



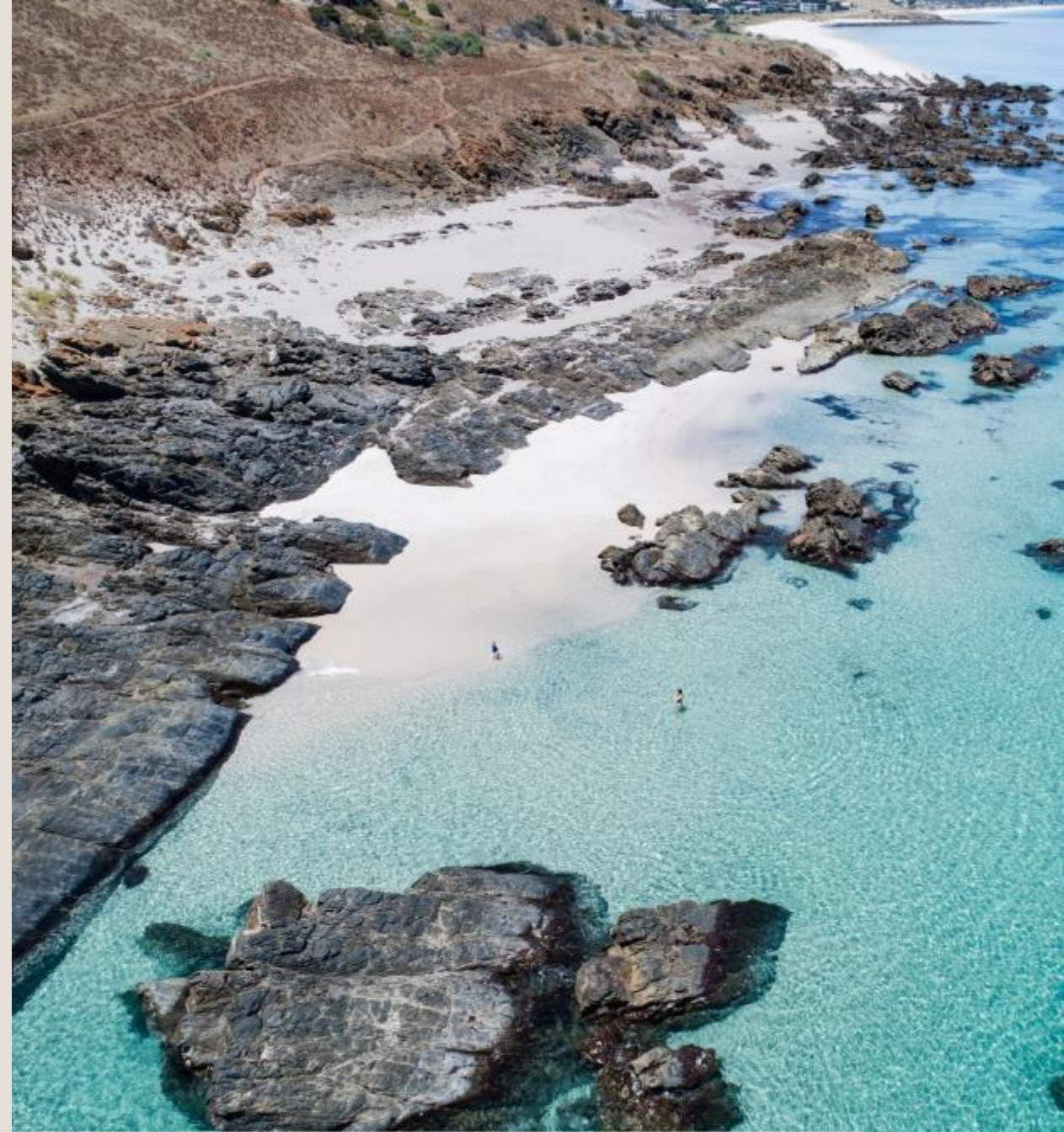
SOUTH AUSTRALIAN 2025 REGIONAL VISITOR STRATEGY

4 May 2021



WHAT CONSUMERS ARE LOOKING FOR?

- Shorter trips and weekend getaways with a focus on intrastate travel
- This is due the uncertainty of being able to confidently plan and book international or domestic holidays.
- Intrastate travel provides certainty, convenience, safety and security, piece of mind and control.
- Travellers looking for a sense of prolonged normalcy before they commit to large scale travel plans.
- People still likely to wait for their next 'big' holiday, opting for shorter (and less expensive) getaways in the interim.





INSIGHTS | FAVOURING CAR TRAVEL

- Provides the driver with a greater sense of control (e.g. can choose who they travel with, where they go and when they leave) which is highly relevant.
- Driving a car also allows the driver to return home at anytime should the need arise (e.g. someone gets sick, restrictions tightening, borders closing).
- Taps into a desire for adventure and discovery beyond the rational benefit of control, the idea of a road trip in SA also taps into the need for a semi structured adventure and exploration.
- Time in transit (i.e. long-haul vs short haul) also factors into this as most would prefer to avoid long haul trips where they are exposed to people whom they don't know (and therefore potentially can't trust) in a confined space.

STRATEGIES TO GROW VISITOR ECONOMY



THE SA VISITOR ECONOMY | DRIVING DEMAND

\$12.8B

EXPENDITURE
TARGET BY 2030

16,000

ADDITIONAL JOBS

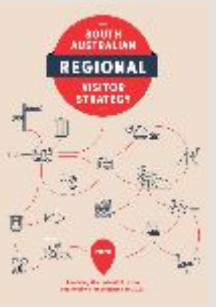
STRUCTURE

STRATEGIC FRAMEWORK

**SOUTH
AUSTRALIAN
VISITOR
ECONOMY
SECTOR PLAN
2030**



**REGIONAL
VISITOR
STRATEGY
2025**



**REGIONAL
TOURISM
ORGANISATI
ON PLANS**



**BUSINESS
PLANS OF
INDIVIDUAL
OPERATORS**



**COUNCIL
TOURISM
PLANS**

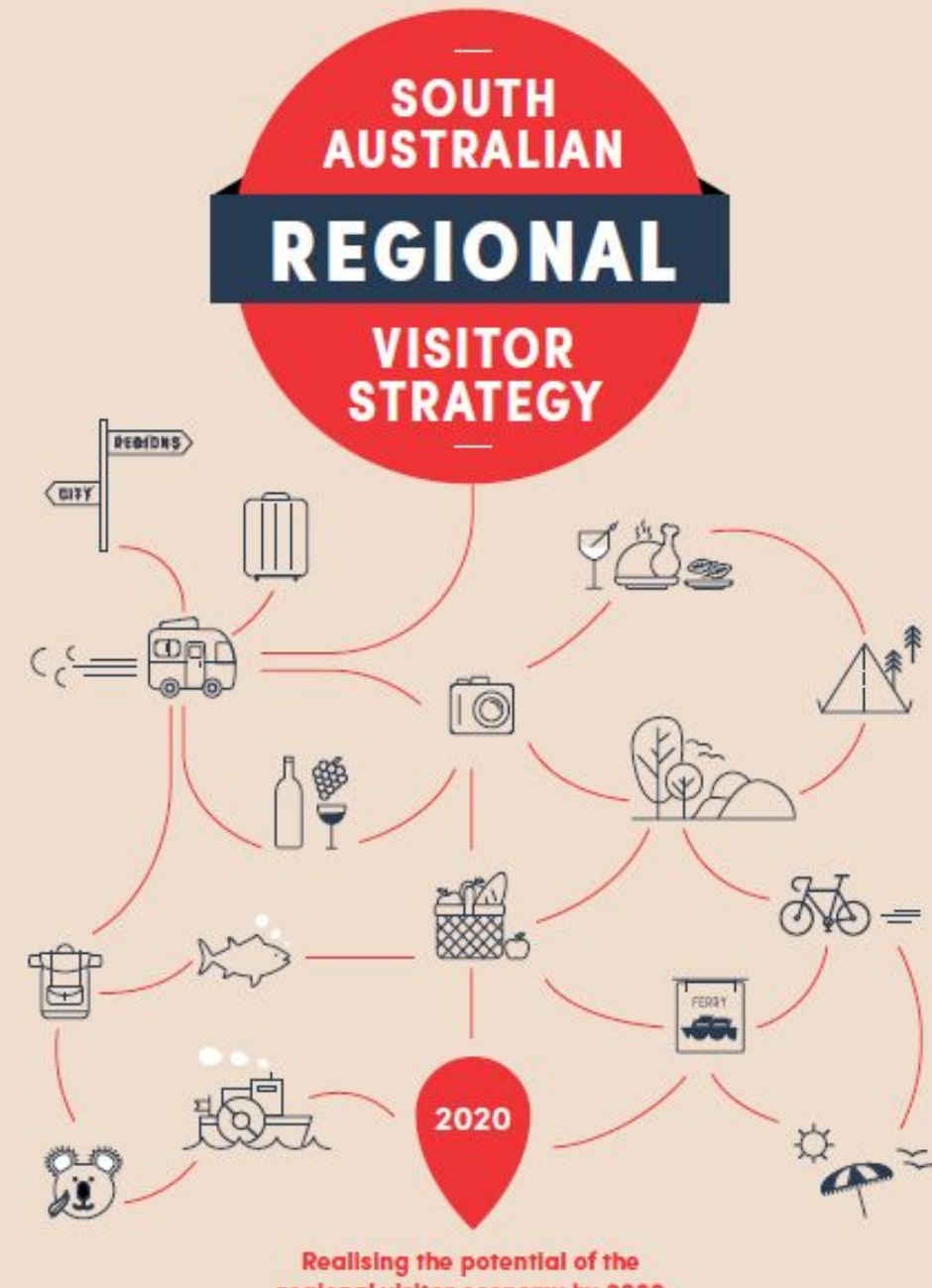


**SATC
CORPORATE
PLAN**



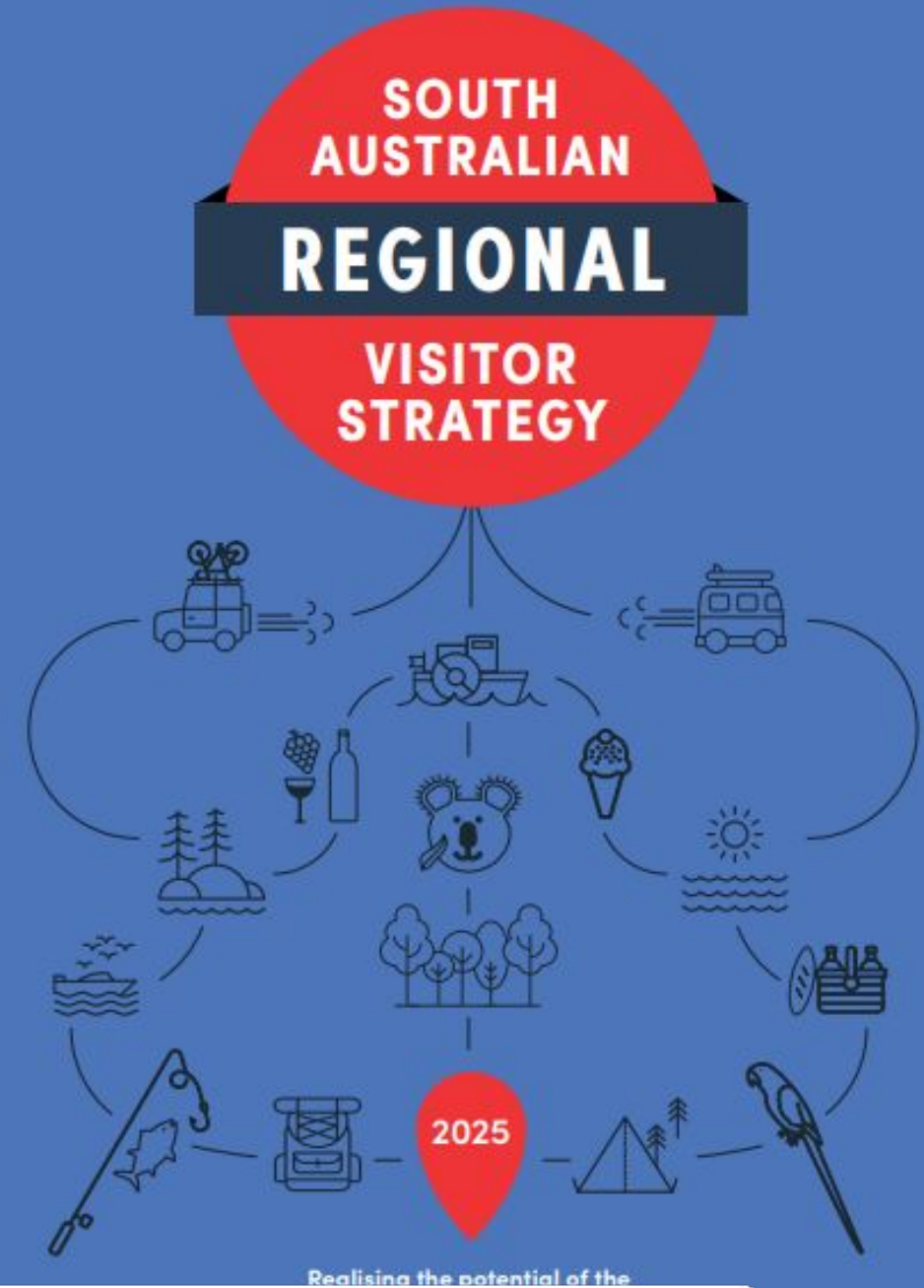
WHAT IS THE REGIONAL VISITOR STRATEGY?

- First initiated by the RTO Chairs organisations in 2017
- RVS Steering Committee
 - Independent group included LGA, RTOs, RDA, TiCSA and SATC
- The 2020 RVS was launched in June 2018
- A strategy developed by the regions, for the regions.
- Supports 2020 target of \$8B (\$3.5B for regions).
- Target reached in December 2019.



2025 RVS

- 2025 SA RVS was launched in March 2021
- The document identifies key pillars and priorities that will support growing the visitor economy to \$4 billion by 2025.
- More than 48 % of South Australia's total visitor expenditure is spent in regions, up from 44% at the end of 2019 (pre drought, bushfires, COVID-19).
- The 2025 RVS was built on the success of the 2020 strategy.



Realising the potential of the

CONSULTATION PROCESS

- In June 2020 planning framework was developed.
- Key focus was to ensure the 2025 RVS aligns with the South Australian Visitor Economy Sector Plan 2030.
- Consultation process included
 - online survey for industry (August)
 - 624 respondents completed the survey
 - 16 regional workshops conducted across all 11 regions with various stakeholders.



STRATEGY DEVELOPMENT

- Developing the individual chapters for each of the 11 regions involved extensive one-on-one feedback from each RTO.
- Each RTO was provided a minimum of 3 rounds of additional feedback as chapters were being developed.
- Final feedback from stakeholders was received in January 2021, and the 2025 RVS was finalised.
- 5,000 copies of the document was printed
- Launch of the 2025 RVS was March 2021.



STRATEGIC PILLARS

MARKETING



**EXPERIENCE
& SUPPLY
DEVELOPMENT**



COLLABORATION



**LEISURE
& BUSINESS
EVENTS**



**INDUSTRY
CAPABILITY**



**PROMOTING
THE VALUE
OF TOURISM**



REGIONAL PRIORITIES

- Each region identified 20 -30 priorities that sit under one of the 6 strategic pillars.
- Under CONSULTATION,
- **Visitor Information Servicing** continues to rapidly evolve as consumers seek timely, inspiring, and practical information via multiple channels during their trip. In addition to face to face information delivery, the use of digital platforms and mobile phones is now a critical part of the visitor servicing mix. All regions in collaboration with councils and industry stakeholders, agreed that their visitor servicing goal is to encourage visitors to stay longer, do more and share their great experiences.



WORKING BETTER WITH SATC

- ATDW listing up to date
- Improve digital presence #seesouthaustralia
 - Facebook
 - Website
 - Instagram
- Share local stories, images, videos
- Keep your RTO up to date with what is new
- Sign up for Tourism Industry Update
- Stay relevant



VISITOR INFORMATION CENTRES

- VIC Captured in the 2025 SA Regional Visitor Strategy
- Focus on visitor servicing
 - you know your region better than anyone else
 - Share your stories as a local, as a place, as an experience
 - Digital uptake is critical, online bookings has never been more relevant
- There are 11 RTOs across SA – good source of information
- Work with your regional tourism organisation representative.
- Role of local government is significant to help achieve tourism outcomes
- Reach out to SATC direct or through your RTM if you have any question

ADDITIONAL ECONOMIC BENEFIT FOLLOWING ADVICE RECEIVED AT A VIC



51% felt they would
definitely stay longer
and spend more



\$216 unplanned
additional spending
per person



239,000 additional
benefit from survey
Respondents



- Despite declining usage, VICs do have a key role to influence visitors on flexible itineraries.
- 40 visitor information centres successfully recoded 2,171 response to the South Australian Accredited Visitor Information Centre Survey in February 2020
- Visitors who use a VIC add benefit and stimulus to the region, with
 - 51 per cent stay longer
 - \$216 in additional unplanned spend
 - \$239,000 in additional benefit

CONSUMER INSIGHTS | NEXT FIVE YEARS

General Consumer Trends

- Quality accommodation
- High expectations of food & wine, nature & wildlife and service
- Higher number of shorter trips
- Experience is central
- Digital as vital communications and booking channel.

COVID impacts on consumer behaviour

- Uncertainty the biggest barrier
- Car travel an opportunity
- International substitution will be limited





SOUTH
AUSTRALIA