



South Australian Tourism Commission

# **THE FUTURE OF TOURISM IN SOUTH AUSTRALIA**

## **MURRAY RIVER, LAKES & COORONG**

25 October 2018





**OPENING ADDRESS**

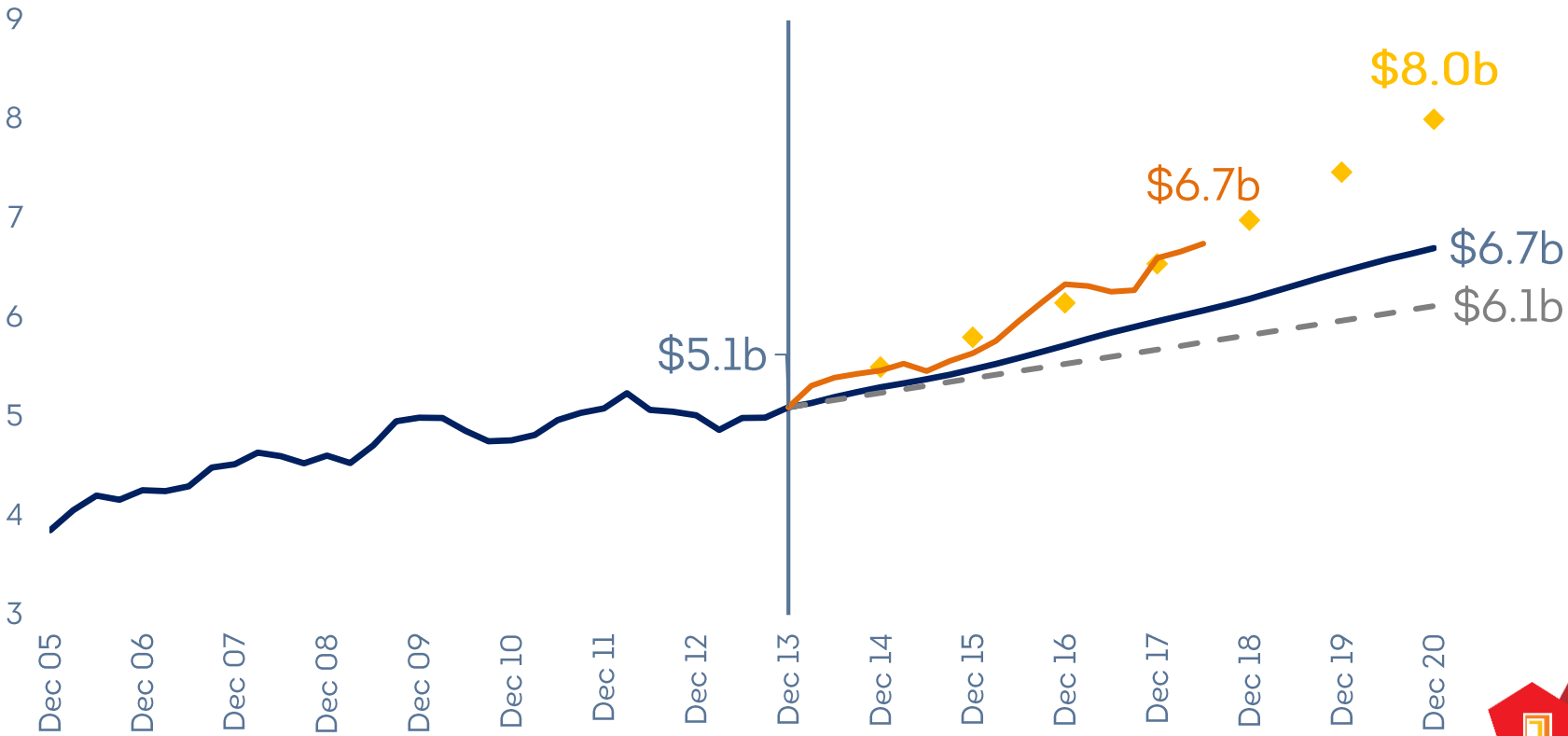
**John Cvetko, Regional Chair**



**OPENING ADDRESS**

**Rodney Harrex, CE SATC**

# SETTING THE SCENE



# SA TOURISM PLAN 2020

## PRIORITY ACTION AREAS

DRIVE DEMAND



WORKING BETTER TOGETHER



SUPPORTING WHAT WE HAVE



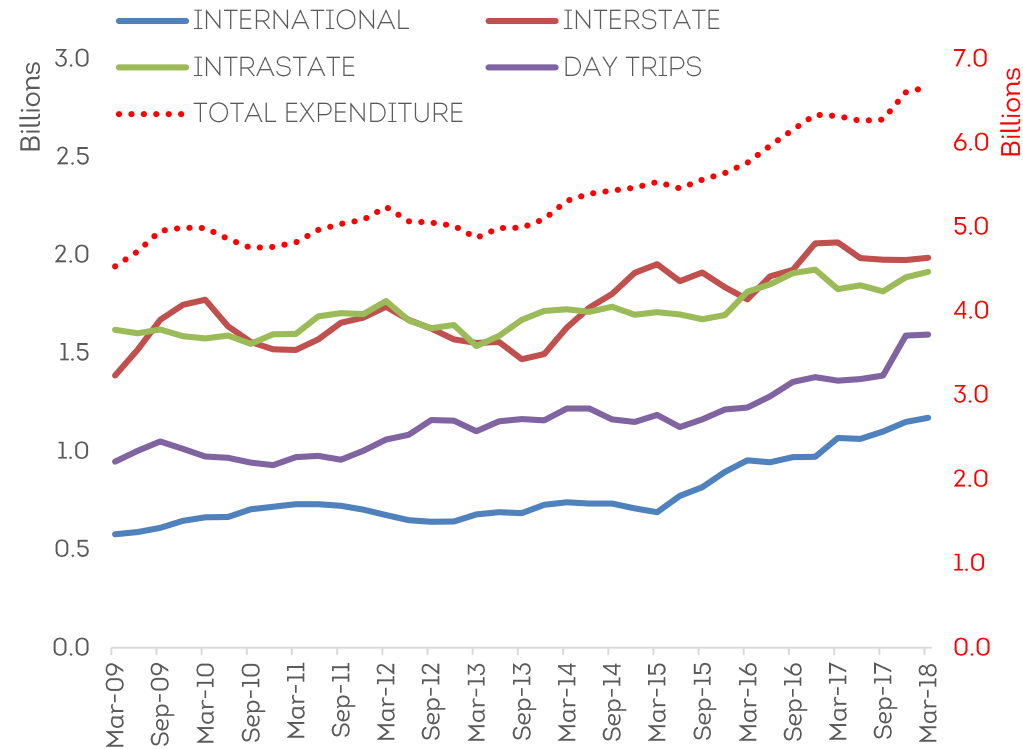
INCREASING THE RECOGNITION OF THE VALUE OF TOURISM



USING EVENTS TO DRIVE VISITATION



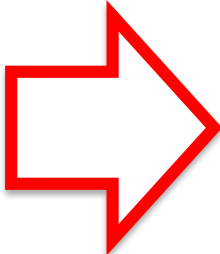
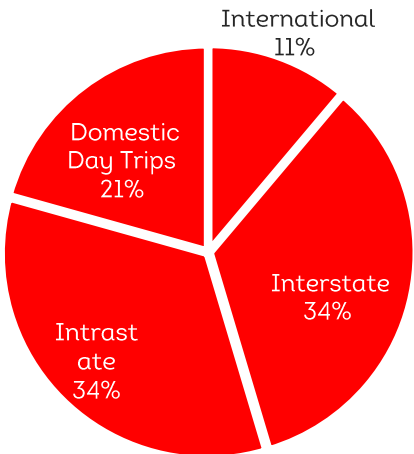
# 10 YEAR OVERVIEW OF EXPENDITURE



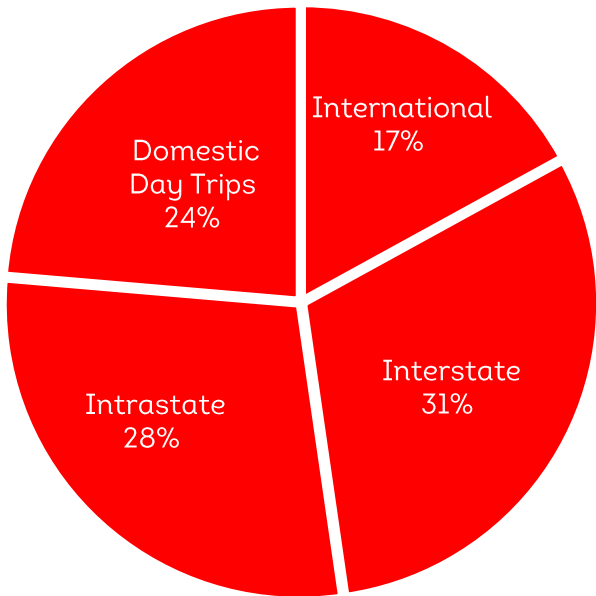
- Total Expenditure up 44%
- International +113%
- Interstate +29%
- Intrastate +18%
- Day Trips +71%

# THE CHANGING VISITOR MIX

2008



2018



# INTERNATIONAL

## Key Trends

- ❑ Doubled in the last decade
- ❑ Movement from traditional western markets to eastern market.
- ❑ Asian expenditure tripled - now the majority of spend in SA.
- ❑ North American expenditure 70%
- ❑ European expenditure flat





# INTERSTATE

## Key Trends

- ❑ Up 29%
- ❑ Increased domestic aviation capacity as well as rise of 'grey nomad' travel



# SOUTH AUSTRALIAN TRAVEL

## Key Trends

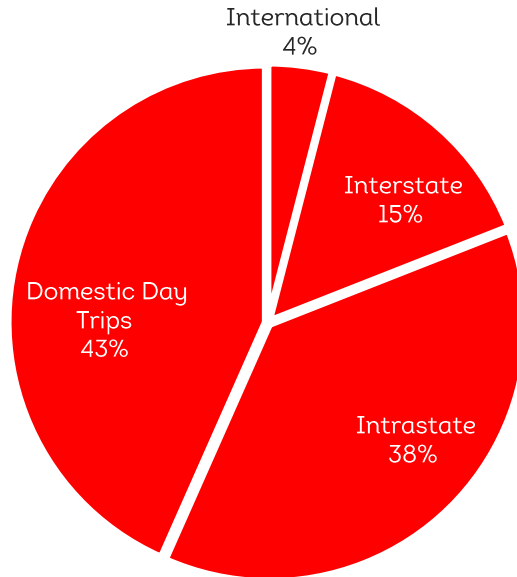
- ❑ Intrastate overnight up 18%
  - Challenging economic environment locally
- ❑ Day trips up 71%
  - Strong growth to near city and populous regions



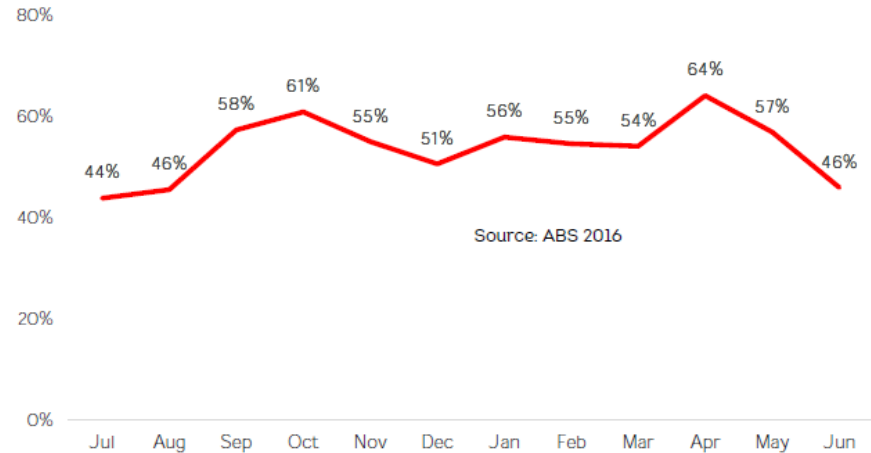
# MURRAY RIVER, LAKES AND COORONG TODAY

**\$139m**

MRL&C Visitor Expenditure



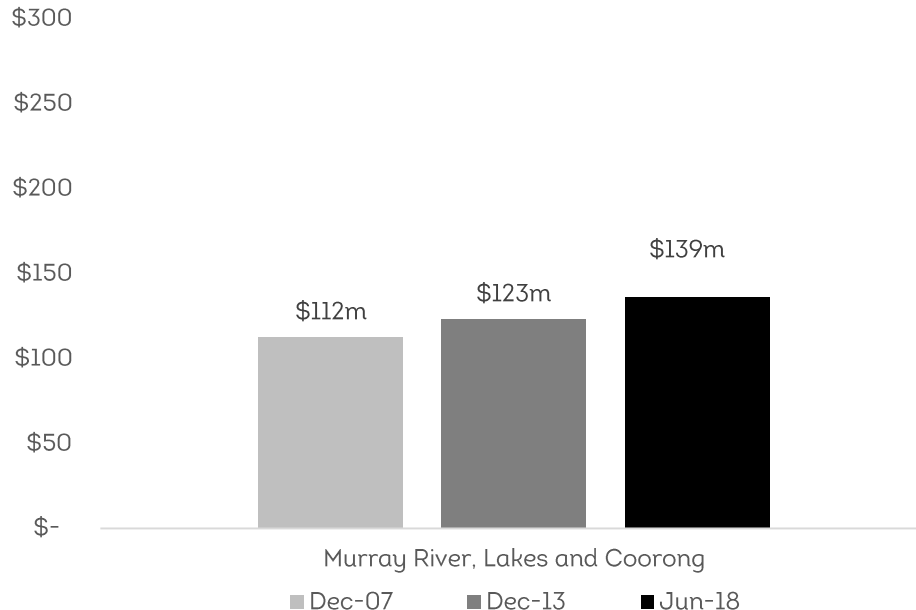
Monthly Occupancy Rates Year end June 2016 - Murray River, Lakes and Coorong



# MURRAY RIVER, LAKES AND COORONG PERFORMANCE

- Murray River Lakes and Coorong has grown from \$112m in 2007 to \$139m today, a growth of 21%.

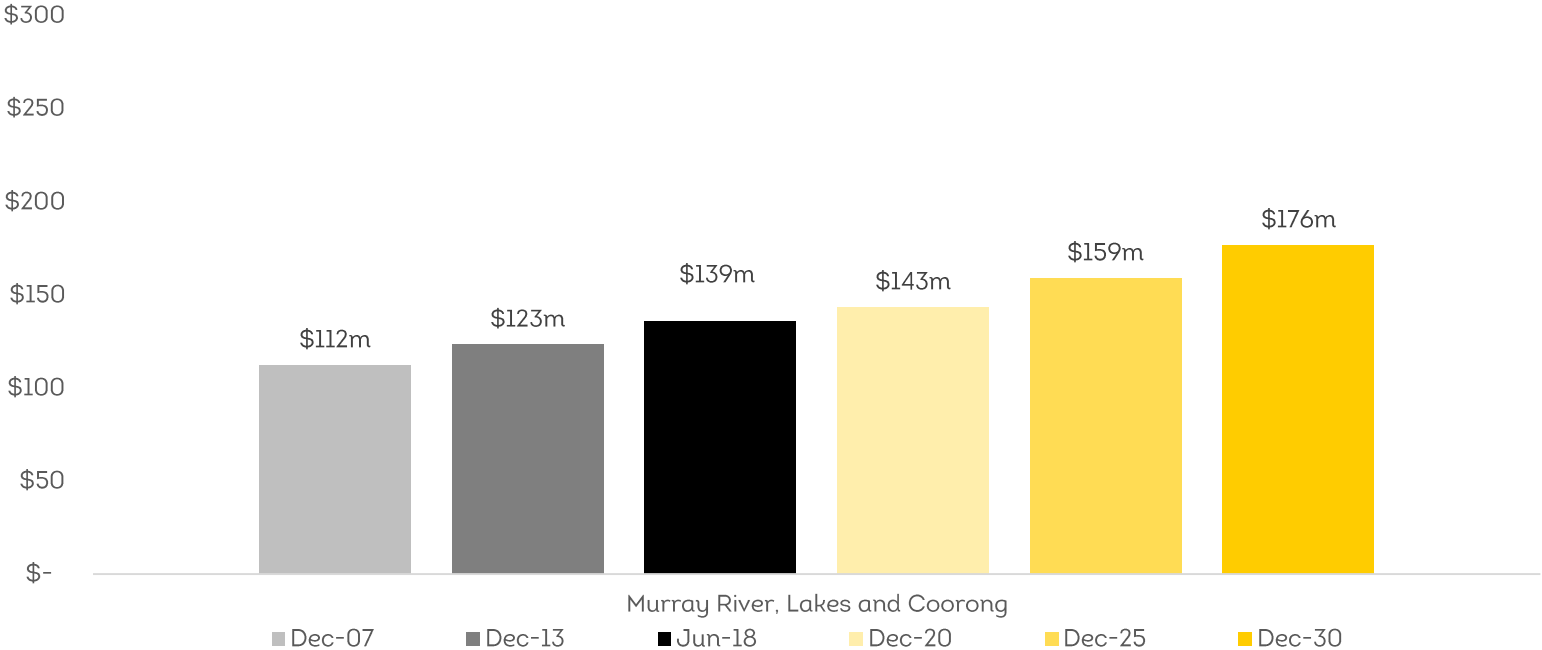
Historical Performance



# CONTINUING THE TREND

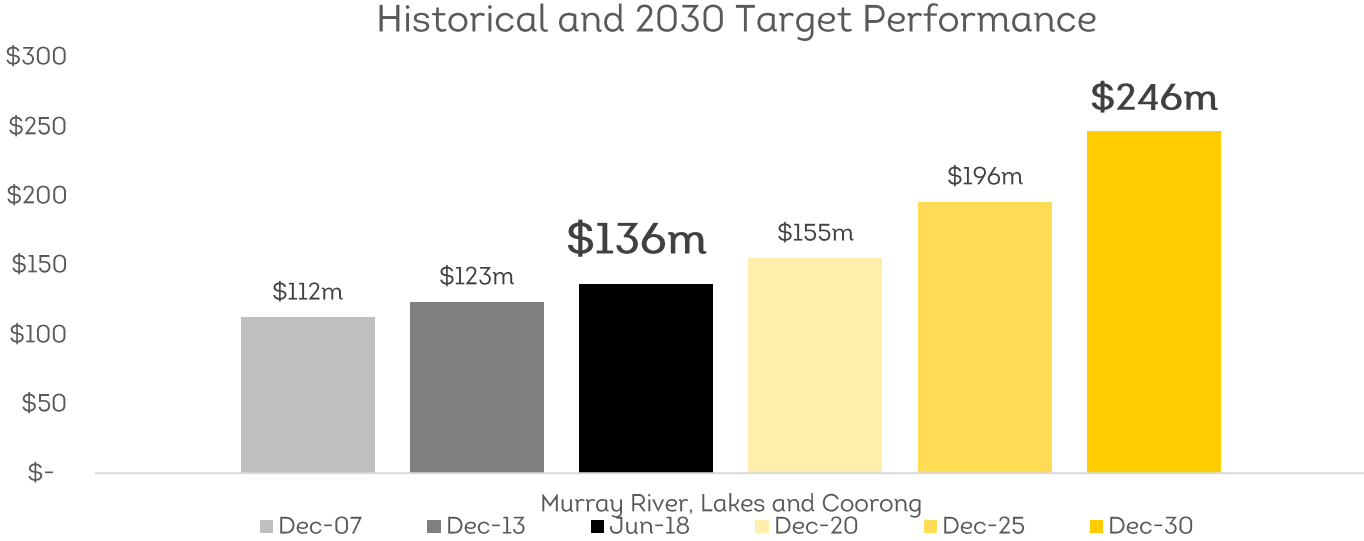
□ Current rate of growth through to 2030 yields \$176m to the region

Historical and 2030 Trend Performance



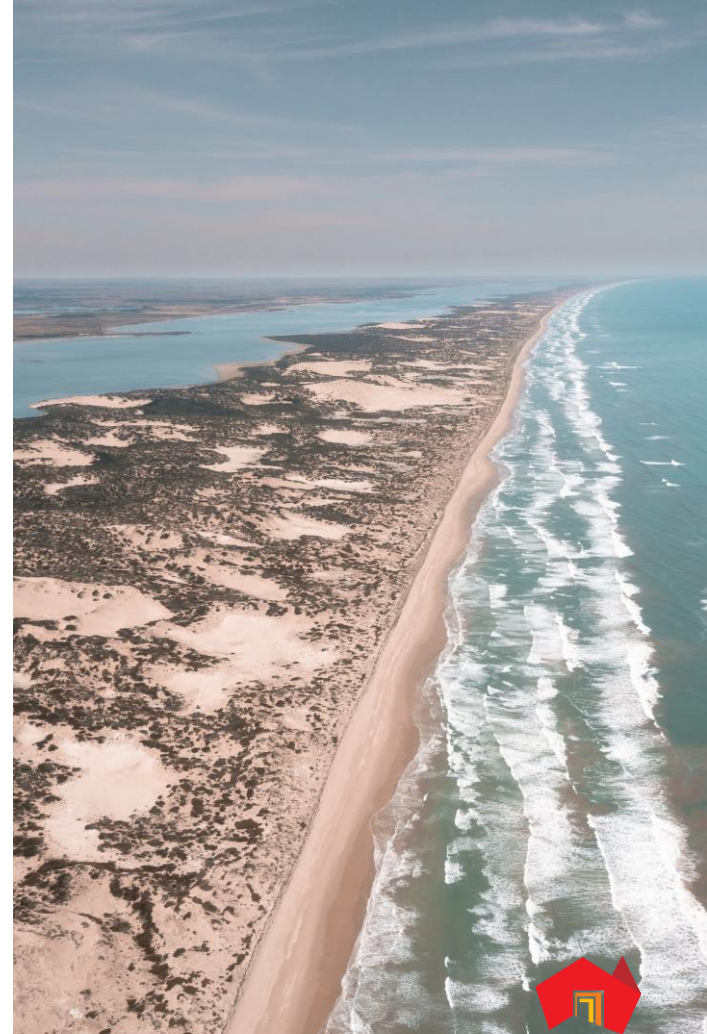
# GROWING BEYOND

□ Set an ambition to grow the region a further \$70m to \$246m by 2030.



# WHAT DOES THAT MEAN?

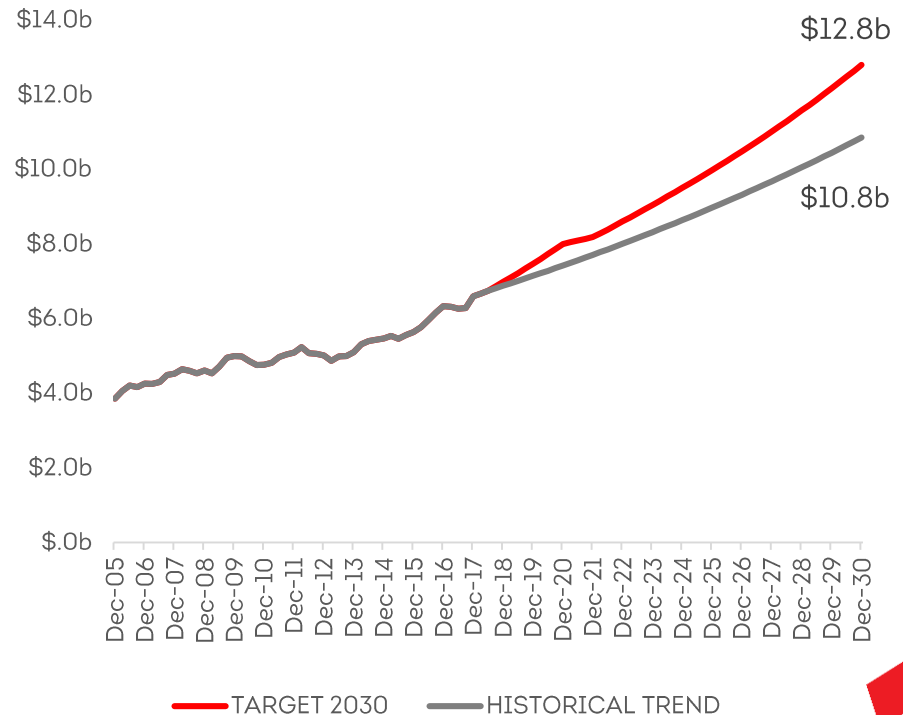
- ❑ \$70m extra by 2030 is an additional \$6m in visitor expenditure generated every year.
- ❑ That is equivalent to
  - 7,000 more international visitors, or
  - 9,000 more from interstate or
  - 17,000 more from intrastate



# SOUTH AUSTRALIA POTENTIAL

- ❑ Achieving \$274m in visitor expenditure in the Murray River, Lakes and Coorong region will contribute to an overall result of \$12.8b in visitor expenditure by 2030.
- ❑ The \$70m of increased expenditure is part of an overall \$2b of additional spend across the state.

SA Visitor Expenditure - Actuals and Forecast





# 12 YEARS AGO 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:

- Alignment
- Experience Generation
- Profitability
- Advocacy and Leadership
- Communication and Marketing

## Regional Visitor Strategy:

- Grow daytrip and overnight visitor spend
- Leverage Touring Routes
- Develop hero tourism experiences

## Meet the Minister Sessions:

- Prioritising investment in Visitor Economy across State Government with a specific need to invest in River infrastructure.
- Reducing the cost of doing business
- Leveraging unique promotional opportunities for the region
- Maximising the benefit of The Bend to the visitor economy

# 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

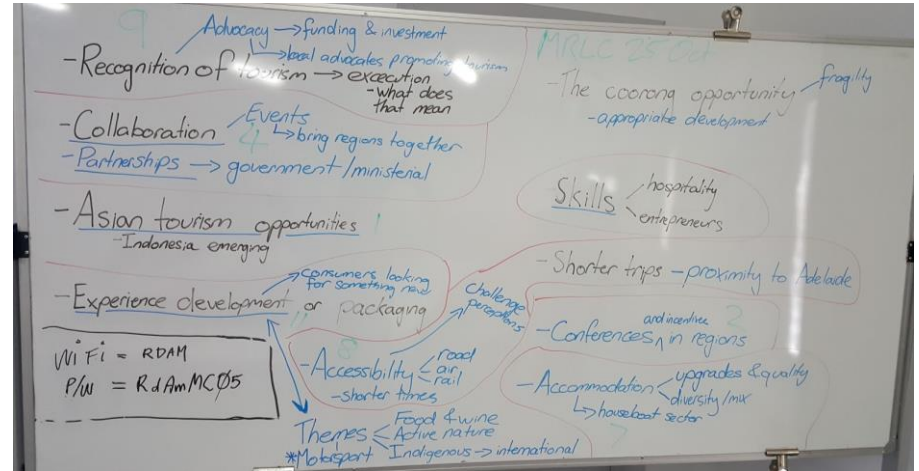
Costs  
Access Research  
Quality Collaboration  
Dispersal Events Partnerships  
Advocacy Demand driving  
Experience development  
Marketing Infrastructure  
Distribution Skills  
Investment  
Digital

A person is relaxing in a blue and grey hammock, suspended between two large tree trunks. The person is wearing a black tank top and shorts, and is holding a glass of beer. The hammock is positioned over a body of water, with a large, rocky cliff face in the background. The scene is set during the golden hour, with warm sunlight illuminating the landscape. The text "SUMMARISING OUR DISCUSSION" is overlaid at the bottom of the image in a bold, white, sans-serif font.

**SUMMARISING OUR DISCUSSION**

# KEY THEMES RAISED

- ❑ Experience development (11 votes)
- ❑ Recognition of tourism (9 votes)
- ❑ Accessibility (8 votes)
- ❑ Accommodation (6 votes)
- ❑ Collaboration and partnerships (4 votes)
- ❑ Infrastructure (4 votes)
- ❑ Business events (2 votes)
- ❑ Emerging markets (1 vote)
- ❑ Skills (0 votes)
- ❑ Events (0 votes)
- ❑ Industry support (0 votes)
- ❑ Drive market and digital disruption (0 votes)

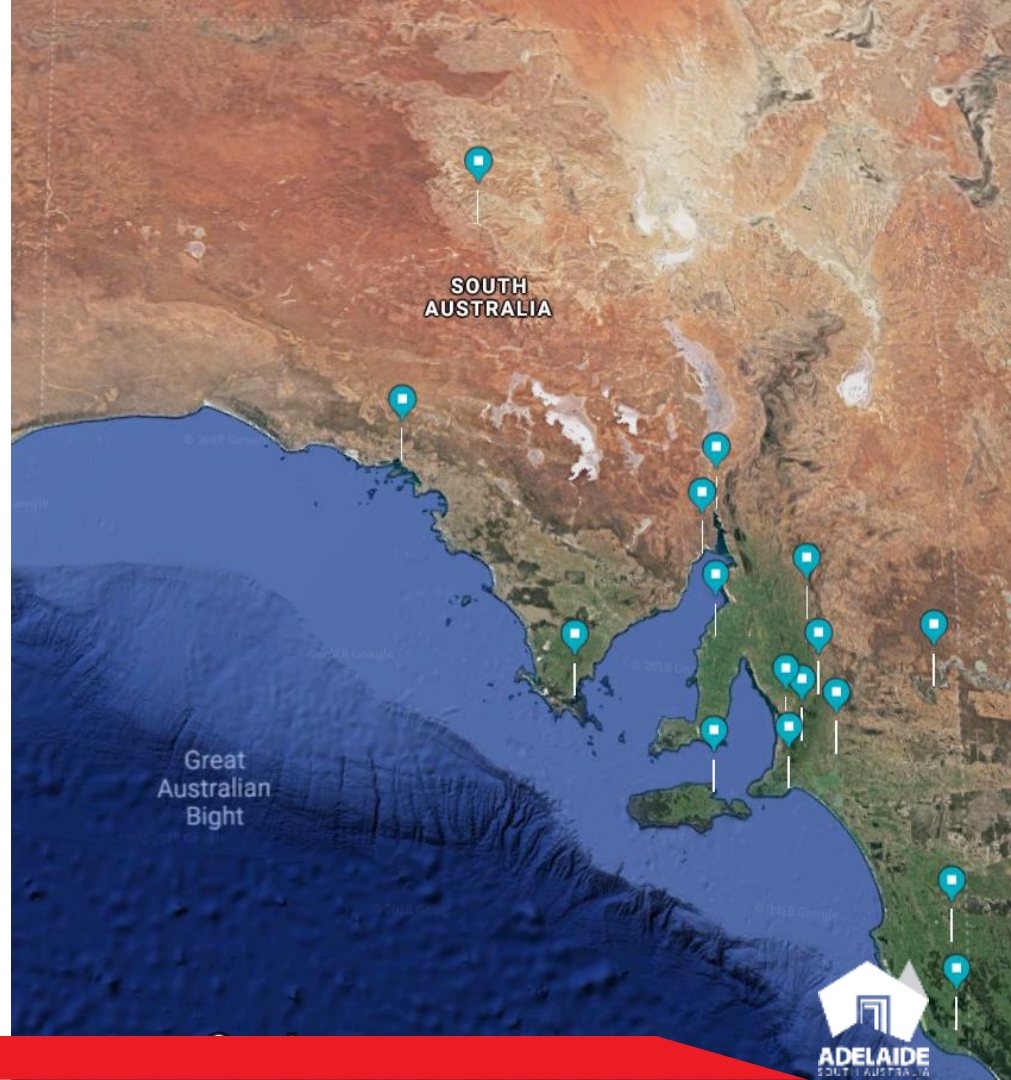


After 90 minutes of discussion, all participants were given 4 votes to provide an indicative prioritisation of the importance of the themes discussed in driving increased performance through to 2030.



# 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





# STAY CONNECTED



## 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*

**THANK YOU.**

