



South Australian Tourism Commission

THE FUTURE OF TOURISM IN THE BAROSSA

October 2018





OPENING ADDRESS

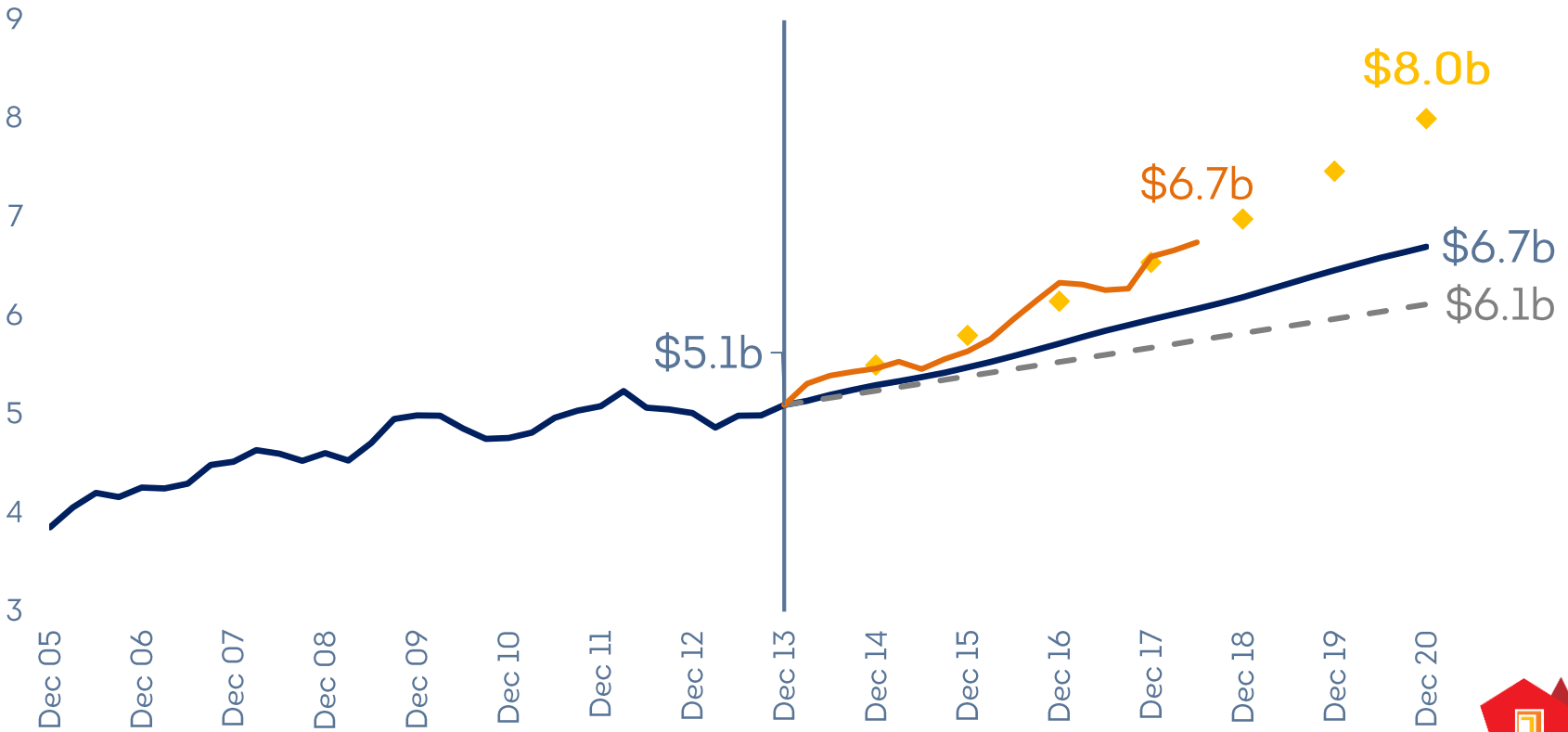
Chris Pfeiffer, Regional Chair



OPENING ADDRESS

Rodney Harrex, CE SATC

SETTING THE SCENE



2020 PRIORITY ACTION AREAS

DRIVE DEMAND



WORKING BETTER TOGETHER



SUPPORTING WHAT WE HAVE



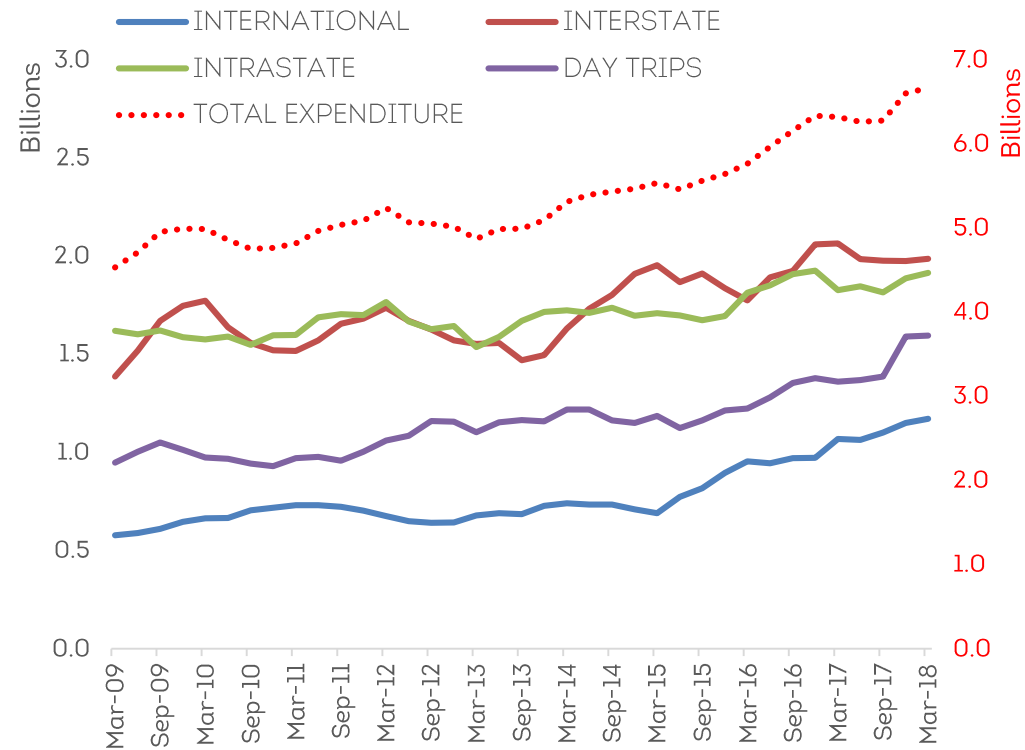
INCREASING THE RECOGNITION OF THE VALUE OF TOURISM



USING EVENTS TO DRIVE VISITATION



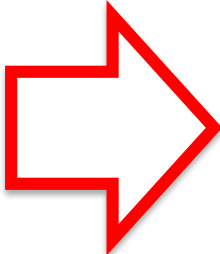
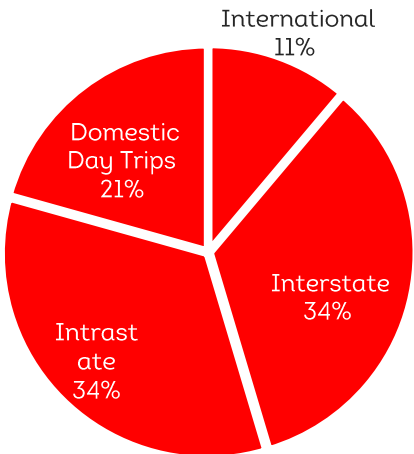
10 YEAR OVERVIEW OF EXPENDITURE



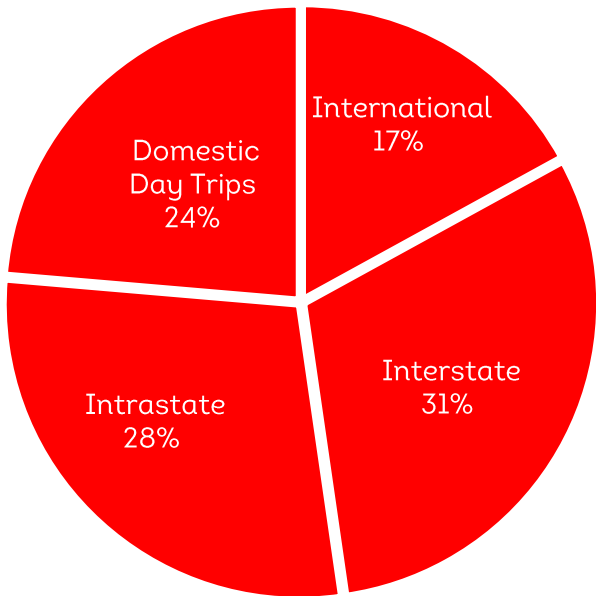
- Total Expenditure up 44%
- International +113%
- Interstate +29%
- Intrastate +18%
- Day Trips +71%

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

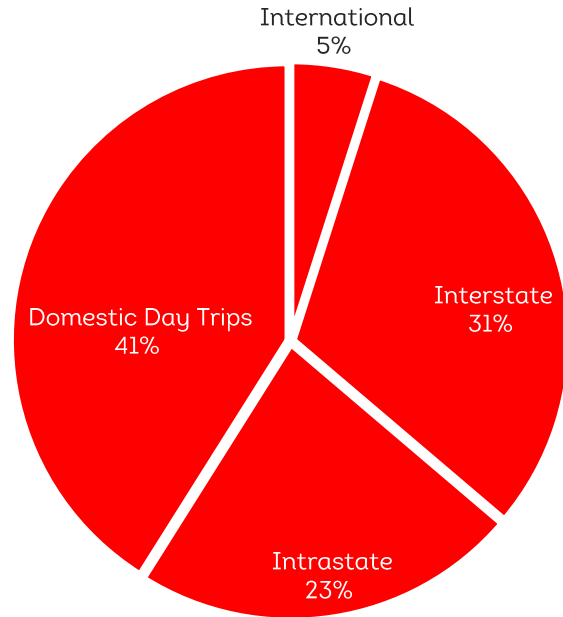
Key Trends

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



BAROSSA TODAY

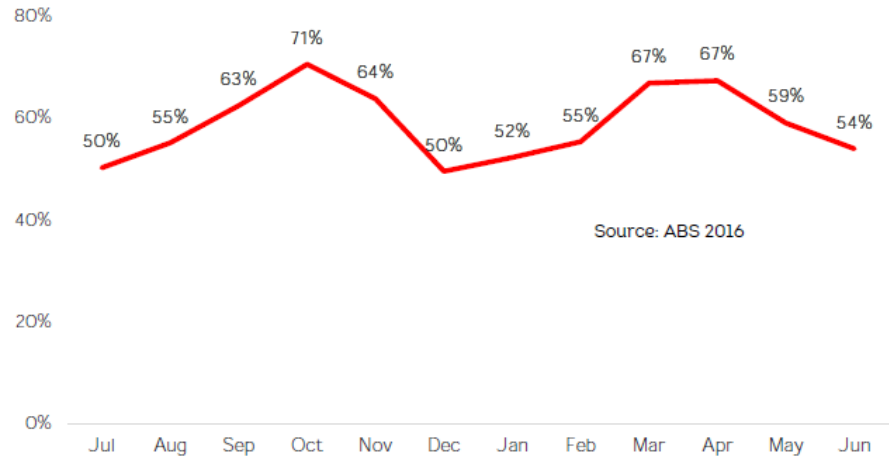
Barossa Visitor Expenditure



Plus 84,000 International Day Trips from Adelaide

\$193m

Monthly Occupancy Rates Year end June 2016 - Barossa

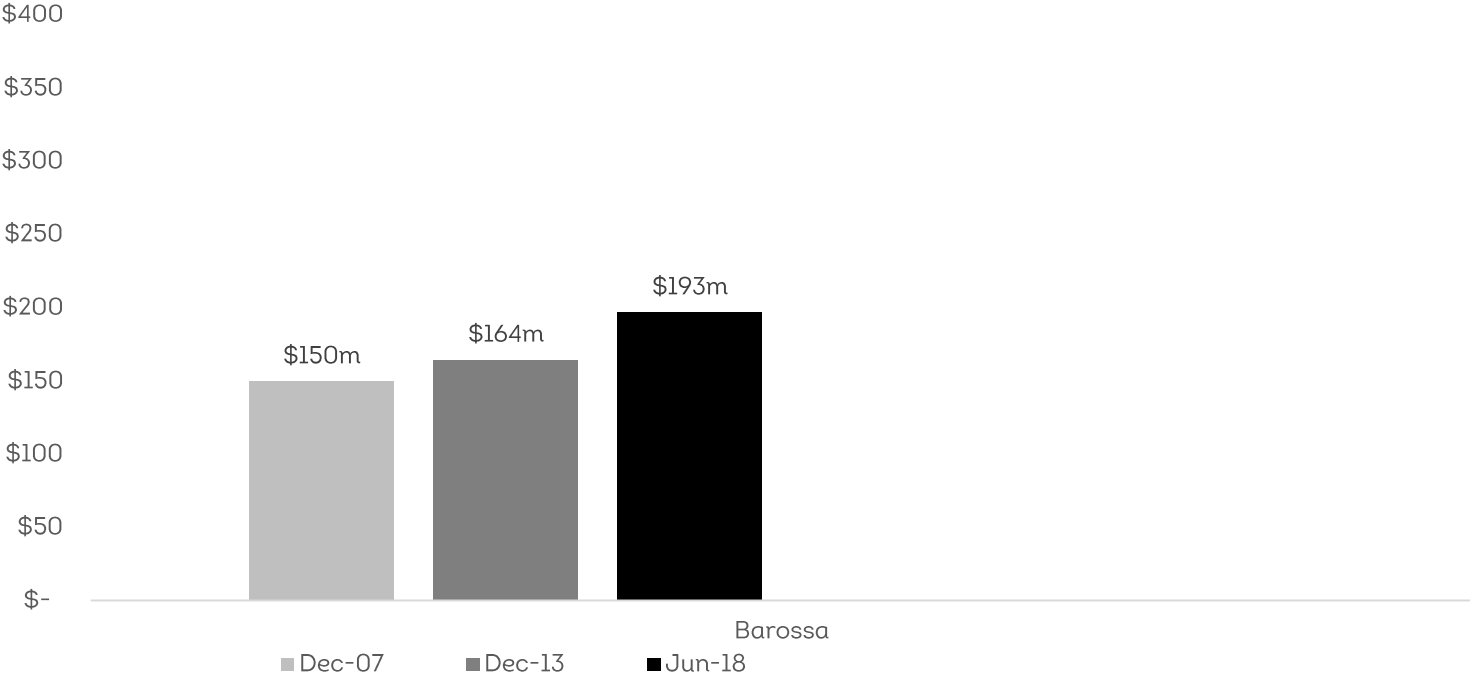


Source: ABS 2016

BAROSSA PERFORMANCE

□ The Barossa has grown from \$150m in 2007 to \$193m today, a growth of 31%.

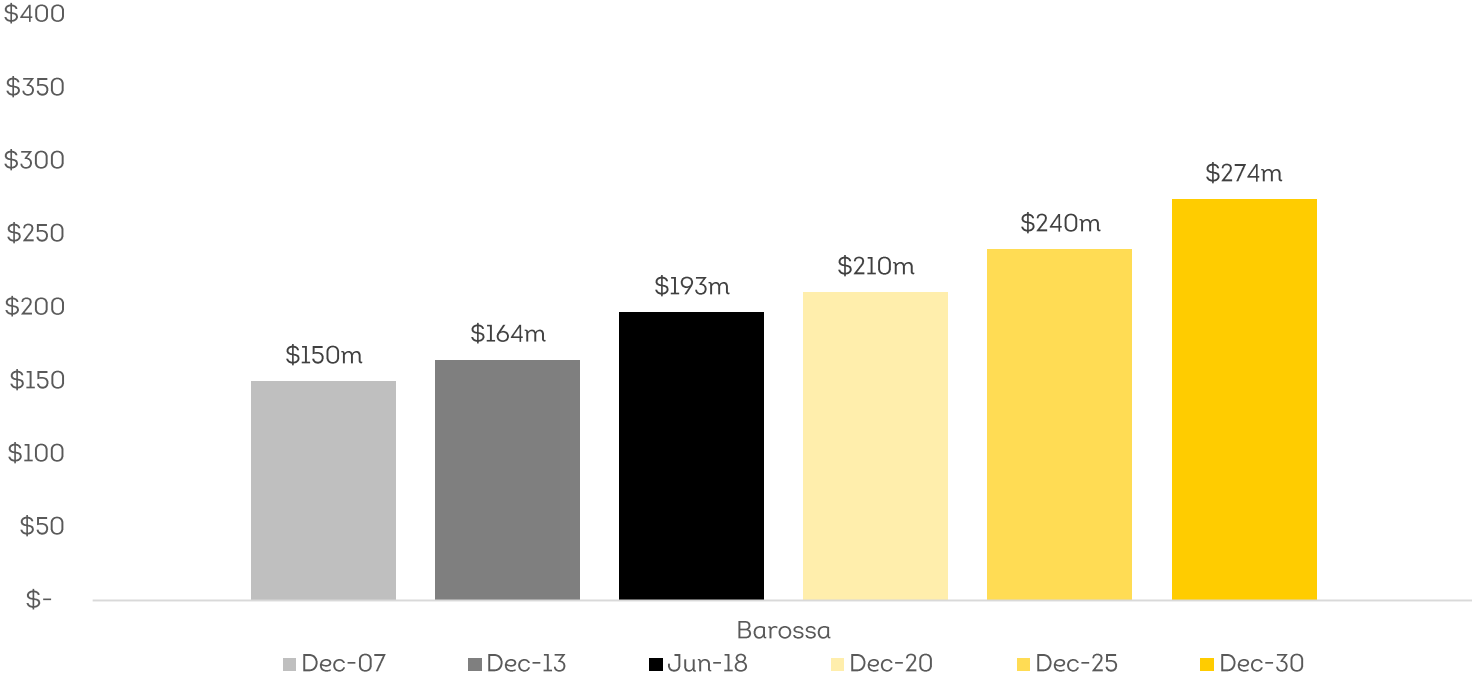
Historical Performance



CONTINUING THE TREND

Current rate of growth through to 2030 yields \$274m to the region

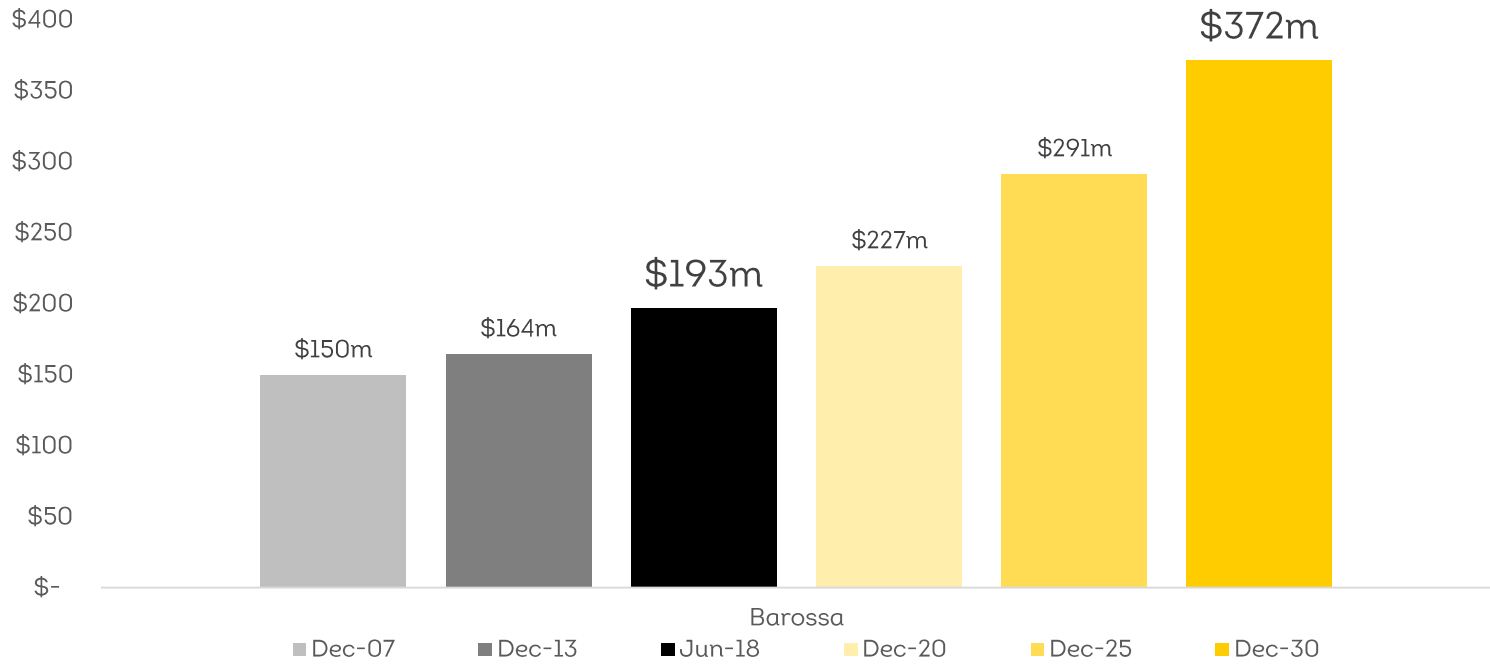
Historical and 2030 Trend Performance



GROWING BEYOND

❑ Set an ambition to grow the region to \$272m by 2030.

Historical and 2030 Target Performance



WHAT DOES THAT MEAN?

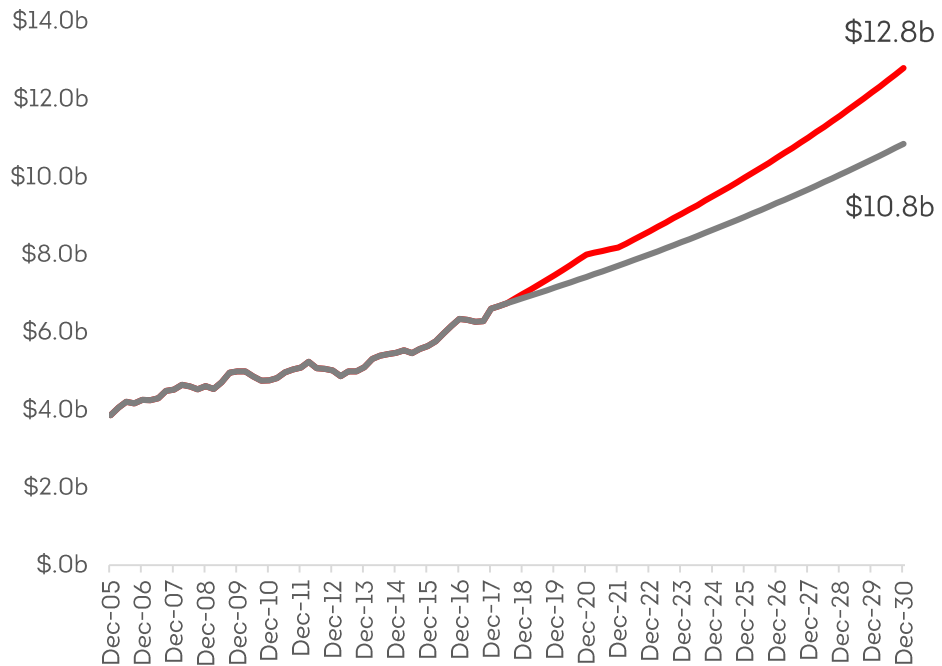
- ❑ \$98m extra by 2030 is an additional \$8m in visitor expenditure generated every year.
- ❑ That is equivalent to
 - 10,000 more international visitors, or
 - 12,000 more from interstate or
 - 23,000 more from intrastate



SOUTH AUSTRALIA POTENTIAL

SA Visitor Expenditure - Actuals and Forecast

- Achieving \$372m in visitor expenditure in the Barossa region will contribute to an overall result of \$12.8b in visitor expenditure by 2030.
- The \$98m of increased expenditure is part of an overall \$2b of additional spend across the state.



TARGET 2030 HISTORICAL TREND



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:

- Experiences
- Profitability
- Communication
- Ease of visit for the consumer
- Collaborate/Coordinate

Regional Visitor Strategy:

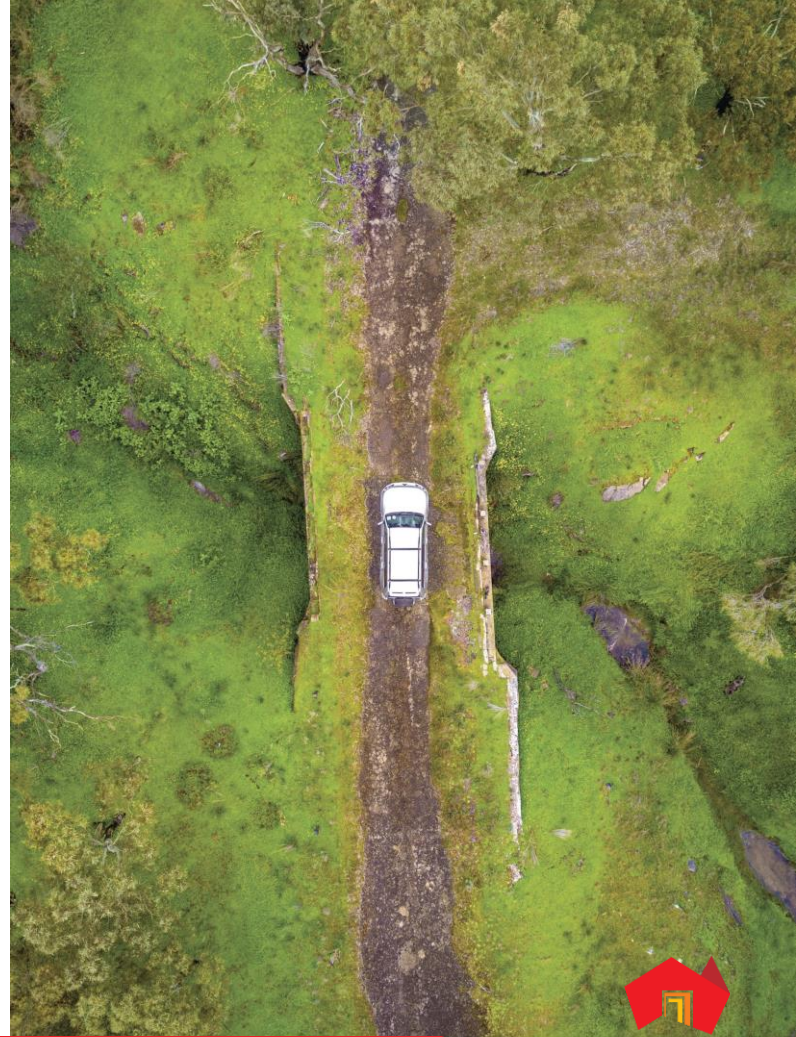
- Increase overnight visitation from interstate and overseas markets
- Accommodation development

Meet the Minister Session:

- Collaboration is essential
- Managing locale culture
- Planning challenges and regulation
- Sharing economy
- Chinese market
- Viability of events

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!



A scenic outdoor dining area featuring a pergola structure covered in vibrant red flowers. The pergola is supported by dark wooden posts and has a light-colored tiled floor. In the foreground, a man and a woman are seated at a square table, engaged in conversation. The woman is wearing a white blouse and blue jeans, while the man is wearing a light blue shirt and dark trousers. They are both holding glasses of wine. In the background, several other people are seated at tables, also enjoying the view. The area is surrounded by lush greenery, including a well-manicured hedge and various trees. The ground is covered with fallen red petals, creating a romantic atmosphere. The overall scene is bright and inviting, suggesting a pleasant outdoor dining experience.

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 FROM WORKSHOP

- ❑ Destination development (11 votes)
- ❑ Marketing (13 votes)
- ❑ Industry development (12 votes)
- ❑ Experience development (10 votes)
- ❑ Accommodation (9 votes)
- ❑ Technology (9 votes)
- ❑ Skills and labour (8 votes)
- ❑ Partnerships (4 votes)
- ❑ Events (3 votes)
- ❑ Regulation and business cost (2 votes)
- ❑ Accessible tourism (1 vote)

Destination development
 ↳ Infrastructure
 ↳ Signage
 ↳ Sustainable 11

Industry development/support
 - entrepreneurs, innovation
 - data & research
 - investment, grants
 - share knowledge
 - case study / films
 - risk appetite 12

Marketing - regional budget
 - brand ↳ consistency } SPTC
 - story telling ↳ authority } TA 13

Accommodation
 - risk in event times
 - intensity of peaks
 - mid week 9

Experience development
 - drive yield
 - expectations of visitor
 - diversity
 - quality
 - changing visitor attitudes
 - evidence based 10

Events
 - consumer events } sustainability
 - business events } 3

Skills, resources, labor supply
 - training
 - tourism as a career
 - population implications 8

Timing - evening
 - mid-week
 - off season

Partnerships
 - external validation
 - global south Australian brands 4

Regulation and costs
 - accreditation 2

Technology / digital
 - role in amplification 9

Accessible tourism
 - wellness 1

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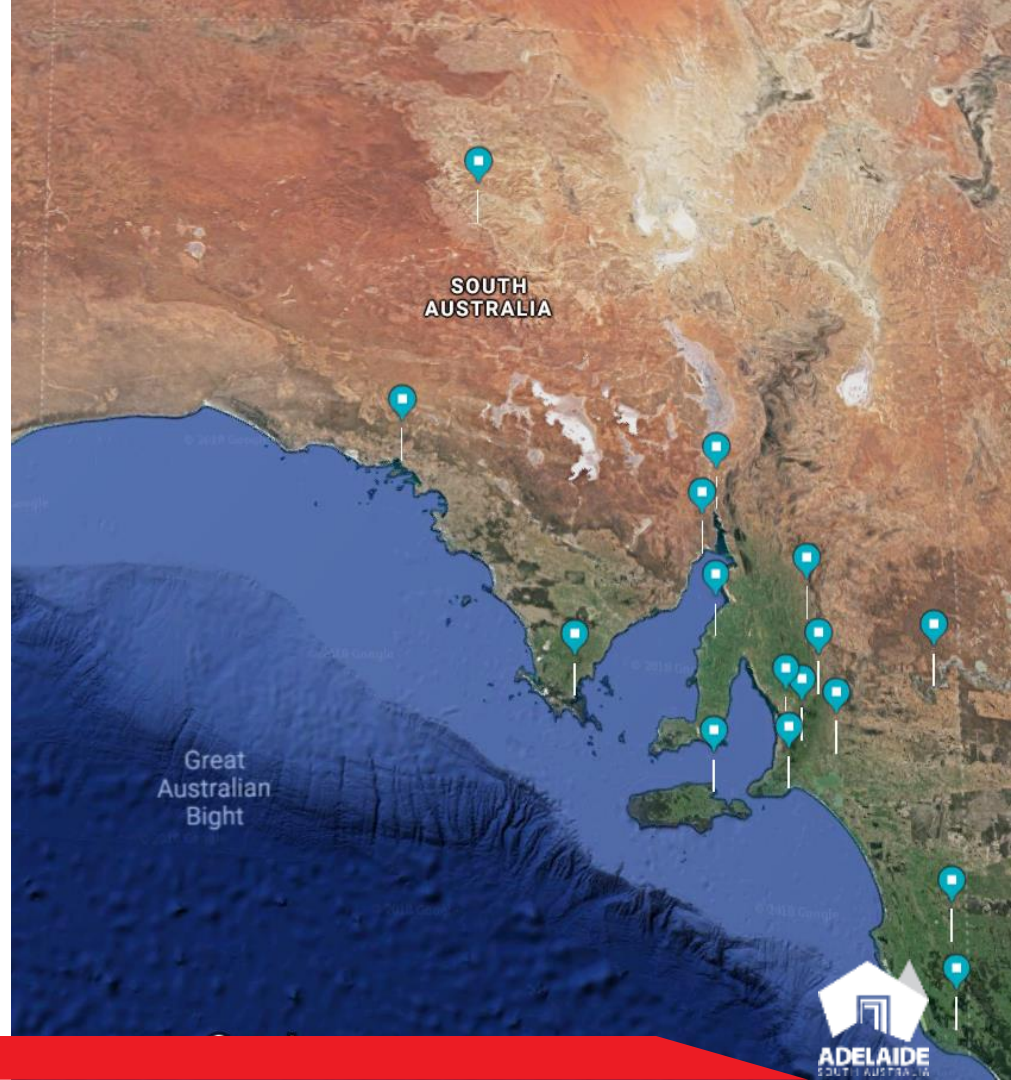
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After 90 minutes of discussion, all participants were given 4 votes to provide an indicative prioritisation of the importance of the themes discussed in driving increased performance through to 2030.

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



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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

THANK YOU.

