



South Australian Tourism Commission

THE FUTURE OF TOURISM IN THE SOUTH AUSTRALIA

- RIVERLAND -

November 2018



AGENDA

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



A photograph of a kangaroo standing on a path covered in fallen autumn leaves. The path is lined with trees that have green and yellow foliage. The kangaroo is facing the camera. The text "OPENING ADDRESS" and "Rodney Harrex, CE SATC" is overlaid on the bottom left of the image.

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



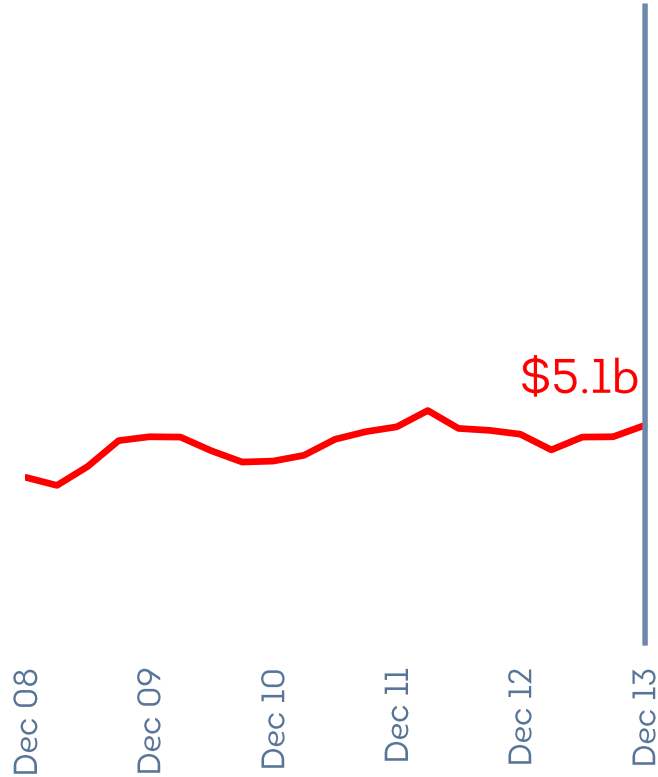
INCREASING THE RECOGNITION OF THE VALUE OF TOURISM



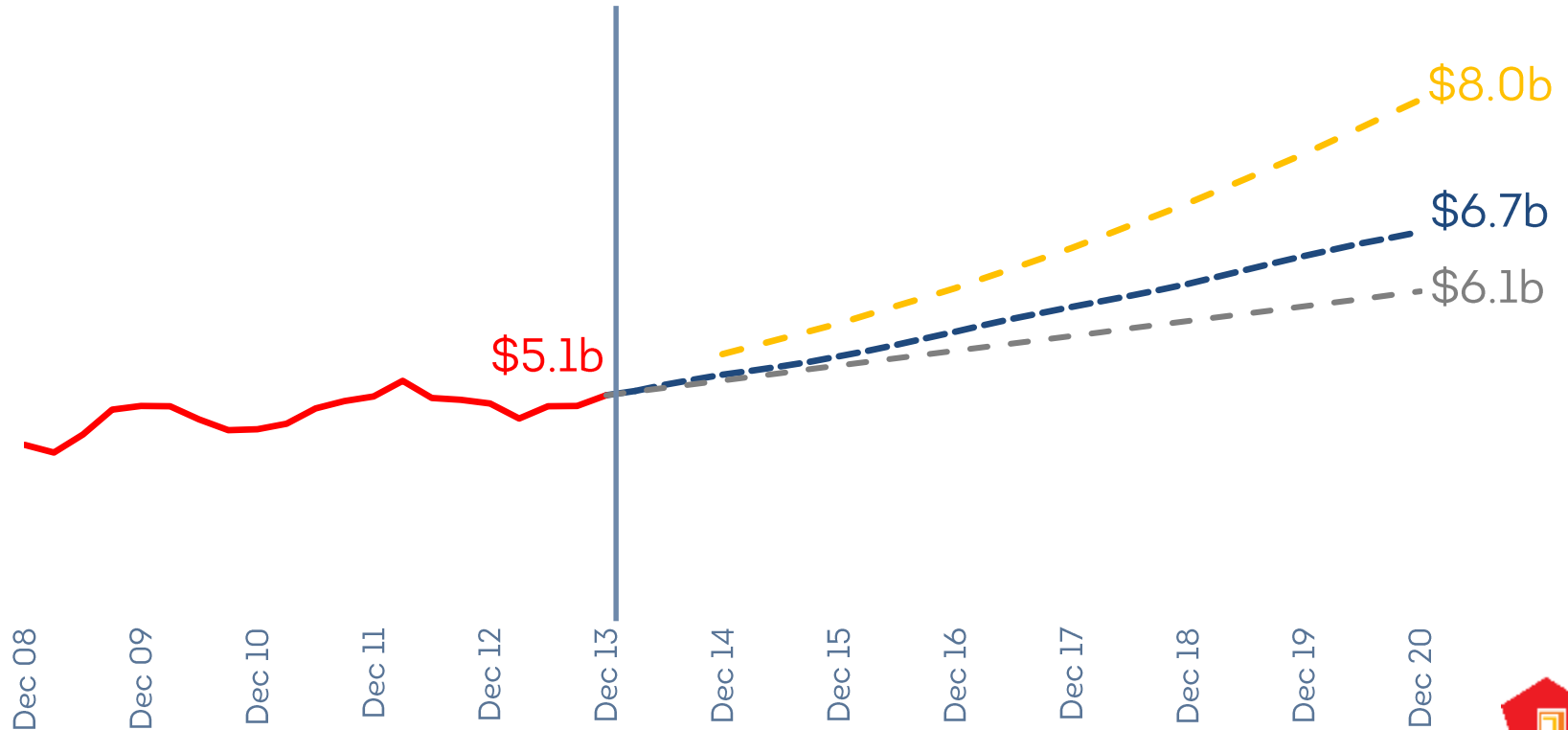
USING EVENTS TO DRIVE VISITATION



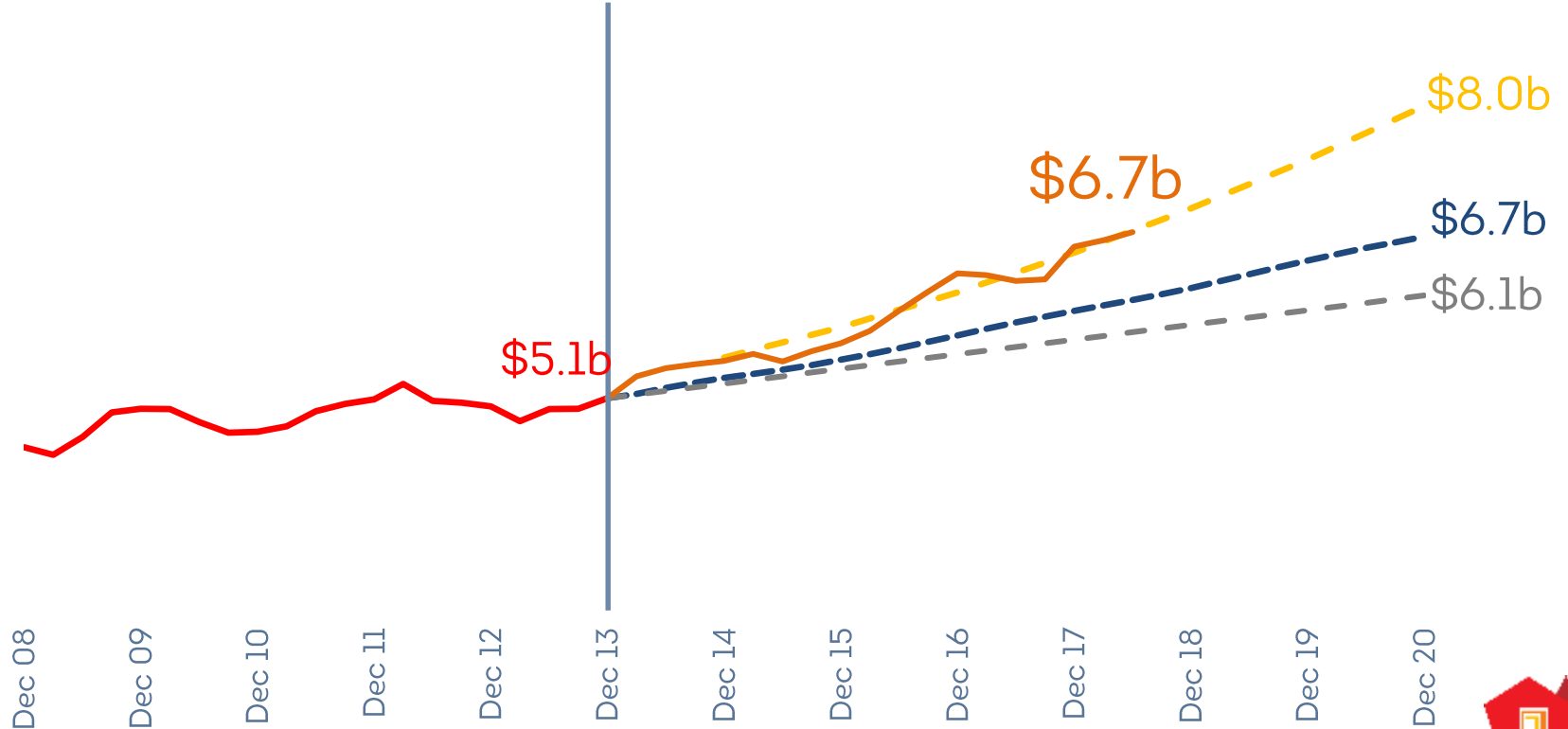
SETTING THE SCENE



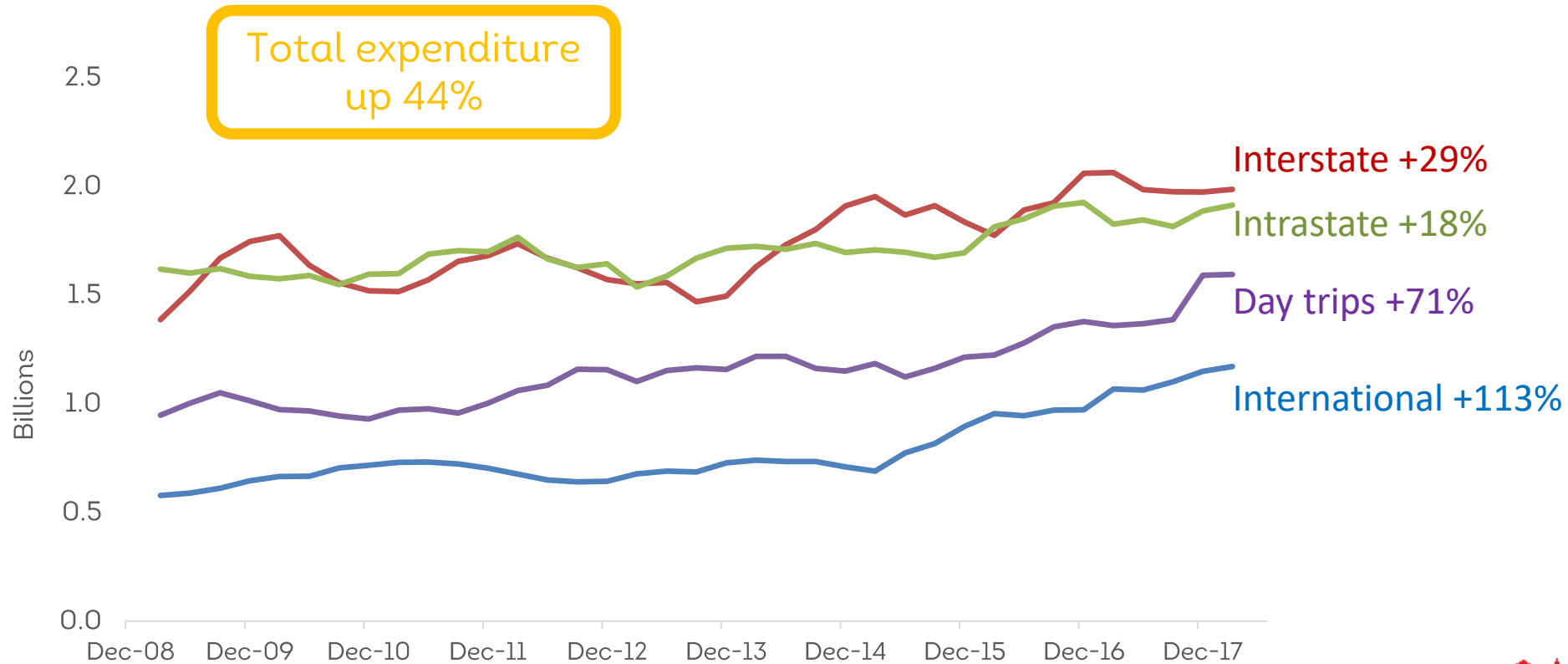
SETTING THE SCENE



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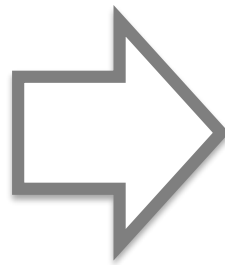
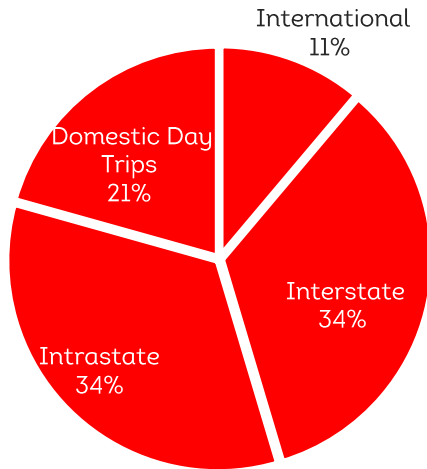


10 YEAR OVERVIEW OF EXPENDITURE

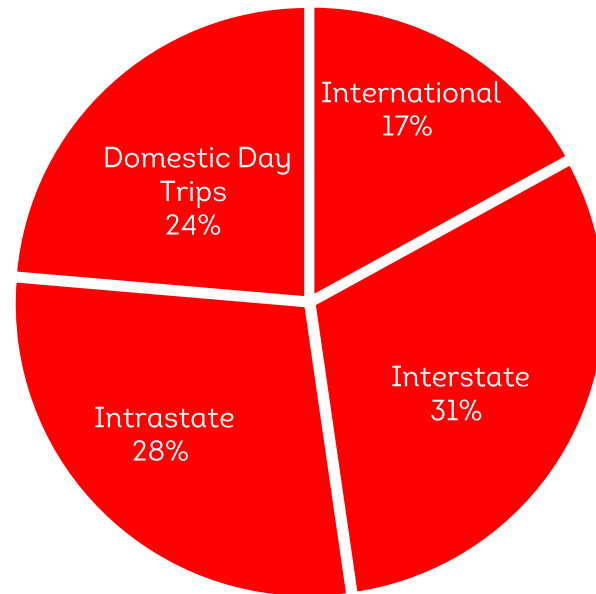


THE CHANGING VISITOR MIX

2008



2018



OUR CHANGING MARKETS

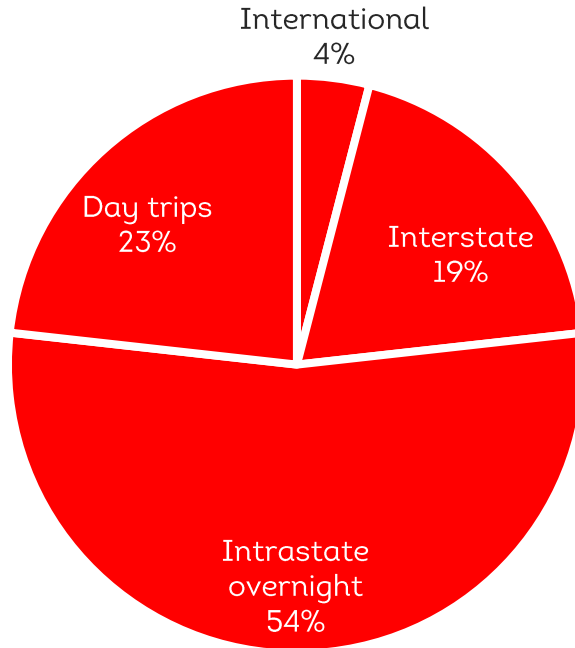
Our **INTERNATIONAL** market has doubled in 10 years, with a movement from western to eastern markets. Expenditure from Asia has tripled, North America has increased by 70% while the European markets have remained consistent.

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%.

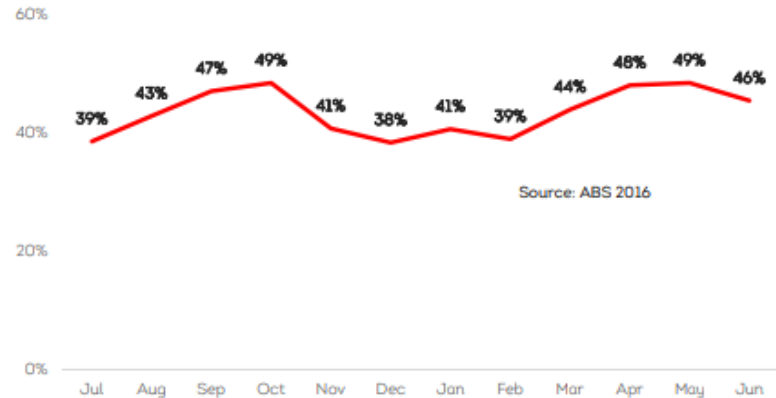
RIVERLAND TODAY

Visitor Expenditure



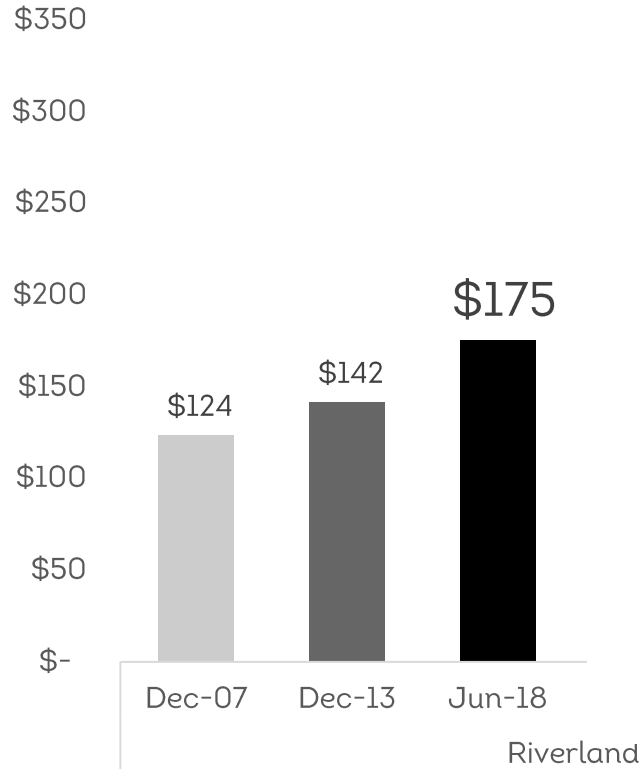
\$175m

MONTHLY OCCUPANCY RATES YEAR END JUNE 2016 - RIVERLAND



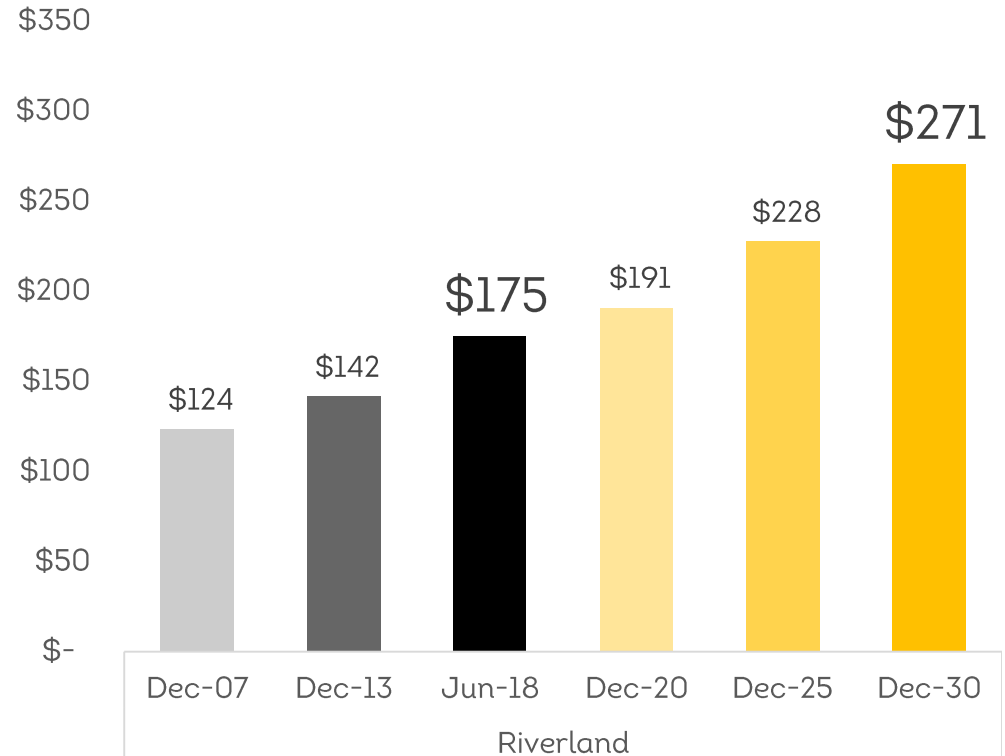
REGIONAL PERFORMANCE

- ❑ The Riverland has grown from \$124m in 2007 to \$175m today, a growth of 42%.



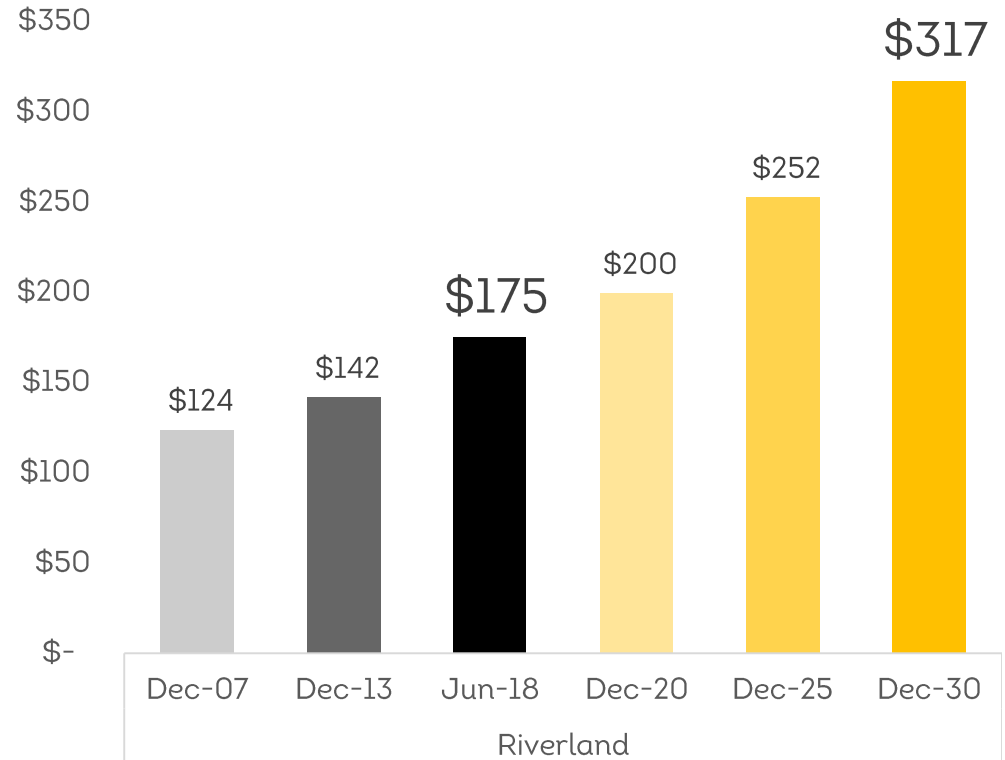
CONTINUING THE TREND

- Current rate of growth through to 2030 yields \$271m to the region



REGIONAL TARGET

- Set an ambition to grow the region to \$317 by 2030.



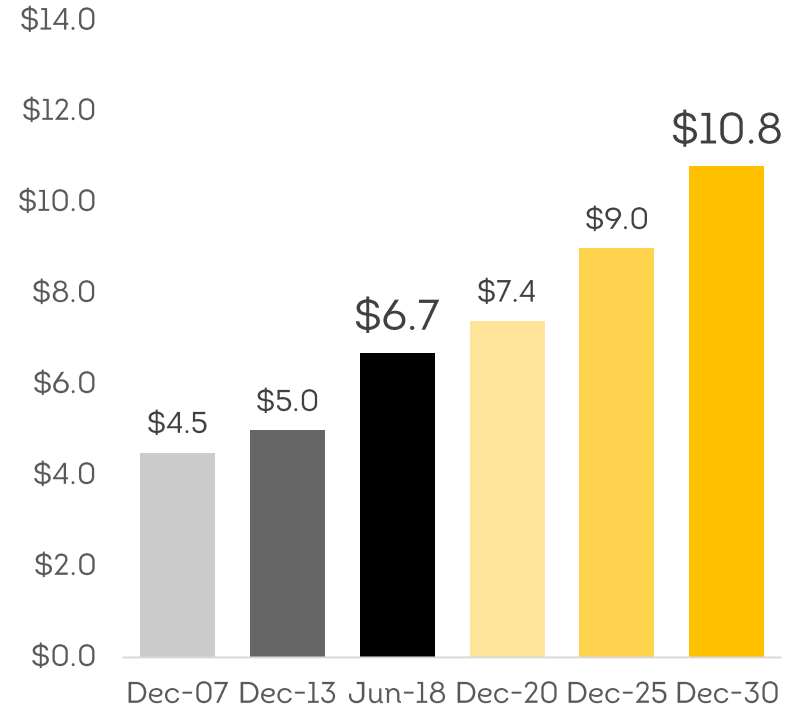
WHAT DOES THAT MEAN?

- ❑ Overall a \$142m increase on today's expenditure (81%)
- ❑ An additional \$46m (17%) above trend by 2030 - \$4m per year.
- ❑ What this means for the region by 2030:
 - VOLUME: 230k more visitors (130k incremental)
 - YIELD: Double the yield from \$350 to \$700
 - Mix of volume and yield



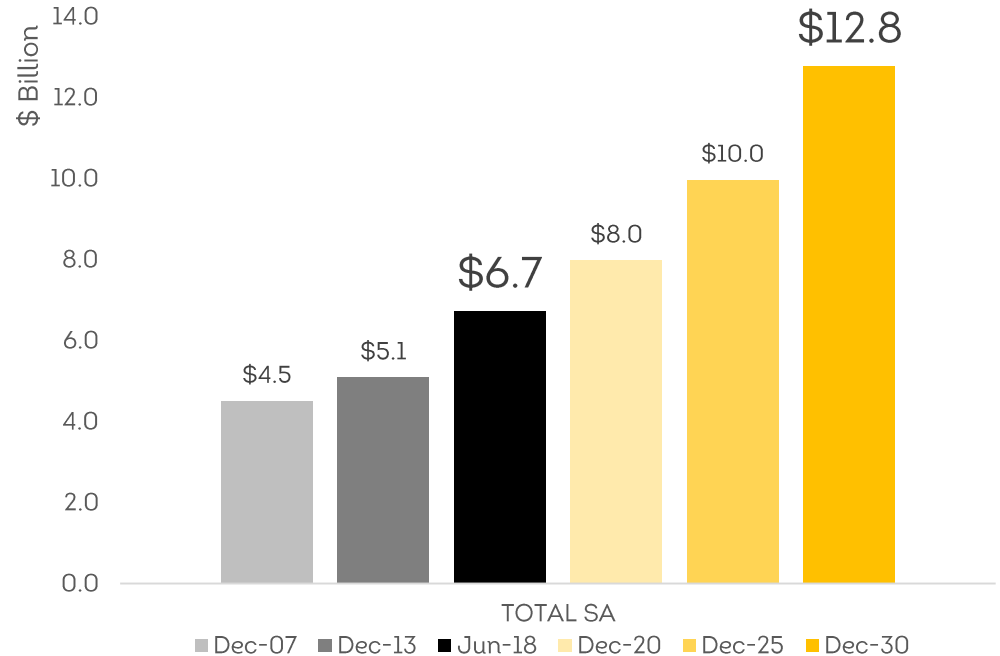
SOUTH AUSTRALIA HISTORICAL TREND

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



SOUTH AUSTRALIA TARGET

- ❑ Achieving \$317m in visitor expenditure in your region will contribute to an overall result of \$12.8b in visitor expenditure by 2030.
- ❑ The \$46m 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

- Improving the understanding of the value of tourism
- Leadership
- Access
- Easing the investment process
- Improving understanding of tourism experiences
- Major events
- International market
- Digital capacity
- Cost of business

TOURISM REGION

REGIONAL VISITOR STRATEGY

- Promotion and maximising appeal
- Alignment of digital marketing
- Growing existing events
- Leveraging the Mighty Murray Way
- Greater collaboration
- Raising industry capability
- Use of online tools

LOCAL ISSUES

MEET THE MINISTER

- Houseboat infrastructure
- Improvements to the road network
- Simplified governance for the river
- River maintenance
- River infrastructure



WORKSHOP

WHAT IS THE 'SOUTH AUSTRALIAN' EXPERIENCE IN 2030?

EMERGING THEMES

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

THOUGHT STARTERS

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

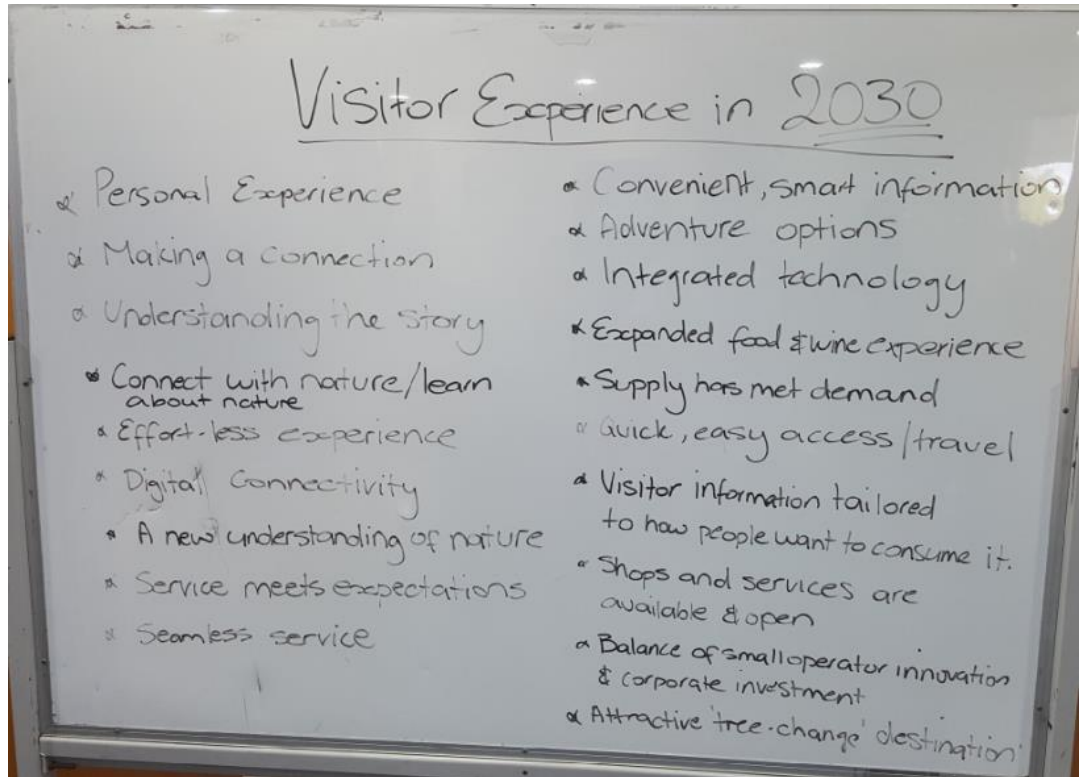
SUMMARISING OUR DISCUSSION



THE SA EXPERIENCE 2030

Riverland, 28th Nov 2018

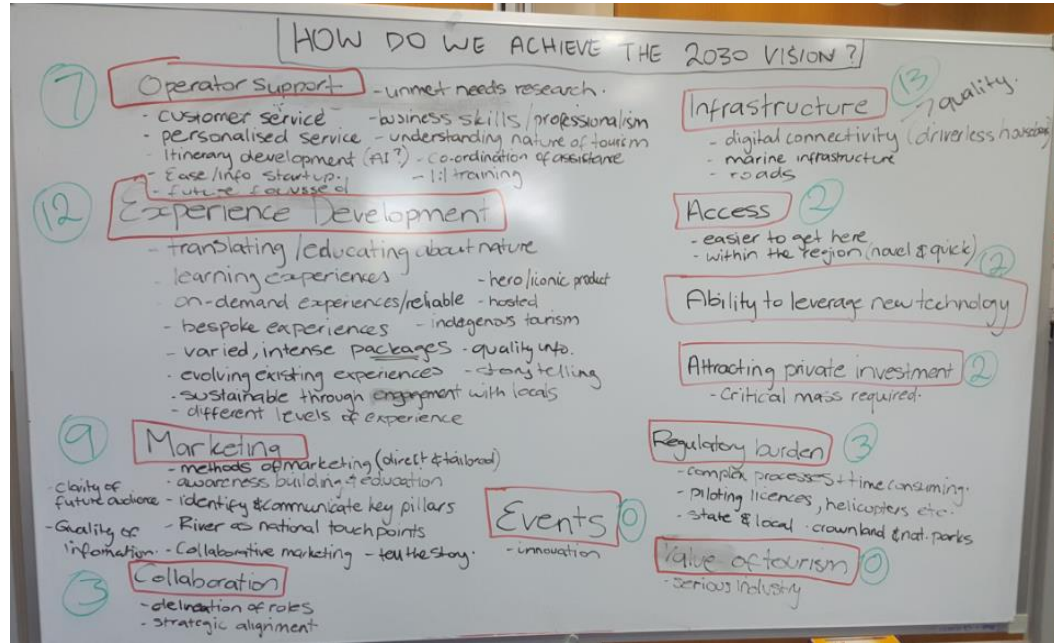
- ❑ Personal experiences
- ❑ Making a connection
- ❑ Understanding the story
- ❑ Connecting with nature
- ❑ Effort - less experience
- ❑ Digital connectivity / Technology
- ❑ Understanding nature
- ❑ Service expectations
- ❑ Adventure tourism
- ❑ Expand food and wine experience
- ❑ Quick, easy access/travel
- ❑ Tailored visitor information
- ❑ Opening Hours



KEY THEMES RAISED

Riverland, 28th Nov 2018

- ❑ Operator Support (7 votes)
- ❑ Experience Development (12 votes)
- ❑ Marketing (9 Votes)
- ❑ Collaboration (3 Votes)
- ❑ Infrastructure (13 Votes)
- ❑ Access (2 Votes)
- ❑ Events (0 Votes)
- ❑ Ability to leverage new technology (2 Votes)
- ❑ Attracting private investment (2 Votes)
- ❑ Regulatory burden (3 Votes)
- ❑ Value of Tourism (0 Votes)



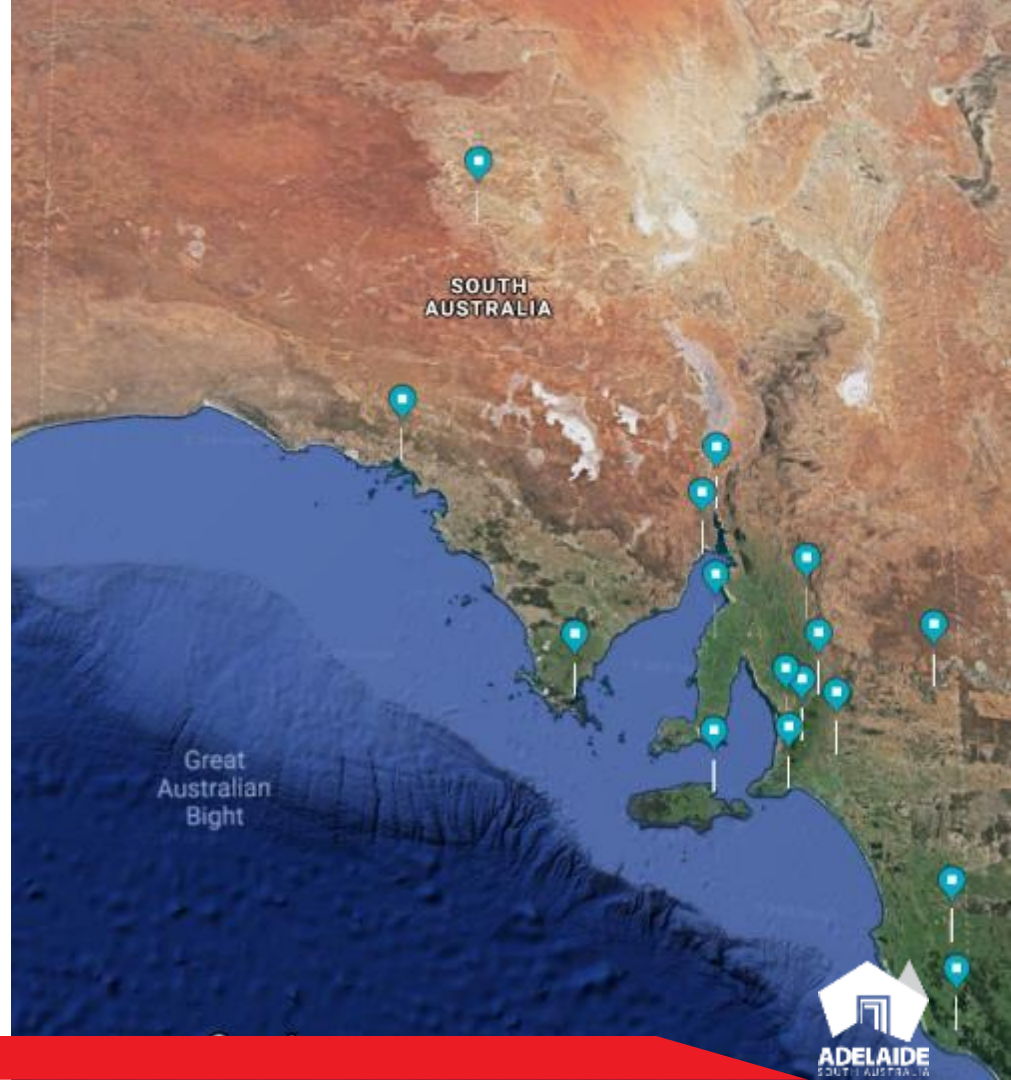
After 90 minutes of discussion, all participants were given 4 votes to provide an indicative prioritisation of the importance of the themes discussed in driving increased performance through to 2030.



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



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]