



South Australian Tourism Commission

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

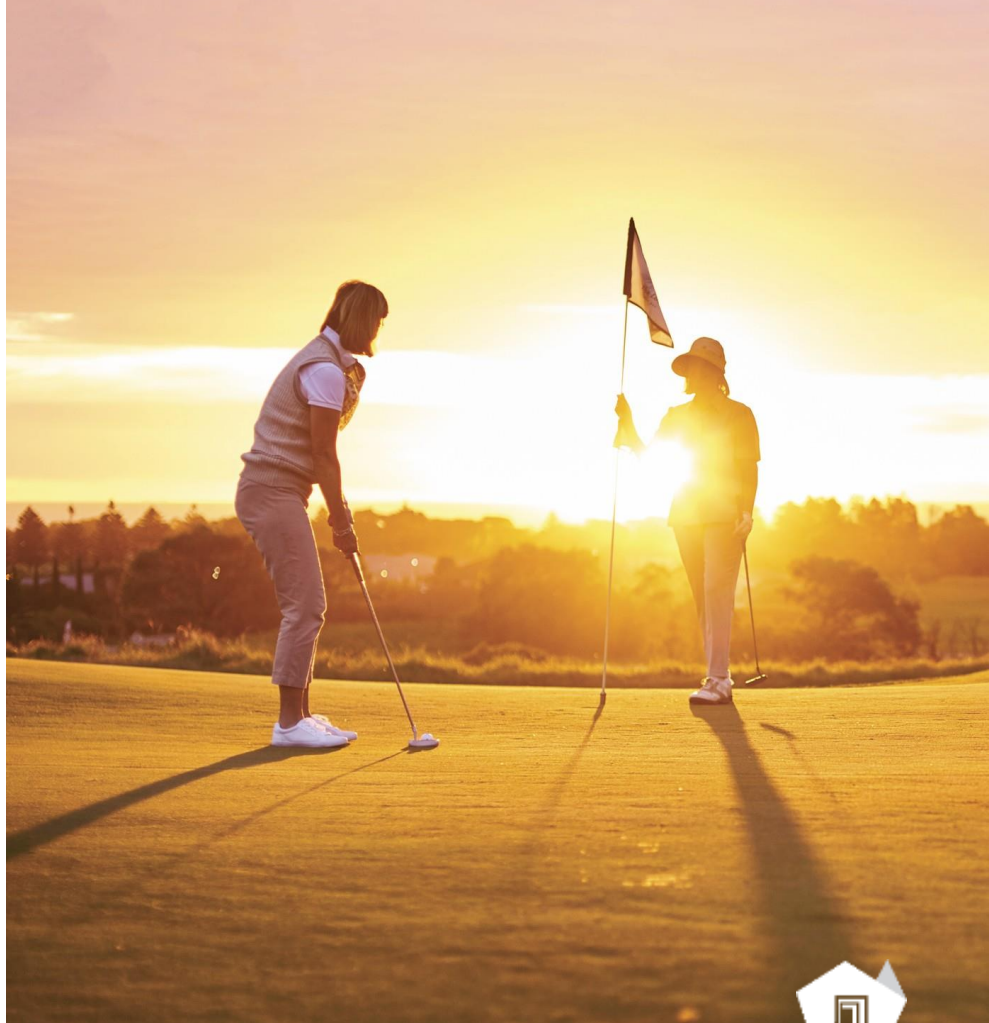
**- FLEURIEU PENINSULA -**

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

# 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



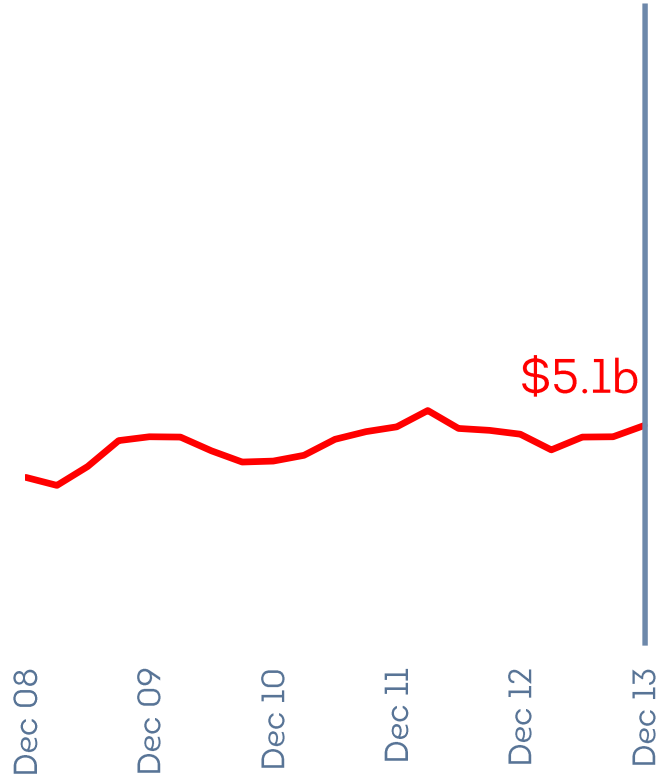
## INCREASING THE RECOGNITION OF THE VALUE OF TOURISM



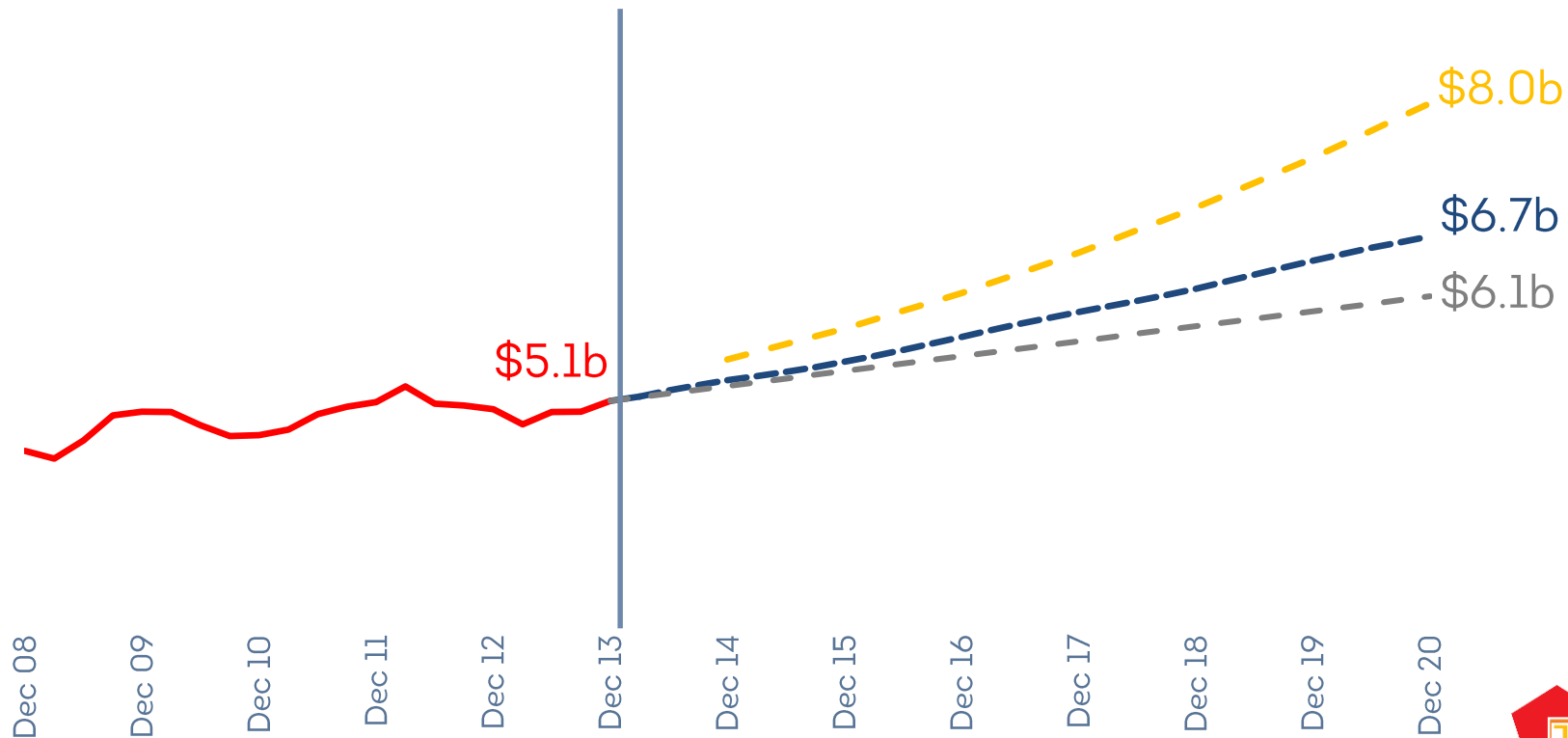
## USING EVENTS TO DRIVE VISITATION



# SETTING THE SCENE

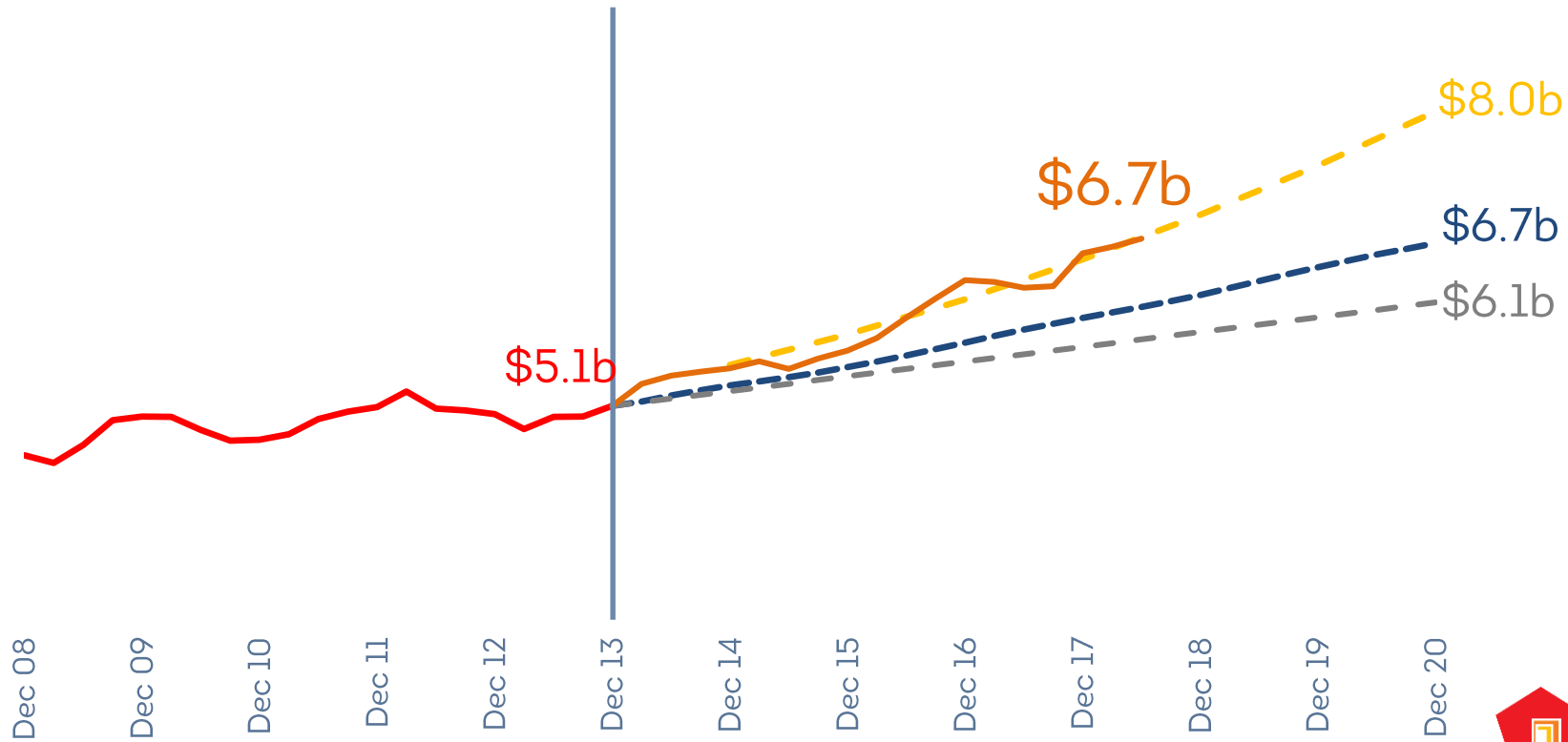


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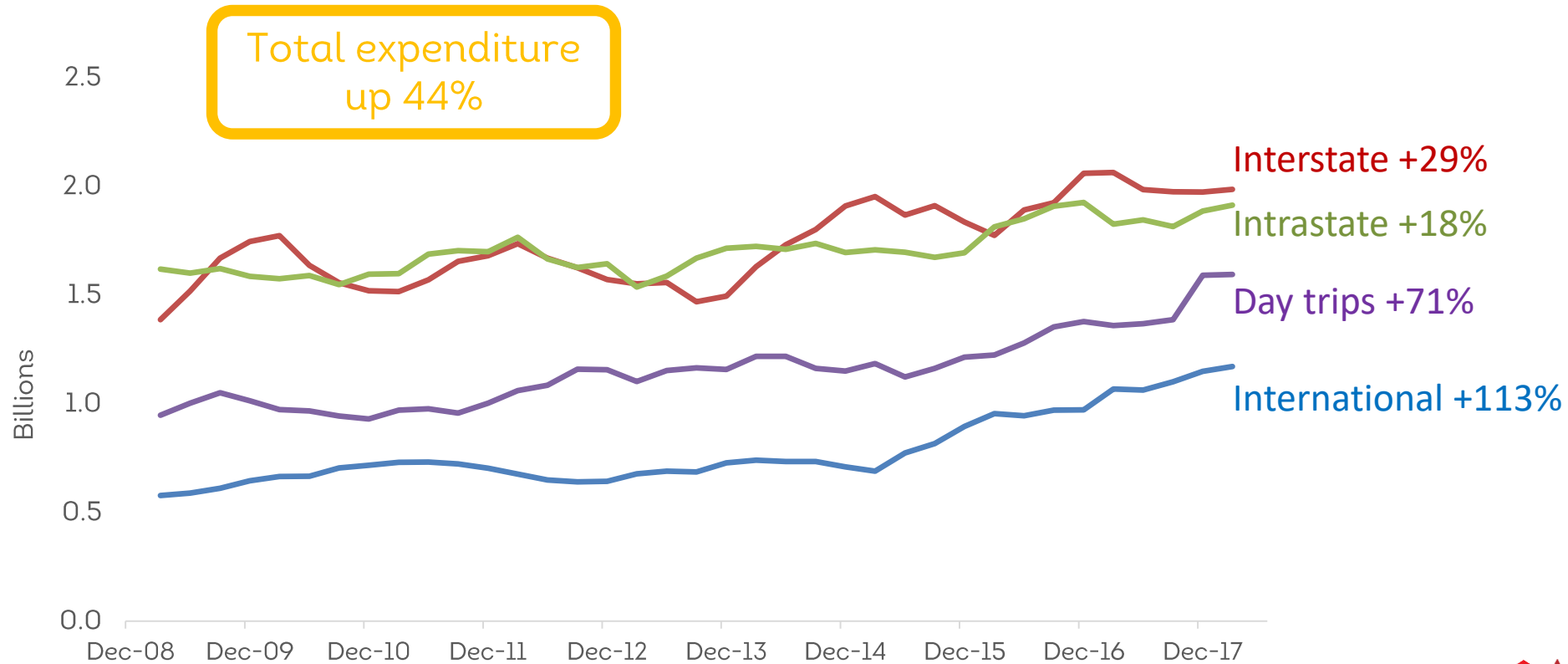




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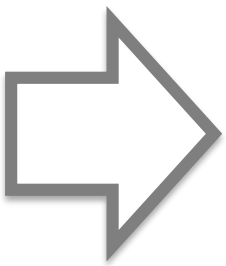
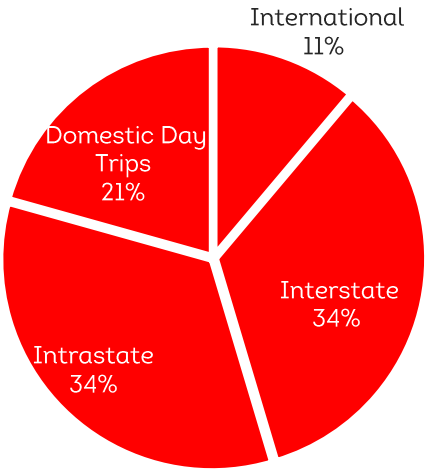


# 10 YEAR OVERVIEW OF EXPENDITURE

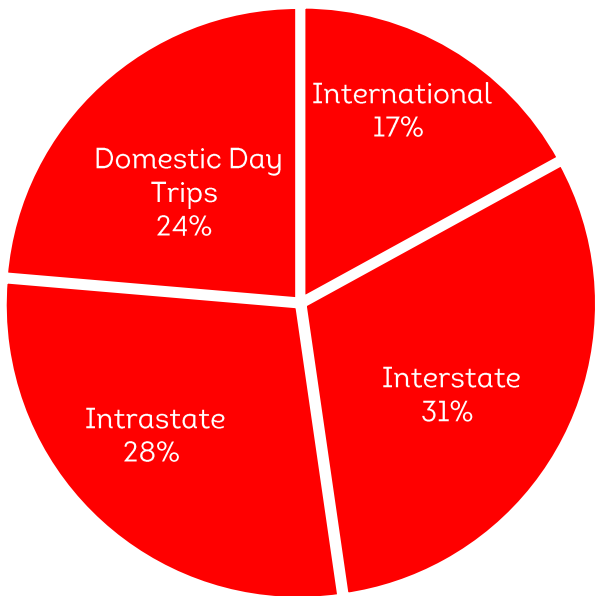


# THE CHANGING VISITOR MIX

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.

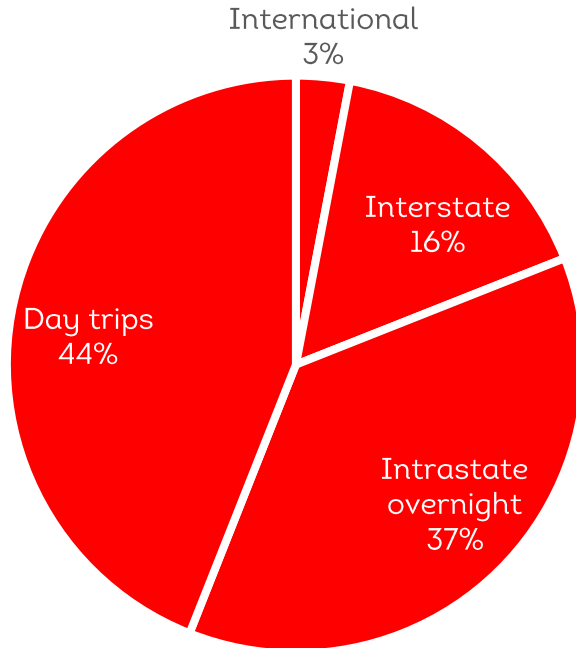
Our **INTERSTATE** market has increased by 29% largely driven by domestic aviation capacity as well as rise of 'grey nomad' travel.

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



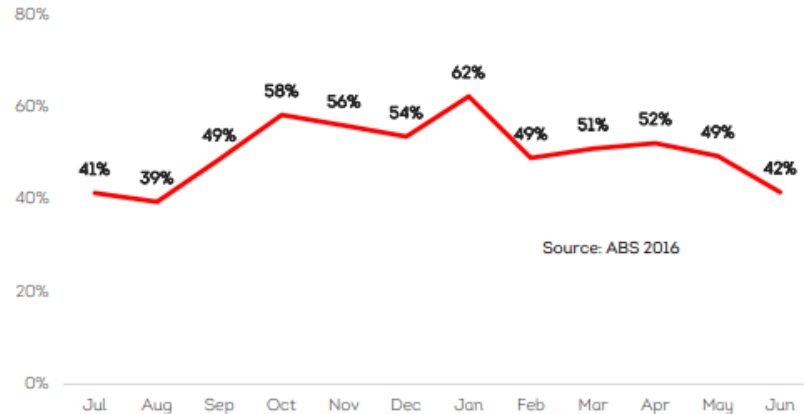
# FLEURIEU PENINSULA TODAY

## Visitor Expenditure



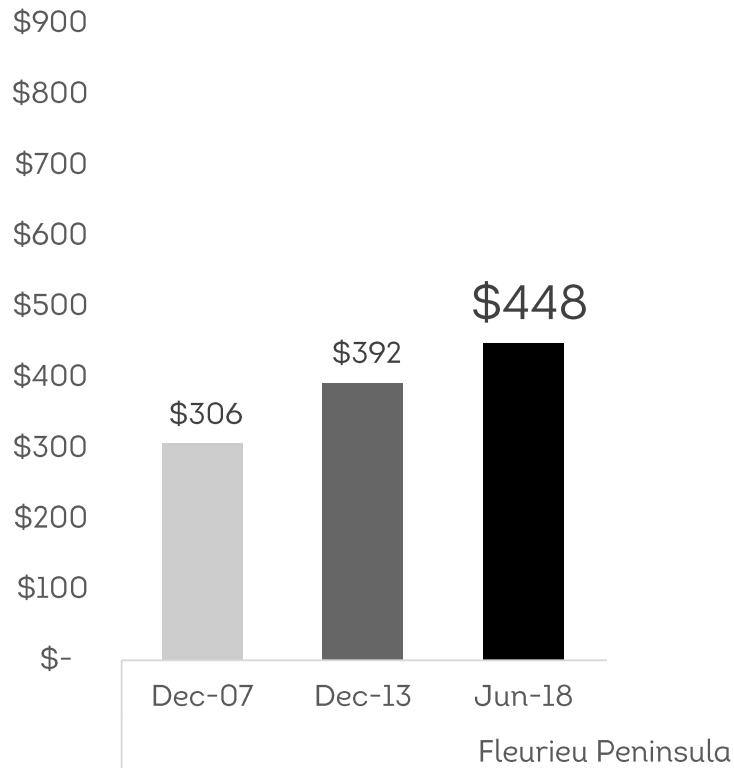
**\$448m**

## MONTHLY OCCUPANCY RATES YEAR END JUNE 2016 - FLEURIEU PENINSULA



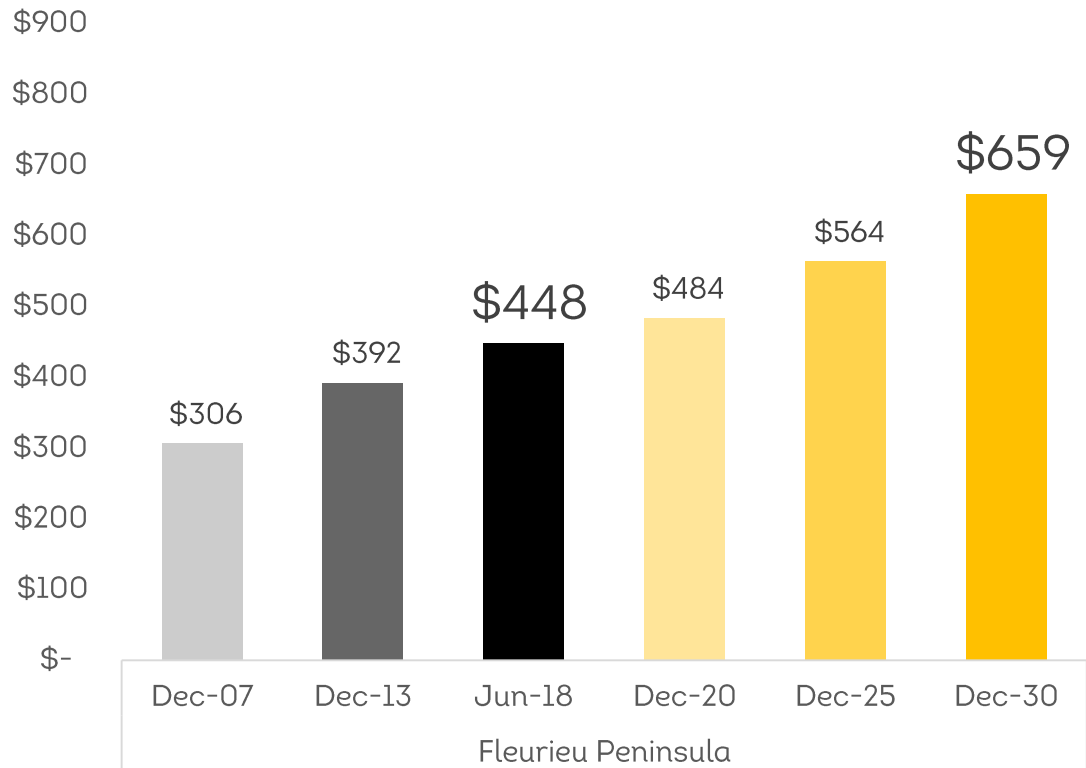
# REGIONAL PERFORMANCE

- ❑ The Fleurieu Peninsula has grown from \$306m in 2007 to \$448m today, a growth of 46%.



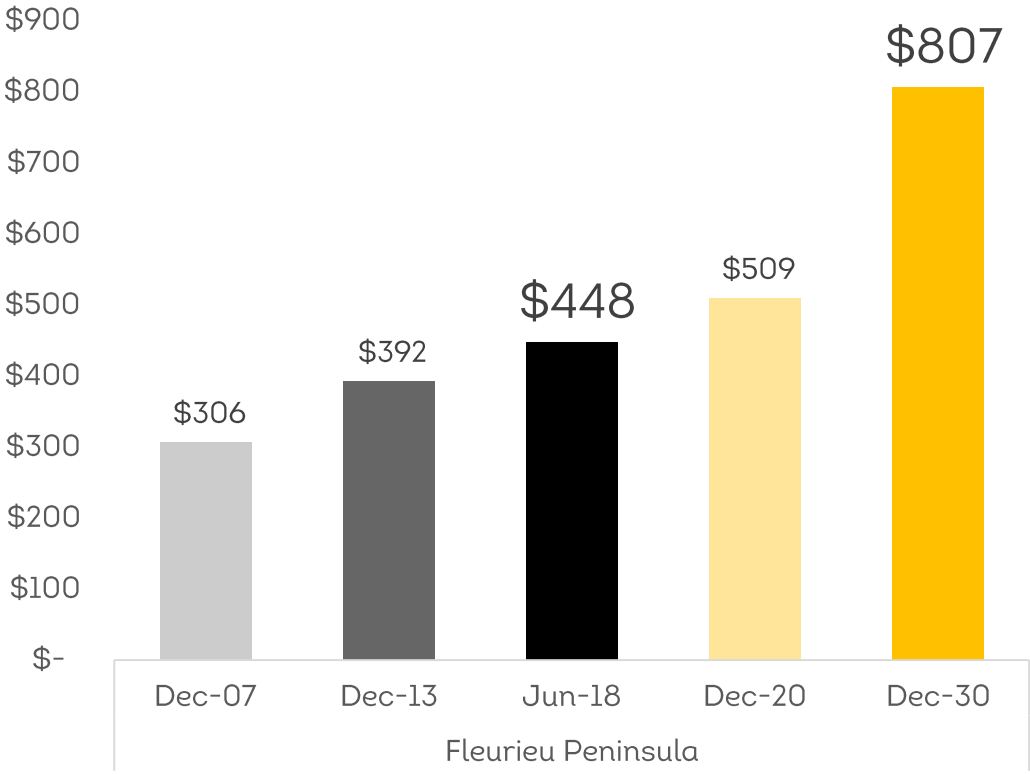
# CONTINUING THE TREND

Current rate of growth through to 2030 yields \$659m to the region



# REGIONAL TARGET

- ❑ Set an ambition to grow the region to \$807 by 2030.





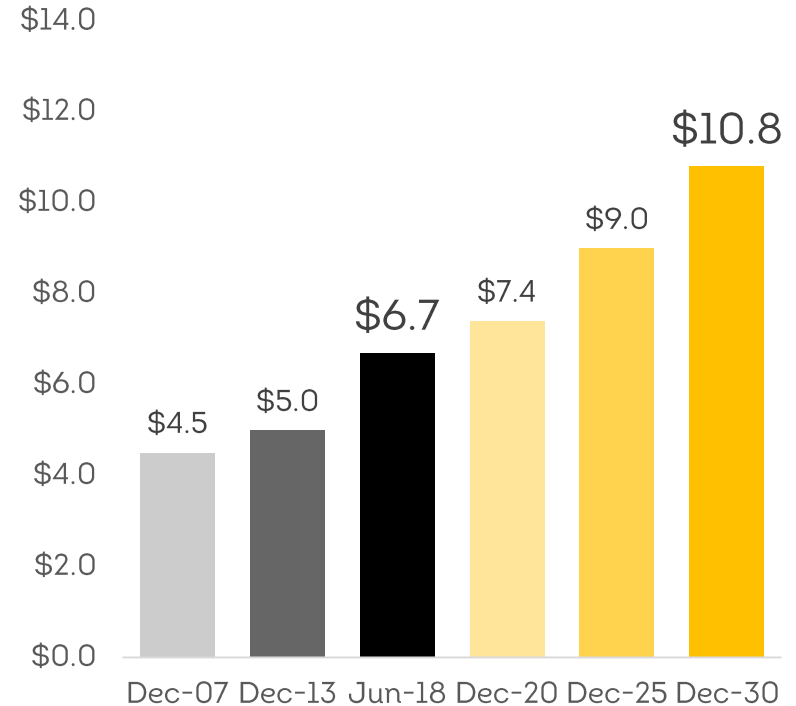
# WHAT DOES THAT MEAN?

- ❑ \$148m extra by 2030 is an additional \$12M in visitor expenditure generated every year.
- ❑ What this means for the Fleurieu Peninsula by 2030:
  - VOLUME:
  - YIELD: Double the average spend per visitor
  - Mix of volume and yield



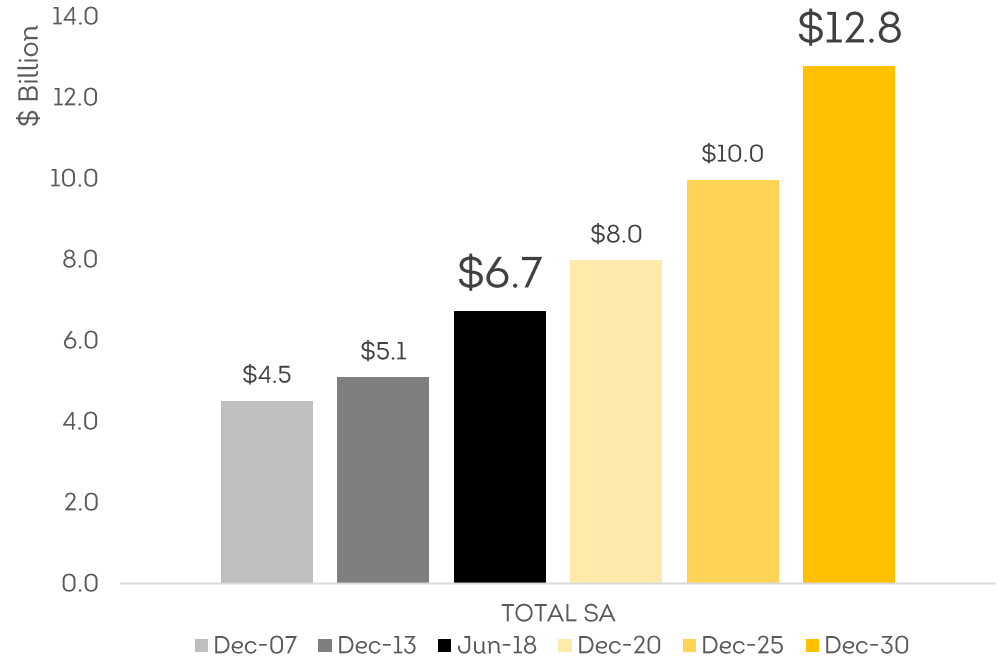
# SOUTH AUSTRALIA HISTORICAL TREND

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



# SOUTH AUSTRALIA TARGET

- ❑ Achieving \$401m in visitor expenditure in your region will contribute to an overall result of \$12.8b in visitor expenditure by 2030.
- ❑ The \$91m 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

- Leadership
- Communicating to customers
- Digital capacity
- Skills
- Collaboration
- Research and insights
- Sustainability and profitability
- Events
- Access
- Experience development

## TOURISM REGION

### REGIONAL VISITOR STRATEGY

- Awareness of offerings
- Alignment of digital marketing
- Increasing bundling and cross promotion
- Supporting events
- Developing iconic products
- Collaboration across regions
- Partnering with Tourism Australia

## LOCAL ISSUES

### MEET THE MINISTER

- Road maintenance
- Activating the Murray Mouth
- Lack of visitor amenities
- Development of Granite Island
- Developing a range of experiences
- Accommodation gaps



**WORKSHOP**

# WHAT IS THE 'SOUTH AUSTRALIAN' EXPERIENCE IN 2030?

# EMERGING THEMES

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



# THOUGHT STARTERS

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

# HANDPICKED

the lane

MERVILLE LANE

MERCHANDISE

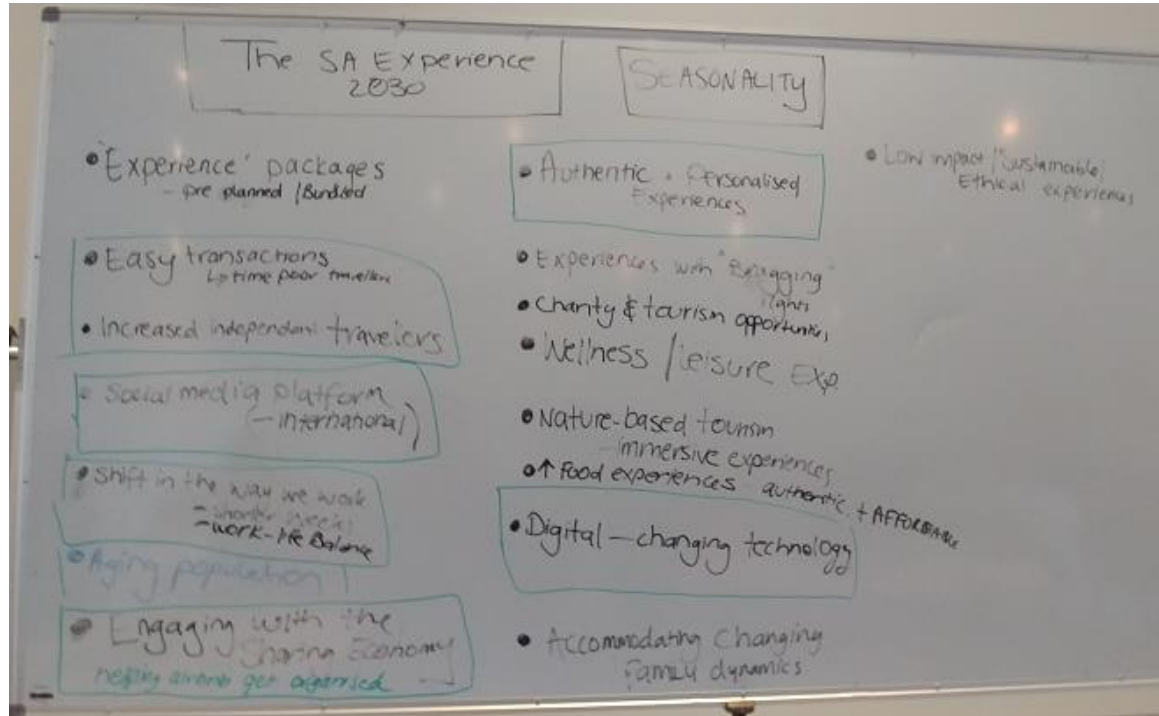
SUMMARISING  
OUR DISCUSSION



# THE SA EXPERIENCE 2030

Fleurieu Peninsula, 26<sup>th</sup> Nov 2018

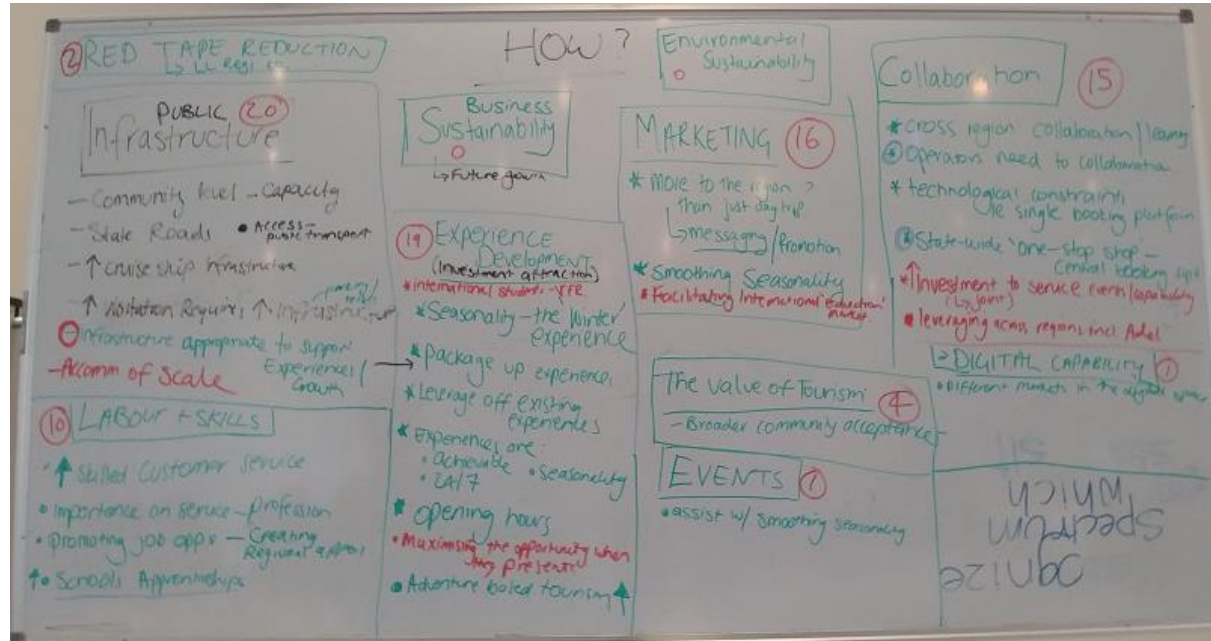
- ❑ Experience packages
- ❑ Easy transactions, time poor independent travellers
- ❑ Social Media Platforms
- ❑ Change in working patterns, work life balance
- ❑ Ageing population
- ❑ Engaging with the sharing economy
- ❑ Authentic and personalised experiences
- ❑ Digital changing technology
- ❑ Nature Based Tourism
- ❑ Seasonality
- ❑ Low impact /sustainable ethical experiences



# KEY THEMES RAISED

Fleurieu Peninsula, 26<sup>th</sup> Nov 2018

- ❑ Red tape (2 votes)
- ❑ Public Infrastructure (2 votes)
- ❑ Labour and Skills (10 votes)
- ❑ Experience development (19 votes)
- ❑ Marketing (16 votes)
- ❑ The Value of Tourism (4 votes)
- ❑ Events (1 vote)
- ❑ Collaboration (15 votes)
- ❑ Digital Capability (1 vote)
- ❑ Business Sustainability (0 votes)
- ❑ Environmental Sustainability (0 votes)



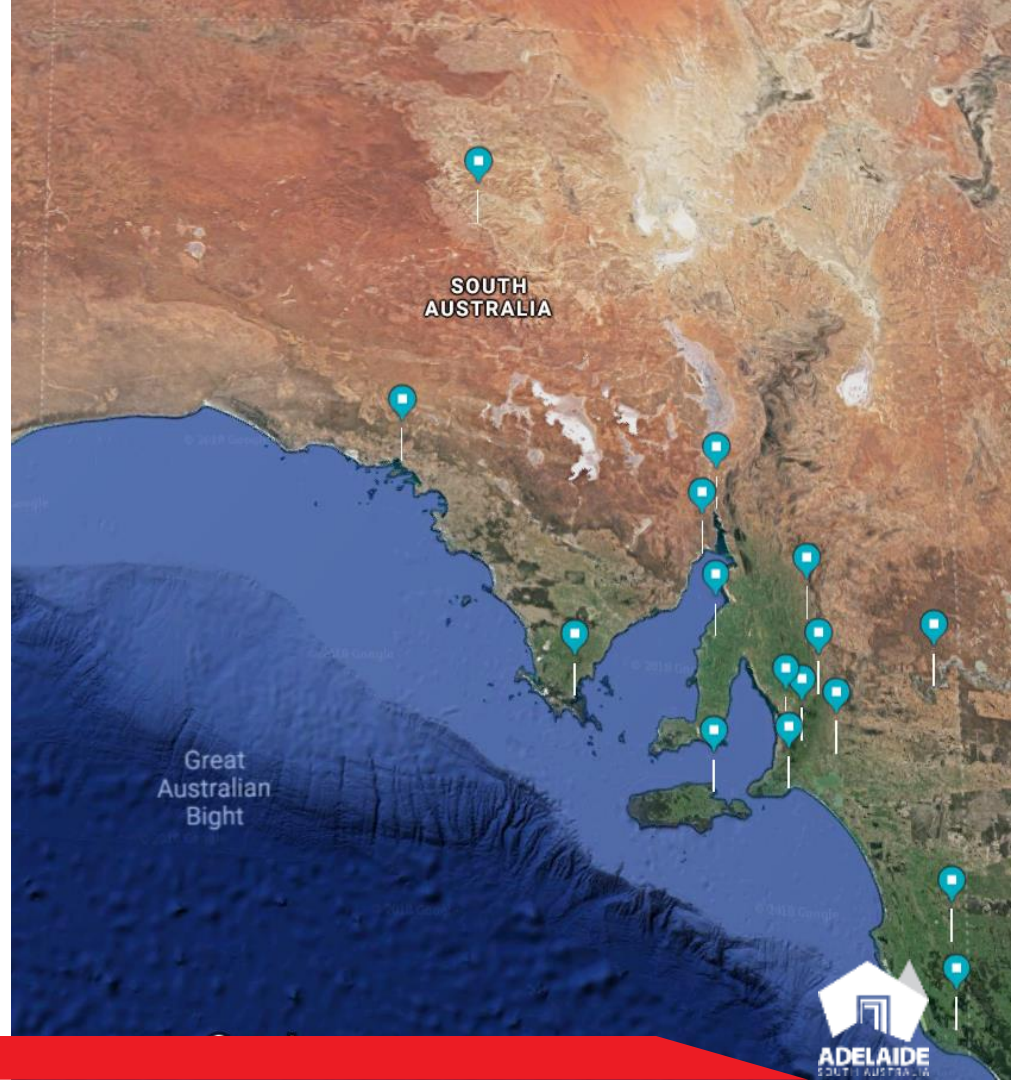
After 90 minutes of discussion, all participants were given 4 votes to provide an indicative prioritisation of the importance of the themes discussed in driving increased performance through to 2030.

# CONSULTATION PROCESS



# CONSULTATION PROCESS

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





# STAY CONNECTED

[www.tourism.sa.com](http://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]