



South Australian Tourism Commission

THE FUTURE OF TOURISM IN THE SOUTH AUSTRALIA

- CEDUNA -

October 2018





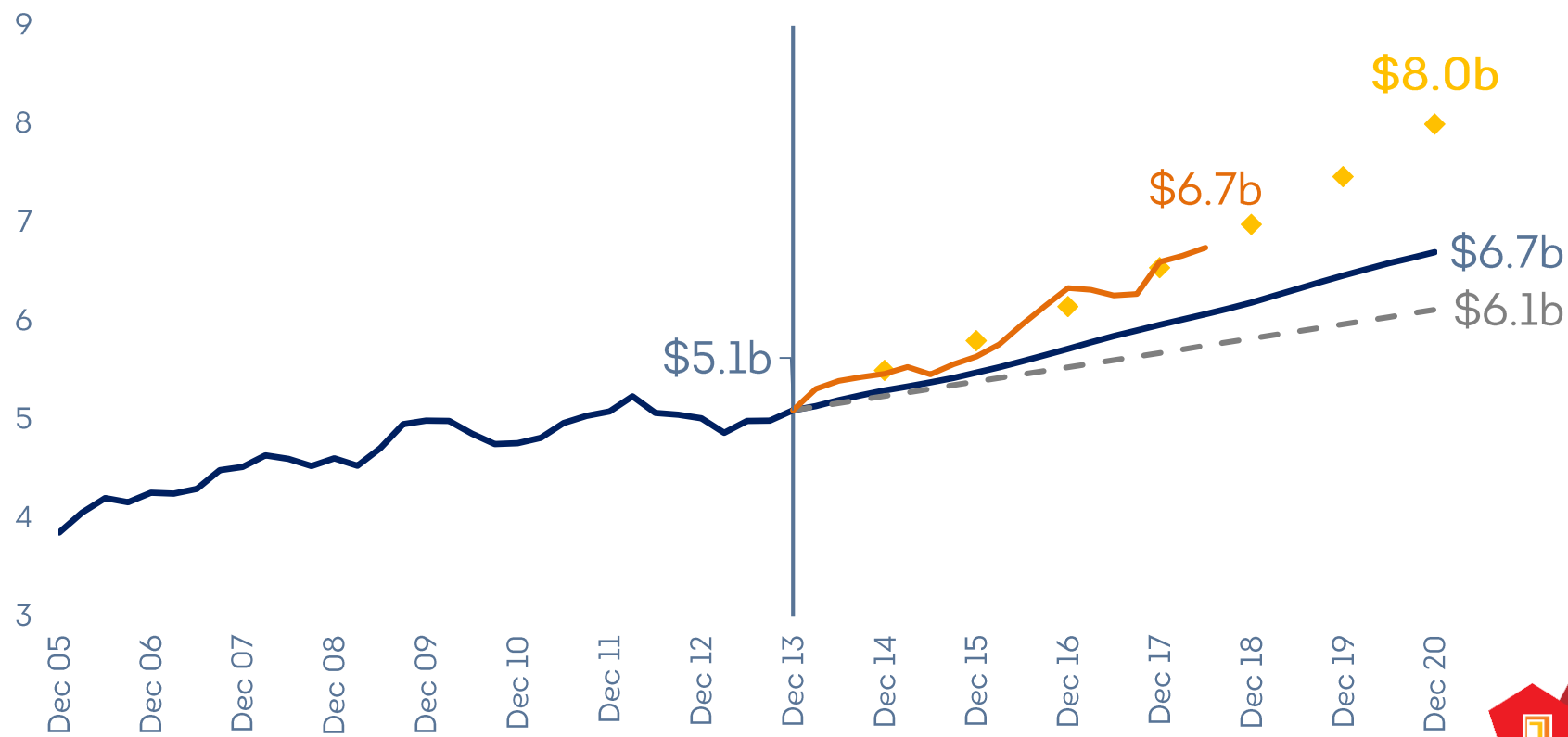
OPENING ADDRESS
RDA

OPENING ADDRESS

Rodney Harrex, CE SATC



SETTING THE SCENE



PRIORITY ACTION AREAS 2020

DRIVE DEMAND



**WORKING BETTER
TOGETHER**



**SUPPORTING WHAT
WE HAVE**



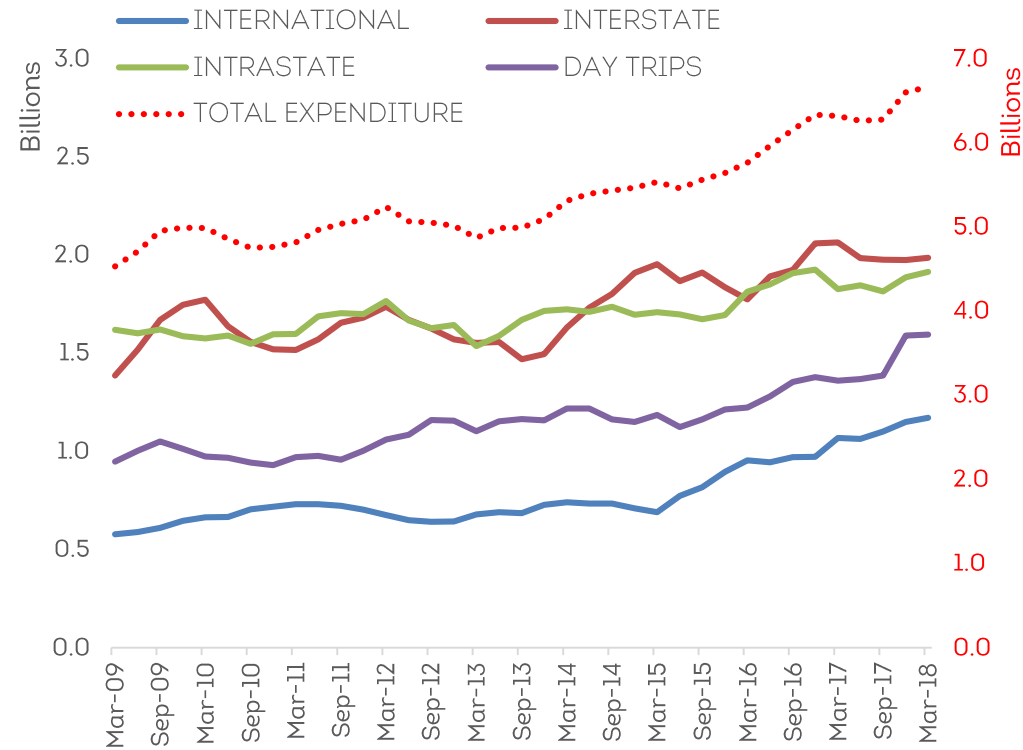
**INCREASING THE
RECOGNITION OF
THE VALUE OF
TOURISM**



**USING EVENTS TO
DRIVE VISITATION**



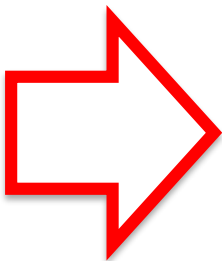
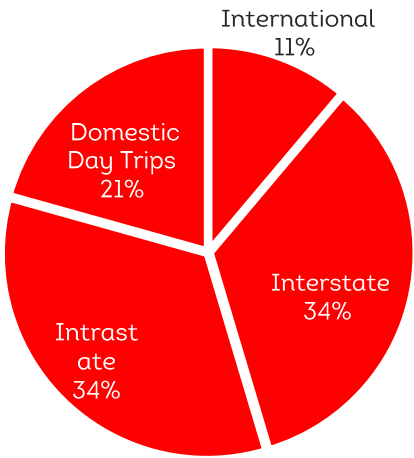
10 YEAR OVERVIEW OF EXPENDITURE



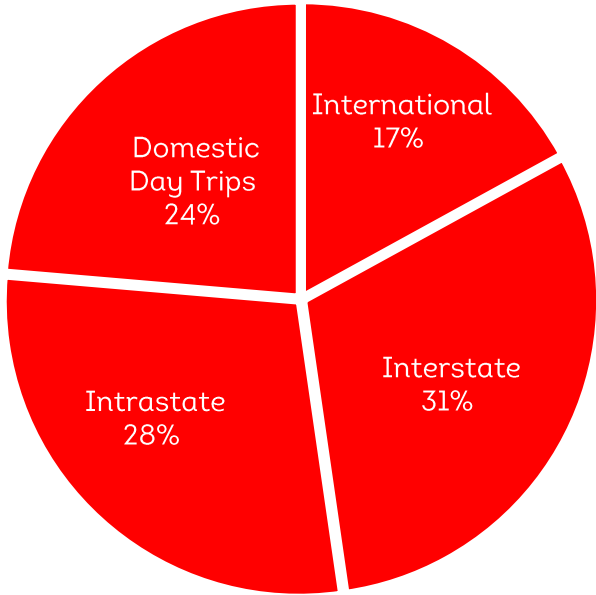
- Total Expenditure up 44%
- International +113%
- Interstate +29%
- Intrastate +18%
- Day Trips +71%

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%.

CEDUNA DISTRICT COUNCIL TODAY

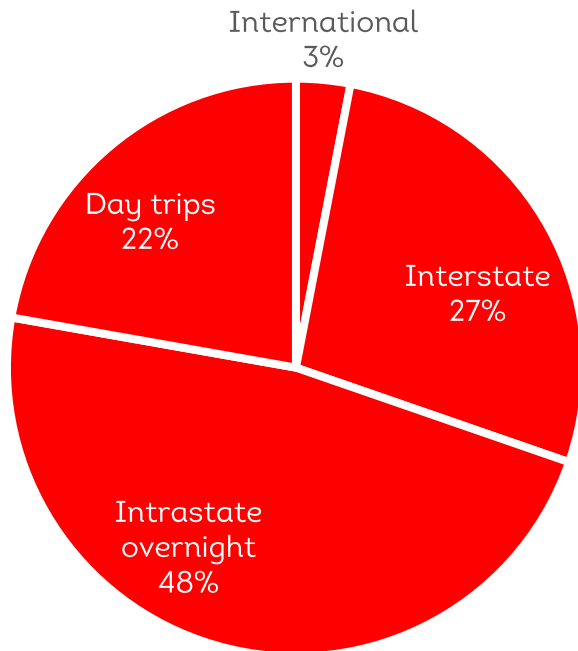


\$26m+

- ❑ 200,000 visitor nights in the DC area
- ❑ 3-4 night average stay
- ❑ 48 tourism businesses
- ❑ Key international markets: Germany, UK and France

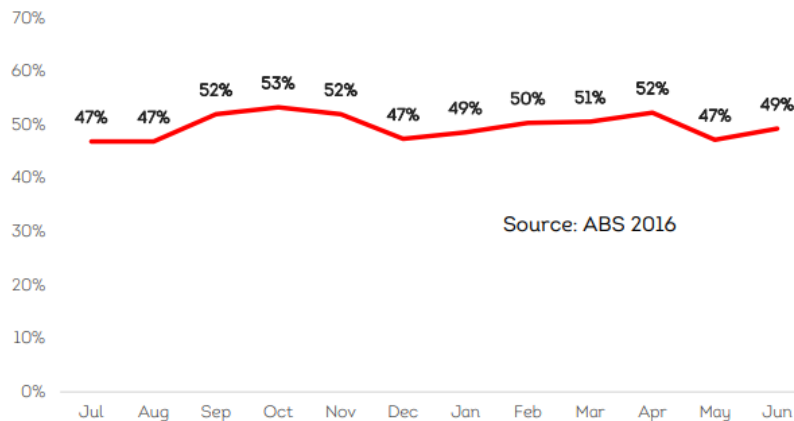
THE EYRE PENINSULA TODAY

Eyre Peninsula Visitor Expenditure



\$272m

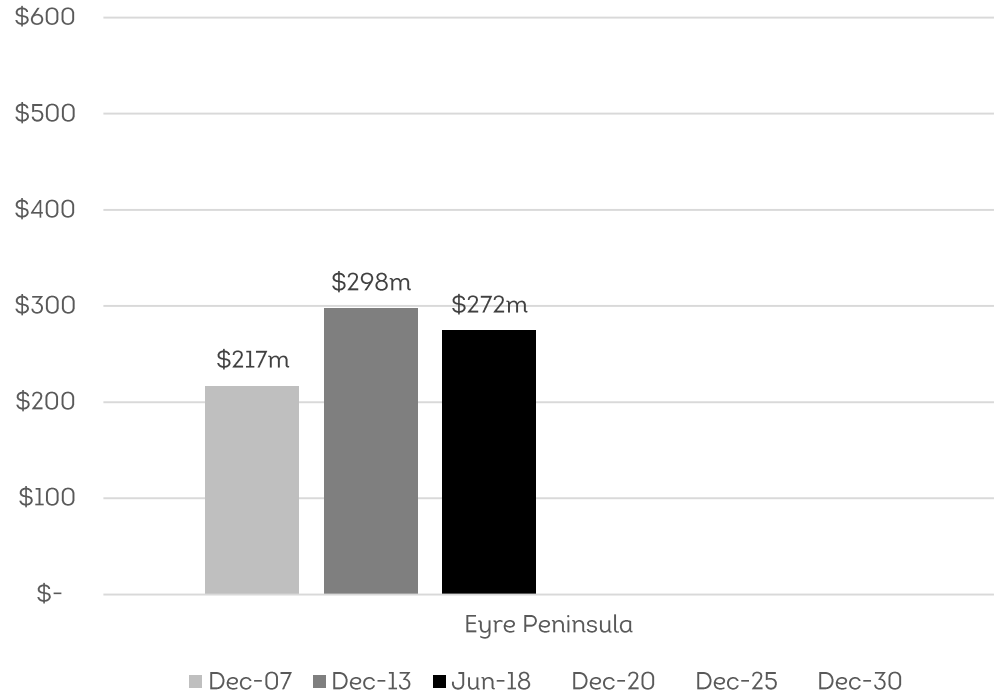
MONTHLY OCCUPANCY RATES YEAR END JUNE 2016 - EYRE PENINSULA



Source: ABS 2016

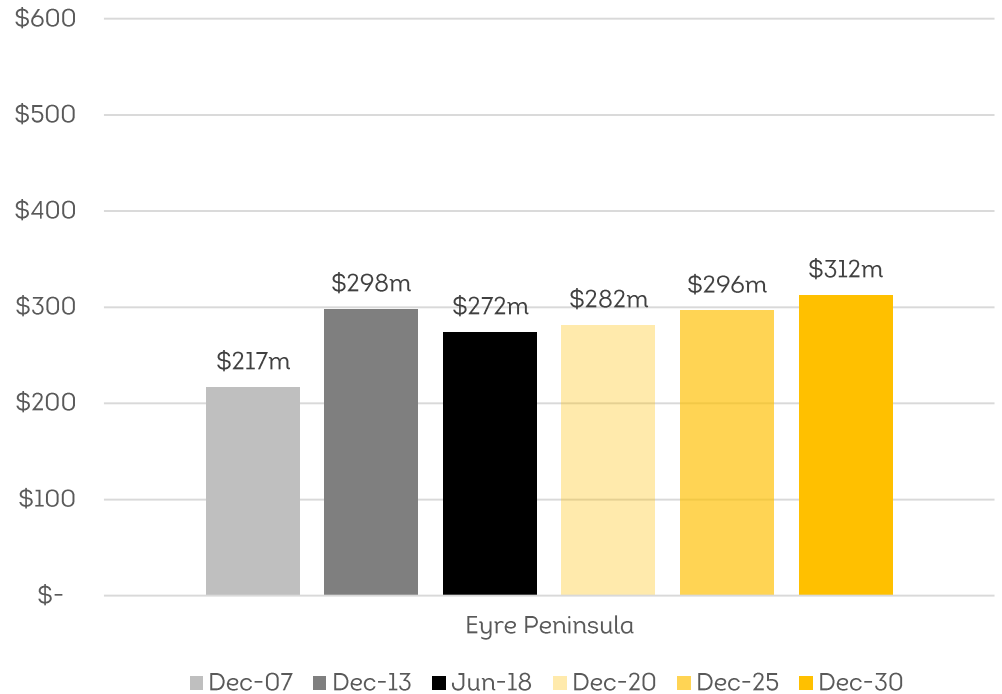
REGIONAL PERFORMANCE

- The Eyre Peninsula has grown from \$217m in 2007 to \$272m today, a growth of 26%.



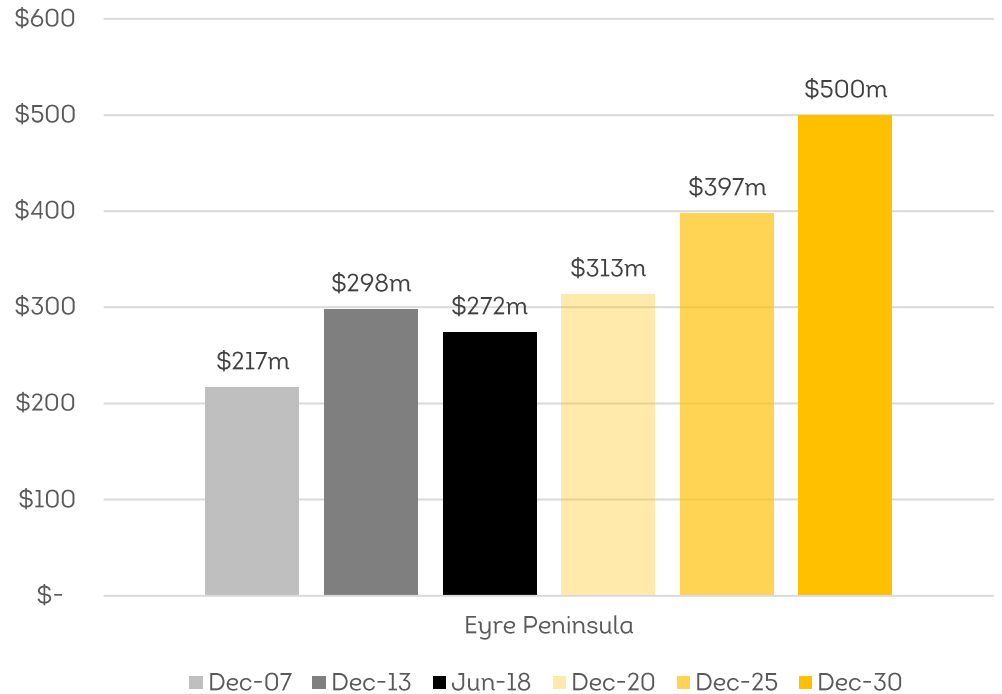
CONTINUING THE TREND

- Current rate of growth through to 2030 yields \$312m to the region



GROWING BEYOND

- Set an ambition to grow the region to \$500m by 2030.



WHAT DOES THAT MEAN?

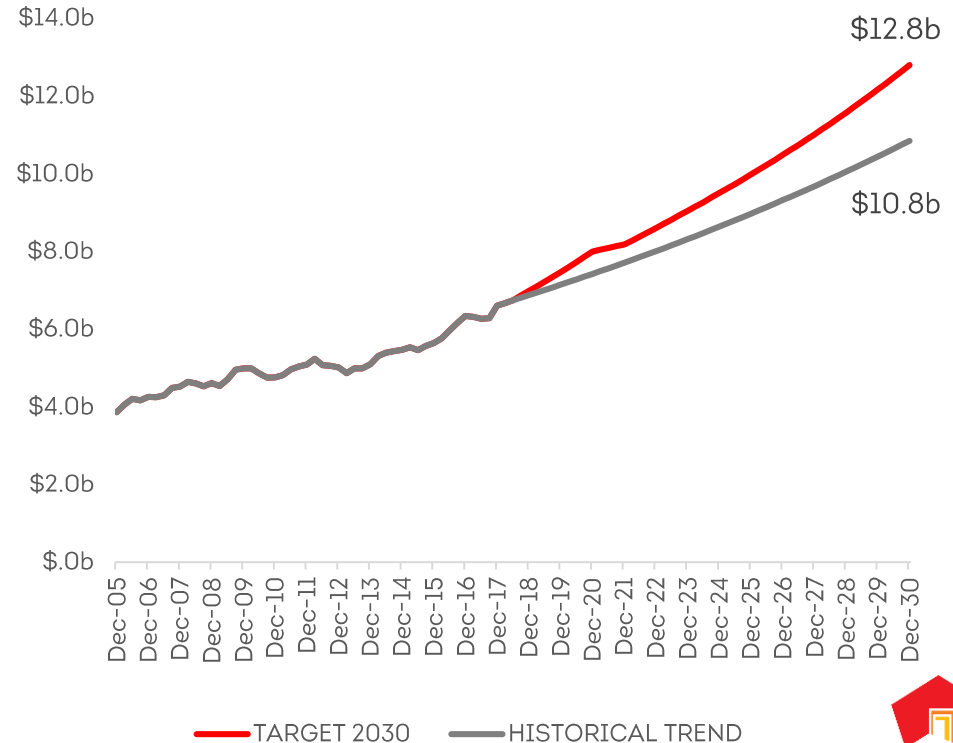
- ❑ \$188m extra by 2030 is an additional \$16m in visitor expenditure generated every year.
- ❑ Every year to 2030 that is:
 - 300 more international visitors AND
 - 6,000 more interstate visitors AND
 - 13,000 more intrastate visitors



SOUTH AUSTRALIA POTENTIAL

SA Visitor Expenditure - Actuals and Forecast

- ❑ Achieving \$500m in visitor expenditure in your region will contribute to an overall result of \$12.8b in visitor expenditure by 2030.
- ❑ The increased expenditure is part of an overall \$2b of additional spend across the state.



THESE COMPANIES DIDN'T EXIST



THE FUTURE TRAVELLER

- ❑ Shorter stays
- ❑ Growth from Asia
- ❑ Digital connectivity
- ❑ More likely to fly
- ❑ High expectations for service



REGIONAL GROUNDWORK

Tourism 2020 consultation:

- Marketing
- Infrastructure
- Red Tape reduction
- Coordination/collaboration
- Value of Tourism

Regional Visitor Strategy:

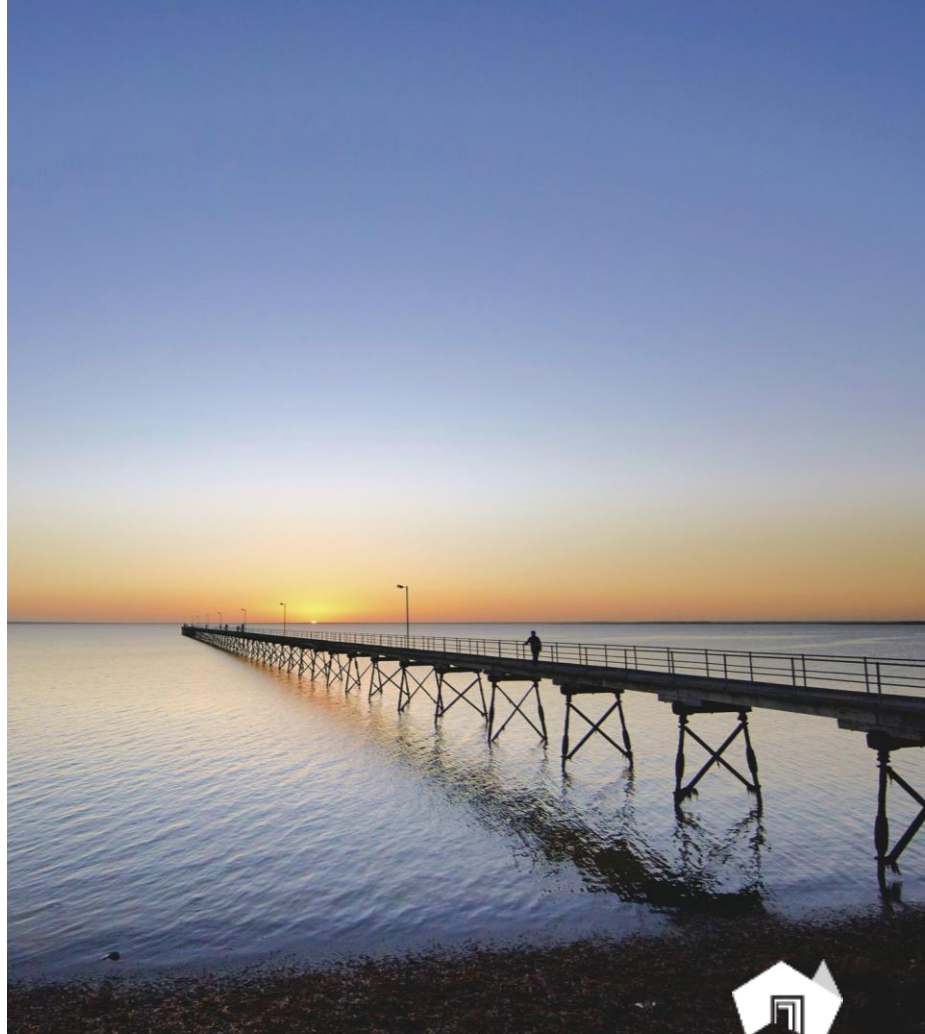
- Pristine nature
- Immersive wildlife experiences
Coastal lifestyle
- Increase overnight stays
- Cooperative approach across marketing, events, product development, council collaboration and investment

Meet the Minister Session: (Ceduna)

- Planning challenges and regulation
- Infrastructure
- Opportunity from drive market (400,000 travel on Highway One)
- Marketing Prioritisation and ROI

THE ROAD TO \$12.8b

- ❑ The plan, and this workshop, is about the whole state
- ❑ Achieving this ambitious potential requires growth across all areas of the state and all sectors
- ❑ A strategic view is essential
- ❑so let's get to it!





WORKSHOP

THOUGHT STARTERS

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

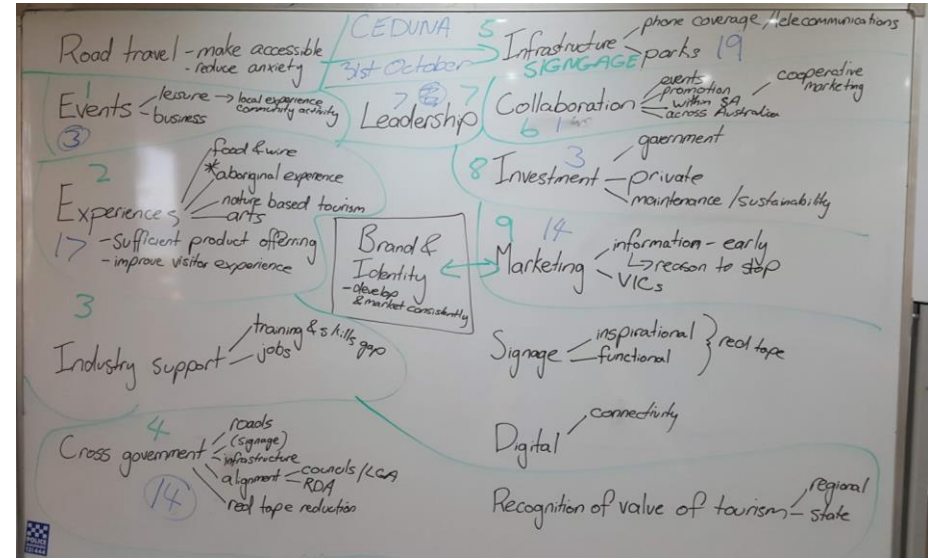
SUMMARISING OUR DISCUSSION



KEY THEMES RAISED

CEDUNA, 31st Oct 2018

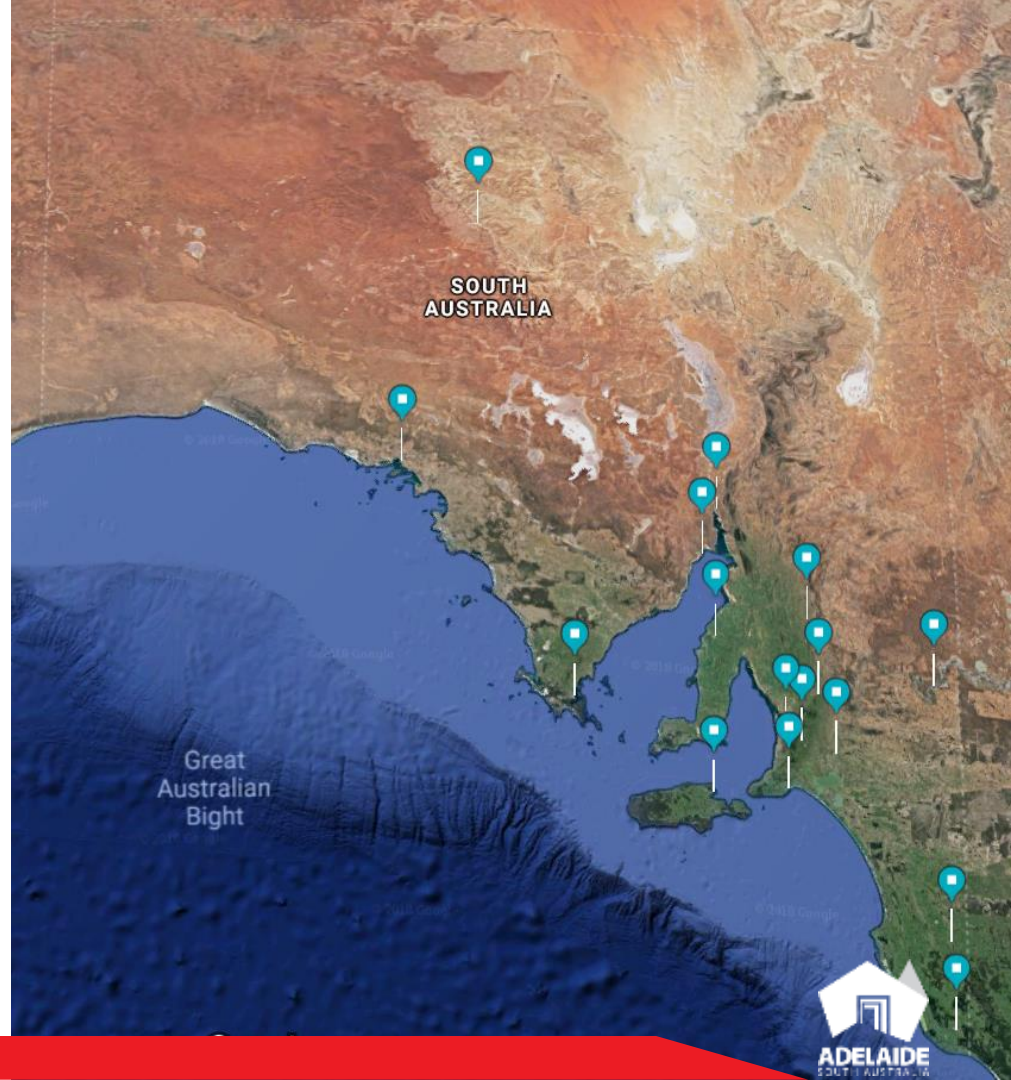
- ❑ Infrastructure, inc Roads (19 votes)
- ❑ Experiences (17 votes)
- ❑ Cross Government (14 votes)
- ❑ Marketing/Brand (9 votes)
- ❑ Leadership (7 votes)
- ❑ Investment (3 votes)
- ❑ Events (3 votes)
- ❑ Collaboration (1 vote)
- ❑ Industry support (0 votes)



After 90 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.

CONSULTATION PROCESS

- ❑ Extensive regional consultation in 16 locations
- ❑ Open and transparent process allowing for input from all stakeholders
- ❑ Initial input open to all on the SATC Corporate Website
- ❑ Feedback sought on Draft plan in March



NEXT STEPS

[illegible]

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