



South Australian Tourism Commission

THE FUTURE OF TOURISM IN SOUTH AUSTRALIA -PORT AUGUSTA-

January 2019



AGENDA

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



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



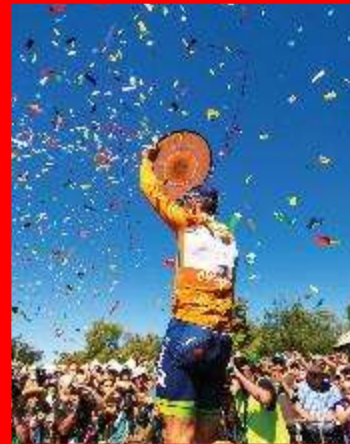
SUPPORTING WHAT
WE HAVE



INCREASING THE
RECOGNITION OF THE
VALUE OF TOURISM



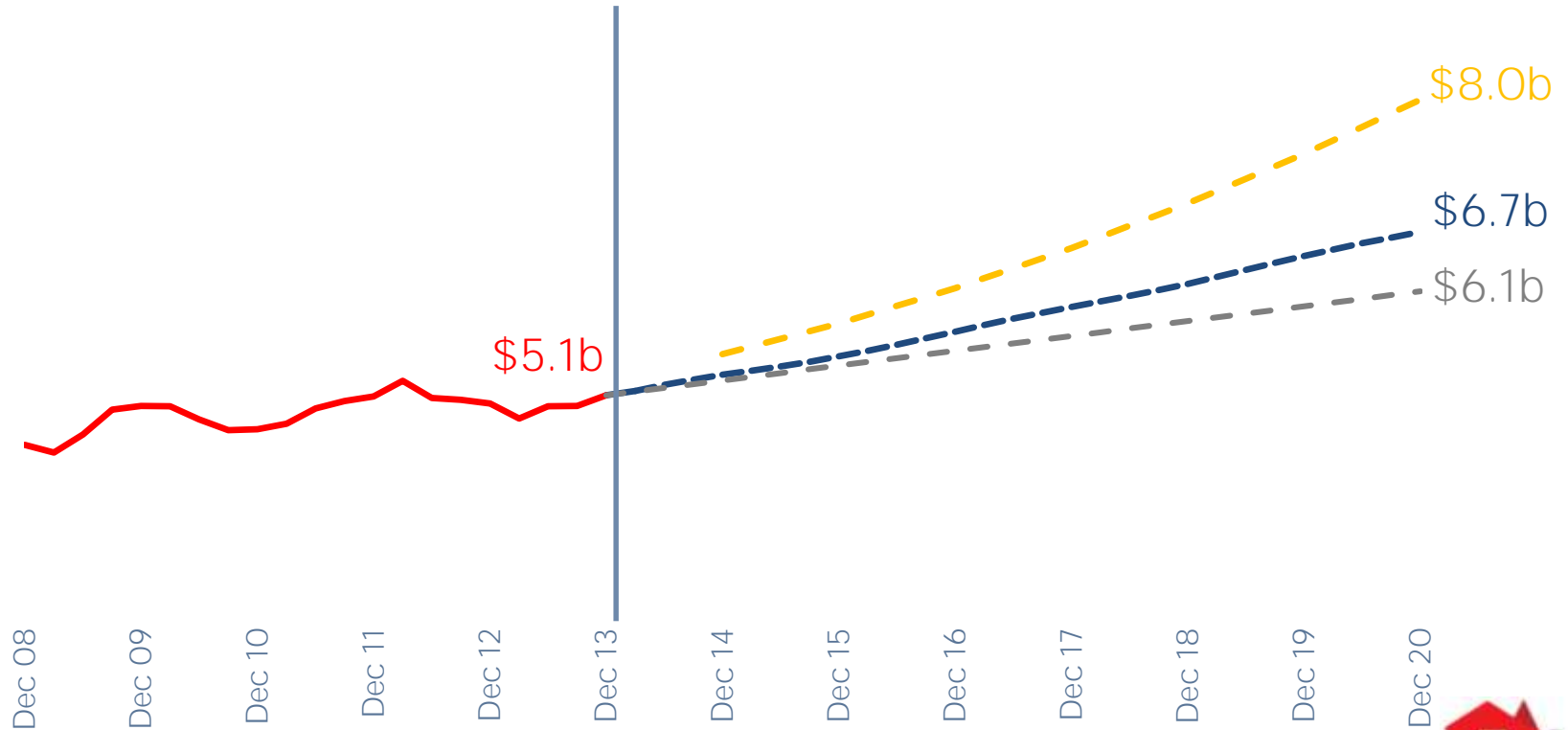
USING EVENTS TO
DRIVE VISITATION



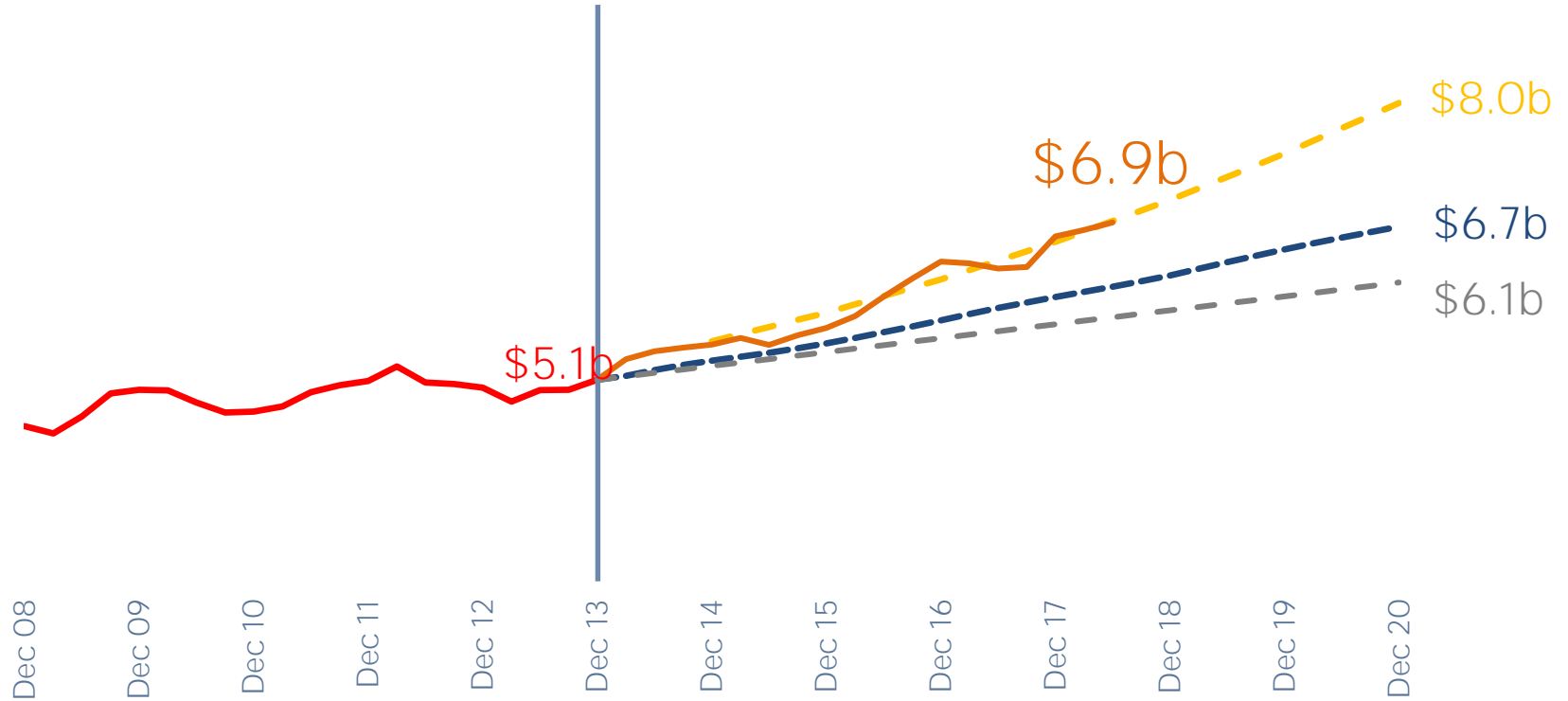
SETTING THE SCENE



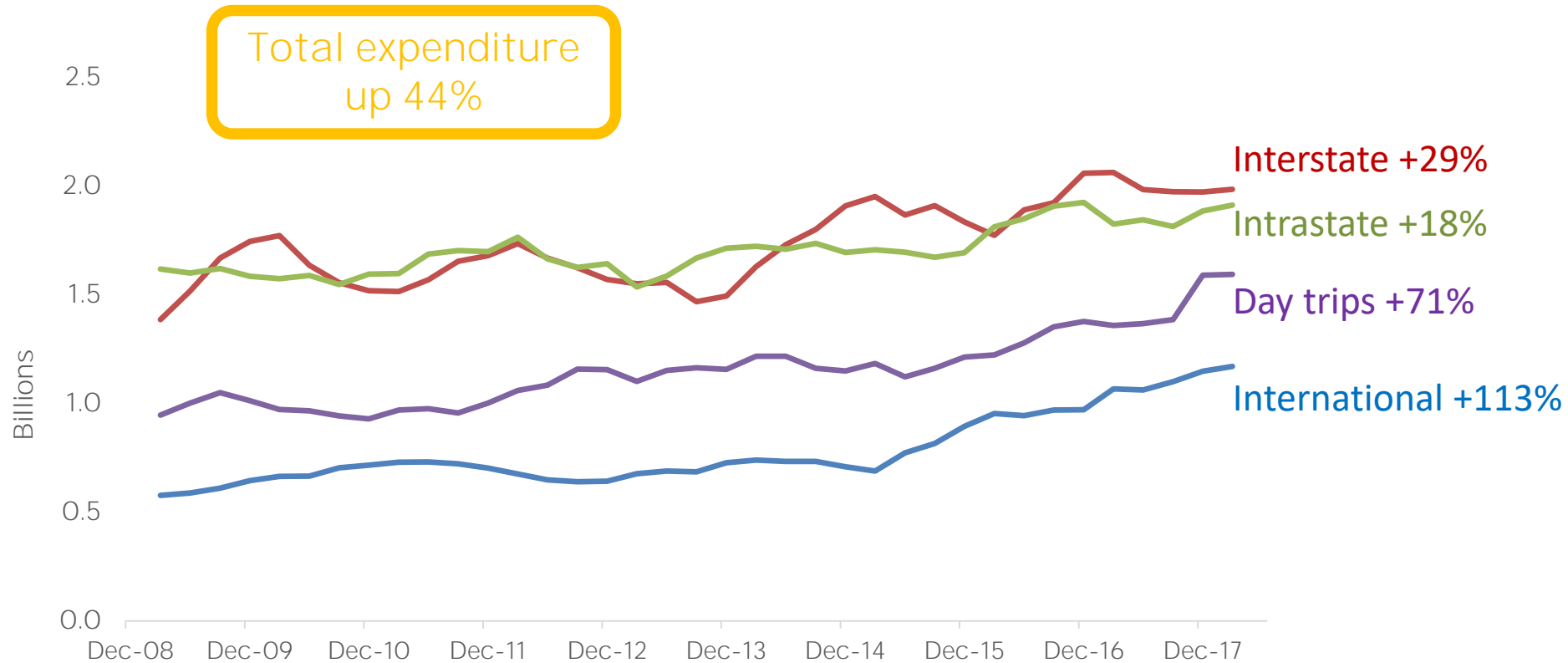
SETTING THE SCENE



SETTING THE SCENE

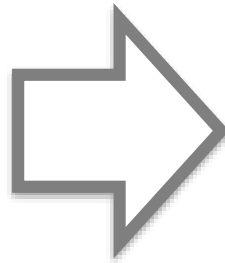
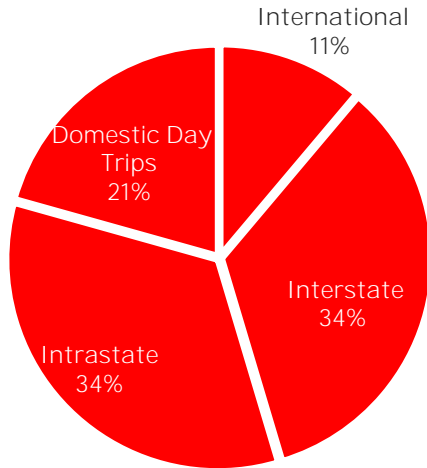


10 YEAR OVERVIEW OF EXPENDITURE

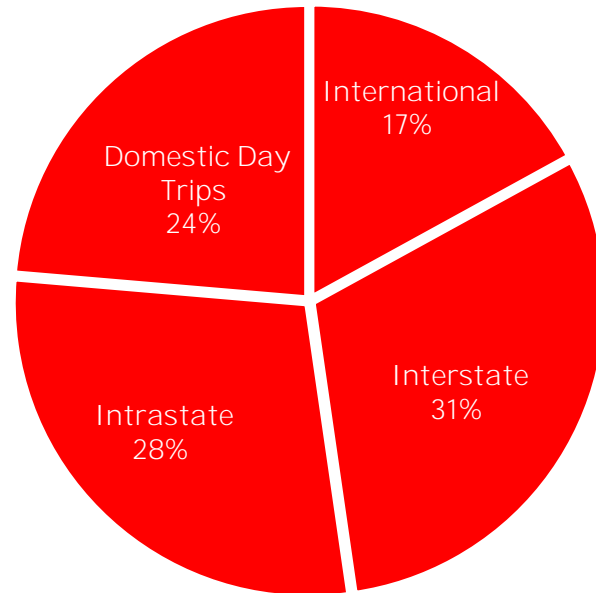


THE CHANGING VISITOR MIX

2008



2018



OUR CHANGING MARKETS

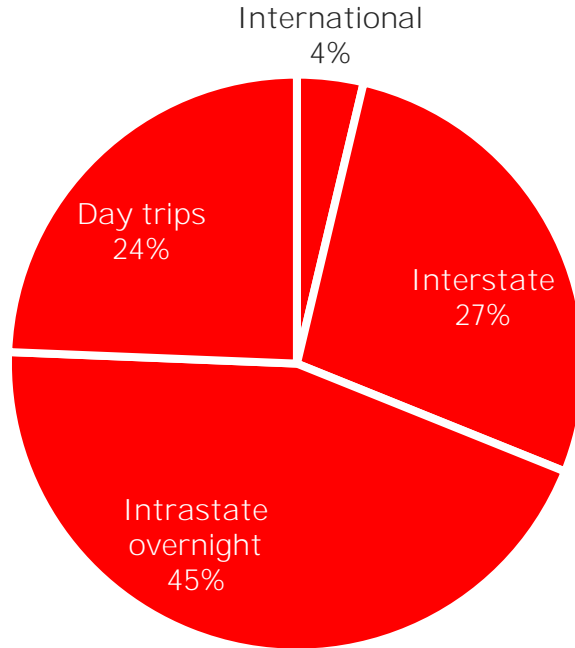
Our **INTERNATIONAL** market has doubled in 10 years, with a movement from western to eastern markets. Expenditure from Asia has tripled, North America has increased by 70% while the European markets have remained consistent.

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%.

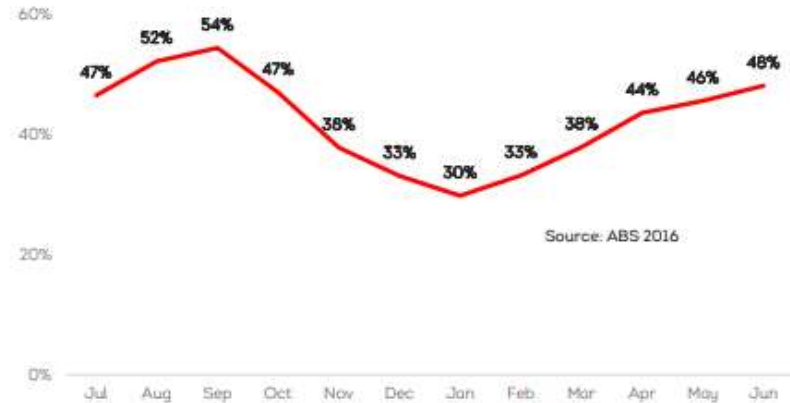
FLINDERS AND OUTBACK TODAY

Visitor Expenditure



\$431m

MONTHLY OCCUPANCY RATES YEAR END JUNE 2016 - FLINDERS RANGES AND OUTBACK



SUB REGIONS -

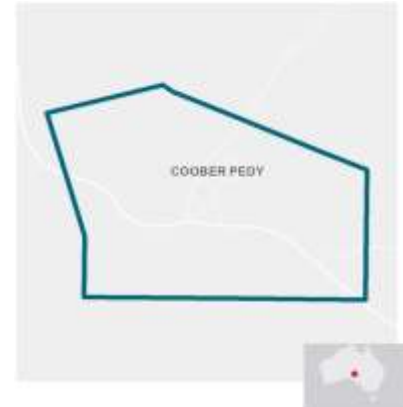
Port Augusta
\$77m



Port Pirie & Districts
\$68m



Coober Pedy
\$38m+

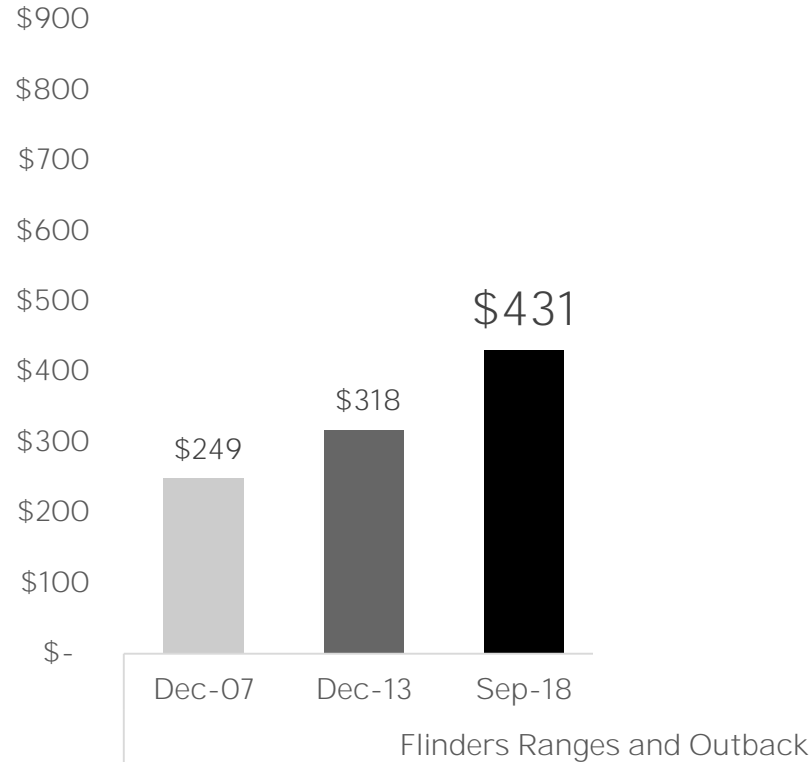


Flinders Ranges DC
\$34m+



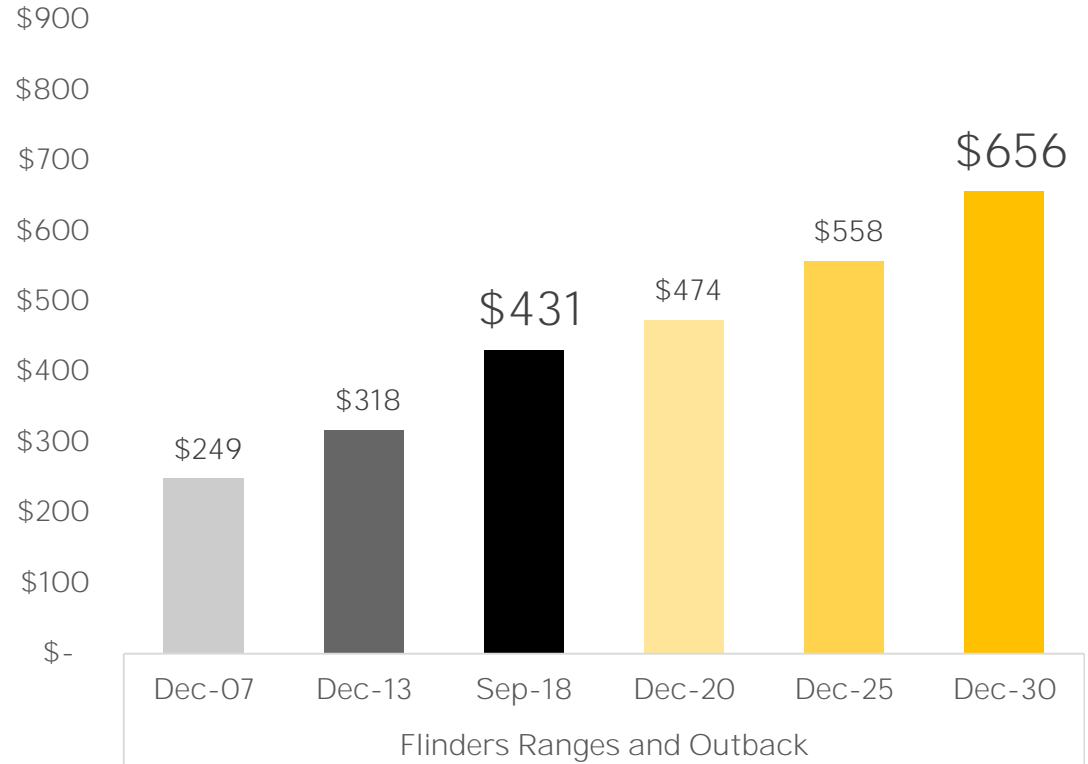
REGIONAL PERFORMANCE

- The Flinders Ranges and Outback has grown from \$249m in 2007 to \$431m today, a growth of 76%.



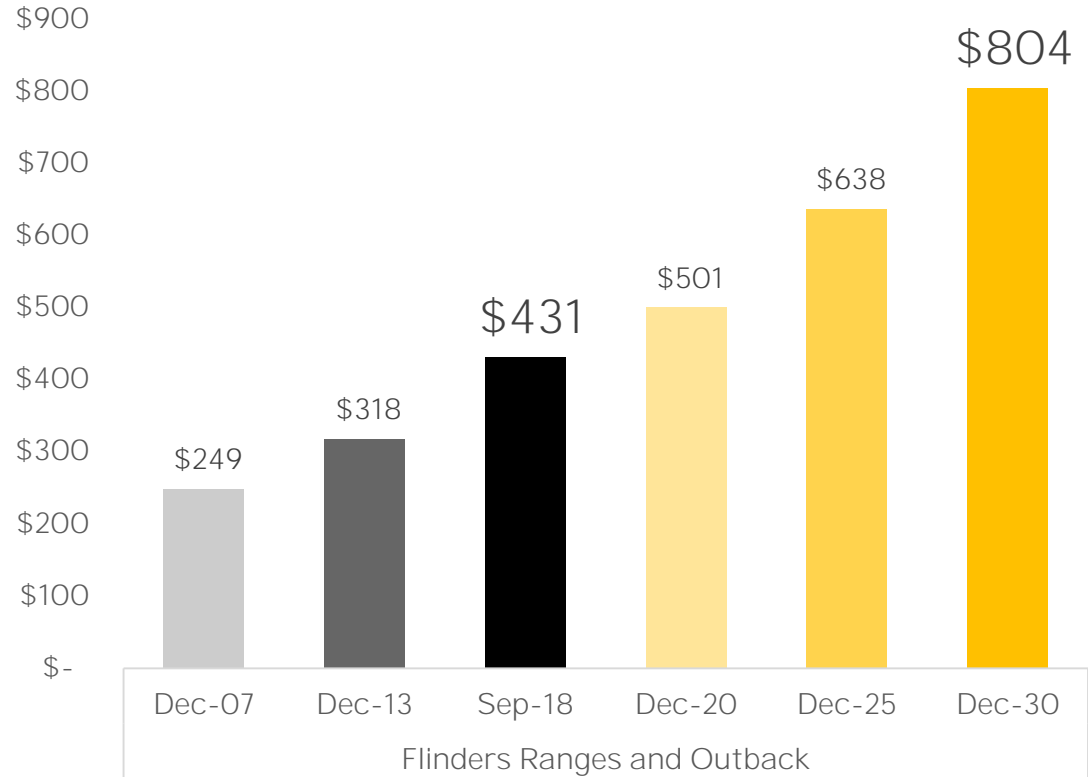
CONTINUING THE TREND

- Current rate of growth through to 2030 yields \$656m to the region



REGIONAL TARGET

- ❑ Set an ambition to grow the region to \$804m by 2030.



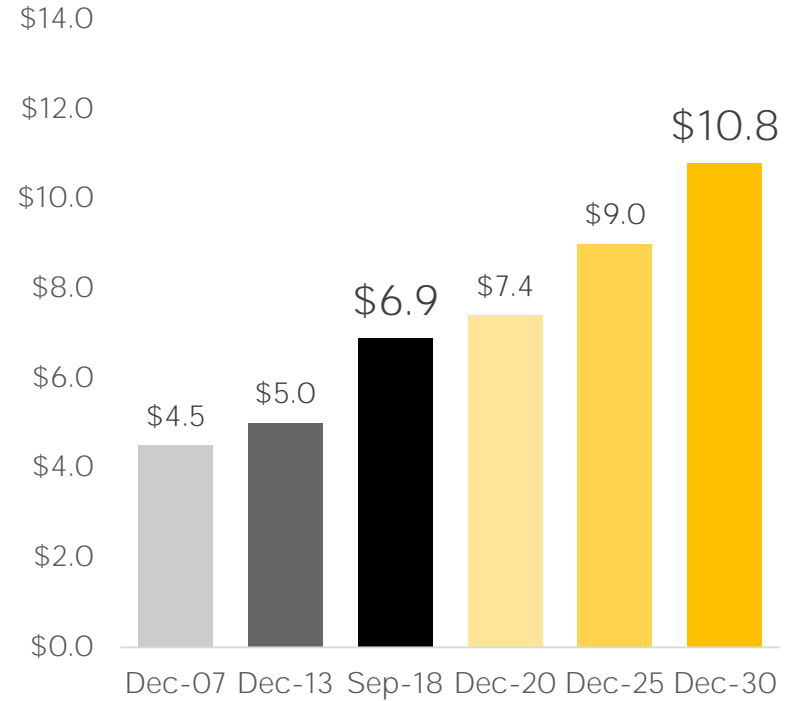
WHAT DOES THAT MEAN?

- ❑ \$373m growth by 2030 is an additional \$31m in visitor expenditure generated every year.
- ❑ What this means for the region by 2030:
 - VOLUME
 - YIELD
 - Mix of volume and yield



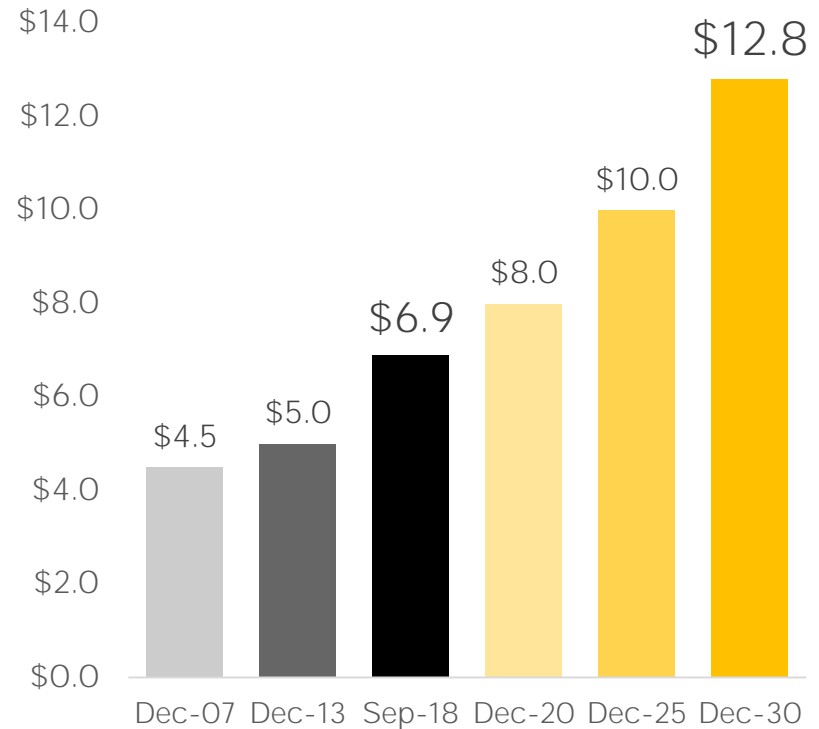
SOUTH AUSTRALIA HISTORICAL TREND

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



SOUTH AUSTRALIA TARGET

- ❑ Achieving \$804m in visitor expenditure in your region will contribute to an overall result of \$12.8b in visitor expenditure by 2030.



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

- Competitive experiences
- Digital technology
- Connection and collaboration
- Recognition of the value of tourism
- Air access and infrastructure

TOURISM REGION

REGIONAL VISITOR STRATEGY

- Promotion of immersive wildlife experiences, expansive natural landscapes, unique accommodation and local characters
- Focus on, and grow, hero events for the region.
- Collaborate with cross-regional events
- Strong collaboration themes including cross/border, Explorer's Way and inter-region.

LOCAL ISSUES

MEET THE MINISTER

- Signage as a regional issue
- Lack of connectivity across the region
- Public amenity upgrades
- Costs of doing business
- Need for increased tourism representation and advocacy
- Lack of toilets along national highways

INFOGRAPHIC AND WHITE PAPER



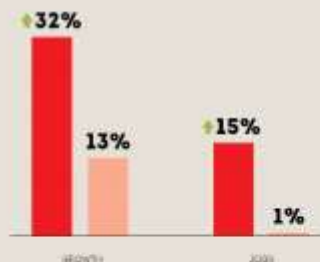
THE SOUTH AUSTRALIAN VISITOR ECONOMY

DRIVING EXPENDITURE AND JOBS

THE STORY SO FAR

- VISITOR EXPENDITURE UP **\$1.7B (+32%)**
- TOURISM JOBS UP **5,000 (15%)**
- OUTPACING OVERALL SOUTH AUSTRALIAN GROWTH
- DRIVING JOBS AND ECONOMIC ACTIVITY IN REGIONS, REACHING **\$2.8B**
- SUCCESS DRIVEN BY STRONG INVESTMENT IN MARKETING AND EVENTS, COUPLED WITH RECORD GROWTH IN **AVIATION**
- SUPPORTING RECORD LEVELS OF **PRIVATE INVESTMENT**

VISITOR ECONOMY DRIVING GROWTH SINCE 2013



■ VISITOR ECONOMY
■ OVERALL SA ECONOMY

THE 2030 AMBITION

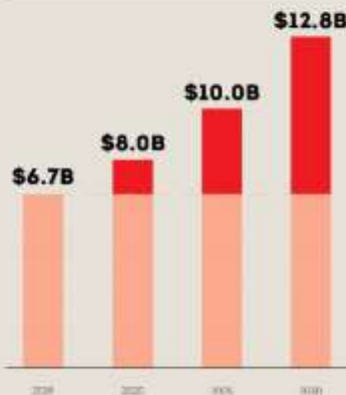


\$12.8B BY 2030



16,000 NEW JOBS

OUR GOAL



WHAT WILL GROW?



REGIONAL SOUTH AUSTRALIA



\$5.1B
BY 2030

LEISURE EVENTS EXPENDITURE



\$750M
BY 2030



TOURISM.SA.GOV.AU

ACCELERATING VISITOR EXPENDITURE AND JOB CREATION THE SOUTH AUSTRALIAN VISITOR ECONOMY

\$12.8B AND 16,000 NEW JOBS BY 2030

THE CONSULTATION


 **5,000** KILOMETRES TRAVELLED

 **100** SURVEY RESPONSES

 **560** DIRECTLY PARTICIPATED

 **17** MEETINGS WITH KEY INDUSTRY & GOVERNMENT GROUPS

 **1,100** VOTES CAST TO DETERMINE STRATEGIC PRIORITIES

 **90%** AGREED SA SHOULD PURSUE AMBITIOUS TARGETS

37 HRS OF WORKSHOPS AT
16 LOCATIONS



THE STRATEGIC PRIORITIES

1

MARKETING

2

EXPERIENCE DEVELOPMENT

3

COLLABORATION

4

INDUSTRY DEVELOPMENT

5

LEISURE & BUSINESS EVENTS

6

PROMOTE THE VALUE OF THE VISITOR ECONOMY

ADVOCACY AREAS

PUBLIC INFRASTRUCTURE

ACCESS, SIGNAGE, TELECOMMUNICATIONS & AQUATIC

LABOUR & SKILLS

STREAMLINING REGULATION



TOURISM.SA.GOV.AU

KEY THEMES RAISED

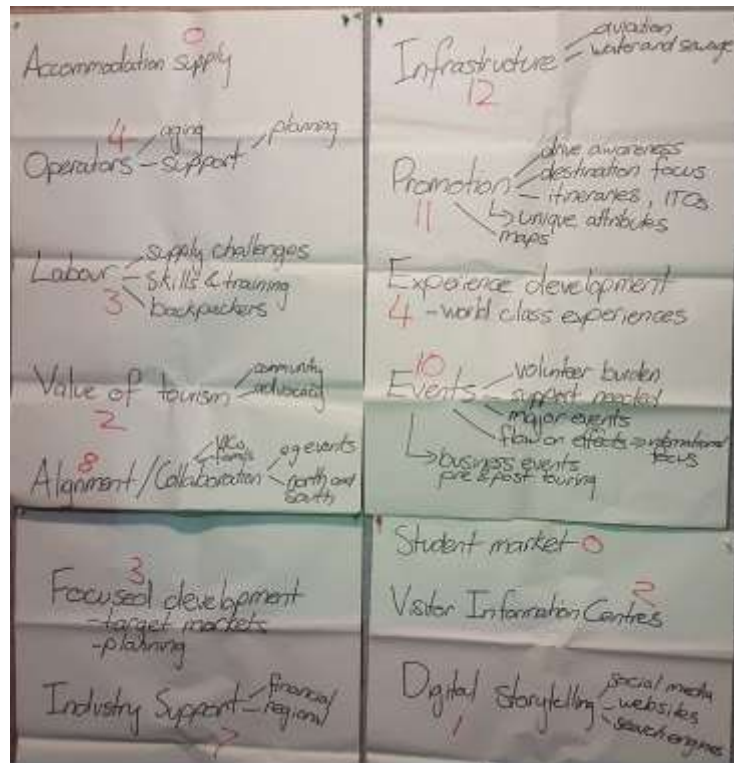
Cooper Pedy, 6th December 2018

Top 5:

- ❑ Infrastructure (12 votes)
- ❑ Promotion (11 votes)
- ❑ Events (10 votes)
- ❑ Alignment and Collaboration (8 votes)
- ❑ Industry Support (7 votes)

4 Votes or less:

- ❑ Experience Development, Operators, Labour and Skills, Focused Development, Visitor Information Centres, Value of Tourism, Digital Story Telling, Accommodation Supply, Student Market



After 60 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.



YOUR OWN PRIORITIES



SUMMARISING
OUR DISCUSSION

KEY THEMES RAISED

Port Augusta, 30th January 2019

Key themes:

- ❑ Value of Tourism (23 votes)
- ❑ Industry Support (20 votes)
- ❑ Marketing & Promotion (18 votes)
- ❑ Infrastructure & Access (16 votes)
- ❑ Collaboration (14 votes)
- ❑ Experience Development (13 votes)
- ❑ Labour and Skills (7 votes)
- ❑ Events (4 votes)



After 60 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





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]