

TOURISM INVESTMENT

SOUTH AUSTRALIA

sky city

WESTWARD



ACKNOWLEDGMENT OF COUNTRY

The South Australian Tourism Commission and its collective stakeholders acknowledge Aboriginal people as the First People and Nations of the lands and waters we live and work upon.

We pay our respect to their Elders past, present and emerging. We acknowledge and respect the deep spiritual connection and relationship Aboriginal and Torres Strait Islander people have to Country.



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SOUTH AUSTRALIA: A DESTINATION EXPERIENCING GROWTH

There has never been a better time to invest in South Australia – especially in the fast growing tourism sector. The State's economy is set to ride high with the boom of its hi-tech, defence, space and trade industries.

Despite the severe disruption of COVID-19, tourism in South Australia is proving its resilience and is investing significantly to rebuild the visitor economy. As South Australia's tourism industry recovers from the impacts of the global pandemic, it is expected that there will be a substantial boost in air and cruise access, resulting in strong business confidence.

This, together with billions of dollars in public and private infrastructure spending, will see South Australia realise its full potential as a truly remarkable international destination. South Australia is the festival State, with a huge line-up of world-class events, festivals and conferences bringing in visitors from around the country and the globe.

As a key economic pillar, the State Government – through the South Australian Tourism Commission – has a clear vision for growing the visitor economy in South Australia. This vision is set out in the South Australian Visitor Economy Sector Plan 2030 and it sets targets for creating new jobs and growing visitor expenditure to \$12.8 billion by 2030. To help achieve this, we work with investors and operators who share our vision to contribute to the success of South Australia.

All of the raw ingredients for world-class tourism development are already here in our State including award-winning food and wine, accessible coastal and natural experiences, and an enviable lifestyle. The South Australian Tourism Commission assists investors and operators to facilitate sustainable tourism developments and experiences that are in keeping with its natural environment and build on the State's key strengths. Investors are already working on an excellent range of projects across the State – many of them the best of their type in the nation.

I encourage potential investors and operators to come and see what is on offer, to share our vision for tourism growth, and to be part of South Australia's bright future.

On behalf of the State Government, I look forward to working with industry stakeholders to support this sector and grow the visitor economy to its full potential.



A handwritten signature in black ink that reads "Zoe Bettison". The signature is fluid and cursive, with a long horizontal stroke at the end.

THE HON ZOE BETTISON MP
Minister for Tourism



SOUTH AUSTRALIAN TOURISM COMMISSION

The South Australian Tourism Commission is committed to growing the State's tourism industry and increasing its contribution to the South Australian economy. Tourism is big business in South Australia, creating work for locals and offering strong prospects for long-term growth. The industry contributes to the State's economic activity, generating jobs and export dollars by attracting interstate and international visitors.

The South Australian Tourism Commission markets South Australia intrastate, interstate and internationally to ensure the state is a compelling part of any Australian or international holiday.

It concentrates on developing and communicating the State's competitive strengths – good living, festivals and events, premium food and wine, and accessible natural experiences.

It secures, manages and sponsors major events that inject significant benefit to the economy and build community spirit.

The South Australian Visitor Economy Sector Plan 2030 sets the direction for the South Australian Tourism Commission to increase tourism expenditure in South Australia to \$12.8 billion by December 2030.

To help us achieve this vision, its work is guided by six strategic priorities, outlined in the South Australian Visitor Economy Sector Plan 2030:

- Marketing
- Experience and supply development
- Collaboration
- Industry capability
- Leisure and business events
- Promoting the value of tourism

Target market

The South Australian Tourism Commission has identified the Australian and international experience seekers as its main target markets.



Australian experience seekers enjoy travelling both interstate and overseas. They tend to spend more on holidays – on average more than \$2,000 per person per trip.



Domestic (24 to 54 years): Looking for a range of unique experiences when choosing a holiday destination.



International (24 to 65 years): Have visited Australia before, likely been to Sydney/Melbourne and Queensland, they are now looking for an alternative destination in Australia.



TOURISM FAST FACTS AS AT DECEMBER 2022

2022 TOURISM IN SOUTH AUSTRALIA ¹



**\$8.3 billion
in expenditure**

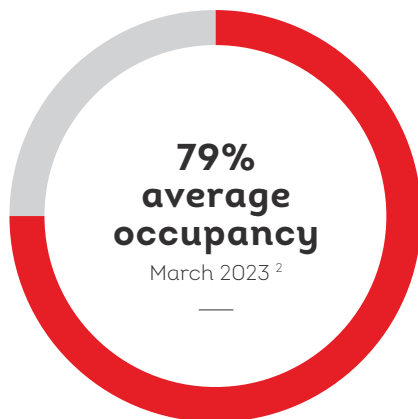


**7.3 million
visitors**



**31.4 million
visitor nights**

CBD ACCOMMODATION OCCUPANCY



March 2023 saw a strong recovery in CBD accommodation occupancy, reaching an average of 79 per cent. This was the second highest monthly average occupancy since the beginning of the COVID-19 pandemic, and the highest number of room nights occupied for a month ever in Adelaide, with an average 8,376 room nights occupied each night. The March 2023 data shows strong demand for accommodation on the back of the growing interstate and international markets.

VISITATION TO SOUTH AUSTRALIA

2.6 million visitors

Staying **12.6 million nights**

TRAVEL WITHIN SOUTH AUSTRALIA

4.5 million travellers

Staying **13.3 million nights**

SOURCES

¹ International Visitor Survey & National Visitor Survey December 2022.

² STR Data March 2023.

TOURISM EMPLOYMENT

In 2020-21 tourism directly employed 37,300 people in South Australia.¹

ECONOMIC CONTRIBUTION OF TOURISM COVID UPDATE

Tourism's contribution to South Australia's Gross Value Added (GVA) for the year 2020-21 was estimated to be \$2.3 billion. This represented 2.1% of SA's total GVA. Due to the impacts of the pandemic, this decreased from the \$2.9 billion contributed from tourism in 2019-20.

Tourism's contribution to Australia's GVA for the year 2020-21 was estimated to be \$29.3 billion. This represented 1.5% of Australia's total GVA. This figure prior to COVID-19 was estimated at \$55.3 billion in 2018-19.

¹ Represents a full year of COVID impacting the visitor economy.
Year end December 2022, Tourism Research Australia's International and National Visitor Surveys.



TOURISM FAST FACTS AS AT DECEMBER 2022

THE REGIONAL OPPORTUNITY

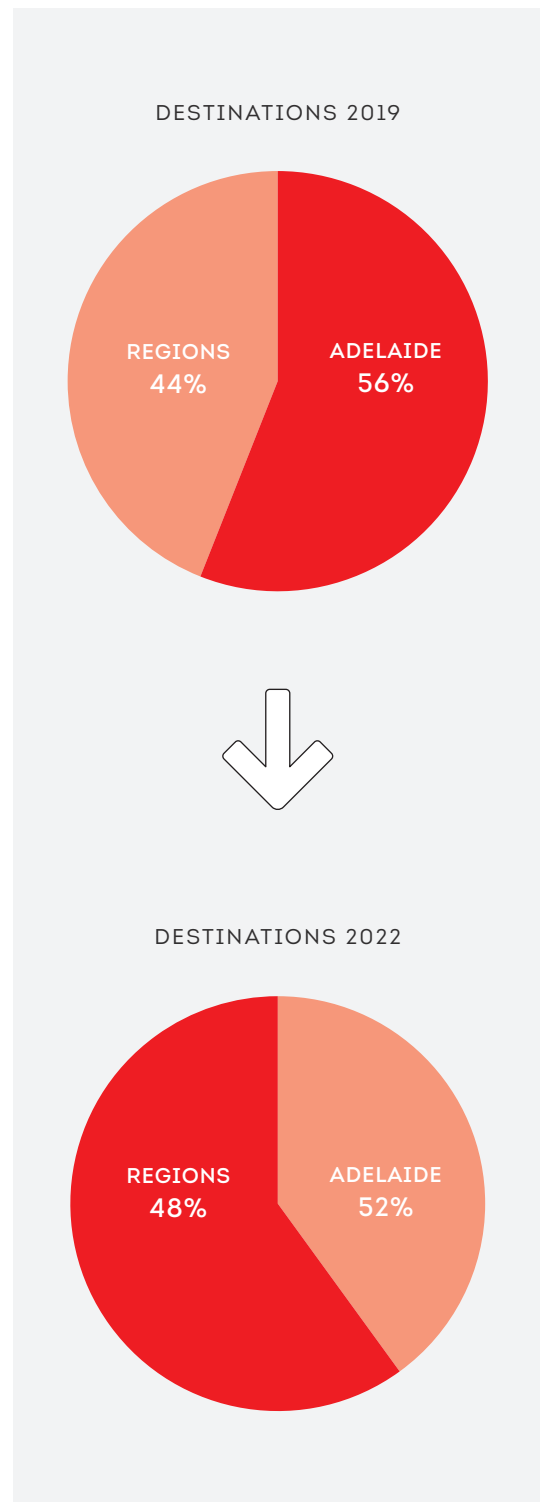
With the international and Interstate borders having been open for an extended period of time we are now seeing strong growth from these markets. The interstate and intrastate markets are at record highs of \$3.2 billion and \$2.8 billion, while the international market in the last 3 months has grown from \$307m to \$519m (Sep -22 to Dec-22). This has been the result of a strong appetite for travel to South Australia and has seen us achieve our target of getting back to the pre-COVID high of \$8.1 billion 12 months early. With the strong growth we are now moving from recovery to growing the visitor economy back in line with our 2030 targets, based on forecast economic conditions, consumer demand metrics, and supply side growth.

Throughout the COVID pandemic period, regional tourism in South Australia was the standout success, with intrastate tourists flocking to destinations within their own state. Despite open borders, this trend has persisted, and regional accommodation continues to experience record setting levels of demand. Regional visitor expenditure (including by international visitors) came to a record high \$3.98 billion, up 12 per cent on the pre-COVID December 2019 and just behind the 2025 Regional Visitor Strategy target of \$4.0 billion. Regions have been performing strongly, driven by the intrastate market and the re-emerging interstate market, led by the growth from Victoria.

Prior to the COVID-19 pandemic, regions contributed 44 per cent of overall visitor expenditure. This peaked at 65 per cent during the worst of the pandemic and has now reverted to 48 per cent. With the interstate and international borders open this gap is returning to pre-COVID levels.

REGIONAL ACCOMMODATION

Regional performance has remained strong throughout the pandemic with every month from the start of 2022 to March 2023 performing above 2019 levels. Over this period we have seen exceptionally strong condition, with average regional occupancy of 64 per cent in 2022, up 7 percentage points on 2019 occupancy of 57 per cent. Other highlights in 2022 were room nights occupied in March and October growing over 147,000 for the first time on record.²



² STR Regional SA Accommodation



ECONOMIC FAST FACTS

WHY INVEST?

Despite the challenges presented by the COVID-19 global pandemic and natural disasters such as bushfires and flooding, South Australia has seen a significant number of major projects get underway, worth billions of dollars. The South Australian Government is committed to the recovery and growth of the state's visitor economy.

South Australia is home to some of the world's leading companies in defence, space, energy and minerals resources, food, wine and agribusiness, financial and business services, digital technology, advanced manufacturing, renewables including hydrogen, health and creative technology.

Adelaide is a great place to live and work. In 2021, the capital was named the third most liveable city in the world and most liveable city in Australia (Economist Global Liveability Index 2021).

PROSPERITY

South Australia's major industries continue to demonstrate sustainable growth.

Up to \$6.4 billion has been committed to naval shipbuilding in South Australia, supporting around 1,300 jobs. Further investment in key naval projects include up to \$5.1 billion investment from 2024.

South Australia is set to become the defence and space State with over \$10 billion of industry investment expected in the next 10 years.

A number of defence and innovation precincts, such as Osborne Naval Shipyard, Mawson Lakes' Technology Park, Tonsley Innovation Precinct, Edinburgh Defence Precinct, and Lot Fourteen, will attract companies to foster industry collaboration.

Our state is a world leader in renewable energy with Solar Reserve APRA Energy and Tesla establishing businesses in South Australia.

Growing South Australia's hydrogen economy is expected to provide benefits through export revenue and contributing to new industries and jobs across the state.

Source: Defence and Space Landing Pad Key naval projects confirmed for South Australia

The growing world demand for premium product that is cleanly, safely and sustainably produced creates significant opportunities for our state's food and wine industries.

Health has been identified as one of South Australia's biggest growth industries that is expected to continue to create jobs and boost the economy.

We have a flourishing creative technology industry including the new technicolour visual effects studio in Adelaide. The arts and culture sector provides strong growth opportunities for the State, and the South Australian Arts and Cultural Tourism Strategy 2025 aims to further promote this industry.

APPEALING DESTINATION

While South Australia's tourism industry - like so many around the world - has been impacted by COVID-19, domestic travel is expected to recover quickly and regional tourism has experienced record growth.

With international borders open, South Australia is welcoming the return of international visitors and is working to rebuild this valuable market.

In January 2022, labour force participation was at 62.9% and total employment was 875,000. One of the key economic growth sectors identified in South Australia is international education. While international student numbers have declined during the pandemic, there is an opportunity for the state to welcome more students as international tourism recovers.

As at April 2023, there was over 35,000 international students studying and living in South Australia.

Source: Department of Energy and Mining minerals. dpc.sa.gov.au and Study Adelaide studyadelaide.com



SOUTH AUSTRALIA'S ECONOMIC STRENGTHS

CURRENT KEY INDICATORS

Merchandise exports	A\$14.7 billion
Private New Capital Expenditure	A\$8.5 billion
Employment	908,900
Gross State Product	A\$128.6 billion

All figures above are from the Australian Bureau of Statistics for the year end June 2022

South Australia's overseas goods exports totalled \$14.7 billion as at June 2022.

The total value of South Australian exports continues to be supported by growth in the value of exports of Wheat, Oil-seeds and oleaginous fruits, Vegetables, Iron and steel and Barley.

These gains were partly offset by declines in the value of exports of Iron ore and concentrates, Wine, Refined copper and copper products, Medicinal and pharmaceutical products and Seafood.

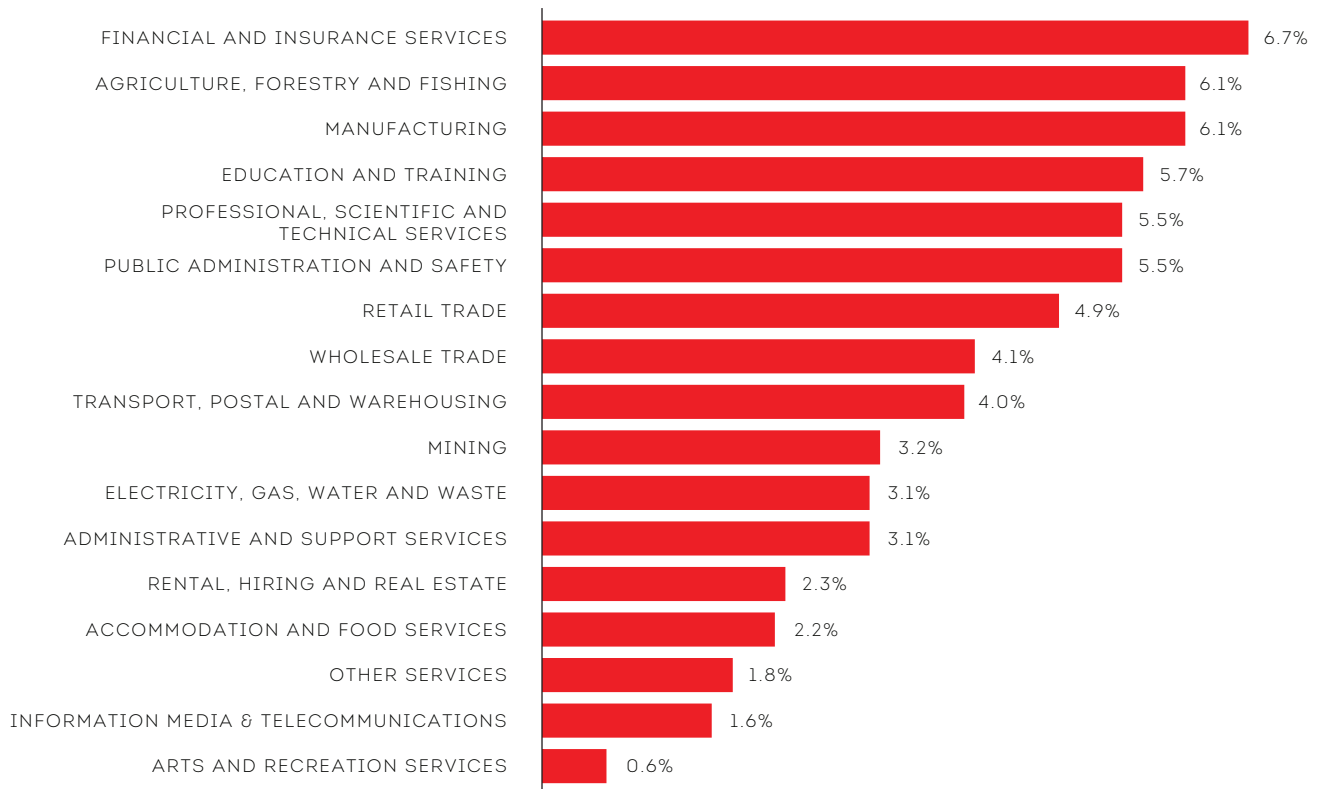
Exports in the year to June 2022 saw growth after the decline experienced through the Pandemic. Export growth was recorded in the export markets of Canada (21%), India (60%) and the United States (36%).





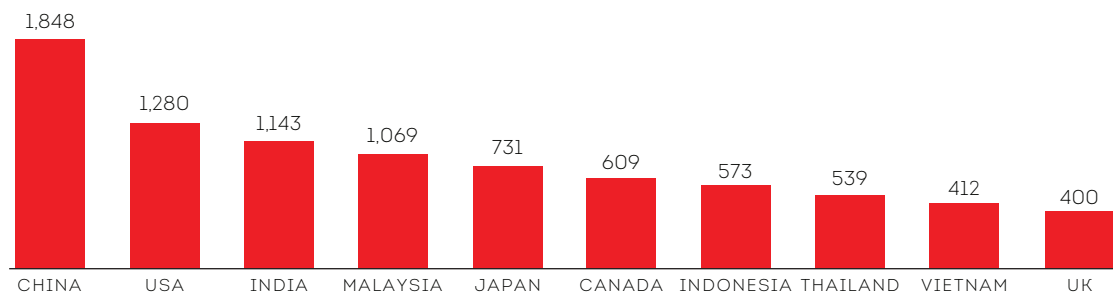
Above Tesla Battery, Jamestown, Flinders Ranges & Outback

PROPORTION OF TOTAL GSP BY INDUSTRY (JUNE 2022)



Industry gross value added as a proportion of total industries: industry gross value added, chain volume measures.
By share of economic output: adelaide.edu.au/saces/economy/industry

MAJOR EXPORT DESTINATION (12 MONTHS TO JUNE 2022, \$M)



Source: SA overseas goods exports June 2022

A DIVERSE & ROBUST ECONOMY

South Australia's key economic sectors will accelerate our economy through business expansion and innovation.

Defence Industry

- South Australia is Australia's 'Defence State', home to a critical mass of world-class industry delivering many of Defence's largest and most complex projects.
- In March 2022, it was announced that more than 950 jobs to be created by Sabab Australia's \$77 million defence hub at Mawson Lakes.
- The Osborne Naval Shipyard, the nation's premier naval industry hub is located in Northern Adelaide at Techport Australia.
- The newly completed Osborne South shipyard will be complemented by a new submarine construction facility at Osbourne North supporting up to 5000 shipbuilding employees.
- The State has a highly-skilled workforce and state-of-the-art infrastructure that deliver specialist services and products for the Australian Defence Force and others around the world.
- With the development of the Information Warfare hub at the Edinburgh Defence Precinct, South Australia is keen to maximise career opportunities across data analytics, artificial intelligence and data protection.
- South Australia will continue to develop defence precincts at Edinburgh, Mawson Lakes and Osborne: the advanced manufacturing precinct at Tonsley; and the innovation precinct at Lot Fourteen.
- It has internationally regarded expertise in systems integration, electronic warfare, surveillance, aerospace, naval ship building, education and training plus research and development.
- The Australian Federal Government has committed to \$200 billion of defence investment spending over the next decade. Almost half of this investment will be delivered in South Australia. The vast majority of major international defence companies, including Lockheed Martin, Raytheon and BAE Systems, position their headquarters for their Australian operations in South Australia.

Space

- South Australia will be home to Australia's first dedicated space manufacturing hub, further cementing the state's reputation as the Space State and providing a vital manufacturing link to the local space industry value chain.
- The Australian Space Park will accelerate Australia's sovereign space manufacturing capability and support the national aim to triple space's contribution to Gross Domestic Product to \$12 billion by 2030.
- Australian Space Park was announced late 2021, following a commitment from the South Australian Government to invest \$20 million to establish the facility close to Adelaide Airport, in partnership with four space companies – Fleet Technologies, Q-CTRL, ATSpace and Alauda Aeronautics, who will co-locate onsite.

International Education

- Home to three well established local universities (Flinders University, The University of Adelaide and University of South Australia) as well as one prestigious international university (University College London), Adelaide has a reputation as Australia's 'Learning City'.
- Attracting new students, new industries and new investors to South Australia provides opportunities for cultural exchange, integration and diversification.
- In 2018, there were nearly 38,000 international student enrolments contributing approximately \$1.8 billion to the local economy supporting almost 12,500 jobs.




Food, Wine and Agribusiness

- South Australia's vibrant food culture has a global reputation for world-leading food grown for local consumption and international export, a thriving restaurant and café industry and increasingly popular food and wine tourism.
- South Australia accounts for almost 80% of Australia's premium wine production produced from some of the oldest vines in the world.
- In 2021-22, South Australia's wine industry generated \$2.4 billion in revenue.
- Food is one of South Australia's largest export earners, with its high-quality seafood, meat, dairy, grains, fruit and vegetables appreciated around the world.

- Food exports from South Australia accounted for \$3.5 billion of total merchandise exports in 2020-21.
- South Australia is home to the Waite Precinct, the largest agricultural research complex in the Southern Hemisphere.

Hi-tech

- South Australia must capture and promote more of the hi-tech value chain in order to drive business innovation and growth.
- Nationally, the technology sector contributes \$122 billion to the Australian economy, with the potential to generate an additional \$50 billion per year.
- For South Australia, it is identified that hi-tech is an enabler of productivity, competitiveness and growth across all sectors.
- A number of technologies and capabilities would have great potential to contribute to the state's economic growth, including:

-  Advanced manufacturing and Industry 4.0
-  Artificial intelligence, machine learning and data analytics
-  Blockchain
-  Cybersecurity
-  Optics and photonics
-  Quantum computing





Health & Medical Industries

- South Australia has a global reputation for health and medical industries capabilities.
- Adelaide BioMed City is one of the largest health precincts in the Southern Hemisphere including SAHMRI and the Australian Bragg Centre, the first proton therapy centre of its type.
- Flinders Village will host the Health and Medical Research Institute, spearheading collaborative research spanning physical and mental health and wellbeing, amplifying the university's longstanding contributions across the health, education and medical sectors in the heart of the southern medical precinct.
- We have world-leading capabilities in artificial intelligence (AI), data analytics, machine learning and research that features across our health and medical industries.

Energy & Mining

- South Australia is a key location for sustainable business with a diverse and resilient resources sector.
- The State's vast natural resource assets are underpinned by a supportive, stable state government, a highly skilled workforce, and a respected regulatory framework creating an environment for sustainable investment.
- South Australia's energy and mineral resource industry is supported by world-renowned research and development initiatives and support services.
- South Australia is internationally recognised for its wealth of mineral resources, hosting the majority of Australia's resources of copper, uranium, graphite, and significant resources of gold, silver, zircon and iron.
- With opportunities in exploration, South Australia provides a destination to invest in sustainable and responsible resource development to meet the needs of our shared future.
- South Australia has the wind, sun, land, infrastructure and skills to be a world-class renewable hydrogen supplier.
- Contributes \$9.2 billion or 8.3 per cent of economic output.
- \$299 million in royalties, \$5.32 billion in exports and employs more than 43,900 people

Key opportunities:

-  Renewable hydrogen
-  Smart energy storage
-  Emerging minerals
-  Electric vehicles

Creative Industries

- South Australia's long-celebrated creative sector has evolved to become a globally renowned collective of artists, innovators, producers and business leaders.
- In 2019, South Australian creative businesses directly contributed \$1.2 billion to the local economy, employing more than 15,000 workers.
- South Australia's creative industries form a vital pillar of economic, cultural and artistic strength for the state.



Above Lot Fourteen Render, Adelaide



Above Collins Class Submarine

TRANSFORMATION OF ADELAIDE

Adelaide is a city of opportunity that embraces innovation, creativity and growth.

South Australia's capital is Australia's most liveable city and the third most liveable city in the world according to the Economist Intelligence Unit's Global Liveability Index for 2021.

As the state's appeal and reputation is growing, Adelaide has enticed some of the world's largest organisation, such as Google, Amazon and MIT, to set up Australian based offices in Adelaide.

Adelaide has recently transformed the CBD from the redeveloped Riverbank Precinct, BioMed City and Lot Fourteen.

Continuing to build a strong reputation as a safe, resilient city, that embraces change and growth, Adelaide is a city of opportunity.

Over the past few years there has been significant investment in downtown Adelaide, including the Riverbank. The redevelopment of the Riverbank Precinct has transformed Adelaide into a vibrant destination of international appeal.

Redevelopment of the Riverbank Precinct:

- \$535 million redeveloped Adelaide Oval to 50,000 seat stadium (2014)
- \$350 million expansion of Adelaide Convention Centre (2017)
- \$40 million Pedestrian footbridge linking the Adelaide Railway Station to the southern entrance of the Adelaide Oval (2014)
- \$90 million redeveloped Adelaide Festival Centre (2018)
- \$2.6 billion new transport infrastructure to service the precinct and surrounding Adelaide
- \$2.7 billion new Royal Adelaide Hospital (2017)

New hotels

From 2020 - 2023, Adelaide saw the opening of seven new hotels of the highest international standards. With a total of 1,467 additional rooms available to meet the growing demand for quality accommodation, Adelaide has greater capacity for hosting leisure and business travel.

OPENED IN 2020/21

Adelaide Oval Hotel	138 rooms
Crowne Plaza	320 rooms
EOS by SkyCity Hotel	120 rooms
Tom's Court Hotel	71 rooms
Majestic Hotel	91 rooms
Hotel Indigo	145 rooms
Sofitel Adelaide	251 rooms

OPENED IN 2023

La Loft	88 rooms
Vibe Hotel	123 rooms
TRYP Hotel	120 rooms

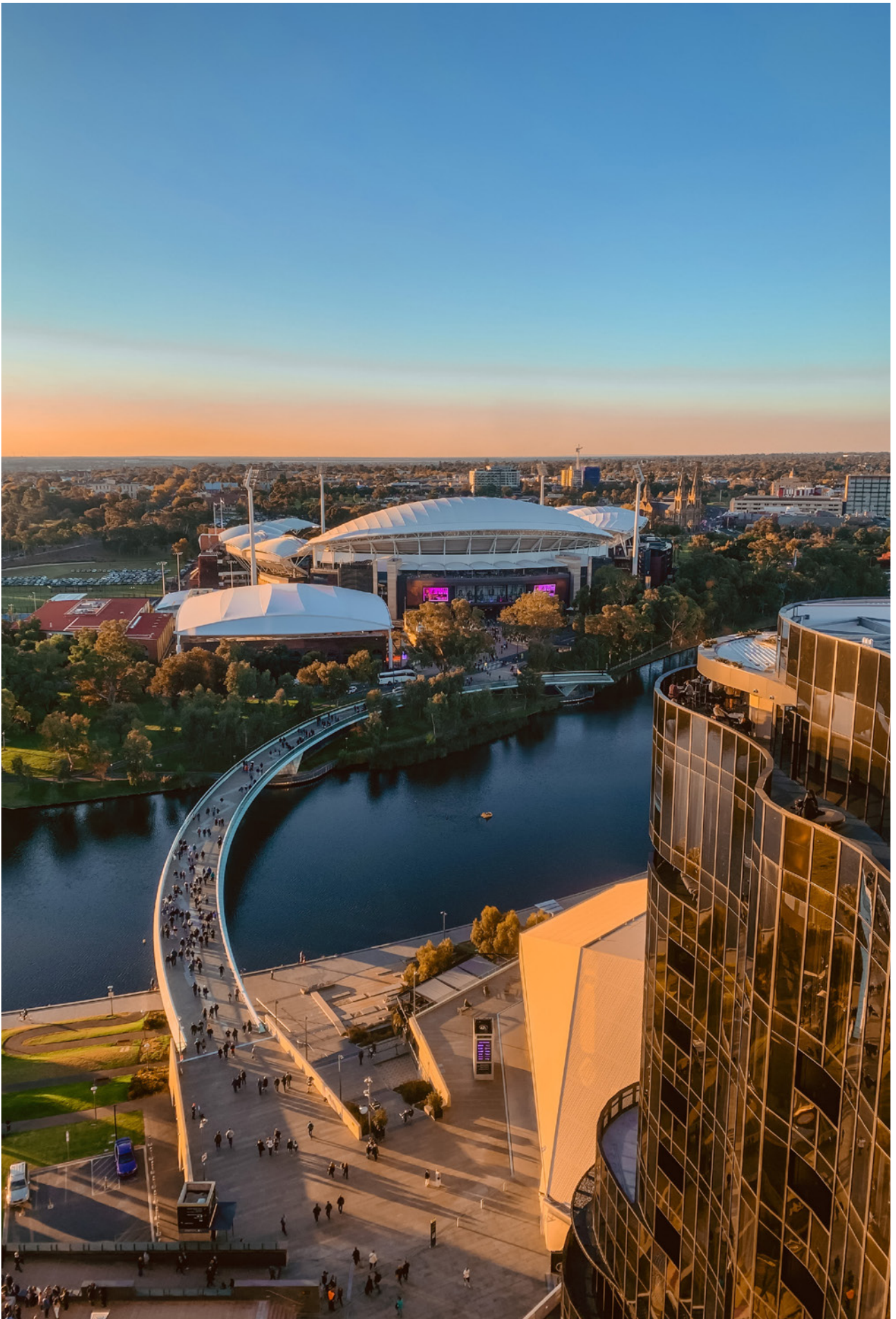
Adelaide Central Market Arcade Redevelopment

In December 2019, the City of Adelaide Council announced a \$400 million redevelopment of Adelaide Central Market Arcade.

The City of Adelaide has entered into a partnership to redevelop the arcade with leading developer ICD Property, Sinclair Brook and architecture firm Woods Bagot.

Capturing the spirit and architecture of the neighbouring Adelaide Central Market, the project will see the enhancement and expansion of the iconic Adelaide Central Market to connect seamlessly into Market Square.

Market Square, owned by ICD Property, includes new residences, offices, a premium hotel, retail and activated public spaces consisting of an elevated 3,000 square metre terrace.



MAJOR DEVELOPMENT PROJECTS

Lot Fourteen

Lot Fourteen brings together South Australia's leading abilities in space, defence, hi-tech and entrepreneurship in one place and leverages these skills by creating a collaborative ecosystem for future industries and careers to thrive.

Lot Fourteen will include:

\$400 million

Aboriginal & Cultural Centre (Tarrkarri)

\$60 million

Digital Technology Academy

\$400 million

Entrepreneur & Innovation Centre & Innovation Hub

Australian Bragg Centre

- Construction on Adelaide's high-tech medical and research facility, and the first proton therapy centre in the Southern Hemisphere, is underway.
- The Australian Bragg Centre, previously known as SAHMRI 2, is currently under development and will be a world-class clinical and research facility within Adelaide's \$3.6 billion BioMed City precinct, delivering advanced radiation treatment of cancers and other tumours.
- It will include facilities for research by the South Australian Health and Medical Research Institute (SAHMRI), along with lab and office space for health and biomedical companies.

OTHER DEVELOPMENTS



\$3.2 billion

New Women's and Children's Hospital



\$200 million

Development of the Marriott International Hotel



\$1 billion

Festival Tower

Source: Experience Adelaide | Major Projects Update: The city shaping projects underway or planned in Adelaide

lotfourteen.com.au

ACCOMMODATION PROJECTS

In recent years Adelaide has seen new hotel supply come to fruition with properties such as Holiday Inn Express, The Mayfair Hotel, ibis Adelaide, Quest, and more recently, the opening of the Sofitel Adelaide, Crowne Plaza, Hotel Indigo, EOS by SkyCity, TRYP Hotel and the Vibe Hotel.

Outside the CBD, there are a number of hotel developments progressing in areas such as Port Adelaide and the seaside community of Glenelg.

In line with other major city infrastructure projects Adelaide's hotel pipeline continues to grow, with new accommodation projects announced. Luxury global brands will launch into the marketplace in 2024, including the Marriott International. The revival of one of Adelaide's landmark heritage buildings has commenced with siteworks being undertaken to develop a \$200 million luxury hotel development at 141-159 King William Street.

A balance of accommodation offerings including premium economy and four-star properties will join Adelaide's room mix in the coming years with contemporary brands such as the Wyndham, Hyatt and TFE Hotels.

These projects are set to increase Adelaide's appeal and international reputation and support South Australia's visitor economy in achieving its \$12.8 billion potential by 2030.



INVESTMENT SUPPORT


The South Australian Tourism Commission has a dedicated Destination Development group that assists developers, operators and investors during the decision process to invest in South Australia's tourism sector. The group aims to see new and refreshed tourism infrastructure and experiences come to fruition in South Australia. Our team of specialists work with local, national and international operators during the consideration, planning and implementation process of new investments.

The Destination Development group is dedicated to airline and cruise ship attraction, new and improved products, experiences and infrastructure and facilitating sustainable investment in South Australia's tourism assets.

The Destination Development group offers free support and advice including, but not limited to:

- Tourism market data and research.
- Project feasibility data.
- Industry contacts within local, state and federal government.
- Targeted identification of potential investors and operators for new tourism assets.
- State and federal funding information.
- Support to start-up businesses and product.

Destination Development priorities:

-  Route development opportunities with key international and domestic airlines.
-  To attract more cruise ships to South Australian ports and anchorages.
-  Accommodation upgrades and new rooms in regional South Australia.
-  Develop new experiences that build on our State's strengths of food, wine and nature.

For the latest list of tourism investment projects, please contact the South Australian Tourism Commission.



Above

Olivers Taranga, Fleurieu Peninsula

AVIATION DEVELOPMENT

Supporting the Growth of Airline Services

The South Australian Tourism Commission is focussed on ensuring that visitors can reach the state easily and affordably. Air access is a critical factor for tourism and economic growth and in a competitive post-COVID environment we are working hard to re-build direct access from key markets as quickly as possible.

The Destination Development group works with Adelaide Airport Limited and other stakeholders to attract new airlines to South Australia and to encourage existing airlines to expand their services.

New international airline route opportunities are being explored as tourism markets start to travel again. Re-establishing existing routes and developing new routes from South-East Asia, China, the USA, Japan and New Zealand are high priorities. Domestic routes underpin international visitation by delivering international visitors to South Australia via interstate airports as part of their Australia-wide itineraries.

Domestic and international aviation services positively impact the entire South Australian economy underpinning both business and leisure travel into South Australia. Thousands of jobs are supported by air access including tourism, international education, trade, defence, space, mining and resources which all rely on sufficient airline access. Tourism injects visitor expenditure into Adelaide and disperses visitors into regional South Australia.

Prior to the COVID-19 pandemic, South Australia had direct air access with its key markets and this helped the state reach record visitation levels in 2019. A diverse portfolio of international carriers operated to Adelaide including Singapore Airlines, Qatar Airways, Air New Zealand, Emirates, Cathay Pacific, Malaysia Airlines, China Southern, Malindo, and Jetstar. The South Australian Tourism Commission will continue to push to re-establish critical air services, ensuring that the government's approach is coordinated and focused.

Regional Air Access

Dispersal of visitors to regional South Australia by air, road and rail shares the economic benefits of tourism. The South Australian Tourism Commission is actively engaged with local government and other regional stakeholders to ensure that visitors can reach the state's exciting tourism experiences.

For example, the South Australian Tourism Commission worked with Kangaroo Island Council to develop a business case to increase the capacity of Kingscote Kangaroo Island Airport's runway and terminal and subsequently support their pitch to secure additional flights.

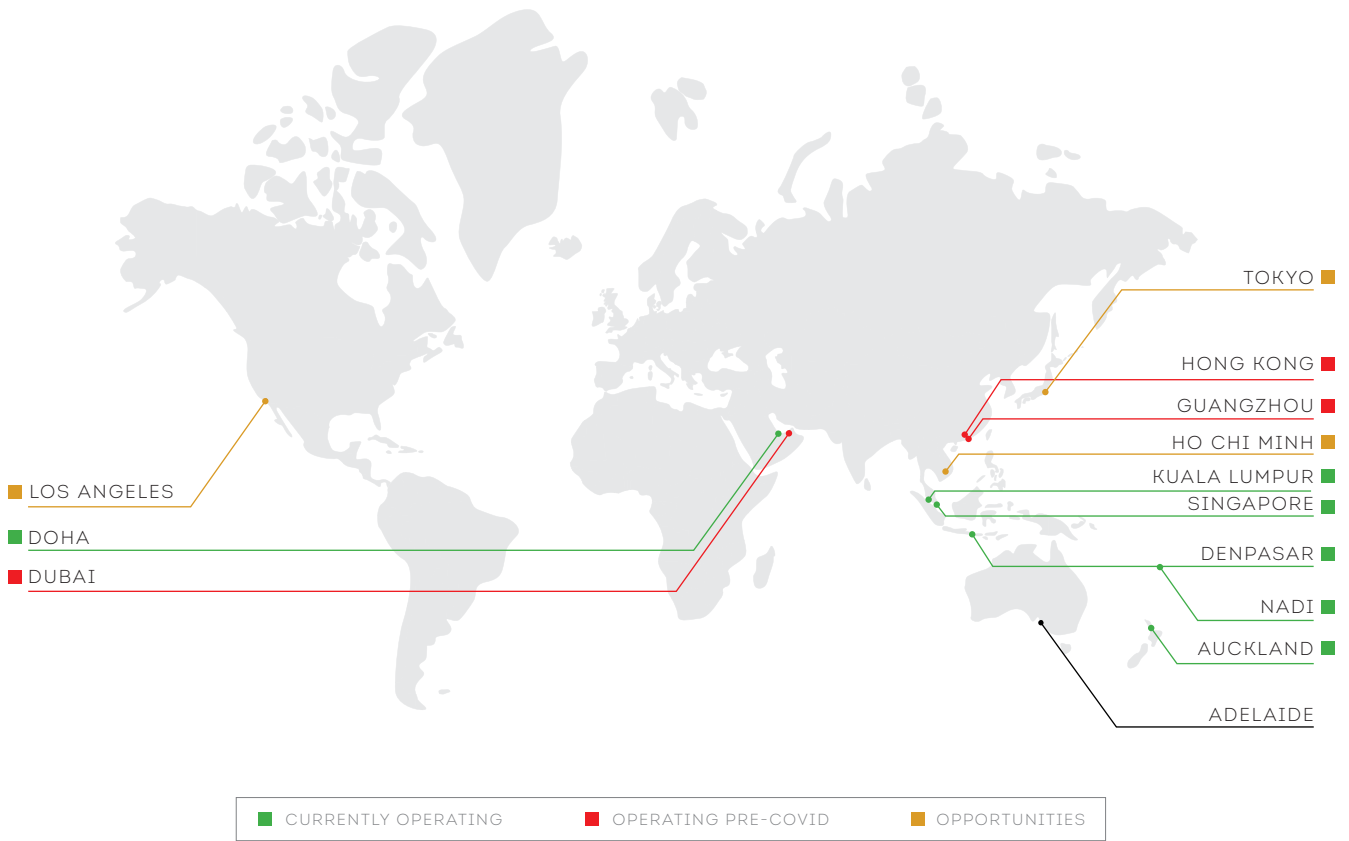
Adelaide Airport Terminal Investment

Infrastructure investment of \$200m delivering new international arrival facilities, retail and passenger servicing completed in 2021.



Above Adelaide Airport, Adelaide

AVIATION DEVELOPMENT MAP



DIRECT ROUTE DETAILS

LOCATION	AIRLINE	CONNECTING ROUTES
Doha	Qatar Airways	149
Kuala Lumpur	Malaysia Airlines	58
Singapore	Singapore Airlines	129
Auckland	Air New Zealand	42
Denpasar	Jetstar	N/A
Denpasar	Virgin Australia	N/A
Nadi	Fiji Airways	23

Routes correct as at May 2023

CRUISE SHIP ATTRACTION

The South Australian Tourism Commission continues to lead South Australia's cruise industry, representing the South Australian Government and working with a wide range of partners to develop, manage and grow the industry in the state. This is achieved not only through encouraging new investment into South Australia's port infrastructure, service delivery and new product development, but also playing an active role by contributing to and providing leadership in national initiatives. The South Australian Tourism Commission represents South Australia at national and international industry trade events and facilitates and supports itinerary planning with domestic and international cruise lines.

With consideration of these key drivers, and recent impacts of the global COVID-19 pandemic on the visitor economy, the South Australian Tourism Commission is focused on the safe resumption of the cruise industry for our state. We are focused on encouraging investment in new cruise infrastructure, increasing regional dispersal and ensuring our services, products and experiences are safely delivered to meet expectations of cruise lines, passengers, regional destinations and local communities.

Over the past decade, the cruise industry has been the fastest growing visitor economy sector in Australia and in South Australia, contributing significantly to the state's economy. Prior to the devastating bushfires in South Australia in the summer of 2019/20 and the significant impact of the COVID-19 global pandemic, the cruise sector contributed \$145 million to the state's economy with double digit growth in passenger numbers steady over the previous five years. The future outlook for the safe resumption of cruise in Australia is optimistic, with strong consumer confidence despite the challenges the industry has faced since the COVID-19 pandemic.

South Australia has a number of destinations available for visiting cruise lines and expedition vessels. Popular berths for large cruise ships include Adelaide at the Port Adelaide Passenger Terminal (Outer Harbor), Port Lincoln on the Eyre Peninsula and Wallaroo on the Yorke Peninsula, and our most popular anchorage Penneshaw on Kangaroo Island.

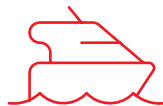
The Port Adelaide Passenger Terminal has recently undergone renovations including new air conditioning, painting, new access points to allow double gangway entry from the ship to the building and enlarging the space available inside the terminal building for passenger movement.

CRUISE SHIP STATISTICS



16

cruise ship visits
in 2009/10 with 17,000
passengers and crew



103

cruise ships visits in
2022/23 with over
227,900 passengers
and crew



\$145M

to the state
economy in 2018/19

Port Adelaide Passenger Terminal, Adelaide

Adelaide's capital city port is located at Outer Harbor. The Port Adelaide Passenger Terminal is a great asset when attracting new cruise lines to the state and allows for growth in cruise itineraries to/from Adelaide with home port itineraries. The facility offers a deep-water channel and wide swing basin, making it one of very few ports nationally that can cater for the largest cruise ships currently visiting Australia. Features include a recently renovated purpose-built passenger terminal building, with a safe and secure berth, as well as 24-hour security providing flexible access in and out of the secured area. Cruise lines offer the opportunity for passengers to embark or disembark from this facility, allowing ships to break longer voyages or home port from South Australia.

Port Lincoln Wharf, Eyre Peninsula

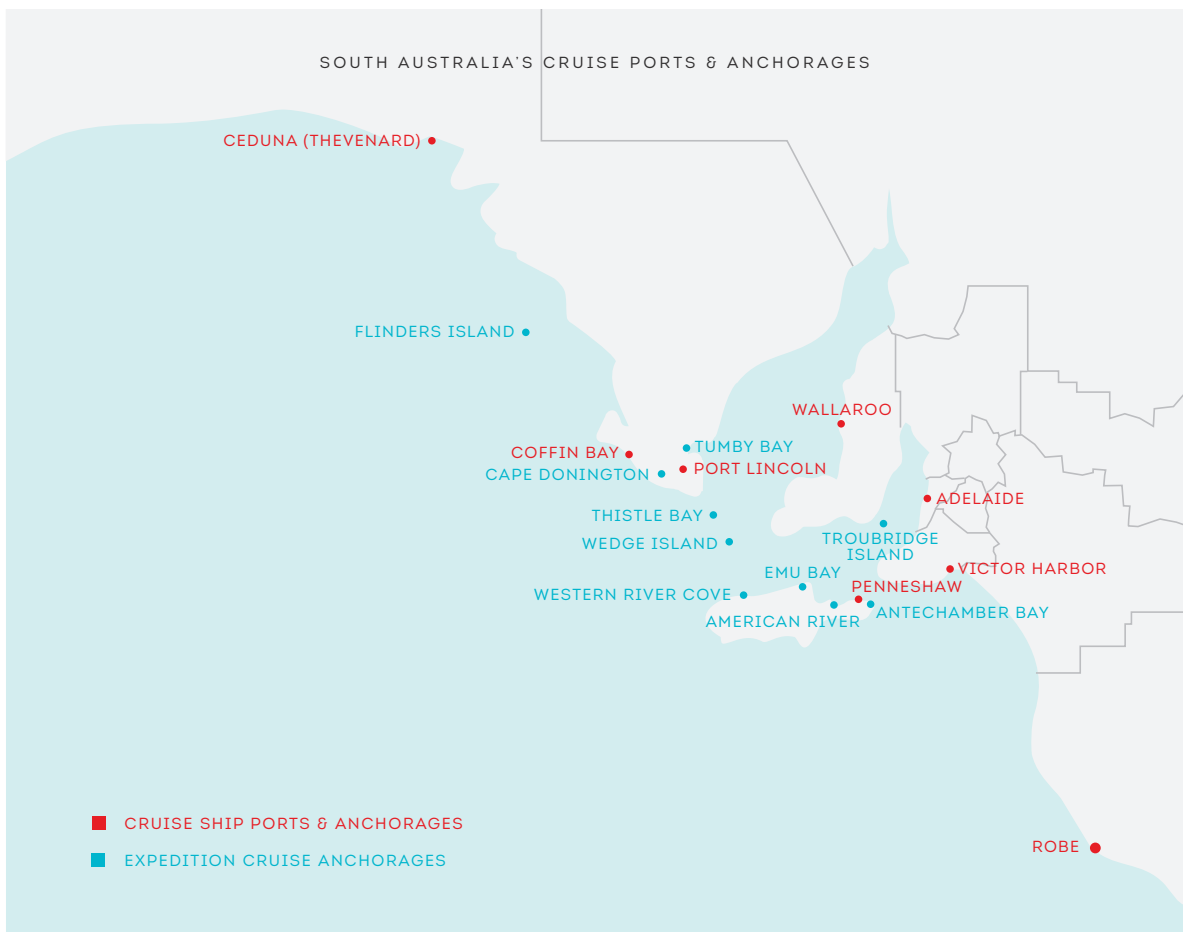
Port Lincoln provides full services for ships of all sizes. As one of the deepest ports in Australia, it allows for easy navigation and has great opportunities to attract large cruise vessels to the region. Located within walking distance to the city of Port Lincoln, passengers have complete flexibility to enjoy the area at their own pace.

Penneshaw Wharf, Kangaroo Island

Kangaroo Island is a well-established and appealing cruise destination with great touring options. The Penneshaw Wharf offers a close anchorage, with a custom-built double pontoon landing structure where cruise ships tender passengers ashore. Cruise ships have been visiting Kangaroo Island for over a decade and the combined outcome of recent South Australian Tourism Commission investment into new facilities and the development of new tourism products has seen a significant growth in cruise ship visitors scheduled for the coming years. The SeaLink Passenger Terminal located at Penneshaw opened in 2014 and is a significant asset for visiting cruise ship passengers.

New Destinations

South Australia has a number of new destinations available including, Wallaroo, Ceduna and Whyalla, as well as anchorages at Robe, Victor Harbor and the islands around the Eyre Peninsula. Many of these locations have been used by small expedition vessels such as Coral Expeditions.





Above Queen Mary 2, Outer Harbor

ACCESSIBILITY

Metropolitan Transport

Adelaide's tramline is free to travel within the city and runs a direct link from the Adelaide Entertainment Centre to the North Terrace precinct. It also links the famous Glenelg Beach to the city. In recent years Adelaide's public transport network has undergone a significant transformation. Rail revitalisation has formed the centre piece of this investment representing the largest and most complex upgrades. This major improvement has transformed the network into a vibrant, state-of-the-art system providing faster, greener, more frequent and efficient services for train, tram and bus commuters. The upgrades will allow Adelaide to continue to be one of Australia's most liveable and sustainable cities. Source: adelaidemetro.com.au

Rail Journeys

Interstate trains The Overland, The Ghan, The Indian Pacific and The Southern Spirit, operated by Great Southern Rail, arrive and depart from the Adelaide Parklands Terminal located only three kilometres from the city centre. A great train journey of South Australia is the Adelaide to Alice Springs to Darwin route offered by The Ghan. It provides an unsurpassed view of South Australia's northern regions including the Flinders Ranges and Outback and is recognised as one of the world's great train journeys. Over three days passengers will travel 2,979 kilometres.





Above

Adelaide Oval, Adelaide

TOURISM INFRASTRUCTURE DEVELOPMENT

The South Australian Tourism Commission works in partnership with Regional Development Australia and local, state and federal government to encourage the development of new tourism infrastructure within South Australia.

Some examples of public tourism investments include the Adelaide Riverbank Precinct; airport developments; visitor information centres; cruise port infrastructure and other crucial public infrastructure to deliver quality tourism assets in South Australia.

Through the South Australian Regional Visitor Strategy 2025 (RVS), there are a number of tourism infrastructure priorities identified across 11 tourism regions in the state.

Priorities include improvements to regional nature trails (an area of high visitor demand), key regional roads, and the supply of reliable telecommunications across all areas.

South Australian regions have also identified coastal and marine infrastructure, signage, and aviation infrastructure as priorities.

Adequate and well-maintained infrastructure is critical for the sustainable growth of regions and a safe and enjoyable visitor experience. Improving and maintaining infrastructure can open up new possibilities and remove barriers to growth.

The Destination Development group works with a wide range of tourism operators, developers and investors to ensure infrastructure projects come to fruition.




The South Australian Tourism Commission focuses on the development of new infrastructure that supports South Australia's strengths and ultimately lead to growth of the visitor economy.

The focus is to:

-  Create new and refreshed tourism infrastructure developments in South Australia.
-  Encourage further investment in South Australia's tourism infrastructure and accommodation assets.
-  Increase South Australia's destination appeal.

The South Australian Tourism Commission welcomes new infrastructure investment with an emphasis on quality, design and sustainability. This applies to a variety of projects and encompasses public infrastructure, significant tourism experiences and quality accommodation of scale.

Examples of private tourism investment in South Australia include:

-  New hotel and resort accommodation.
-  Conference facilities.
-  Tourism infrastructure in wine regions.
-  Integrated, sustainable leisure tourism precincts that include a variety of natural and cultural experiences.

The Destination Development group also helps private enterprise to deliver a number of individual projects involving numerous stakeholders with the aim of accelerating projects into the marketplace and ensuring that the best possible outcomes are achieved.

EXPERIENCE DEVELOPMENT

The Destination Development group is focused on developing new demand driving products and providing advice to enhance existing South Australian tourism operations.

We support tourism operators through building their industry capabilities to create more appealing experiences that meet consumer and trade expectations by:

- Distributing industry tools and resources.
- Providing business advice and local, state, federal funding referrals.
- Facilitating and supporting government relations and stakeholder engagement.

The team also works with consumer and trade partners to identify gaps in products and experiences in South Australia to deliver new products. This includes the diversification of appealing experiences to a post COVID-19 consumer.

The Destination Development group works with industry partners to develop new and refreshed visitor experiences that leverage the State's competitive advantages of food, wine and nature. Key sectors have been identified as priorities for experience development in South Australia. These include Wellness Tourism, Aboriginal Tourism and Agritourism.

Source: Global Wellness Tourism Economy 2018, Global Wellness Institute

1 Primary Wellness Travellers: those who travel with the main motivation being to fulfil their wellness needs.

2 Secondary Wellness Travellers: those who incorporate a wellness activity during their leisure or corporate trip with any main purpose other than wellness.

Wellness Tourism is travel for the purpose and pursuit of maintaining and enhancing one's personal health and wellbeing.

South Australia is fortunate to be well-placed to capitalise on the emerging Wellness Tourism opportunity. We will build on existing strengths such as nature-based experiences in combination with premium produce and wine, to enhance wellness experiences and position our state as a world-leading Wellness Tourism destination.

91 million

Wellness Tourism trips undertaken by PWT ¹

89%

Of all 830 million Wellness Tourism trips are undertaken by SWT ²

\$88 billion

Value of the PWT market segment

\$551 billion

Value of the SWT market segment, which is 86% of all Wellness Tourism expenditure

8%

PWT Global growth per annum

10%

SWT Global growth per annum





Above

Santos Tour Down Under, Adelaide

EVENTS SOUTH AUSTRALIA

Events South Australia is the events division of the South Australian Tourism Commission. Its charter is to promote South Australia as a tourism destination and attract visitors to the state through securing, managing, developing and sponsoring major events and festivals, along with taking a leadership role in the events industry. Events South Australia works with private and public sector organisations sharing its vision and wanting to build strong events that provide economic, tourism, promotional and social benefits to the state.

Events South Australia owns and manages four major events: the Santos Tour Down Under, Tasting Australia presented by RAA Travel, Bridgestone World Solar Challenge and the National Pharmacies Christmas Pageant.

Each year Events South Australia also sponsors a range of major, regional and community events and festivals, with this calendar complemented by blockbuster one-off events to ensure a balance across the year.

Through these events we are committed to growing leisure event expenditure within South Australia to \$750 million by 2030.

Adelaide, with its thriving Riverbank Precinct and renewed venues such as the Adelaide Oval and the South Australian Aquatic and Leisure Centre, is an ideal setting for major events. The city can accommodate fans from around the world but remains compact enough to be swept up in the excitement big events bring. Our regions host an impressive suite of events and festivals, allowing them to highlight their diverse assets and giving visitors an incentive to venture further.

Major Events Secured by Events South Australia

The South Australian events calendar spans the year and features international and national drawcards. It focuses on the state's varied strengths of food and wine, arts and culture, cycling and spectator sports. Some of the events include:

AUSTRALIAN MASTERS GAMES

Regarded as one of the premier and largest participation sporting events on the Australian sporting calendar.

WOMADELAIDE

A spectacular three-day world of music, arts and dance celebration set in the serene Adelaide Botanic Gardens.

ILLUMINATE ADELAIDE

A new major annual winter event taking over Adelaide's city streets, laneway and buildings that celebrates innovation, music, art, technology and light.

FIFA WOMEN'S WORLD CUP 2023

Adelaide is one of nine host cities for the 2023 FIFA Women's World Cup, to be hosted between Australia and New Zealand.

NRL AMPOL STATE OF ORIGIN

South Australia will again welcome the biggest rivalry in Rugby League with the return of the Ampol State of Origin in 2023.

SOUTH AUSTRALIA TOURISM DESTINATIONS

Adelaide

Surrounded by parklands, Adelaide boasts an array of quality alfresco restaurants and shops and a thriving local arts scene. Visitors can see the Art Gallery, South Australian Museum, Adelaide Botanic Garden or National Wine Centre, or discover the bustling Adelaide Central Market. Popular activities include shopping in Rundle Mall, taking a stroll along the Torrens River, the Adelaide Oval Roof Climb, exploring Adelaide's small bar scene or taking the tram to the seaside precinct of Glenelg.

Adelaide Hills

A 20-minute drive from the city, the region is home to several major attractions including Cleland Wildlife Park, National Motor Museum, Mount Lofty Summit, Beerenberg Farm and the historic German town of Hahndorf. Famous for its cool-climate wines, rolling vineyards, natural bush land and fresh produce that can be found in many quality restaurants and pubs. B&B accommodation is plentiful.

Barossa

Widely known as one of Australia's most important wine regions, the Barossa is also rich in heritage and local culture. The region boasts over 80 cellar doors and 150 wineries, from household names such as Jacobs Creek to boutique wineries. The close proximity of the Barossa makes it an ideal day-trip destination. Maggie Beer's Farm Shop is a popular stop, as well as seeing the beauty of the Barossa from a hot air balloon.

Clare Valley

This region's wineries, restaurants and beautiful scenery provide the perfect setting for a short break. A good way to discover the area is by walking or cycling the Riesling Trail that passes cellar doors and historic towns like Auburn. The heritage-listed town of Mintaro is worth a visit, as is nearby Martindale Hall - a Georgian style mansion built in 1879.

Eyre Peninsula

Known as the "Seafood Frontier" of Australia, this region is vast, surrounded by more than 2,000 kilometres of untouched coastline, un-spoilt national parks and secluded beaches. The region is home to some of Australia's most breathtaking marine experiences - swimming with sea lions, tuna or Great White Shark cage diving as well as "ocean to plate" experiences.

Fleurieu Peninsula

Just a 40-minute drive from Adelaide you will find an outstanding combination of seaside resorts, rolling hills, vineyards plus great surfing and swimming beaches. The lush green interior hosts more than 20 conservation parks. World-class wineries and gourmet producers of cheese, almonds, olives and olive oil celebrate regional fare each week at the Willunga Farmers Market.

Flinders Ranges & Outback

A few days in this beautifully rugged, 540 million year old landscape will stay with you forever. The area is ideal for a 4WD tour to see the many natural attractions including vast salt lakes, rock formations, waterholes and rare wildlife and plants. Wilpena Pound, Coober Pedy and Arkaroola Wilderness Sanctuary are popular destinations not to be missed.

Kangaroo Island

One of the world's great pristine wilderness destinations, the island is a place of beauty and a place of escape. Be greeted by sea lions basking on un-spoilt white beaches and koalas dozing in eucalyptus trees. The spectacular coastline provides magnificent views and historic lighthouses. Accommodation includes self-contained houses, B&Bs, motels, resorts and luxury retreats. Take the ferry from Cape Jervis, fly to Kingscote from Adelaide or Melbourne with Qantas or book a cruise with a KI stop on the itinerary to experience this natural beauty.

Limestone Coast

Discover fabulous food and wine, white sandy beaches, quaint fishing ports and natural attractions like the world-heritage listed Naracoorte Caves and Mount Gambier's Blue Lake. The Coonawarra wine region is well known for its rich terra rossa soil, cellar doors and restaurants, while seaside towns like Robe and Kingston are the place for sun, surf and relaxation.

Murray River, Lakes & Coorong

Just one hour's drive from Adelaide, the Murray River, Lakes and Coorong offers an un-spoilt natural environment perfect for bushwalking in a national park, diverse scenery to enjoy while relaxing on a houseboat on the Murray River and historic towns like Mannum. There are plenty of recreational activities and water sports on offer, and major attractions like Monarto Safari Park are a must with their up close and personal encounters such as the Lions 360 experience.

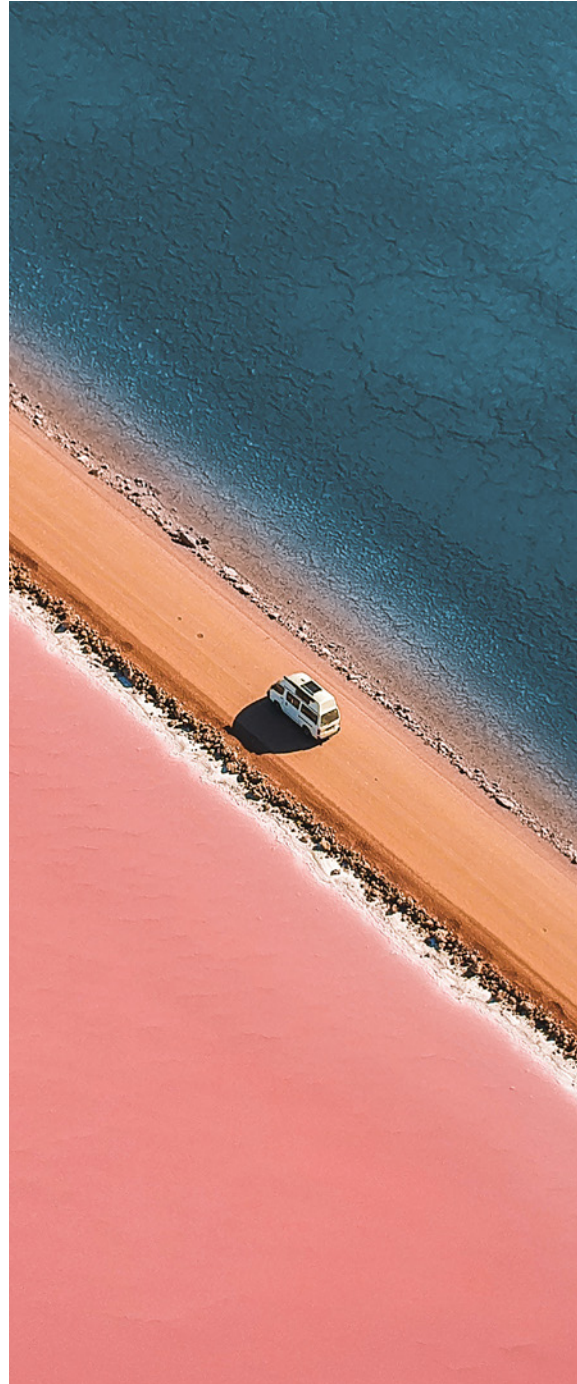
Riverland

Less than two hour's drive from Adelaide the year-round sunshine in the region is perfect for outdoor activities. Visitors can take a houseboat cruise along the Murray River, sample the local produce, play a round of golf, stroll through a wetland or discover a historic town. Native birdlife abounds and there are several excellent conservation parks.

Yorke Peninsula

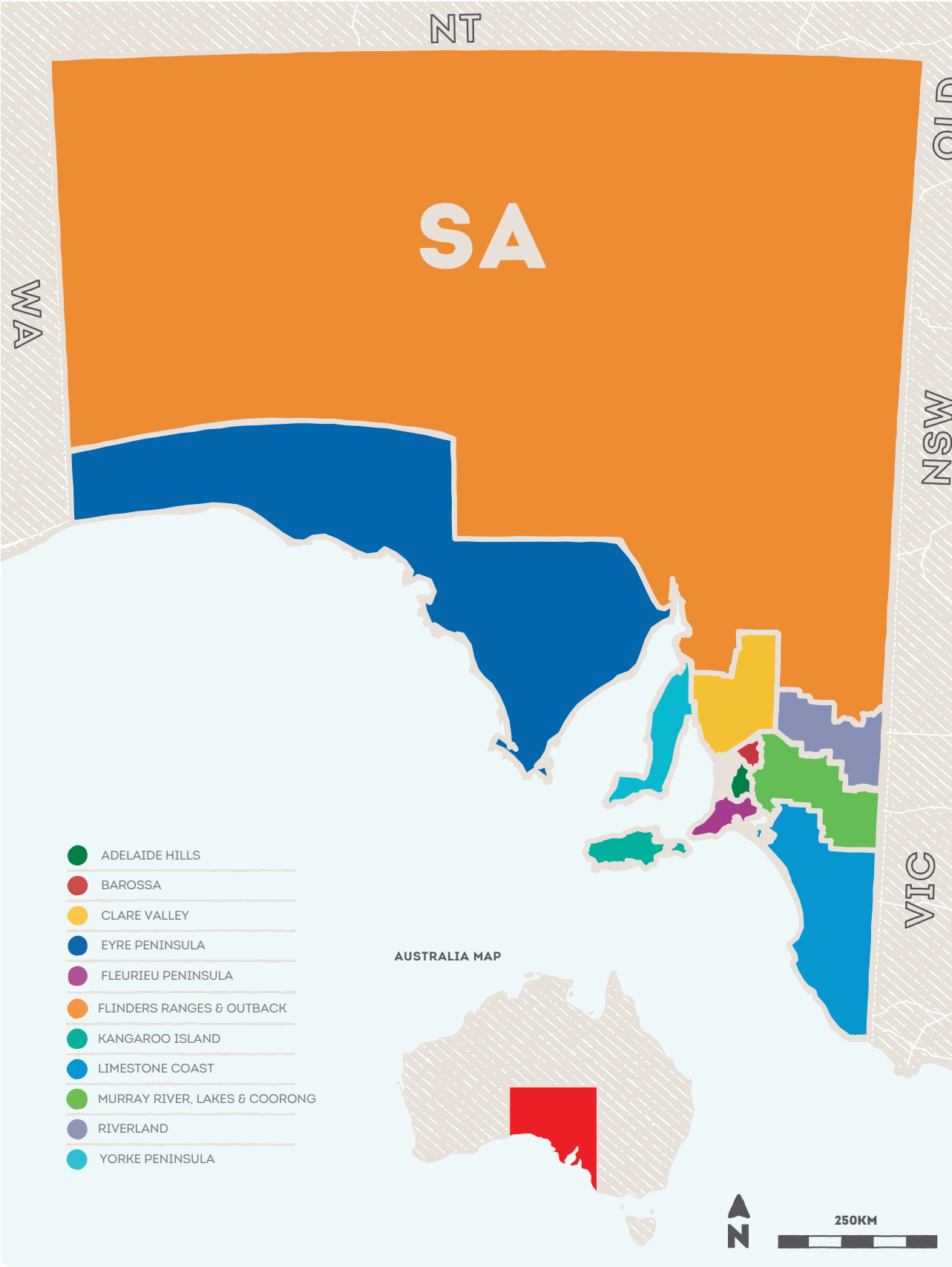
Beginning just 90 minutes from Adelaide, Yorke Peninsula has over 700km of coastline and is a diverse region to explore and discover sparkling clear waters, white sandy beaches, great fishing and fascinating history. Innes National Park, one of the state's most famous wildlife havens, has 9,200ha of flora and fauna and spectacular rugged cliffs.

southaustralia.com



Above Lake Macdonnell, Eyre Peninsula

REGIONS OF SOUTH AUSTRALIA



ADELAIDE, SOUTH AUSTRALIA



CLIMATE

SEASON	MONTHS	CONDITIONS	TEMPERATURE
Summer	December - February	mainly hot & dry	25°C - 35°C
Autumn	March - May	mainly dry	20°C - 25°C
Winter	June - August	cool & wet	10°C - 15°C
Spring	September - November	little rain	20°C - 25°C

POPULATION



25.4M

People live in Australia*



1.78M

People live in South Australia*



1.4M

People live in the Adelaide metropolitan area*

*abs.gov.au



Above

Murray River Walk, Riverland

CONTACT INFORMATION & DISCLAIMER

The South Australian Tourism Commission actively seeks out and works with recognised regional tourism bodies, tourism operators and investors who share our vision and want to facilitate appropriate and sustainable tourism product that builds on our state's key strengths.

Our Destination Development group focuses on four main areas:

- **Aviation Development:**
Working with partners such as Adelaide Airport Ltd and government agencies to deliver effective business cases to domestic and international airlines.
- **Cruise Development:**
Investing in infrastructure, building strong partnerships and engaging with cruise lines, key government and private bodies to deliver cruise itineraries that are new and dynamic.
- **Investment and Infrastructure Development:**
Focusing on priority infrastructure projects that are financially and environmentally sustainable.
- **Experience Development:**
Increasing the range and quality of tourism experiences suitable for our priority target markets.

Important notes for the reader:

Publication date: May 2023. All statistics reported in this document are calculated using the latest available data.

Disclaimer:

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