TODAY

Tourism Trends beyond 2020

Where are we now?
Where do we want to go?
How will we get there?
Visitors aren’t who they used to be...

FROM TOURISTS TO ‘TEMPORARY LOCALS’
They want to see + do what locals love to do.

Immersive, local, personalised experiences.
Travel for their interests and passions (also happy to pay for it!). Events included!
Visitors trust what others say more than what you say about your destination...

TRUST IN ADVERTISING IN AUSTRALIA

To what extent do you trust the following forms of advertising?

#1 and #2 Word of Mouth
92% of consumers trust peer recommendations more than adverts
Your visitors use many and various, convenient sources to find travel information + engage with travel brands.

Amy had **419 digital moments** researching her trip over 2 months

- **5 videos**
- **34 searches**
- **380 web page visits**


Mobile has fractured the purchase journey

Mobile allows travelers to be spontaneous once they arrive.

85% of leisure travelers decide on activities only after having arrived at the destination.

1/2 of international travelers use smartphones to look for things to do once they’ve arrived at a destination.
Social Media Chat + Messaging

DESTINATION MARKETING REALITY
HOW WE MARKET A DESTINATION HAS CHANGED...

A destination’s brand is NOT a logo. It’s what visitors say about your destination.
This is the visual identity for wider Tourism Region.

This is NOT Goyder’s destination brand.

Your stories are your brand.

THE SUM OF ALL EXPERIENCES SOMEONE HAS WITH A DESTINATION

THE SUM OF ALL THE STORIES SOMEONE HEARS
Other People's Stories about your destination

VISITORS = NEW BRAND CUSTODIANS
Back in its heyday, when Burra had a larger population than Melbourne, there were over 10 hotels, much like this one! Why not stop in for a bite to eat in one of the few hotels that are left, you may even hear some great stories from some of the locals! #burrahistoric #museum CIF
Travellers become destination advocates when they have exceptional experiences.
Successful destination marketing is less about advertising, and more about leveraging brand advocates.
Successful destinations aren’t limited to council boundaries. They instigate cross-boundary collaboration + partnerships to grow their visitor economy.
KEY EXPERIENCES

Food, Wine + Beverages
History, Heritage, Arts, Culture
Outdoor + Adventures
Events

Stronger together.

SUPPORTING

Signage
Roads
Parking
Public Toilets/Bins
Parks/Reserves/Trails
Museums/History Walks
RV + Caravan Parks
Public Art
Community Events
Town Placemaking
Wifi/NBN/Mobile
5

There’s no point investing in visitor servicing or marketing activities unless you can measure ROI.

Organisation Goals

Grow your visitor economy, (Expenditure, Jobs for residents, business growth)
Organisation Goals

Marketing + Visitor Servicing Goals

Objectives

Grow your visitor economy, (Expenditure, Jobs for residents, business growth)

Brand Awareness, Engagement, Intent to travel, Leads/Bookings, Visitor Experience, Visitors Serviced, Visitor Advocacy

Measurable KPIs that achieve Marketing and Visitor Servicing Goals
Only pursue strategic + measurable initiatives

High Yield Visitors, Niche Segments + Markets

Right Story, Channel + Stage of Travel

Measure + Realign

VISITOR SERVICING reality
Financial sustainability of running VICs

35c
Of every tourism dollar is invested in operating a VIC

ARTN Local Government Spend on Tourism Jan 2017
90% of councils agree that Tourism offers future economic development opportunities for their local area.
Financial sustainability of running VICs
Visitors don’t need VICs for travel information anymore...

Amy had **419 digital moments** researching her trip over 2 months

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87% of these digital moments happened on mobile

If visitors happen to find a Visitor Centre, they will probably wander in, why not? But they no longer see it as a must do when they arrive. That's a fundamental change.

- DESTINATION THINK

Financial sustainability of running VICs
Visitors don’t *need* VICs for information anymore...
Bricks and Mortar VICs still add value..
93% of people visited attractions + experiences they otherwise wouldn’t have without visiting a accredited VIC

1 in 5 Visitors stayed longer after visiting an accredited VIC
Financial sustainability of running VICs
Visitors don’t *need* VICs for information anymore...
Bricks and Mortar VICs still add value..
Servicing model needs to evolve based on how visitors find info
OPPORTUNITY

OFFLINE

DREAM | PLAN | BOOK / CONVERSION | PRE-TRAVEL | IN DESTINATION | POST-TRAVEL

ONLINE

WHERE ARE WE now?
CURRENT STATE OF PLAY

Clare Valley Tourism Region Expenditure (2016-2018)
Source = SATC Clare Valley Tourism Regional Profile

Slightly upward trend...
SATC reported that CVTR has achieved $89M Dec 2018 – 90% of the 2020 Target for the CVTR is ($99M)
Source = SATC Clare Valley Tourism Regional Profile

Domestic – 98%
Visitors – 178K
Nights - 395K

International – 2%
Visitors – 4K
Nights - 39K

Tourism Employment
Source = Tourism Research Australia Regional Satellite Account for Clare Valley 2016-2017

Jobs are slowly growing...
Burra / Goyder VIC
Source = Regional Council Goyder

STRENGTHS,
CHALLENGES +
OPPORTUNITIES
**STRENGTHS**

Growing South Australian Visitor Numbers
Active, successful associations + government bodies – brand, marketing
Visitor Experiences - Depth and breadth of tourism product, CV wine brand, 40+ wineries, enriching heritage, Riesling Trail
Access – Proximity to Adelaide, Barossa, Yorke Peninsula + Flinders Ranges
Landscapes + Natural Beauty – Vineyards/Bare Hills/Agriculture
VIC – 2 Professionally run Centres with Knowledgeable staff

**CHALLENGES**

**Governance + Resourcing** – duplication/working in silos/lack of cut through/no single entity.
**Visitor Experience + Product Development** – staffing, under-investment by private industry, aging population, higher end accommodation
**Brand + Marketing** – Lack of skilled staff, strategic planning, measurement, single ownership, brand activation, underperforming digital assets, advocacy, lower yield visitor focus
**Infrastructure** – toilets/bins/signage/parking/placemaking in some areas
**Visitor Servicing** – lack of digital focus and regional collaboration
Governance + Collaboration – Single Entity/Consolidation
Strategy – Industry Education, Resourcing, Tourism KPIs + Reporting
Stakeholder Activation and Education
Tourism Assets – Hero/Private, Events, Policy, Funding
Access – Roads, Cruise, Cycling
Infrastructure – Signage, Information Bays, Placemaking, Roads, Parking
Marketing, Communications + Visitor Servicing – High Yield + Niche Interest/Markets
VISION + STRATEGIC GOAL

VISION
To be recognised as an authentic and quintessential Australian destination renowned for its rich and immersive wine and food, heritage, cultural and outback experiences.

STRATEGIC GOAL
To work collaboratively with all levels of industry to build a thriving and sustainable visitor economy for the residents and businesses in the Clare Valley Tourism Region.

HOW WILL WE MEASURE SUCCESS?
METRICS + KPIS

Visitor Expenditure
Industry Sentiment, Participation + Engagement
Visitors – Visits, Nights, ALOS, Day Trips
Visitor Sentiment

VISITORS, MARKETS + BRANDING?
The Region’s tourism experiences aren’t for everyone.

It is only for those who love what the Region has to offer.

CVTR HIGH YIELD VISITORS

- Affluent families, school age children
- Affluent couples, No kids, 25 – 35
- Affluent couples, No kids, 55 +

Domestic Intra + Interstate priority short term
NICHE INTERESTS

Food + Wine
Cycle
Sport
Nature Based
Art, Culture + Heritage
Wellbeing

NICHE MARKETS

Caravan + Camping (High Yield Segment)
Weddings
Cruise
Business Events
PRIORITY AREAS

AREAS OF EMPHASIS

Regional Awareness
Seasonality
Dispersal
Ensure strong governance and clear strategic direction to enable all stakeholders to effectively collaborate to grow the Region’s visitor economy.
KEY ACTIVITIES

Review + evolve the Region’s resourcing and governance to successfully implement plan

Industry networking + comms

Coming together is a beginning,
Keeping together is progress,
Working together is success.

- HENRY FORD

The biggest challenge, but also biggest opportunity for the Region!
Drive awareness and appeal of the Clare Valley Tourism Region as a travel destination, inspiring more people to visit, stay longer, spend more and disperse throughout the Region.
"We wished we had allowed more time. We didn't realise there was so much to see"

**KEY ACTIVITIES**

- Brand activation - storytelling
- Single + unified consumer channels + hashtags – social/eDM/blog
- 12 month Content + Marketing Calendar
- Regional Visitor Guide
- Leverage SATC – famils/media/campaigns
- Increase CVTR stories + content on 3rd Party Websites
- New Photos + Video Assets
KEY ACTIVITIES

Burra Passport Trail + Riesling Trail Marketing Support
Partnership Marketing
Niche Segment/Interest Projects - Food + Wine, History + Heritage, Arts + Culture,
Cycle, Sport, Caravan and Camping, Weddings, Business, Cruise
Ongoing, strategic reporting

3 VISITOR SERVICING
Provide appropriate and relevant visitor information for the Region’s High Yield Visitor Persona’s and Niche Interest and Market segments when and where they expect it.

**KEY ACTIVITIES**

- Review current Visitor Centre Operations (inc. Legatus Report)
- United Visitor Servicing for whole Region
- New Visitor Servicing Plans – Measurement, Face to Face, Online Rep, Online Visitor Servicing, Outreach, Collateral Brand Alignment, Local Engagement
- Update Information Bays, Other VIC’s, Events, Online Listings
Use events as a trigger to visit the Clare Valley Tourism Region year round.
KEY ACTIVITIES

Support existing events via Marketing
Attract new tourism events
Attract business events
Attract relevant sporting events
Leverage major events

INFRASTRUCTURE + EXPERIENCE DEVELOPMENT
Support the development and expansion of experiences via relevant product development and infrastructure initiatives, to grow market share of the region’s HYVP’s AND support visitors to have positive, memorable experiences.

EXPERIENCES

History + Heritage – More Immersive Hero Products (eg Passport Trail), new SA Heritage strategy, Copper Triangle
New Accommodation – land is needed 1st!
Hospitality Careers Pathway
Food, Wine + Beverages – attract/expand/paddock to plate
Art + Culture – new Art Gallery, support existing, indigenous
Nature Based – Activate Spring Gully/Redbanks, extend cycle connectivity, new operators, Outback
INFRASTRUCTURE

Signage
Car Parking
Public Amenities maintained/activated – Toilets/Bins/RV Campgrounds/Parks Trails
Placemaking – Clare, other villages, trails
Digital Connectivity – WIFI, Mobile Network, NBN
Roads Funding
Positive Council Policy

INDUSTRY CAPABILITY

6
Advocate and encourage visitor experiences in Clare Valley Tourism Region to deliver the best quality experience for visitors.

**KEY ACTIVITIES**

- Industry Training – Digital Marketing, Customer Experience
- TICSA - Accreditation, Awards
- Connect with Grants
- SATC Support – Product Dev, Trade, China, Cruise
Communicate with residents, local businesses, community groups, council staff, elected members and tourism industry to help them understand the contribution of the Visitor Economy to the Clare Valley Tourism Region.
**THE VISITOR ECONOMY**

Strong Visitor Economy
= More jobs + opportunities for CVTR residents
= More sustainable CVTR communities

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**KEY ACTIVITIES**

Share + report on new Tourism Plan > All key stakeholders
Continued Regional Visitor Stats collection
Visitor Sentiment Benchmarking
Tourism ‘Good News’ Stories to Residents
ROLLING OUT IN COMING MONTHS.....

CLARE VALLEY TOURISM REGION DESTINATION MANAGEMENT + MARKETING PLAN 2019-2024