

TOURISM INVESTMENT SOUTH AUSTRALIA



Welcome to **SOUTH AUSTRALIA**

Bunyerroo Valley, Flinders Ranges & Outback



On behalf of the South Australian Government, I am delighted to welcome you to our vibrant State.

As Minister for Trade, Tourism and Investment, I am pleased at the significant number of private investments into South Australia that are influencing our economic growth. We're open for business with new hotels and infrastructure projects happening

across the State to accommodate our growing number of visitors.

South Australia is diverse, modern and lively. Boasting world-class food and wine experiences, stunning coastlines, natural beauty and friendly people – we're a destination unlike any other.

Our city has been revitalised in recent times, with the redevelopment of the Adelaide Oval, the Riverbank Precinct, the Adelaide Convention Centre and the Research and Medical Precinct. We're renowned for hosting award winning events every year, including the Santos Tour Down Under, the Women's Australian Open Golf and motorsport's Adelaide 500 – drawing guests from across the country and around the globe.

We're proud of our regional areas too. Their outstanding leisure attractions are a tourism engine room – accounting for 40 per cent of total visitor expenditure. Kangaroo Island is quickly becoming one of the most notable destinations in Australia and is one of South Australia's biggest drawcards. It is home to pristine wilderness, unique experiences and is globally renowned for Southern Ocean Lodge and Flinders Chase National Park.

Our visitor economy is breaking records, at an all-time high of \$6.7 billion – well on track to reach the target of \$8 billion by 2020. The State Government in partnership with the South Australian Tourism Commission will continue to find ways to ensure tourism plays its part in transforming our economy.

You'll quickly discover that South Australia is a great place to live, visit and do business. Tourism is our super-growth area and I call on you to be a part of our strong and prosperous future.

A handwritten signature in blue ink, reading 'David Ridgway'.

David Ridgway
Minister for Trade, Tourism and Investment



CONTENTS

South Australia – A Destination Experiencing Growth	4	Aviation Development	18
The South Australian Tourism Commission	5	Cruise Ship Attraction	20
Tourism Fast Facts	6	Investment and Tourism Infrastructure Development	22
Economic Fast Facts	7	Experience Development	24
Economic Strengths	8	Events South Australia	26
A Diverse and Robust Economy	10	Activating China – 2020	28
Transformation of Adelaide’s Riverbank	12	South Australia is Easily Accessible	29
Adelaide Major Projects	14	South Australia’s Tourism Destinations	30
Adelaide Accommodation Projects	15	Location	34
Investment Support	16	Contact us	36

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 defence and trade industries.

South Australia's tourism industry is experiencing a substantial boost in air and cruise access, indicating strong business confidence.

This, together with unprecedented 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 globe each year.

Most importantly, the South Australian Tourism Commission has a clear vision for the future and how it will assist tourism to grow in South Australia.

The South Australian Tourism Commission is serious about working with investors and operators who share its vision.

All of the raw ingredients for world-class tourism development are already here in our State including fantastic food and wine, accessible coastal and natural experiences and an enviable lifestyle.

The South Australian Tourism Commission will assist investors and operators to facilitate sustainable tourism developments and experiences that support our 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.

The South Australian Tourism Commission encourages potential investors and operators to come and see what is on offer, to share its tourism vision, and to be part of South Australia's bright future.

THE SOUTH AUSTRALIAN TOURISM COMMISSION



De Mole River, Kangaroo Island

The South Australian Tourism Commission is committed to growing the State's tourism industry.

Tourism is big business in South Australia, creating work for South Australians 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 that South Australia is a compelling part of any Australian or international holiday.

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

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

The South Australian Strategic Plan sets the direction for the South Australian Tourism Commission to increase tourism expenditure in South Australia to a potential of \$8 billion by December 2020.

These priorities include:

- ▶ **Vibrant City** – increase Adelaide's reputation as a world-class city which offers many experiences, events and festivals for all types of visitors.
- ▶ **Attract a higher share of high yield visitors** from interstate.
- ▶ **Enhance South Australia's tourism proposition** through online channels and grow intrastate tourism demand.
- ▶ **Maintain existing international markets** (e.g. UK, North America, New Zealand and China).
- ▶ **Game changers** – increase airline access and develop high-end products and experiences and contribute to the growth of South Australia's food and wine experiences.

TARGET MARKET

The South Australian Tourism Commission has identified the Australian and International Experience Seeker as their primary group of travellers.

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, have likely been to Sydney/ Melbourne and Queensland, and are now looking for an alternative destination in Australia.

TOURISM FAST FACTS



Middle River, Kangaroo Island



\$6.7B

Tourism Expenditure



6.9M

Visitors



34.9M

Visitor Nights

INTERNATIONAL VISITATION TO SOUTH AUSTRALIA

- ▶ 475,000 international visitors
- ▶ Staying 11.1 million nights

INTERSTATE VISITATION TO SOUTH AUSTRALIA

- ▶ 2.4 million interstate visitors
- ▶ Staying 11.2 million nights

TRAVEL WITHIN SOUTH AUSTRALIA

- ▶ 4.0 million intrastate visitors
- ▶ Staying 12.3 million nights

ACCOMMODATION OCCUPANCY

Hotels in Adelaide achieved an occupancy level of 80% in the year to June 2018.

TOURISM EMPLOYMENT

In 2016-17 tourism directly employed 598,200 people Australia wide, and 36,000 people in South Australia.

ECONOMIC CONTRIBUTION OF TOURISM

Tourism's contribution to South Australia's Gross Value Added (GVA) for the year 2016-17 was estimated to be \$2.8 billion. This represented 3.0% of SA's total GVA.

Tourism's contribution to Australia's GVA for the year 2016-17 was estimated to be \$51 billion. This represented 3.1% of the total Australia's total GVA.

ECONOMIC FAST FACTS

Major Mining Projects and Biotechnology

WHY INVEST?

South Australia has a record number of major projects underway across a broadening economy worth billions of dollars.

- ▶ South Australia is home to some of the world's leading companies in defence, minerals and energy resources, food, wine and agribusiness, financial and business services, digital technology, innovation, advanced manufacturing, renewables, health industries and creative technology.
- ▶ In 2018, Adelaide remained Australia's most affordable city and one of the most affordable cities in the Asia Pacific region.
- ▶ In 2016, the Economic Intelligence Unit ranked Adelaide as the world's fifth most liveable city.
- ▶ In 2017, Lonely Planet named South Australia as the fifth best region in the world.
- ▶ Adelaide was ranked the most cost competitive city in Australia, moving ahead of Melbourne in KPMG's 2016 biennial Competitive Alternatives Report.

PROSPERITY

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

- ▶ \$89 billion of naval shipbuilding will happen in South Australia.
- ▶ South Australia is set to become the Defence and Space State with more than \$10 billion of industry investment expected in the next 10 years.
- ▶ World leader in renewable energy with Solar Reserve APRA Energy and Tesla establishing businesses in South Australia.
- ▶ The growing world demand for premium product that is cleanly, safely and sustainably produced creates significant opportunities for our food and wine industries.
- ▶ Health is one of South Australia's biggest growth industries that will continue to create jobs and boost the economy. The state's growing reputation is attracting big health players including Mayne Pharma and PowerHealth Solutions.
- ▶ Flourishing creative technology industry including Technicolor which will open a visual effects studio in Adelaide late 2018.

APPEALING DESTINATION

- ▶ South Australia is experiencing strong growth in visitation from China and South East Asia.
- ▶ The Tourism Forecast Committee forecasts for South Australia predict growth across all purposes of visitors at both city and regional levels.
- ▶ Labour force participation is at 62.9% in April 2018. Total employment is at 840,700 in April 2018.
- ▶ International student numbers are growing each year. The state had approximately 36,000 overseas students enrolled in 2017.

South Australia's **ECONOMIC STRENGTHS**



Collins Class Submarine

DEFENCE

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.

The nation's premier naval industry hub is located in Northern Adelaide at Techport Australia.

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.

It has internationally regarded expertise in systems integration, electronic warfare, surveillance, aerospace, naval ship building, education and training plus research and development.

In recent years South Australia has secured billions of dollars' worth of new defence and security projects that will provide opportunities for years to come, such as the \$8 billion Air Warfare Destroyer project and the Future Submarine program worth over \$50 billion.

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.

MINERALS AND ENERGY RESOURCES

- ▶ 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 mineral and energy 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.

Major resource projects:

- ▶ BHP's Olympic Dam mine is one of the State's largest employers providing employment for 3500 people. The Southern Mine Area expansion is underway with a potential brownfields expansion under consideration.
- ▶ OZ Minerals' Carrapateena copper-gold mine is under construction. The \$916 million project is to be developed over the next 2 years and provides employment opportunities for around 1000 people in construction and 450 ongoing.
- ▶ New oil and gas discoveries continue to be made by explorers in the Cooper-Eromanga basins and remains an important supplier of natural gas to customers in Southeastern Australia.
- ▶ There has been a renaissance in exploration in the South Australian Otway Basin in 2018, triggered by the Haselgrove-3 gas discovery and Federal Government funding for a new gas processing plant in the region.

The South Australian resources sector continues to demonstrate sustained development with the following industry data for 2017:

Mineral and petroleum production **\$5.2B**

Mineral and petroleum exports account for 31% of the State's exported goods (\$11.9 billion) **\$3.7B**

Mineral and petroleum exploration expenditure to secure resources of the future **\$188.5M**

CURRENT KEY INDICATORS

Merchandise Exports **A\$11.9B***

Private New Capital Expenditure **A\$5.2B***

Employment **840,000***

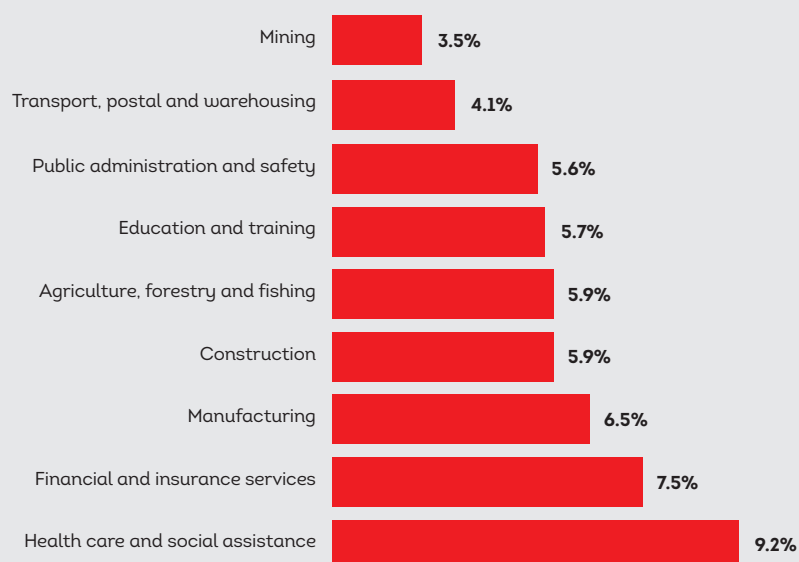
Gross State Product **A\$103.3B^**

*As at March 2018. ^2016-17. Source: Australian Bureau of Statistics

Major exports in the year to September 2018:

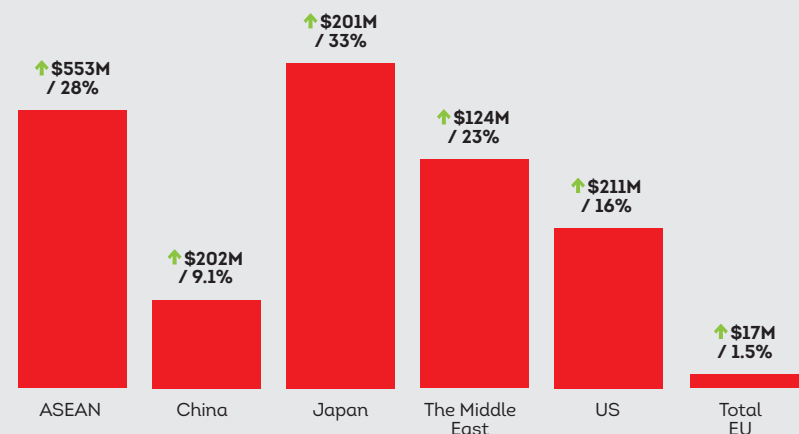
- ▶ South Australia's overseas goods exports totalled \$11.9 billion.
- ▶ The total value of South Australian exports continues to be supported by growth in the value of exports of wine, wheat, metal ores and metal scrap, petroleum and petroleum products, and copper. These gains were partly offset by declines in the value of exports of lead, road vehicles, parts and accessories, 'other/confidential' (which includes bulk barley) and fish and crustaceans.
- ▶ Export growth in the year to March 2018 was recorded in the export markets of ASEAN (including Malaysia), China, Japan, and the Middle East but there have been declines in the major export destinations of the United States and the total European Union.

Proportion of total GSP by industry (2016-17)



Industry gross value added as a proportion of total industries: industry gross value added, chain volume measures.

Major export destinations (12 months to March 2018)



*Including Malaysia (up \$180 million or 21%)



A diverse and ROBUST ECONOMY

Bird in Hand Winery, Adelaide Hills

WINE AND FOOD

- ▶ In 2016, Adelaide / South Australia joined the prestigious Great Wine Capitals Global Network.
- ▶ South Australia accounts for almost 80% of Australia's premium wine production made from some of the oldest vines in the world.*
- ▶ In 2015-16 South Australia's wine exports reached \$2.11 billion AUD*.
- ▶ South Australia's production of red and white wines is a major contributor to Australia's position as the world's seventh-largest producer of wine.
- ▶ 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.
- ▶ South Australia is home to the Waite Precinct, the largest agricultural research complex in the Southern Hemisphere.

MANUFACTURING

- ▶ Manufacturing is recognised as a key component of prosperous and resilient economies around the world and has always been a cornerstone of South Australia's economy.
- ▶ The sector's success is due to growing advanced manufacturing that will continue to develop internationally competitive products and services.
- ▶ The State is increasingly responding to global demand in new areas such as mining equipment, health and medical equipment and ICT.
- ▶ The State is well positioned to capitalise on new and emerging manufacturing opportunities in a wide range of sectors.

EDUCATION

- ▶ Adelaide has a reputation as Australia's 'Learning City,' home to three well established local universities (Flinders University, The University of Adelaide and University of South Australia) as well as two prestigious international universities (Carnegie Mellon University and University College London).
- ▶ South Australia hosts approximately 36,000 overseas students annually, the majority from Asia and India. The largest enrolments are from Chinese students.**
- ▶ South Australia's international education industry now generates more than \$1.2 billion and is one of the State's largest export sectors.

"South Australia accounts for almost 80% of Australia's premium wine production made from some of the oldest vines in the world."

Source: Department for State Development www.statedevelopment.sa.gov.au

*Department of Primary Industries Regions South Australia www.pir.sa.gov.au

**Education Adelaide www.studyadelaide.com



SAHMRI, Adelaide

CLEAN TECHNOLOGY

- ▶ South Australia's advanced clean technology sector is creating environmentally-friendly products and services.
- ▶ The State leads Australia in renewable energy sources such as wind, solar, geothermal and wave power.
- ▶ The State has recognised expertise in water treatment and waste management.
- ▶ It is a world-class, export-oriented hub of water technology and services and is at the forefront of responding to climate change and water scarcity.

ICT AND ELECTRONICS

- ▶ South Australia's ICT and electronics industries are worth billions of dollars and are experiencing sustained growth.
- ▶ Closely linked to South Australia's manufacturing, research and education, minerals and energy, defence and medical expertise, the State's ICT businesses provide global companies with innovative products and services in a wide range of specialist areas.
- ▶ Areas include industrial systems, business intelligence and finance, health, education, telecommunications, transport and creative industries.

TECHNOLOGY

- ▶ South Australia's technology industry encompasses several sectors. The life sciences sector employs about 1,300 people, and a significant number of people are also employed in related technology industry sectors. Collectively the industry generates several hundred millions of dollars in revenue exports each year.
- ▶ Research and development in the State's commercial and public organisations have led to internationally recognised advances in therapeutics, gene-based diagnostics, molecular plant breeding, stem-cell research and livestock productivity.
- ▶ Adelaide's Technology Precinct at Thebarton is home to one of Australia's largest clusters of commercial technology companies.



Transformation of ADELAIDE'S RIVERBANK

Riverbank Precinct, Adelaide

Billions of dollars' worth of projects are underway or recently completed at Adelaide's Riverbank including:

\$535M	Redeveloped Adelaide Oval to a 50,000 seat stadium
\$350M	Expansion of Adelaide Convention Centre
\$40M	Pedestrian footbridge linking the Adelaide Railway Station to the southern entrance of the Adelaide Oval
\$90M	Redeveloped Adelaide Festival Centre
\$2.6B	New transport infrastructure to service the precinct and surrounding Adelaide
\$2.7B	New Royal Adelaide Hospital

The redevelopment of Adelaide's Riverbank is well underway. One of the city's largest and most significant urban renewal initiatives presents a unique opportunity to realise the area's potential as a vibrant destination of international significance.

The Riverbank is attracting public and private investment that will enhance the transformation of the precinct in the coming years. The revitalised area will draw people back into the heart of the city and by 2020 it is anticipated the precinct will attract 15.6 million visitors annually.

The redevelopment of the Adelaide Riverbank Precinct incorporates a range of sporting and entertainment venues, events, attractions, activities and lively public spaces that will create a must-see destination for visitors to Adelaide and a natural convergence point for residents.

The focal point will be the establishment of spaces that will provide visitors with a mix of restaurants, bars, exclusive shopping and public space that will add to the appeal of the precinct.



Major components of the redevelopment include the expansion of the Adelaide Convention Centre (doubling its capacity, to create a world-class 3,500 seat meeting venue), and a Morphett Street boulevard linking the precinct with the South Australian Health and Bio-Medical Precinct.

The open plan design will link the redeveloped Adelaide Convention Centre and Festival Plaza with North Terrace.

A pedestrian footbridge linking the south bank to the north bank of the river for improved access to and from Adelaide Oval has been integral to the success of the precinct.

This development draws visitors to the precinct both day and night and encourages riverfront dining. Programmed events will be staged throughout the year to ensure this space is a vibrant precinct for visitors and locals.

The former Royal Adelaide Hospital site in Adelaide's east end, is a vital part of the Adelaide Riverbank. The site will be transformed into a creation and innovation hub that will create high-value jobs and industries, securing the future for generations of South Australians to come and positioning Adelaide as the start-up capital of Australia.

The multi-billion dollar precinct will include:

- ▶ World-class convention facilities
- ▶ Diverse sporting facilities
- ▶ Multi-use entertainment spaces
- ▶ Five star hotels
- ▶ Casino expansion
- ▶ Festival Plaza
- ▶ State-of-the-art hospital
- ▶ Globally-recognised health and research precinct



Royal Adelaide Hospital, Adelaide

The new Royal Adelaide Hospital (RAH) forms a critical part of the South Australian Health and Biomedical Precinct which will be the largest health precinct in the southern hemisphere.

The precinct is the State's highest priority project for health, research and education infrastructure.

Together, the new RAH and South Australian Health and Medical Research Institute (SAHMRI) facilities provide the foundation for a cluster of organisations to deliver world-leading models of training, research and clinical service delivery. SAHMRI opened in late 2013 and significantly increased Australia's capacity for leading scientific research.

\$200M New South Australian Health and Medical Research Institute

\$230M Health Innovation Building, University of South Australia

\$246M Adelaide Health and Medical Sciences Building, University of South Australia

\$2.7B New Royal Adelaide Hospital

Recently completed is the \$230 million Health Innovation Building (HIB) at the University of South Australia. The HIB is the home to the Centre for Cancer Biology (CCB), the Science | Creativity | Education Studio (SciCEd) and the Innovation and Collaboration Centre (ICC). The CCB carries out a world class program of research, making breakthrough discoveries into new ways to prevent and treat the disease.

The University of Adelaide Health and Medical Sciences Building, opened in early 2017 with 1600 medical, nursing and dental students. It will grow to be an epicentre of clinical teaching in Adelaide. Housing integrated laboratories, where they will undertake ground breaking research to address problems such as cancer, symptoms of chronic diseases and children's health.

Adelaide's new creation and innovation neighbourhood is the site of the former Royal Adelaide Hospital. When fully established in the next five years, more than 5000 people will work and stay within the site, creating a centre of gravity for the Adelaide start-up community. It will become the ideal environment for entrepreneurs to partner with industry, researchers, mentors and investors to help grow their start-up or existing businesses.

Adelaide 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 King William South, Quest on Franklin, Quest Port Adelaide and The Watson Art Series Hotel.

Sofitel Hotel, Adelaide

In line with other major city infrastructure projects Adelaide's hotel pipeline continues to grow between 2017-2020 with new accommodation projects announced. Luxury global brands will launch into the marketplace in 2020, including the Sofitel Hotel on Currie Street, Crowne Plaza on Frome Street, plus the Adelaide Casino Luxury Hotel all of which will set new benchmarks with high end propositions. The recent announcement of the development of a Westin Hotel at the GPO site will see an additional high-end accommodation in early 2021 at the southern part of Adelaide's CBD.

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 Atura Adelaide Airport Hotel in 2018 and the Travelodge in 2020.

These projects are set to increase Adelaide's appeal and international reputation and support South Australia's visitor economy in achieving its \$8 billion potential by 2020.



Westin Hotel, Adelaide

INVESTMENT SUPPORT



Festival Plaza, Adelaide

The South Australian Tourism Commission has a dedicated Destination Development Team that assists developers, operators and investors during the decision process to invest in South Australia's tourism sector.

The team aims to see new and refreshed tourism infrastructure and experiences come to fruition in South Australia. The team of specialists works with local, national and international operators during the conceptualisation, planning and implementation process of new investments.

The Destination Development Team 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 Team 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 products.
- ▶ 'Best of Breed' Investor Familiarisation Program.

DESTINATION DEVELOPMENT PRIORITIES

- ▶ Develop route opportunities with key international and domestic airlines.
- ▶ Attract more cruise ships to South Australian ports and anchorages.
- ▶ Upgrade accommodation and new rooms in regional South Australia.
- ▶ Develop new experiences that build on our State's strengths of food, wine and nature.



Hillocks Ocean Pod, Yorke Peninsula

AVIATION DEVELOPMENT





GROWING AIRLINE SERVICES TO ADELAIDE

Air access is an enabler of visitation to a tourism destination. Ensuring that visitors can reach their desired destination, easily book their arrangements and find affordable and competitive fares, is a priority of the South Australian Tourism Commission.

The Destination Development Team works with major stakeholders such as Adelaide Airport Limited to attract new airlines to South Australia and to encourage existing airlines to expand their services.

International airlines that currently fly direct non-stop to Adelaide include Air New Zealand, Cathay Pacific, China Southern, Emirates, Fiji Airways, Jetstar Airways, Malaysia Airlines, Qatar and Singapore Airlines.

AVIATION STRATEGY

The South Australian Tourism Commission's strategy is to push for increased services from domestic and international airlines.

The agency targets routes that deliver visitors from priority tourism markets. It ensures that the government's approach is coordinated and focused.

The government's Activating China Strategy has been a major priority in recent years for the South Australian Tourism Commission. The recent success of non-stop air access between Adelaide and Guangzhou, China by China Southern Airlines supports the rapidly growing Chinese market.

REGIONAL ACCESS

Dispersal of visitors to regional South Australia by air, road and rail is a way to share the economic benefits of tourism.

The South Australian Tourism Commission is actively engaged with local government to ensure that regional airports and regional airlines disperse visitors to the State's exciting tourism experiences.

The South Australian Tourism Commission worked with Kangaroo Island Council to increase the capacity of Kangaroo Island Airport's runway and terminal. The expansion allows for larger aircraft and encourages new routes to Kangaroo Island such as Qantas flights from Adelaide and Melbourne

"Adelaide Airport ranked Australia's fastest growing capital city airport for international passenger numbers in 2016-17"

Adelaide Airport Limited



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 Destination Development Team represents South Australia at national and international industry trade events, and facilitates and supports itinerary planning with domestic and international cruise lines.

The South Australian Cruise Ship Strategy 2020 has been developed by the South Australian Tourism Commission to ensure our state continues to be a national leader and destination of choice by visiting cruise lines to Australia. The agency aims to attract 100 ship visits with a value of \$200 million for the local economy by year 2020.

The cruise industry is one of the fastest growing tourism sectors in Australia and South Australia. It has contributed significantly to the State's economy over the past decade, with the 2016/17 season alone generating \$98.5 million in economic benefit for South Australia. Our destinations and itineraries continue to appeal to the growing cruise segment, with the 2018/19 season set to welcome 86 cruise ship visits, up 32% on the 2017/18 season which attracted 65 arrivals.

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 cruises 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 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.

"The SATC aims to attract 100 ship visits with a value of \$200 million for the local economy by year 2020."



Queen Mary 2, Adelaide

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 investment by the South Australian Tourism Commission 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.



Penneshaw Wharf, Kangaroo Island

POTENTIAL DESTINATIONS

South Australia has other port options at Wallaroo, Ceduna and Whyalla, as well as anchorages at Robe, Victor Harbor and the islands around Eyre Peninsula that are currently being investigated for future opportunities.

Investment and Tourism INFRASTRUCTURE DEVELOPMENT

The Bend Motorsport Park, Murray River, Lakes & Coorong

The Destination Development Team 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.

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 Team also helps private enterprise to deliver a number of individual projects involving numerous stakeholders with the aim of accelerating projects into the market place and ensuring that the best possible outcomes are achieved.



National Wine Centre of Australia, Adelaide

GOVERNMENT INFRASTRUCTURE

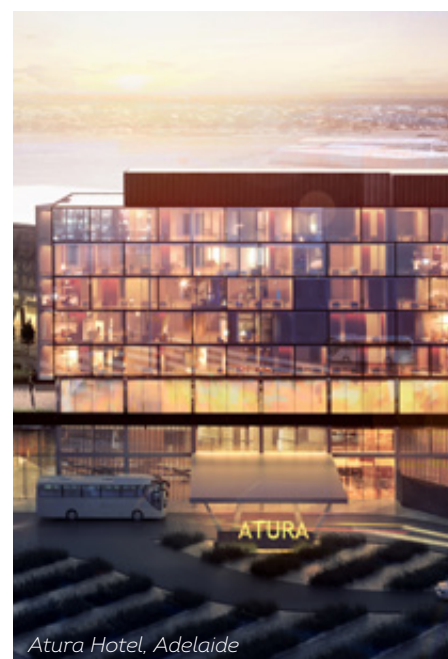
The South Australian Tourism Commission works in partnership with Regional Development Australia and Local, State and Federal Government to encourage the development of new tourism infrastructure within South Australia.

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.

The Adelaide Riverbank Precinct redevelopment is an example of multiple public and private stakeholders working together collaboratively.

This integrated development demonstrates a whole-of-government commitment to further increasing Adelaide's destination appeal.

As part of the Regional Visitor Strategy (released in 2018) upgrading and improving regional infrastructure is a priority. This includes activating reliable Wi-Fi in popular tourism towns, service centres, highly-visited sites, attractions and on regional touring routes.



Atura Hotel, Adelaide

EXPERIENCE DEVELOPMENT

Oceanic Victor, Fleurieu Peninsula

The Destination Development Team 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.

The Destination Development Team works with industry partners to develop new and refreshed visitor experiences that leverage the State's competitive advantages of food, wine and nature.

BEST OF BREED PROGRAM

The South Australian Tourism Commission hosts business decision makers on familiarisation visits in South Australia to promote investment in experience development. The South Australian Tourism Commission provides a fully hosted itinerary, introductions to key contacts, background research and our vision for the identified experience development opportunity.



EVENTS SOUTH AUSTRALIA



Santos Tour Down Under, Fleurieu Peninsula

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 six major events - the Santos Tour Down Under, Adelaide 500, Tasting Australia, Bridgestone World Solar Challenge, Adelaide Fashion Festival and Christmas Pageant - that make a significant contribution to the state, injecting tens of millions of dollars into the local economy each year and boosting South Australia's profile around the world.

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.



Tasting Australia, Eyre Peninsula

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, motorsport, and mass participation. Some of the events include:

ISPS Handa Women's Australian Open Golf, February. The world's top female golfers contest the Patricia Bridges Bowl trophy at Adelaide's premier golf courses.

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

Australian Scouts Jamboree, January 2019. The 25th National Scout Jamboree expects to attract around 12,000 people to Tailem Bend.

NRL: Sydney Roosters at Adelaide Oval, June 2019. For the third year, Sydney Roosters will make Adelaide their home away from home.

Australian Masters Games, October 2019. Regarded as one of the premier and largest participation sporting events on the Australian sporting calendar. The Games

offer a broad range of sports and is open to anyone over 30 years old.

Australian Swimming Olympic and Paralympic Trials, 2020. This crucial selection meet determines the Tokyo 2020 Olympic and Paralympic Australian Swim teams.

NRL Holden State of Origin, 2020. For the first time South Australia will host a match in this prestigious best-of-three series between New South Wales' and Queensland's State representative sides.

ICC World Twenty20, 2020. South Australia secured matches as part of the Men's T20 including a semi final to be hosted at Adelaide Oval.

ACTIVATING CHINA 2020



Beerenberg Farm, Adelaide Hills



57K

Inbound Chinese Visitors



\$415M

Expenditure

Chinese visitation to Australia has been growing strongly over the last ten years. The South Australian Tourism Commission's Activating China – 2020 Strategy, launched in 2013, illustrates Chinese visitation patterns. It has the aim of reaching 57,000 Chinese visitors worth \$450 million expenditure into South Australia. It outlines six key focus areas to triple Chinese visitation to South Australia by 2020. South Australia is fortunate to offer direct non-stop air access between Adelaide and mainland China, launched by China Southern Airlines in December 2016.

China 2020 Potential for South Australia:

57K

Visitors

\$450M

Expenditure

As of 2018, there are flights offered by China Southern Airlines 5 days a week. By March 2018 the 2020 target of visitation was met, with 57,000 Chinese visitors travelling to South Australia, with the total expenditure being \$415 million.

An online version of this report can be found at www.tourism.sa.gov.au

Strategic focus areas

- Communicate to the most profitable consumer for South Australia.
- Make it easy to research and book South Australia.
- Make it easy to get to South Australia.
- Deliver quality South Australian experiences.
- Deliver quality South Australian infrastructure.
- Leverage partnership opportunities.

South Australian positioning

From consumer research in China, it has been identified that South Australia should be promoted under three core themes:



WINE

Due to the growing interest in wine across China, South Australia, as the wine capital of Australia and the home of several widely recognised brands, is a highly appealing destination.



NATURE

South Australia can provide some of the best nature and wildlife experiences in Australia, especially on Kangaroo Island, while also providing unpolluted urban environments.



FOOD

An essential part of travel for Chinese visitors, South Australia's fresh local produce, especially seafood, is of high appeal.

South Australia is **EASILY ACCESSIBLE**

RAIL JOURNEYS

Interstate trains The Overland, The Ghan, and The Indian Pacific, 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.

CRUISE SHIP ARRIVALS

The Port Adelaide Passenger Terminal is just a 40 minute train journey away from Adelaide. South Australia's port facilities (including Port Lincoln and Kangaroo Island) are some of the best in Australia. These assets support growth in the cruise industry and visits to South Australia, as well as encouraging regional dispersal throughout the State. Cruise ship passengers are offered a wide variety of shore excursions or are free to explore Adelaide and South Australia on their own.



The Ghan, Flinders Ranges & Outback

ADELAIDE AIRPORT

Located just 15 minutes from Adelaide's central business district and minutes from the city's famous beachside suburbs, Adelaide Airport is arguably the most conveniently located of all Australia's capital city airports. National and international visitors are assured a quick, easy and inexpensive journey into the city centre. Indeed, Adelaide Airport has become the most efficient passenger terminal in Australia.

INTERNATIONAL AIR ACCESS

Adelaide enjoys high-frequency, international direct flights with the major airlines including Air New Zealand, Cathay Pacific, China Southern, Emirates, Fiji Airways, Jetstar Airways, Malaysia Airlines, Qatar and Singapore Airlines. Adelaide's central position on the continent ensures fast, frequent and affordable domestic connections to all major Australian cities.

METROPOLITAN TRANSPORT

Adelaide's tramline is free for 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 with a \$2.3 billion investment by the State Government. 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: www.adelaidemetro.com.au



South Australia's TOURISM DESTINATIONS

The Lane Vineyard, Adelaide Hills

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 of South Australia, South Australian Museum, Adelaide Botanic Garden, 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 Jacob's 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, or see 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 2000 kilometres of untouched coastline, unspoilt 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" fresh seafood dining experiences.

FLEURIEU PENINSULA

Just a 40-minute drive from Adelaide you will find an outstanding combination of seaside resorts, rolling hills, vineyards, great surfing and swimming beaches and the opportunity to swim with tuna at Oceanic Victor. 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.



Big Bend, Murray River, Lakes & Coorong

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 unspoilt 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 stop at Kangaroo Island 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 unspoilt natural environment perfect for bushwalking in a national park and diverse scenery to enjoy while relaxing on a houseboat on the Murray River. There are plenty of recreational activities and water sports on offer, and major attractions like Monarto Zoological Park and The Bend Motorsport Park are a must visit.

RIVERLAND

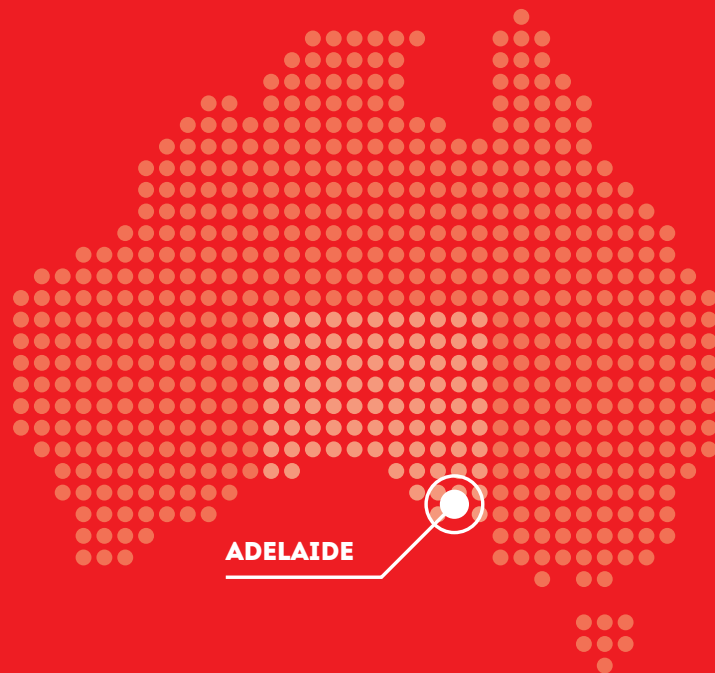
Less than two hour's drive from Adelaide the year-round sunshine in the region is perfect for outdoor activities. Visitors can take a house boat cruise along the Murray River, sample the local produce, play a round of golf, stroll through a wetland or discover a historic town. Native birdlife abounds 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 9200ha of flora and fauna and spectacular rugged cliffs.

LOCATION





ADELAIDE'S 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

24.7M

People live in Australia*

1.71M

People live in
South Australia*

1.25M

People live in the Adelaide
metropolitan area*



* Source: Australian Bureau of Statistics

South Australian Tourism Commission

CONTACT US

The Destination Development Team 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.

The team 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.

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Important notes for the reader

Publication date: July 2018. All statistics reported in this document are calculated using the latest available data.

All images of the Riverbank Precinct re-development and new accommodation builds are the latest available artist impression images.

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