



South Australian Tourism Commission

**THE FUTURE OF
TOURISM IN THE
SOUTH AUSTRALIA
- YORKE PENINSULA -**

November 2018



AGENDA

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



OPENING ADDRESS

Regional Chair

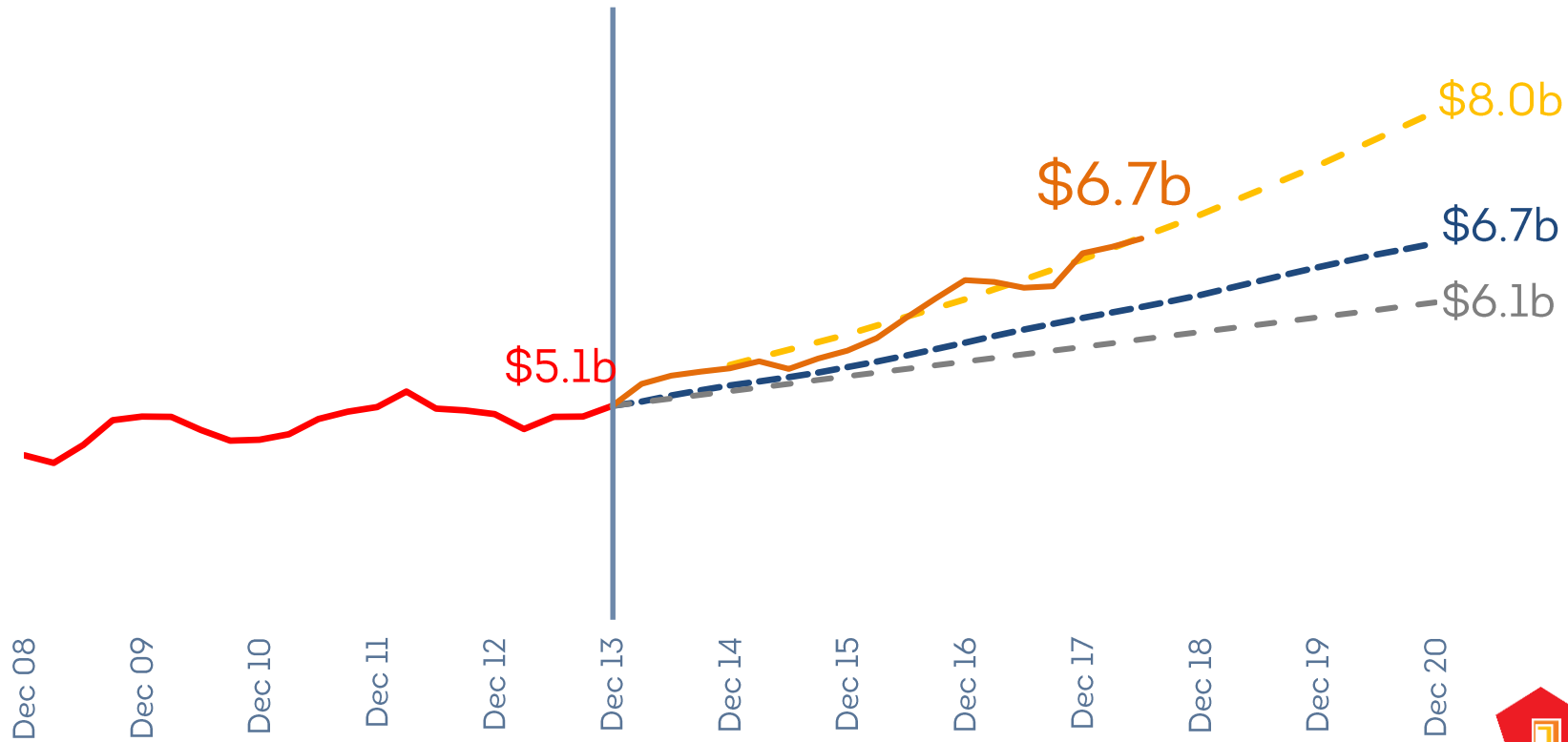


OPENING ADDRESS

Rodney Harrex, CE SATC



SETTING THE SCENE



PRIORITY ACTION AREAS 2020

DRIVING DEMAND



WORKING BETTER TOGETHER



SUPPORTING WHAT WE HAVE



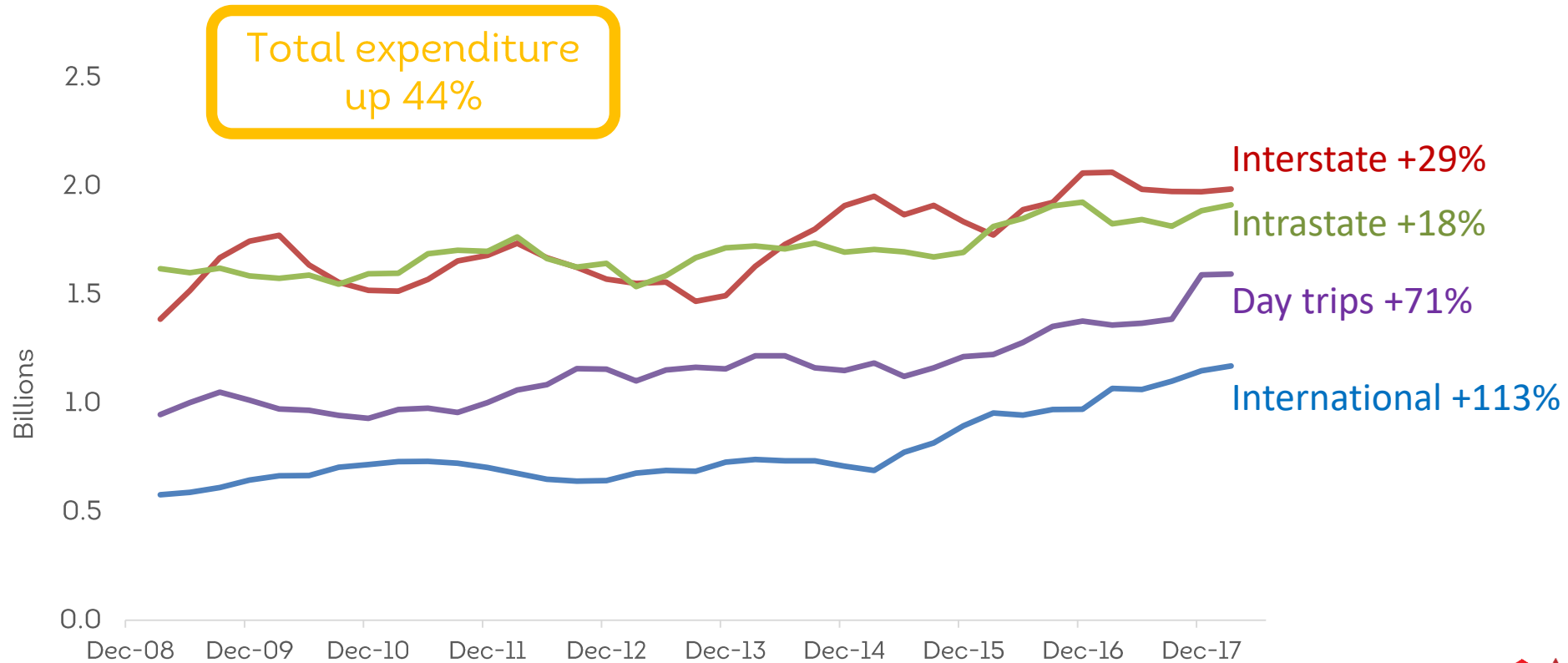
INCREASING THE RECOGNITION OF THE VALUE OF TOURISM



USING EVENTS TO DRIVE VISITATION

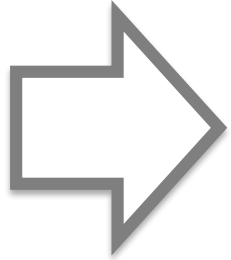
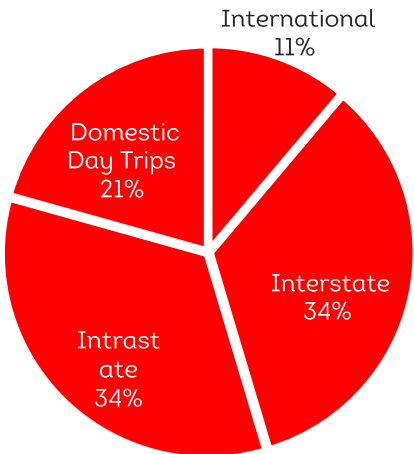


10 YEAR OVERVIEW OF EXPENDITURE

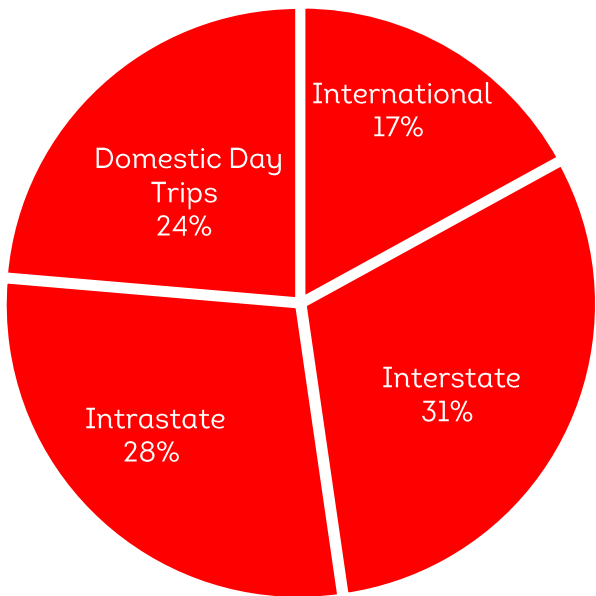


THE CHANGING VISITOR MIX

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.

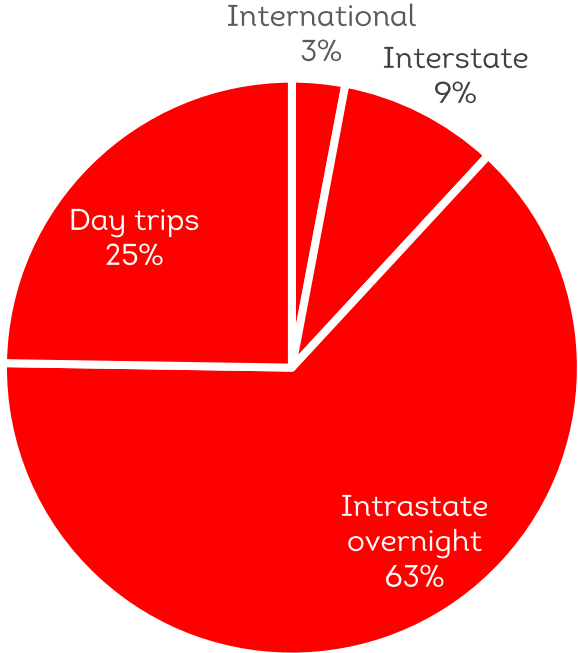
Our **INTERSTATE** market has increased by 29% largely driven by domestic aviation capacity as well as rise of 'grey nomad' travel.

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

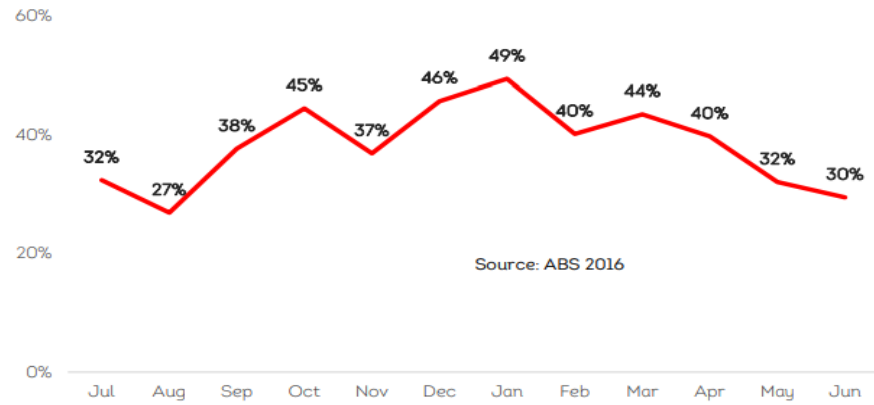
THE YORKE PENINSULA TODAY

Yorke Peninsula Visitor Expenditure

\$205m

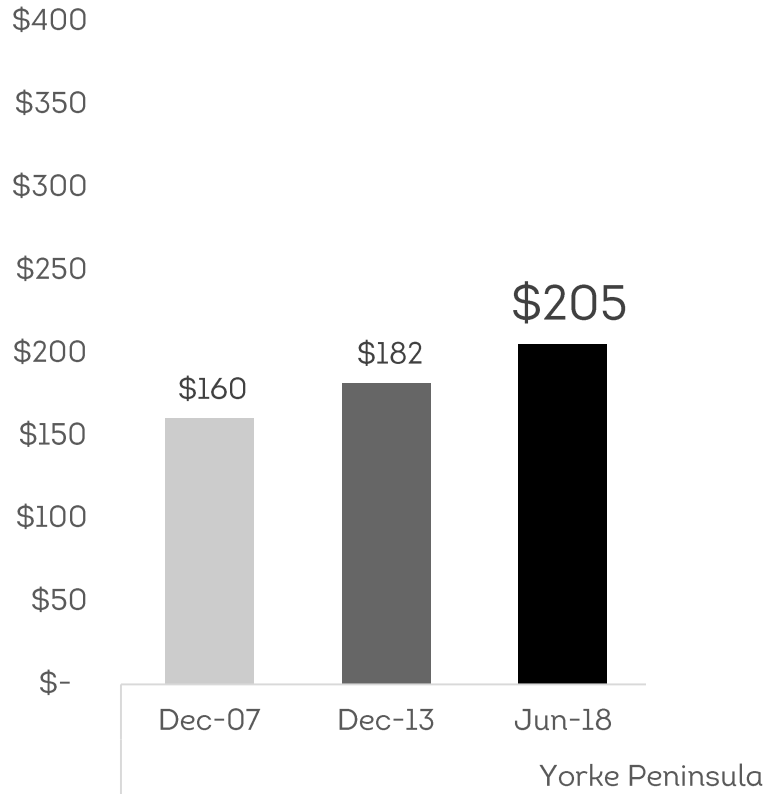


MONTHLY OCCUPANCY RATES YEAR END JUNE 2016 - YORKE PENINSULA



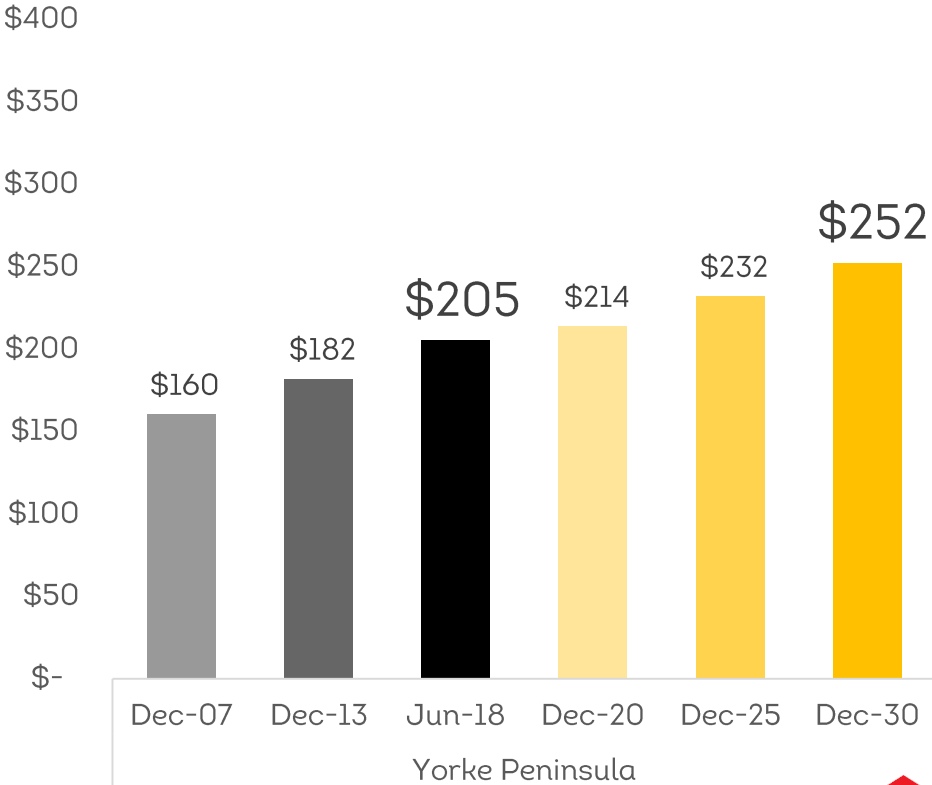
REGIONAL PERFORMANCE

□ The Yorke Peninsula has grown from \$160m in 2007 to \$205m today, a growth of 28%.



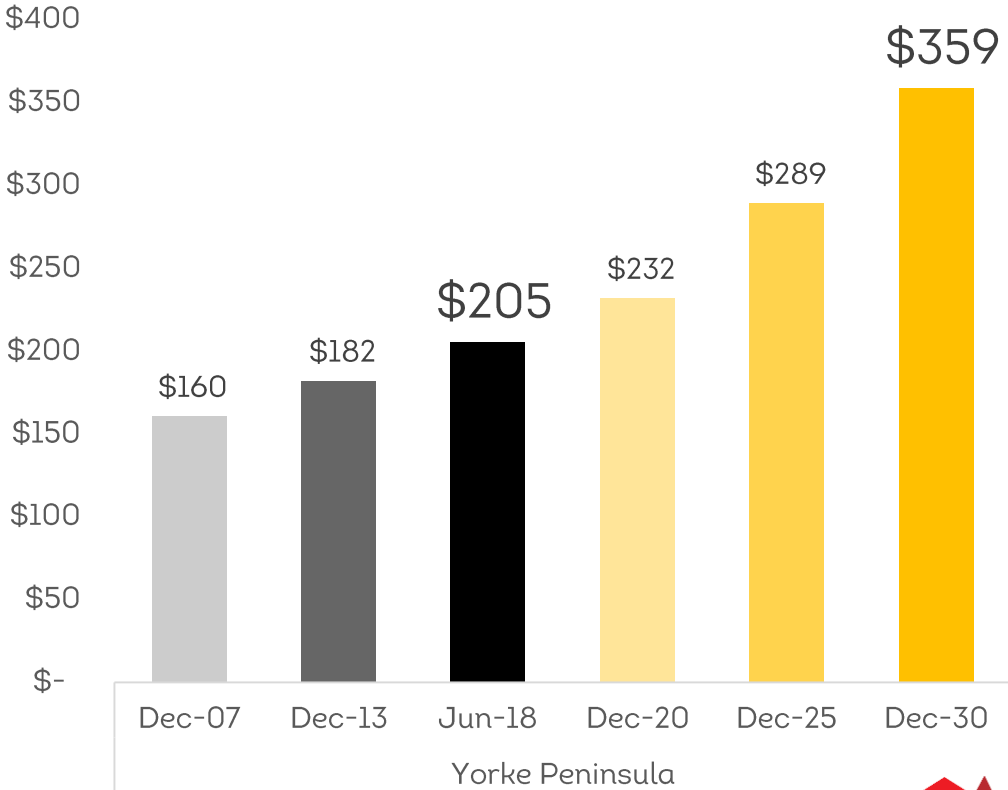
CONTINUING THE TREND

□ Current rate of growth through to 2030 yields \$252m to the region



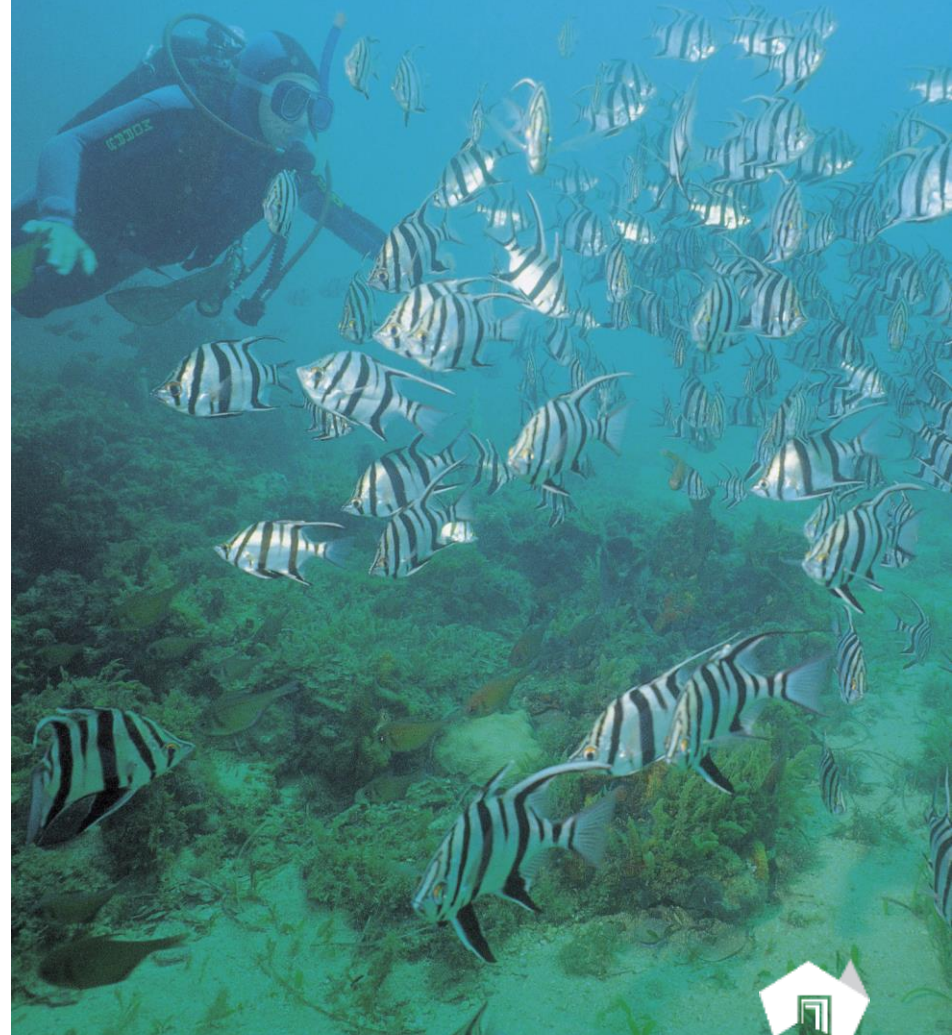
REGIONAL TARGET

- Set an ambition to grow the region to \$359 by 2030.



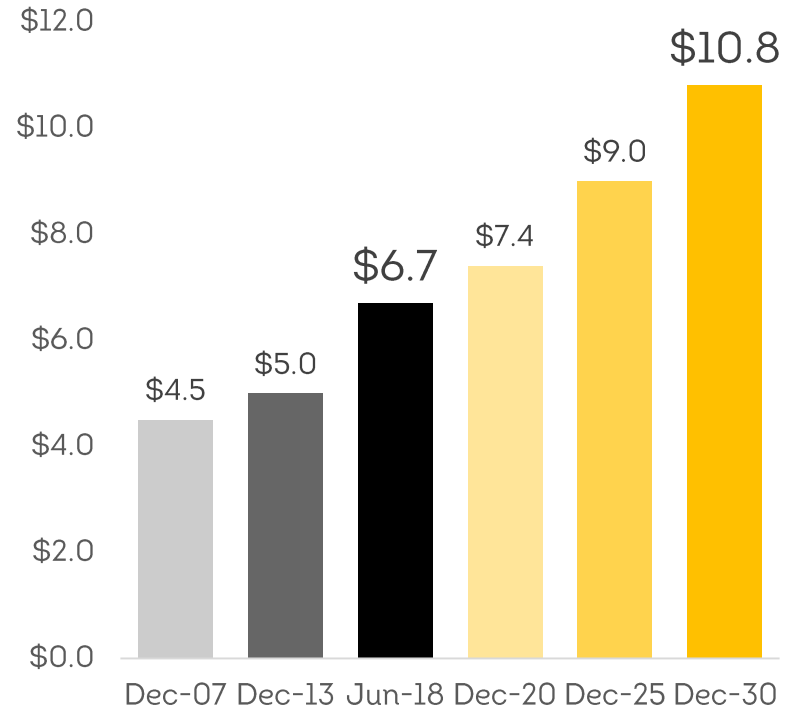
WHAT DOES THAT MEAN?

- ❑ \$107m extra by 2030 is an additional \$9m in visitor expenditure generated every year.
- ❑ What this means for the Yorke Peninsula by 2030:
 - VOLUME: +2,000 international, +23,000 interstate and +190,000 intrastate
 - YIELD: Double the average spend per visitor
 - Mix of volume and yield



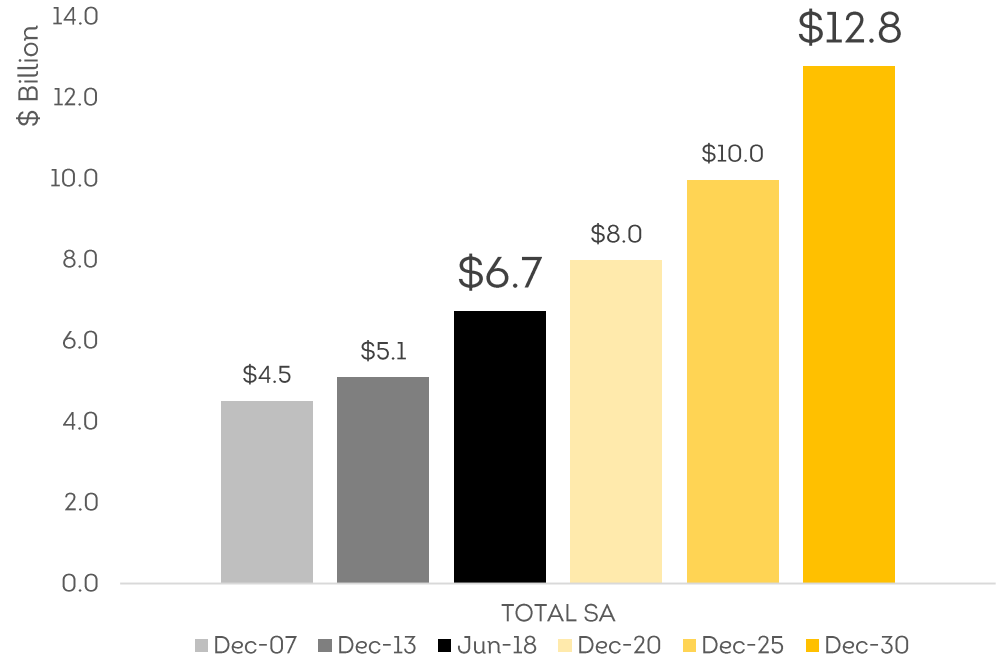
SOUTH AUSTRALIA HISTORICAL TREND

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



SOUTH AUSTRALIA POTENTIAL

- ❑ Achieving \$359m in visitor expenditure in your region will contribute to an overall result of \$12.8b in visitor expenditure by 2030.
- ❑ The \$107m increased expenditure is part of an overall \$2b of additional spend across the state above the historical trend.



THESE COMPANIES DIDN'T EXIST



Instagram



THE FUTURE TRAVELLER

- ❑ International travel population:
 - Shorter stays
 - Growth from Asia
- ❑ Domestic travel population:
 - Aging
 - More ethnically diverse
- ❑ Digital connectivity and disruption
- ❑ High expectations for service



REGIONAL GROUNDWORK

SOUTH AUSTRALIA

TOURISM 2020 CONSULTATION

- Digital capacity
- Investment and Planning
- Events
- Marketing
- Operator Capability
- Skilled labour availability
- Regional dispersal
- Connectivity and access
- Experiences
- Collaboration
- Budget

TOURISM REGION

REGIONAL VISITOR STRATEGY

- Awareness of offerings
- Targeting drive markets
- Build appeal of regional hero events
- Leveraging the Coastal Way
- Raising industry capability
- Clustering and bundling experiences

LOCAL ISSUES

MEET THE MINISTER

- Need for additional and more customised data
- Developing new experiences in the area
- Issues with seals
- Maintenance of jetties
- Road maintenance



WORKSHOP

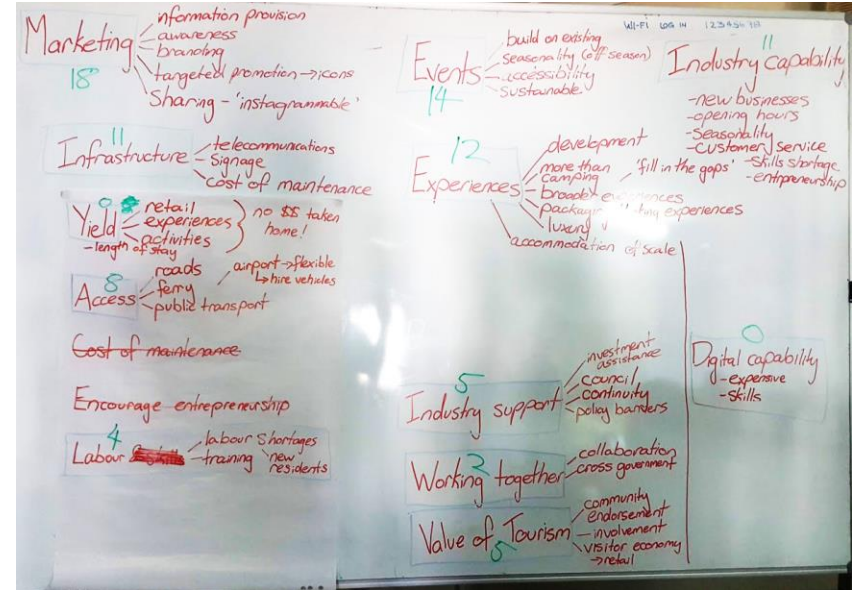
SUMMARISING OUR DISCUSSION



KEY THEMES RAISED

Yorke Peninsula, 15th Nov 2018

- ❑ Marketing (18 votes)
- ❑ Events (14 votes)
- ❑ Experience development (12 votes)
- ❑ Industry capability (11 votes)
- ❑ Infrastructure (11 votes)
- ❑ Access (8 votes)
- ❑ Industry support (5 votes)
- ❑ Labour issues (4 votes)
- ❑ Value of Tourism (5 votes)
- ❑ Working together (2 votes)
- ❑ Yield (0 votes)
- ❑ Digital capability (0 votes)



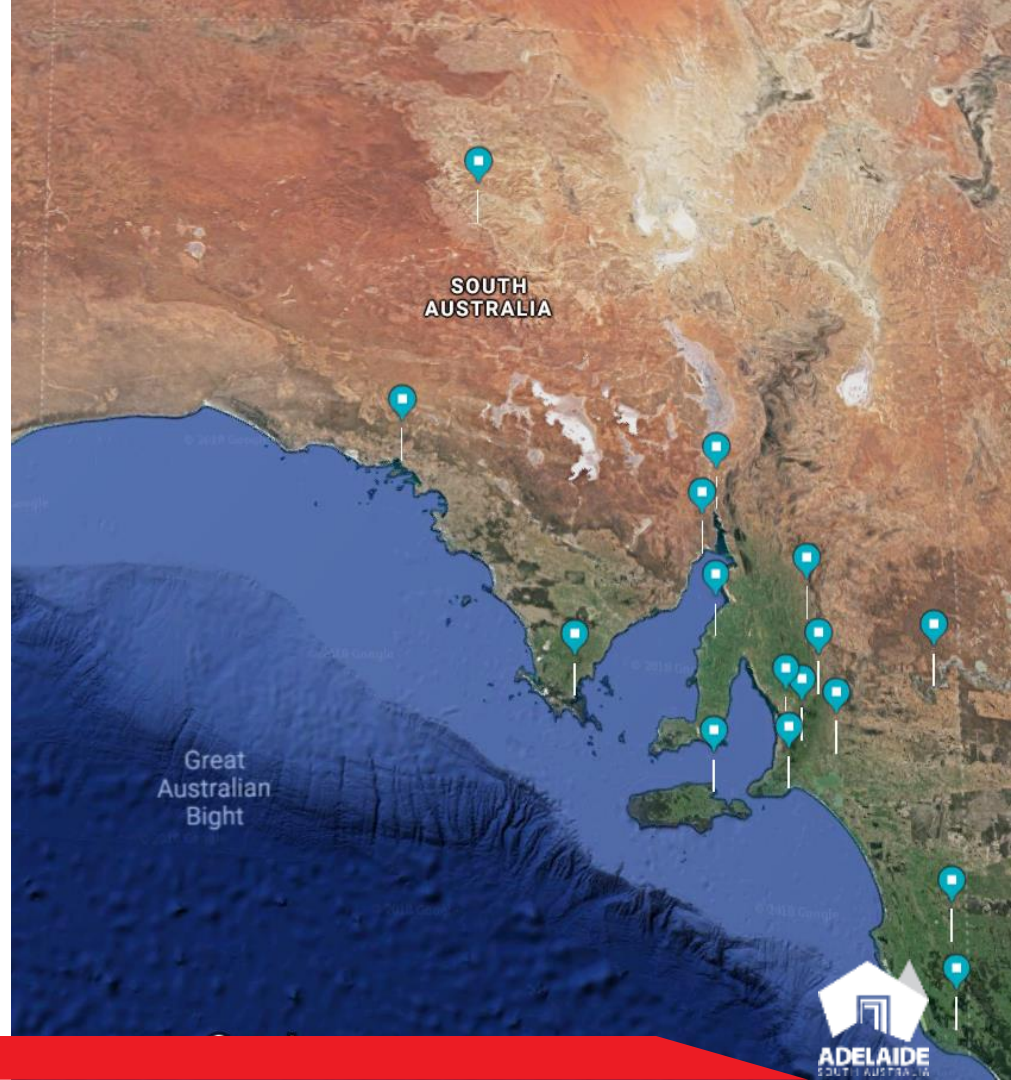
After 90 minutes of discussion, all participants were given 4 votes to provide an indicative prioritisation of the importance of the themes discussed in driving increased performance through to 2030.



CONSULTATION PROCESS

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



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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