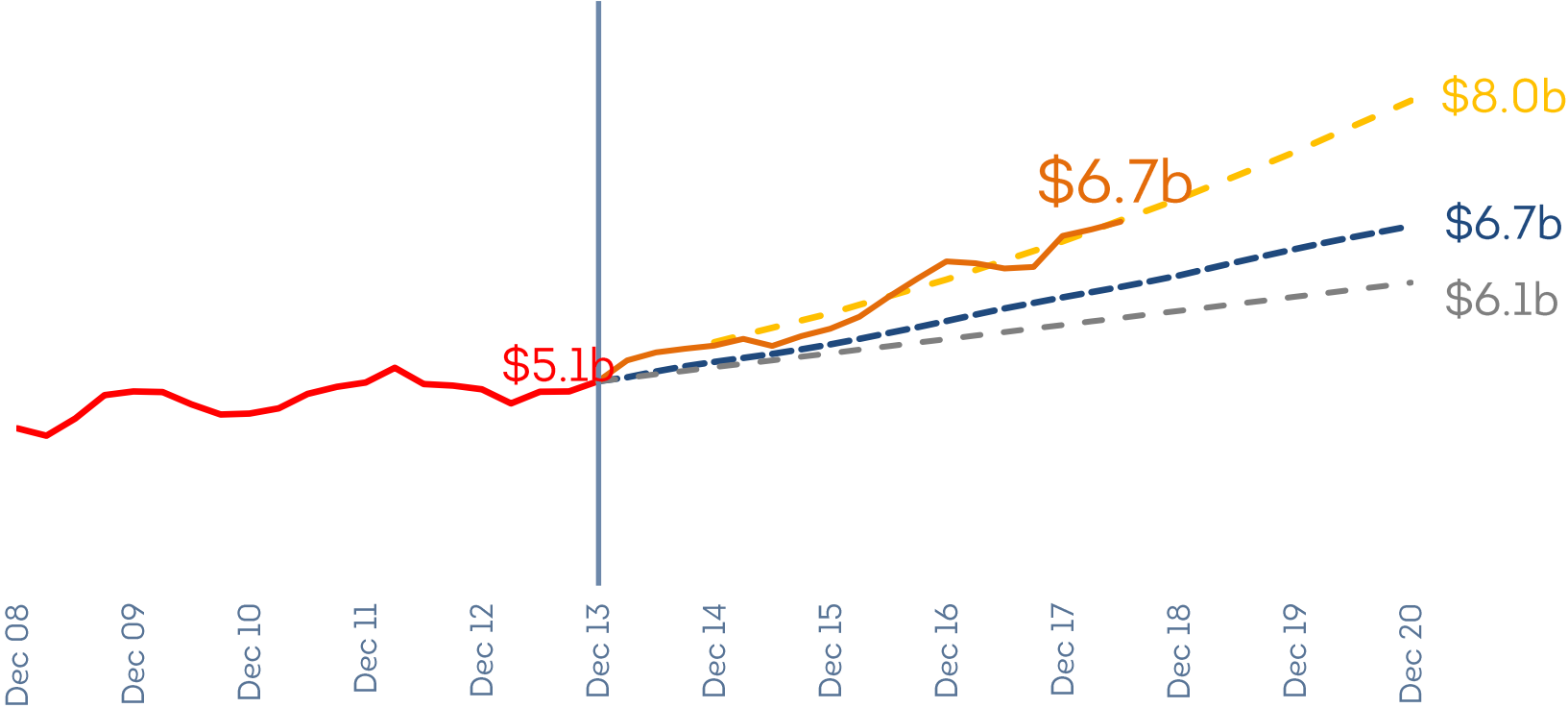
SETTING THE SCENE



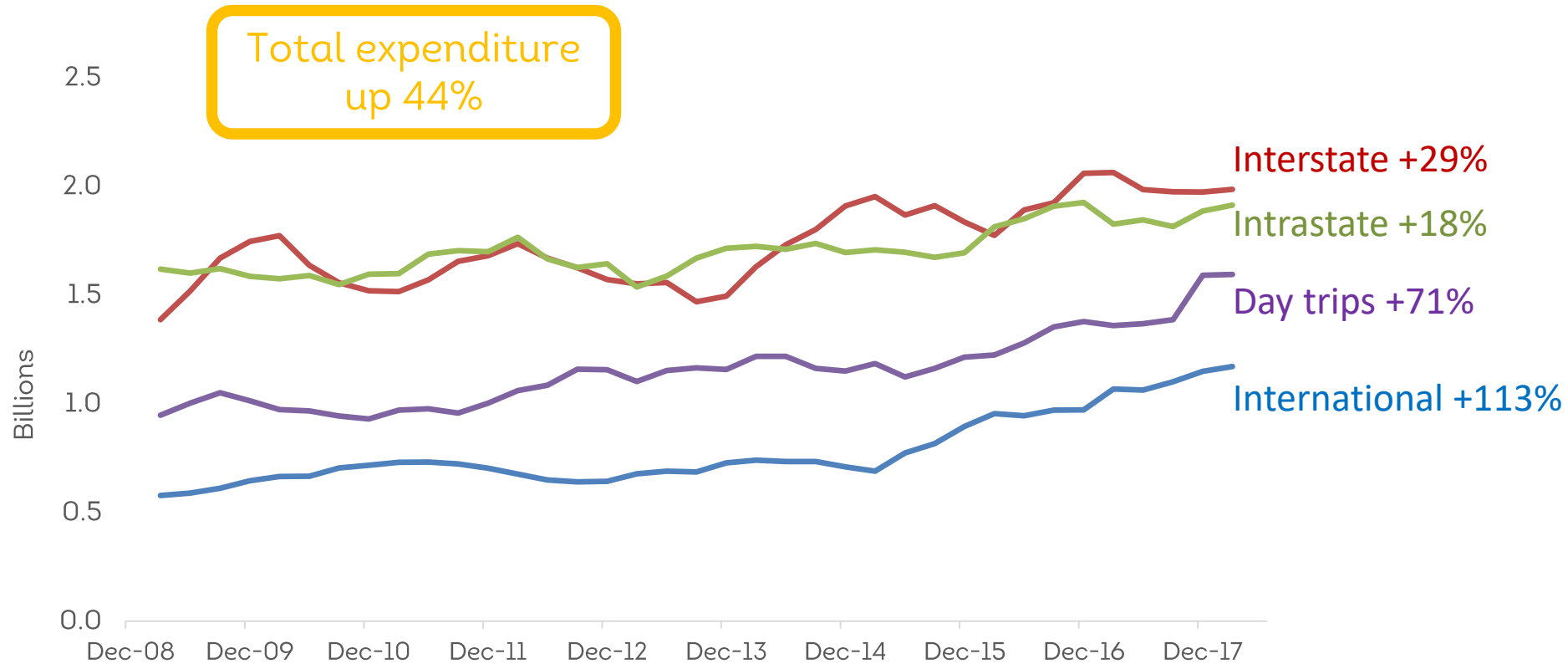
SETTING THE SCENE



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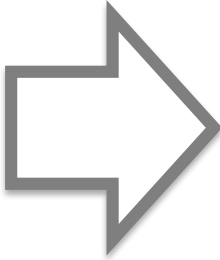
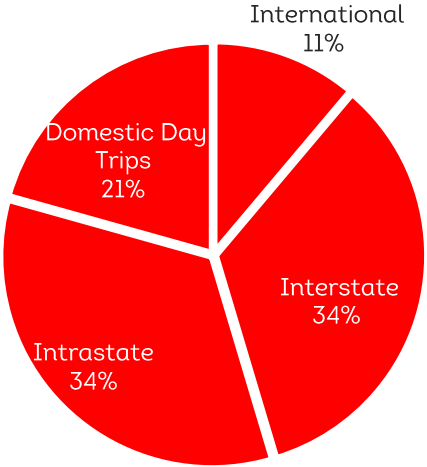


10 YEAR OVERVIEW OF EXPENDITURE

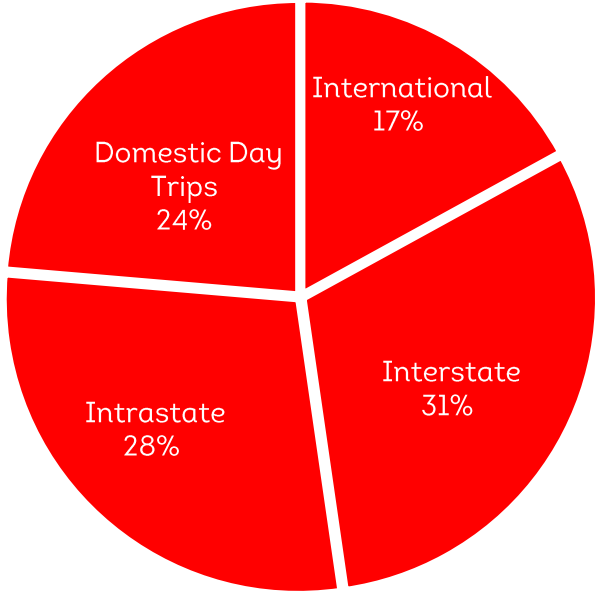


THE CHANGING VISITOR MIX

2008



2018



OUR CHANGING MARKETS

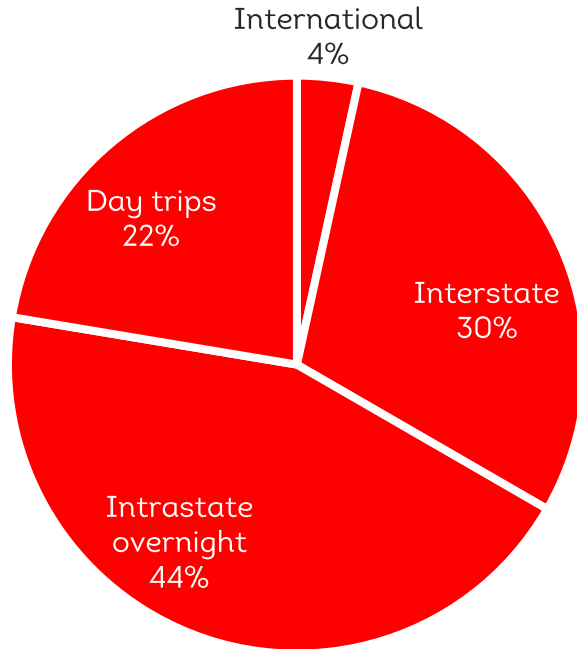
Our **INTERNATIONAL** market has doubled in 10 years, with a movement from western to eastern markets. Expenditure from Asia has tripled, North America has increased by 70% while the European markets have remained consistent.

Our **INTERSTATE** market has increased by 29% largely driven by domestic aviation capacity as well as rise of 'grey nomad' travel.

And South Australians are traveling **INTRASTATE** too with overnight stays up 18% and day trips having increased by 71%.

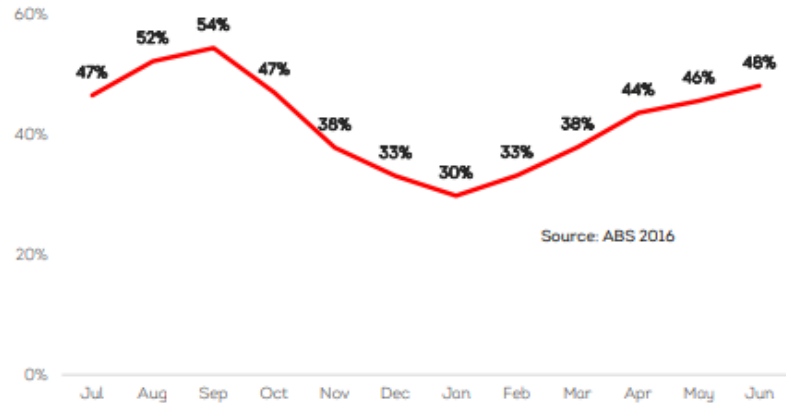
FLINDERS AND OUTBACK TODAY

Visitor Expenditure



\$437m

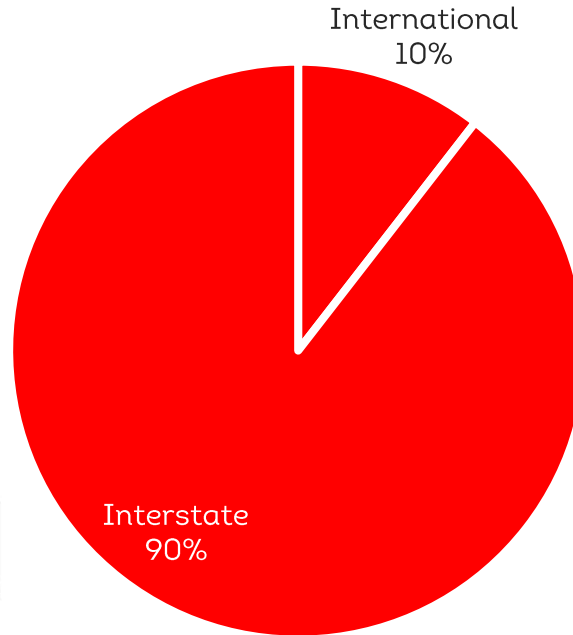
MONTHLY OCCUPANCY RATES YEAR END JUNE 2016 - FLINDERS RANGES AND OUTBACK



COOBER PEDY TODAY

Visitor Expenditure

\$38m+



❑ Key international markets:

❑ Germany

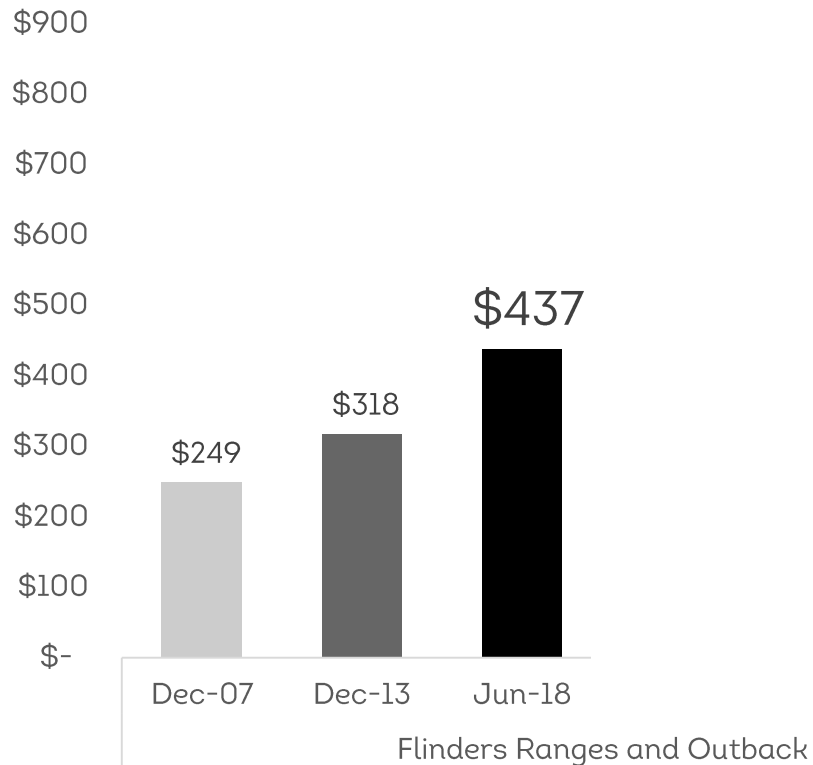
❑ UK

❑ US

❑ Holiday purpose primarily, with some Business travel by domestic visitors

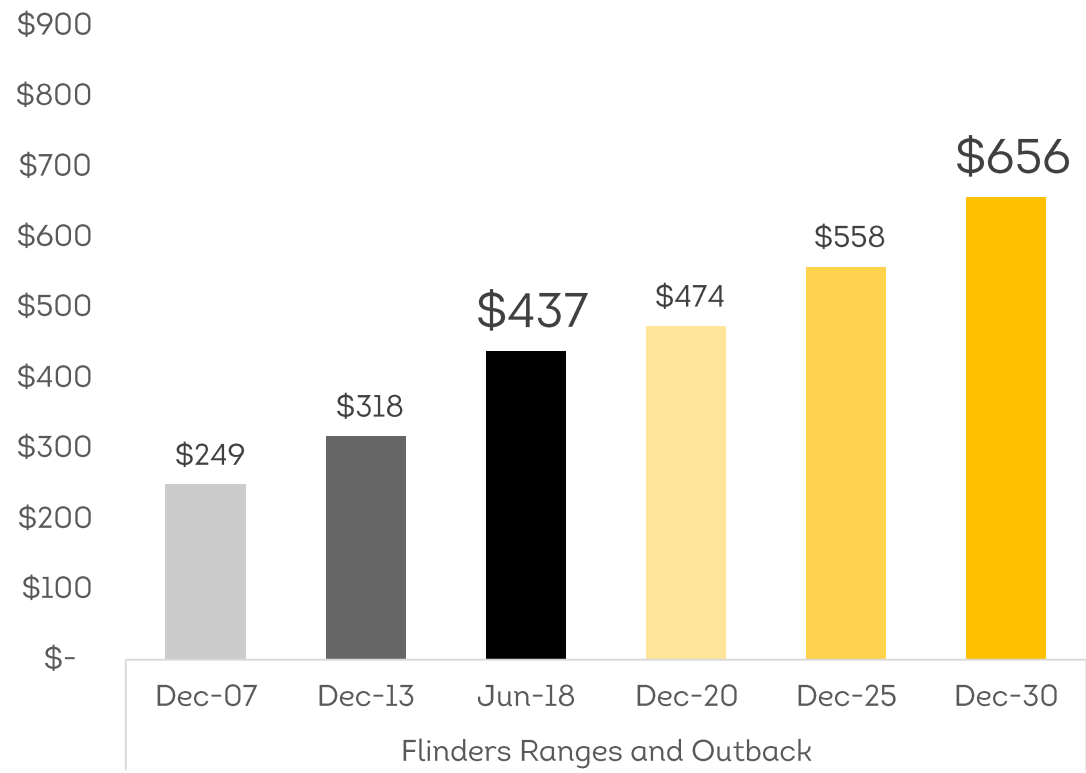
REGIONAL PERFORMANCE

- ❑ The Flinders Ranges and Outback has grown from \$249m in 2007 to \$437m today, a growth of 76%.



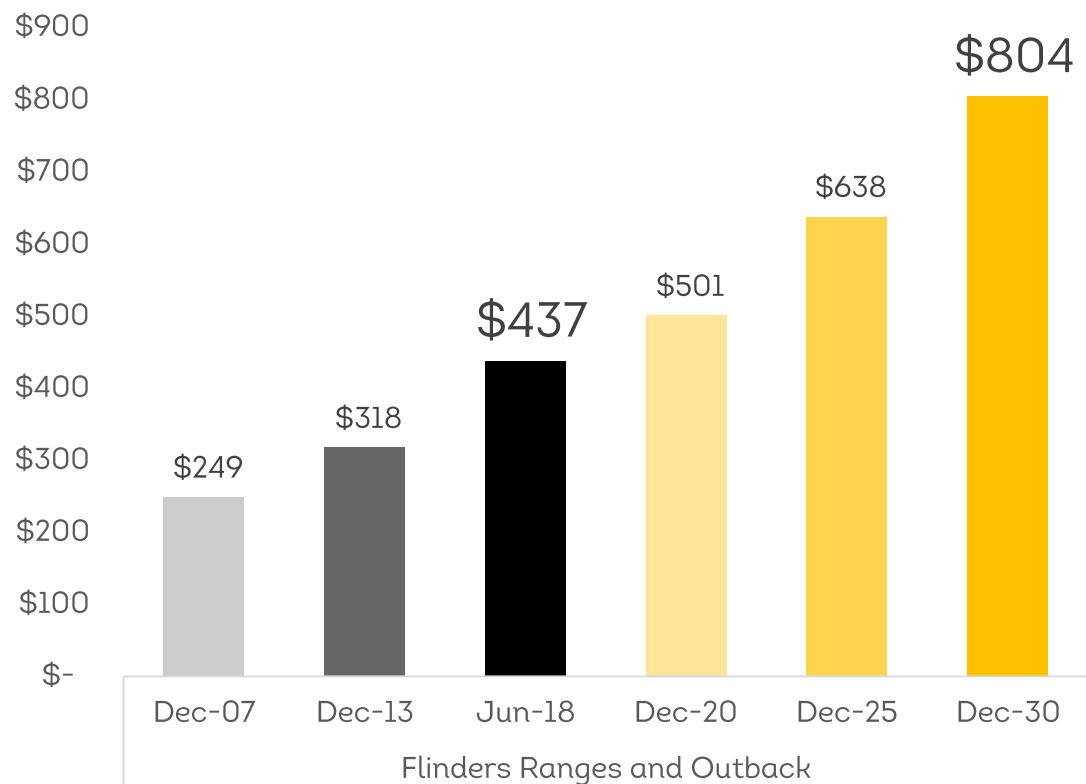
CONTINUING THE TREND

□ Current rate of growth through to 2030 yields \$656m to the region



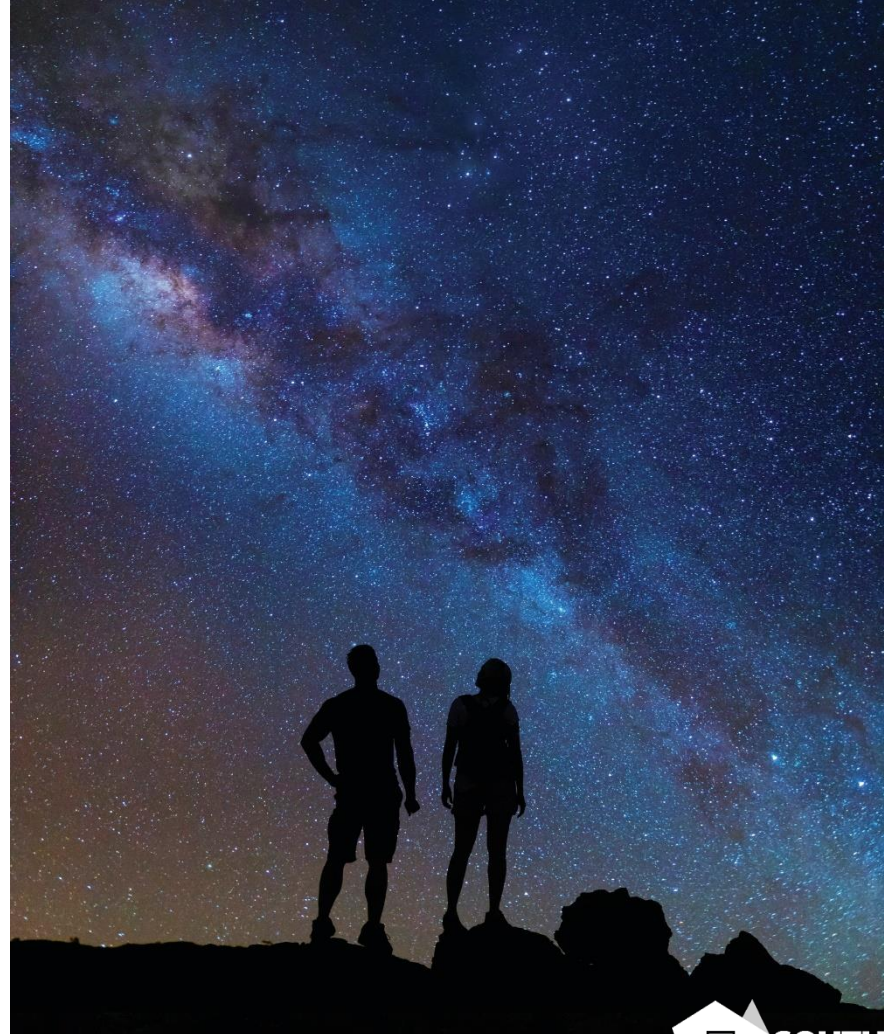
REGIONAL TARGET

- ❑ Set an ambition to grow the region to \$804m by 2030.
- ❑ That's \$367m above current levels



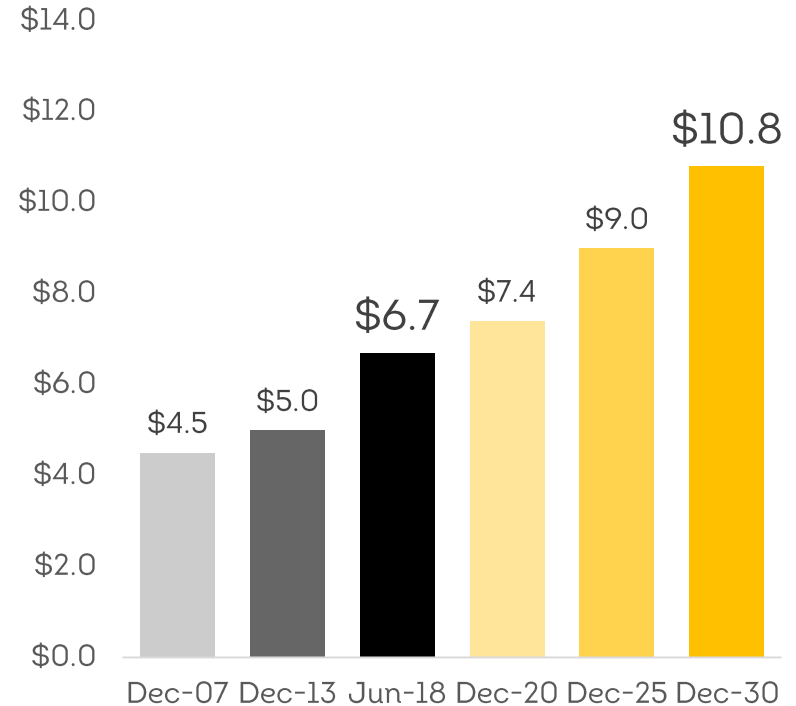
WHAT DOES THAT MEAN?

- ❑ \$367m growth by 2030 is an additional \$31m in visitor expenditure generated every year.
- ❑ What this means for the region by 2030:
 - VOLUME
 - YIELD
 - Mix of volume and yield



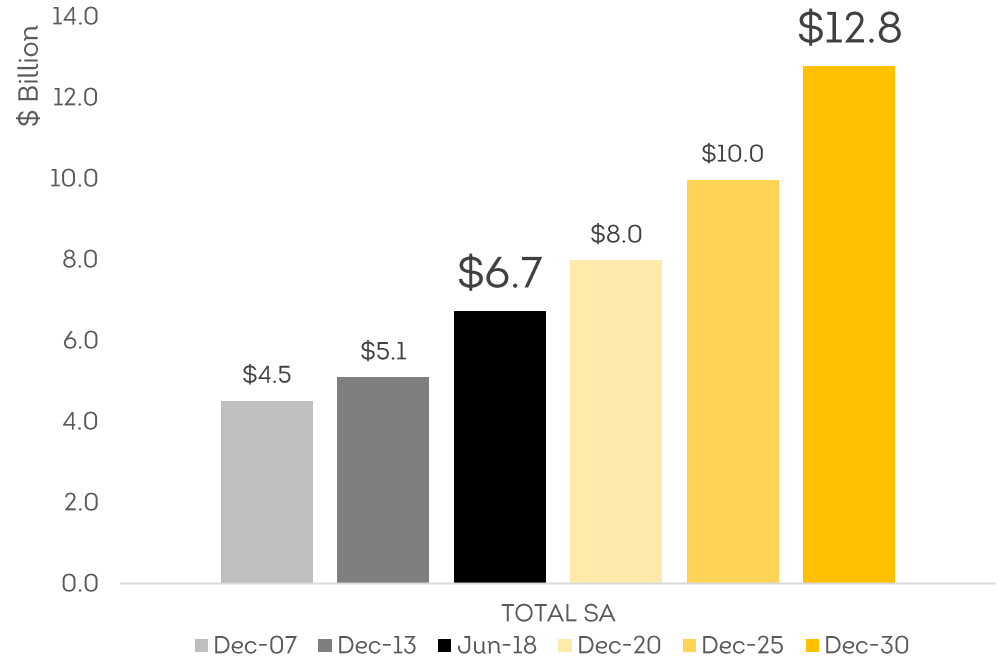
SOUTH AUSTRALIA HISTORICAL TREND

- Historical trend for South Australia provides a result of a \$10.8b in visitor expenditure by 2030.....



SOUTH AUSTRALIA TARGET

- ❑ Achieving \$367m in visitor expenditure in your region will contribute to an overall result of \$12.8b in visitor expenditure by 2030.
- ❑ The \$148m increased expenditure is part of an overall \$2b of additional spend across the state above the historical trend.



THESE COMPANIES DIDN'T EXIST



THE FUTURE TRAVELLER

- ❑ International travel population:
 - Shorter stays
 - Growth from Asia
- ❑ Domestic travel population:
 - Aging - from wealthier baby boomers to poorer Gen X and destitute Millennials
 - More ethnically diverse
- ❑ Digital connectivity and disruption
- ❑ High expectations for service - on demand, instant and personalised



REGIONAL GROUNDWORK

SOUTH AUSTRALIA

TOURISM 2020 CONSULTATION

- Competitive experiences
- Digital technology
- Connection and collaboration
- Recognition of the value of tourism
- Air access and infrastructure

TOURISM REGION

REGIONAL VISITOR STRATEGY

- Promotion of immersive wildlife experiences, expansive natural landscapes, unique accommodation and local characters
- Focus on, and grow, hero events for the region.
- Collaborate with cross-regional events
- Strong collaboration themes including cross/border, Explorer's Way and inter-region.

LOCAL ISSUES

MEET THE MINISTER

- Signage as a regional issue
- Lack of connectivity across the region
- Public amenity upgrades
- Costs of doing business
- Need for increased tourism representation and advocacy
- Lack of toilets along national highways



WORKSHOP

WHAT IS THE 'SOUTH AUSTRALIAN' EXPERIENCE IN 2030?

THOUGHT STARTERS

Costs
Access Research
Quality Collaboration
Dispersal Events Partnerships
Advocacy Demand driving
Experience development
Marketing Infrastructure
Distribution Skills
Investment
Digital

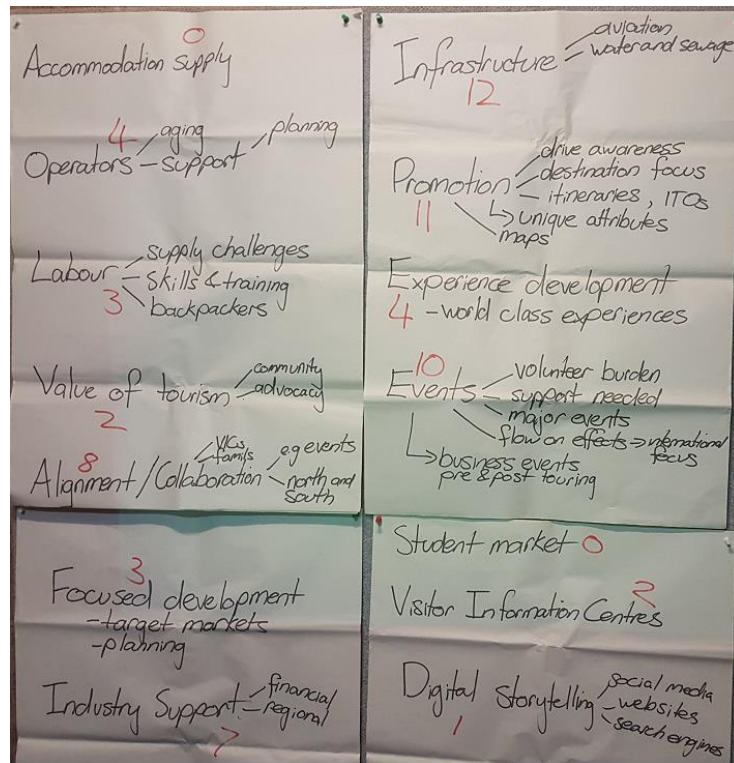


**SUMMARISING
OUR DISCUSSION**

KEY THEMES RAISED

Coober Pedy, 6th December 2018

- ❑ Accommodation Supply (0 votes)
- ❑ Operators (4 votes)
- ❑ Labour and Skills (3 votes)
- ❑ Value of Tourism (2 votes)
- ❑ Alignment and Collaboration (8 votes)
- ❑ Focused Development (3 votes)
- ❑ Industry Support (7 votes)
- ❑ Infrastructure (12 votes)
- ❑ Promotion (11 votes)
- ❑ Experience Development (4 votes)
- ❑ Events (10 votes)
- ❑ Student Market (0 votes)
- ❑ Visitor Information Centres (2 votes)
- ❑ Digital Story Telling (1 votes)



After 60 minutes of discussion, all participants were given 4 votes to provide an indicative prioritisation of the importance of the themes discussed in driving increased performance through to 2030.

EMERGING THEMES

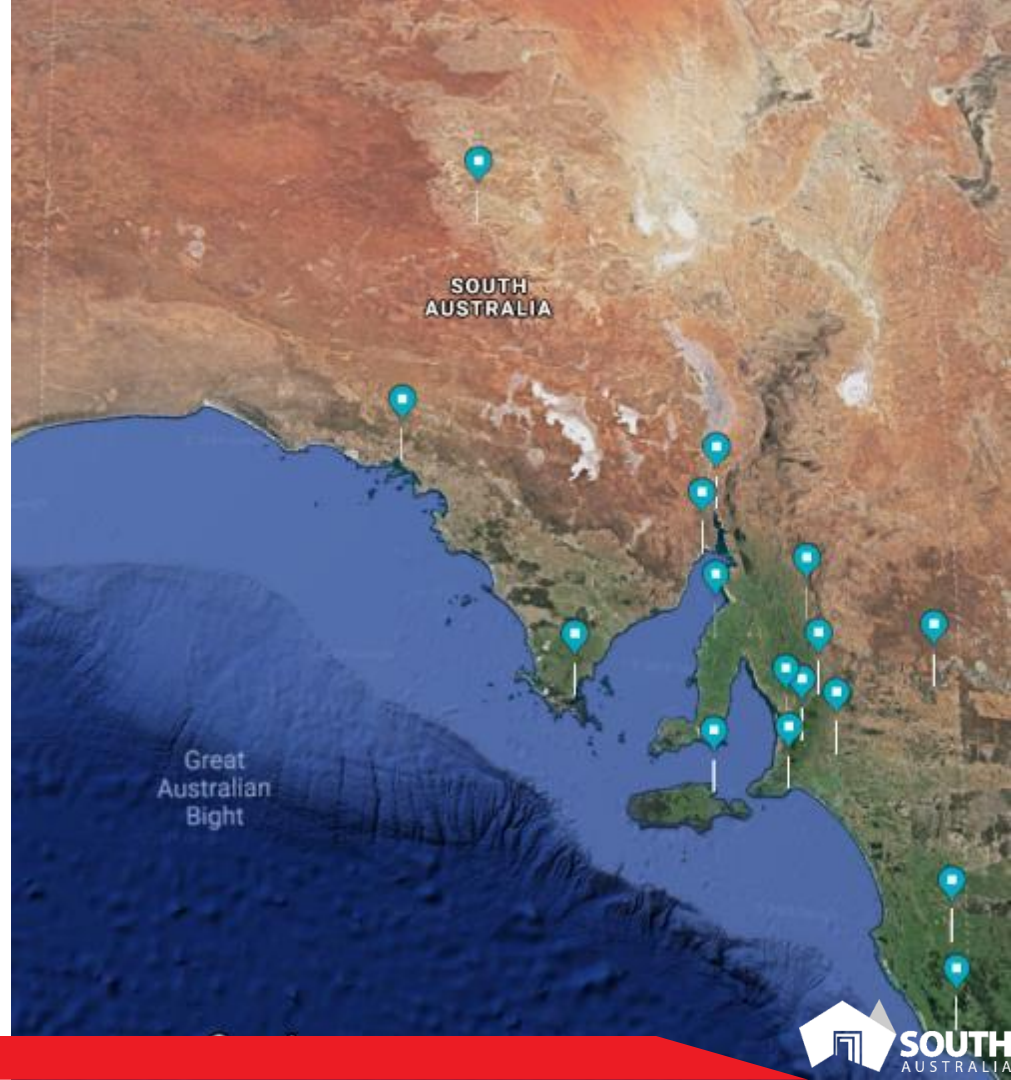
- ❑ Experience Development
- ❑ Marketing/Driving Demand
- ❑ Access
- ❑ Industry Capability
- ❑ Infrastructure
- ❑ Collaboration
- ❑ Red Tape reduction
- ❑ Events
- ❑ Industry support



CONSULTATION PROCESS

CONSULTATION PROCESS

- ❑ Extensive regional consultation in 16 locations
- ❑ Open and transparent process allowing for input from all stakeholders
- ❑ Presence on YourSAy



STAY CONNECTED

www.tourism.sa.com



THE NEXT SOUTH AUSTRALIAN TOURISM PLAN

THE STORY SO FAR

The South Australian Tourism Plan 2020 was published in 2014 after extensive consultation with over 400 members of the tourism industry. At the time the South Australian Visitor Economy was worth \$5.1 billion, and the plan set an ambitious target of reaching \$8.0 billion by December 2020.

Since then, growth has been substantial. Latest visitor results show the visitor economy is now worth \$6.7 billion, up over 30 per cent in only 4 years and on track to achieve the \$8.0 billion.

THE PROCESS FROM HERE

With 2020 fast approaching, the SATC has commenced



Middle River, Kangaroo Island

NEXT STEPS

[illegible]