

SOUTH AUSTRALIAN  
TOURISM COMMISSION

# WELLNESS

TOURISM ACTION PLAN 2025



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## SOUTH AUSTRALIAN TOURISM COMMISSION WELLNESS TOURISM ACTION PLAN 2025

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**For the purpose of this strategy “Wellness Tourism” is defined as travel for the purpose and pursuit of maintaining and enhancing one’s personal health and wellbeing.**

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Consumers of Wellness Tourism enjoy experiences associated with maintaining or enhancing their mental, spiritual, emotional, physical, and social wellbeing, with a key driver for many being a connection to nature. These experiences can drive consumers to travel to a particular destination or might be additional activities undertaken at a destination they are visiting for other purposes.

These consumers or “Wellness Travellers” are generally more motivated by a need to fulfill a sense of purpose, accelerate personal growth, or an opportunity to help others.

Wellness Tourism experiences may include but are not limited to:

- Day spas offering a la carte or fully inclusive pamper packages (e.g. massage, facials, thermal bathing, cosmetic treatments)
- Detox, personal coaching, naturopathy, and other specialist-led treatment programs
- Mind-body intervention classes (e.g. yoga, meditation, tai chi)
- Recreational activities that enhance health and fitness (e.g. hiking, kayaking, group fitness training)
- Visiting tranquil, awe-inspiring and remote destinations to unwind and connect with nature (e.g. sanctuaries, parks, naturally occurring water sources)
- Agritourism (e.g. cooking classes, produce farm tours, paddock-to-plate dining)
- Aboriginal and Torres Strait Islander healing practises, storytelling, cultural presentations, and bush medicine education
- Attending spiritual retreats and visiting places of spiritual wellbeing
- Activities which foster a deeper sense of connection, be it with other travellers, oneself, friends and family, and/or the environment
- Giving back and voluntourism (e.g. vegetation restoration, animal welfare support, community support programs)

These wellness experiences may complement a range of accommodation styles including authentic farm stays, glamping and eco-lodges, dedicated health/spirituality retreats, and luxurious all-inclusive resorts.



Left

Top: Coriole Vineyards, Fleurieu Peninsula | Bottom: Jurlique Farm, Adelaide Hills

Right

Top: Novotel Barossa Valley Resort, Barossa | Bottom: One Kangaroo Island, Kangaroo Island

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## INTRODUCTION

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The Regional Visitor Strategy 2025 acknowledges the emerging Wellness Tourism sector in South Australia and its growth potential over the coming years. The South Australian Tourism Commission (SATC) is committed to working with our key industry stakeholders and regional partners to support the achievement of the South Australian Visitor Economy Sector Plan's target of \$12.8 billion expenditure and an additional 16,000 jobs by year 2030. The outcomes of this Wellness Tourism Action Plan will contribute to the Visitor Economy Sector Plan's target through supporting new and existing Wellness Tourism opportunities in line with present-day travel behaviours and trends.

As we move beyond the devastating and lasting impacts of the global COVID-19 pandemic, South Australia is fortunate to be well-placed to capitalise on the emerging Wellness Tourism opportunity. We will do this by building on existing strengths, such as nature-based experiences and premium produce – with a diverse range of these assets located within close proximity of Adelaide. We will enhance our existing experiences and position the state as a world-leading Wellness Tourism destination, while leveraging Australia's appeal as a clean, green destination offering unique cultural traditions and health promoting native plants.

This Plan provides the South Australian Government, key industry stakeholders and regional partners with clear direction and priority actions that will support us in reaching our state's Wellness Tourism potential.

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**The SATC's vision is for South Australia to be a world-leading Wellness Tourism destination. Our aim is to establish new Wellness Tourism products and experiences for both Primary and Secondary Wellness Travellers.**

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In order for us to achieve this vision, the SATC will focus on delivering the following five key objectives:

1. Provide industry capability building opportunities for new and existing Wellness Tourism operators
2. Encourage investment in new and existing Wellness Tourism products and experiences, and activate natural assets
3. Promote and market Wellness Tourism products and experiences that are aligned with South Australia's key domestic and international target markets
4. Support the growth potential of Wellness Tourism in South Australia through fostering strong partnerships with tourism operators, private investors, industry associations, regional authorities, as well as local, state and federal government departments
5. Encourage wellness orientated trade and consumer events to be held throughout South Australia





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## WELLNESS TRAVELLERS

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The Wellness Traveller market segment is diverse and has evolved far from the typical day spa or health retreat visitor of yesteryear. Many Wellness Travellers are searching for transformative and engaging experiences that ultimately result in a sense of contentment and positive emotions.

Wellness Travellers are typically more affluent, better educated, and more experienced travellers. They are early adopters and willing to try new or novel experiences - particularly those that are synonymous with the wellbeing of the host community, other people and the planet. Wellness Travellers are more likely to be motivated by fulfilling a sense of purpose, personal growth, giving, and helping others.<sup>1</sup>

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<sup>1</sup>Global Wellness Tourism Economy 2018,  
Global Wellness Institute

### THE WELLNESS TRAVELLER



**Affluent**



**Educated**



**Experienced  
travellers**



**Early adopters**



**Care about  
others**



Above

Greenly Beach, Eyre Peninsula



### Primary Wellness Travellers

Primary Wellness Travellers (PWT) are those who travel with the main motivation being to fulfil their wellness needs. Core demand driving Wellness Tourism products are the driving factor in their destination choice.

### Secondary Wellness Travellers

Secondary Wellness Travellers (SWT) are those who incorporate a wellness activity during their leisure or corporate trip with any main purpose other than wellness. This means that core demand driving Wellness Tourism products and experiences are not their main driving factor for travelling to a destination. Secondary Wellness Travellers make up the large majority of the Wellness Traveller market, meaning that supporting Wellness Tourism products and experiences (that can easily be built into an existing travel itinerary) are crucial.

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**91 million**

Wellness Tourism trips undertaken by PWT.

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**\$88 billion**

Value of the PWT market segment.

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**89%**

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

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**\$551 billion**

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

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**8%**

Global growth per annum.

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**10%**

Global growth per annum.

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SOURCE: GLOBAL WELLNESS TOURISM ECONOMY 2018, GLOBAL WELLNESS INSTITUTE

### Hedonic vs. Eudemonic Wellness Travel Types

Every Wellness Traveller will have a unique set of interests and motives for their travel experience. Many will fall along on a scale between purely Hedonic and purely Eudemonic Wellness Tourism needs, meaning that a combination of Hedonic and Eudemonic Wellness Tourism experiences and products will be more broadly appealing to the masses.

#### Hedonic Wellness Travellers

Seek immediate gratification and indulgence. They are self-rewarding and lean toward luxurious experiences.

#### Eudemonic Wellness Travellers

Travel for experiences that offer longer lasting satisfaction through personal growth, such as learning a new skill, developing connections and giving back.

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## GLOBAL WELLNESS TOURISM INDUSTRY

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### Global Trends

Wellness Tourism is one of the fastest growing global tourism sectors, with a growth rate of 6.5% annually, contributing significantly to the visitor economy over recent years. In 2017, over 830 million wellness trips resulted in \$639 billion global expenditure.<sup>1</sup>

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**830 million**

Global Wellness Trips

**\$639 billion**

Value of Wellness Trips

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There are no signs to suggest that the growth of the global Wellness Tourism is slowing, and in light of the recent COVID-19 global pandemic, it is expected that Wellness Tourism will increase in importance, as more consumers place higher value on their health and wellbeing when planning their travel.

In recent years there has been evidence of growth in the following consumer trends::

- Learning different relaxation techniques,
- Living like a local through authentic experiences,
- Food tours, cooking classes, agritourism and paddock-to-plate experiences,
- Personal transformation,
- Slow Travel (e.g. Cittaslow),
- Voluntourism,
- Continuing healthy lifestyle habits during holiday time, and
- Prescribed holidays to reduce stress.<sup>2</sup>

### Wellness Tourism Leaders

There are well-established Wellness Tourism destinations all around the world and each has its own unique positioning (which can be seen on the map across the page). There are a number of destinations that deliver world-class Wellness Tourism experiences and attract high value Wellness Travellers (average higher spend per trip).

Some key examples include:

- **The United States of America**  
A heavy focus on lifestyle-based services; key locations include Colorado (hiking & mountain yoga retreats), New York (urban health spas/hotels), California (detox & weight loss retreats), Arizona (spas).
- **Central Europe**  
A key focus on therapeutic services; key locations include Germany (climatic health resorts), France (thalassotherapy), Austria (alpine wellness hotels), Italy (thermal spas & beauty treatments).

As Wellness Tourism destinations, China and Japan lean heavily on hot springs and strong cultural themes, however the average spend per visitor is slightly lower than the aforementioned Western Hemisphere destinations.

Meanwhile, although South Africa attracts a smaller number of Wellness Travellers (approximately 7 million trips<sup>3</sup>), several of its wine regions are promoting compelling wellness retreat packages which include wine, nature and wellness activities like yoga and meditation.

### Global Stakeholders

#### Global Wellness Institute

The Global Wellness Institute (GWI) is a not-for-profit organisation with a mission to empower wellness worldwide. GWI is recognised as the leading source for authoritative wellness industry research, having released several reports since 2007. The Institute looks at all areas of the global wellness economy, which was valued at US\$4.5 trillion in 2018. Wellness Tourism is ranked as the fourth most valuable global wellness economy sector (as shown on the chart across the page).

#### Wellness Tourism Association

Established in the United States of America in 2018, the Wellness Tourism Association (WTA) is a not-for-profit global network of destination marketing agencies, accommodation properties, tour operators, travel advisers, wellness practitioners, media and other partners that form the global Wellness Tourism industry. WTA has over 100 members from 21 countries and aims to provide a collective voice to support the sustainable future of the sector. The Association works with its members to help define the industry and educate consumers to help them recognise legitimate and credible Wellness Tourism providers.

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<sup>1</sup> Global Wellness Tourism Economy 2018, Global Wellness Institute

<sup>2</sup> Wellness Tourism Worldwide Report 2014, Global Wellness Institute



## GLOBAL WELLNESS TOURISM EXPENDITURES & DESTINATIONS (2017)

### EUROPE \$210.8B

**UK** - Weekend wellness retreats & bootcamps  
**Norway** - Nordic wellness  
**Finland** - Sauna  
**Austria** - Alpine wellness hotels  
**Germany** - Climatic health resorts  
**France** - Thalassotherapy  
**Turkey** - Turkish baths  
**Russia** - Sanatoria and banya

### NORTH AMERICA \$241.7B

**California** - Weight loss & detox retreats  
**Colorado** - Hiking & mountain yoga retreats  
**Arizona** - Destination spas  
**New York** - Urban healthy hotels & spas

### LATIN AMERICA-CARIBBEAN \$34.8B

**Mexico** - Temazcal & beach resort spas  
**Caribbean** - Wellness cruises  
**Costa Rica & Belize** - Rainforest spa retreats  
**Brazil** - Thermal waterparks  
**Argentina & Chile** - Thermal resorts

### MIDDLE EAST-NORTH AFRICA \$10.7B

**Israel** - Dead Sea spa resorts  
**Egypt** - Sand baths  
**Morocco** - Thermal hammams

### ASIA-PACIFIC \$136.7B

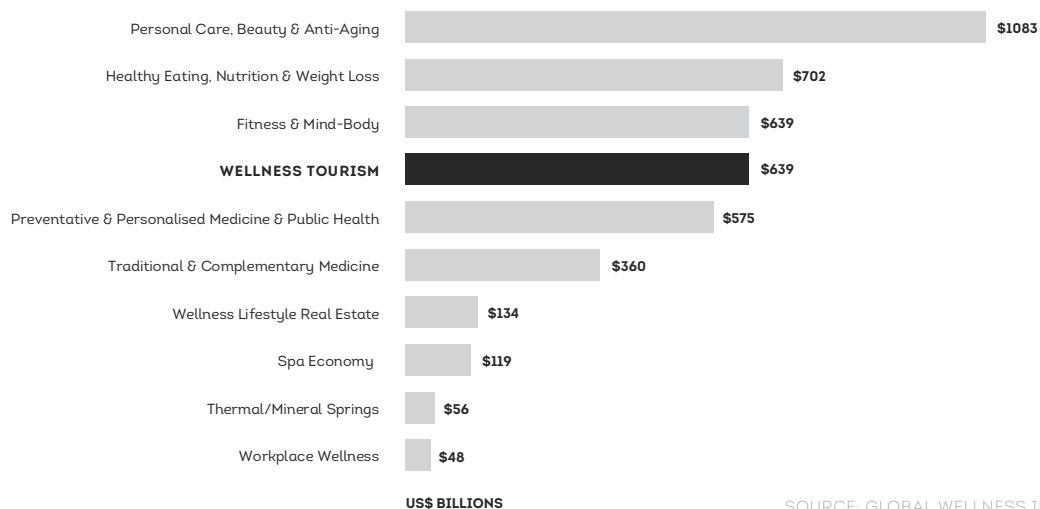
**China** - Hot spring resorts  
 & traditional chinese medicine  
**Korea** - Jjimjilbang  
**Japan** - Onsen & super sento  
**India** - Meditation, yoga & Ayurveda retreats  
**Malaysia & Thailand** - Executive checkups  
**New Zealand** - Hot springs  
**Australia** - Surf & yoga retreats

### SUB-SAHARAN AFRICA \$4.8B

**Kenya, Tanzania & Botswana** - Safari spas  
**Zambia** - Walking & yoga safaris  
**South Africa** - Health hydros, yoga & wine retreats

SOURCE: GLOBAL WELLNESS INSTITUTE

## GLOBAL WELLNESS ECONOMY - 2018



SOURCE: GLOBAL WELLNESS INSTITUTE

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## AUSTRALIAN WELLNESS TOURISM INDUSTRY

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Australia is an emerging Wellness Tourism destination, currently ranked 14th in the world<sup>1</sup>, but offers significant growth opportunities over the coming years. Our overnight domestic Wellness Tourism market continues to grow, faster than the global average at 9.6% annually<sup>3</sup>, with 421,000 visitors going to a spa, sanctuary or wellbeing centre in 2019.<sup>4</sup>

Australia boasts many areas of high natural amenity which offer an idyllic setting for Wellness Tourism. Activation of destinations, such as Byron Bay in New South Wales and Daylesford in Victoria, have increased the appeal of Australia for health-conscious consumers who are willing to spend on their wellbeing.<sup>3</sup>

In 2017, Australia attracted 10 million wellness trips contributing approximately \$15 billion to the national economy.<sup>1</sup>

Australia's core target market, the High Value Traveller (HVT), shares several traits with a Wellness Traveller including their desire to:

- Immerse themselves in local culture (Authenticity)
- Learn more about the world (Open-Minded)
- Give back (Purposeful)

A high portion of HVTs also travel to gain a new perspective, to learn something new, or simply for a moment to reflect.<sup>5</sup>

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### #14

Australia's position globally as a Wellness Tourism Destination

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### 234,000

Amount of international visitors to Australia who visited a spa, sanctuary or wellbeing centre in 2019

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### 67%

International Wellness Travellers to Australia who are female

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<sup>1</sup> Global Wellness Tourism Economy 2018, Global Wellness Institute

<sup>3</sup> Investment Opportunities in Wellness Tourism 2019, Tourism Australia

<sup>4</sup> National Visitor Survey and International Visitor Survey 2019, Tourism Research Australia

<sup>5</sup> High Value Traveller Snapshot 2018, Tourism Australia

<sup>6</sup> Wellness Tourism: A Destination Perspective 2013, Voigt & Pforr

<sup>7</sup> Wellness Tourism Initiative 2020 Australian Survey Results, Global Wellness Institute



### Domestic Wellness Travellers

In Australia, domestic Wellness Travellers are predominantly females aged 24-45 who choose to travel with a friend, spouse or family member.<sup>6</sup> When staying overnight, the Australian Wellness Traveller stays for an average of 3.7 nights and spends almost double the average spend of a typical domestic traveller, at \$1122 per person.<sup>4</sup>

Different age groups are more likely to engage with varying degrees of wellness experiences, with the younger demographic (25-44) more likely to participate in a beauty spa treatment, while travellers over 45 find lifestyle and fitness programs more appealing. Spiritual retreats tend to attract people aged over 55+ and a higher proportion of males (26%).<sup>6</sup>

Current trends suggest that Australian Wellness Travellers:

- are most likely to visit an Australian destination for their next wellness trip,
- use travel to adjust/reboot a focus on their own health and wellbeing,
- find the location and connection to nature the most important aspect of their wellness destination choice,
- prefer a semi-structured wellness program,
- are most influenced in their planning by word of mouth,
- book direct via websites, and
- will spend more for accommodation that meets their needs.<sup>7</sup>



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## AUSTRALIAN WELLNESS TOURISM INDUSTRY

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### Australian Wellness Tourism Products

Australia's established Wellness Tourism locations focus heavily on surf and yoga retreats, as well as beauty spa treatments. Examples of well-known Australian Wellness Tourism destinations include Byron Bay (surf and yoga), Daylesford (hot springs), Margaret River (natural environment and day spas) and Flinders Island (day spas and tranquil surrounds). The Gold Coast is an emerging Wellness Tourism destination, with a focus on day spas.

Some of Australia's most recognised Wellness Tourism products include:

- Gwinganna Lifestyle Retreat, Tallebudgera Valley, QLD – inclusive eco-resort featuring a detox program
- Hepburn Springs Bathhouse, Hepburn Springs, VIC – historic bathhouse using naturally occurring mineral water for therapeutic and beauty treatments
- Gaia Retreat and Spa, Byron Bay, NSW – lifestyle retreat with a focus on pampering and day spa treatments (co-founded by Olivia Newton-John)

### National Stakeholders

#### Tourism Australia

Tourism Australia is the Australian Government agency responsible for attracting international visitors to Australia, both for leisure and business events. The organisation is active in 15 key markets through activities such as advertising, PR and media programs, trade shows and industry programs, consumer promotions, online communications and consumer research. Tourism Australia has identified Wellness Tourism as one of five key niche areas for regional tourism development and actively promotes private investment in this sector.

#### Wellness Tourism Summit

Founded by Katherine Droga (Chair of the Global Wellness Institute's Wellness Tourism Initiative and member of the Wellness Tourism Association), the Wellness Tourism Summit is Australia's first dedicated event and meeting place for the business of wellness travel.

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### POPULAR WELLNESS TOURISM DESTINATIONS







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## SOUTH AUSTRALIAN WELLNESS TOURISM INDUSTRY

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### Positioning and Markets

As we move beyond the devastating and lasting impacts of the global COVID-19 pandemic, South Australia is fortunate to be well-placed to capitalise on the emerging Wellness Tourism opportunity. We will do this by building on existing strengths, such as nature-based experiences and premium produce – with a diverse range of these assets located within close proximity of Adelaide. Accessible Provenance, Natural Therapy, Wildlife Encounters and A Curious Place are all key pillars, integral to the state's position as a tourism destination and can be incorporated into activities targeted specifically to Wellness Travellers.

There is a great opportunity to promote products and experiences that appeal to SATC's key target market, the High-Yield Experience Seeker (HYES). Content which promotes opportunities for visitors to immerse themselves in local culture, learn more about the world, give back, gain a new perspective, learn something new, or take a moment to reflect will have broad appeal across Tourism Australia's HVT and SATC's HYES markets, in addition to Wellness Travellers.

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## 16,400

International Wellness Travellers visited South Australia in 2019 (7% of national total)<sup>4</sup>

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SATC heavily targets professional urban Australian females with a household income over \$100k, who are aged 25-54 and interested in food. There are clear synergies with the Wellness Traveller profile, creating an opportunity to incorporate wellness themes into existing state marketing initiatives.

It is important to capitalise on the opportunities presented by the domestic Wellness Traveller market in the short-term to enhance existing products, encourage investment in new experiences and build industry capability for South Australian tourism operators.

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**South Australia 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.**

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Products and experiences which appeal to the Wellness Traveller will be unique and authentic to South Australia, and built on the following foundations:

- Natural landscapes, native plants and wildlife encounters,
- Premium local ingredients and culinary traditions,
- Aboriginal healing practices and spiritual traditions,
- Special muds, minerals, oils and waters,
- City vibrancy and boutique regional events, and/or
- Local art, history, culture, and vernacular architecture.

### South Australian Wellness Tourism Products

South Australia offers several existing retreats, special events and practitioners specifically targeting the wellness market, however specific tourism-orientated products remain limited. While traditional wellness resorts are currently in short supply throughout the state, South Australia is able to package existing products and experiences that will appeal to Wellness Travellers.

Existing experiences and products include, but are not limited to:

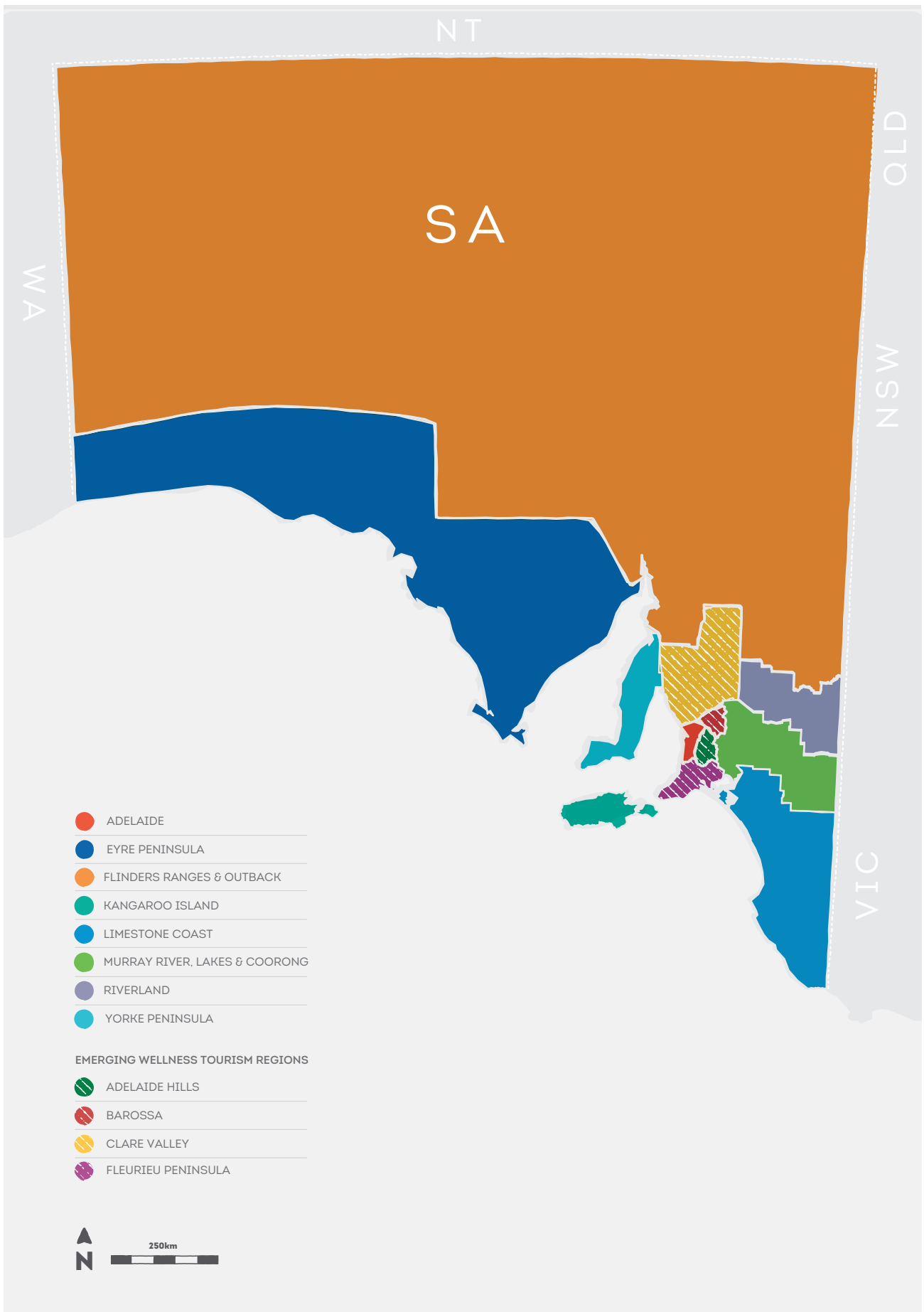
- Roaming Zen Wine & Yoga, Adelaide Hills
- Gate Keeper's Day Spa at Mt Lofty House, Adelaide Hills
- Jurlique Farm, Adelaide Hills
- Barossa Wellness, Barossa
- Vasse Virgin Barossa, Barossa
- Endota Spa at Novotel Barossa Valley Resort, Barossa
- Big Heart Adventures Women's Wellness Walking Tour, Clare Valley
- The Riesling Trail, Clare Valley
- Askara Retreat Centre, Fleurieu Peninsula
- Soulshine Retreat, Fleurieu Peninsula
- Port Elliot Wellness, Fleurieu Peninsula
- Southern Ocean Walk, Fleurieu Peninsula
- The Arkaba Walk, Flinders Ranges & Outback
- Kangaroo Island Health Retreat, Kangaroo Island
- Murray River Walk, Riverland

As per the Regional Visitor Strategy 2025, there is evidence to suggest wellness product clusters are forming around certain areas of the state. See across the page for a map outlining emerging Wellness Tourism regions.

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<sup>4</sup> National Visitor Survey and International Visitor Survey 2019, Tourism Research Australia





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## SOUTH AUSTRALIAN WELLNESS TOURISM INDUSTRY

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### New Product Development

Through actively bundling new and existing products and experiences via the promotion of packages, itineraries, and centralised digital marketing, South Australian businesses can create more appealing Wellness Tourism offerings. Examples include the promotion of cycling trails which connect attractions at different locations, activating wellness hubs at specific regional areas, and launching all-inclusive wellness resorts.

Several South Australian regions, including Adelaide Hills, Barossa, Clare Valley and Fleurieu Peninsula, have identified the importance of growing Wellness Tourism through the South Australian Regional Visitor Strategy 2025; however, all regions already have the opportunity to leverage this sector through capitalising on the abundance of statewide assets that appeal to Wellness Travellers.

A number of luxury accommodation properties with dedicated wellness facilities are due to open in the coming years, including Wirra Wirra (Fleurieu Peninsula) and Oscar Seppeltsfield (Barossa). Eos by SkyCity also opened in Adelaide at the end of 2020, offering a dedicated spa and wellness centre. These properties will act as core demand driving products and support South Australia's vision as a world leading Wellness Tourism destination; however other supporting wellness activities (e.g. tours and attractions) outside of these resorts will be required to provide a holistic experience for both Primary and Secondary Wellness Travellers.

### Activating Wellness Tourism Products and Experiences

There are a number of existing tourism businesses and natural assets across the state that have the potential to diversify or reposition their offering in a way that proactively attracts the Wellness Traveller.

Some examples may include, but are not limited to:

- **Nature-based assets**  
Sanctuaries and wildlife parks, National/Conservation Parks, reservoirs, reserves, gardens, forests, trails, look-outs, observatories, and naturally occurring water formations (e.g. lakes, underwater caves, waterfalls, coastlines, tide pools, thermal springs). *Potential locations include South Para Reservoir, Deep Creek Conservation Park, Warrawong Wildlife Sanctuary.*
- **Premium producers**  
Wineries, distilleries, breweries, fruit growers, organic and native food producers, destination dining providers, farms offering paddock-to-plate dining, and other agritourism providers. *Some examples may include Wirra Wirra Vineyards, Pangkarra Foods, Lessismore Farm.*
- **Accommodation providers**  
Luxury hotels, dedicated retreats or group accommodation, farm stays, eco-lodges, and glamping. *Potential providers may include The Frames, Wandering Souls, Bungaree Station.*
- **Tour operators**  
Eco, adventure, walking, cycling, produce, surfing, water sports, and luxury private tour themes. *Some possible operators may include Earth Adventure, Eco Caddy, Surf & Sun.*
- **Cultural/spiritual attractions and storytellers**  
Aboriginal heritage tours, sites of significance, places of worship, museums, galleries and cultural presentations. *Some examples may include Wilpena Pound, Sevenhill Centre of Ignatian Spirituality, Coorong National Park.*

These tourism products and experiences could be complemented by wellness specific offerings such as spa treatments and yoga classes.



### South Australian Stakeholders

#### Department for Health and Wellbeing – Wellbeing SA

Established in April 2020, Wellbeing SA has a long-term vision to create a balanced health and wellbeing system that supports improved physical, mental and social wellbeing for all South Australians. The Wellbeing SA Strategic Plan 2020-2025 outlines the need to support system changes through partnerships with community groups, members, and supporting State Government agencies, to enable this vision.

#### Department for Environment & Water (DEW)

DEW aims to help South Australians conserve, sustain and prosper through land, water and environment planning and regulating. DEW is committed to activating sustainable nature and heritage-based tourism across the state, including via the Nature-Based Tourism Co-Investment Fund and the Opening Up Our Reservoirs project. They also issue leases and licences for tour operators to work in National and Marine Parks.

#### Office for Recreation, Sport and Racing (ORSR)

ORSR aims to develop stronger, healthier, happier and safer communities through sport and recreation. ORSR promotes the state's recreational trail network through the Trails SA website, which includes over 600 walking, cycling and horse-riding trail experiences.



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## SOUTH AUSTRALIAN WELLNESS TOURISM INDUSTRY

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### Situational Analysis

For South Australia to achieve our vision of being a world-leading Wellness Tourism destination, we need to establish new demand driving Wellness Tourism products and experiences. We also need to support existing businesses to grow and expand their offering to Primary and Secondary wellness travellers.

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#### STRENGTHS

- Wellness tourism is a growing global trend and was worth US\$10.5m to Australia in 2017<sup>1</sup>
- Wellness Tourism in regional Australia is growing at 9.6% per annum<sup>3</sup>
- Wellness supports and enhances existing SATC brand pillars
- Existing natural assets – including extensive trails networks and unique features
- Strong primary industry sector, with plentiful organic, healthy and artisan produce readily available
- Luxury world class accommodation properties with wellness facilities coming online over the next few years (e.g. Wirra Wirra (Fleurieu Peninsula) and Oscar at Seppeltsfield (Barossa))

#### WEAKNESSES

- Australia is not known as a popular Wellness Tourism destination
- Australia is a long-haul destination for many markets which may prove harder to create a carbon-neutral experience (sustainability is a key selling point for many Wellness Travellers)
- Perception of 'Wellness Tourism' as a niche area could alienate consumer market segments or the industry
- Lack of luxury regional accommodation and experiences available for Wellness Travellers, including no national/ international brand wellness resort facilities in the state
- Lack of industry experience and capability to meet the high expectations of Wellness Travellers
- No Wellness Tourism Association in South Australia (or Australia) to provide unity and governance of industry sector
- Limited access to naturally occurring waterholes/ mineral springs, which are of high appeal to Wellness Travellers

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<sup>1</sup> Global Wellness Tourism Economy 2018, Global Wellness Institute

<sup>3</sup> Investment Opportunities in Wellness Tourism 2019, Tourism Australia

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#### OPPORTUNITIES

- Abundance of natural assets to support the creation of new wellness experiences
- Cross government collaboration (e.g. DEW Nature-based Tourism activation, ORSR Game On Program, and Wellbeing SA Strategy implementation)
- Development of new wellness specific resort-style accommodation
- Wellness activities can appeal to a wide range of markets (non-discriminatory)
- Leverage existing and committed investment in related infrastructure projects (e.g. trails, eco-friendly transport, resort-style accommodation)
- Wellness theme is growing in relevance post the global COVID-19 pandemic
- Development of wellness bundles using pre-existing clusters (e.g. Adelaide Hills, Barossa, Clare Valley, and Fleurieu Peninsula)
- Wellness Travellers are more inclined to support eco-friendly initiatives, which encourages sustainable tourism in South Australia
- Diversification of primary producers to create unique retail options for Wellness Travellers and increase export opportunities (e.g. pink salt scrubs, native medicine/ foods)

#### THREATS

- Competing Wellness Tourism Destinations in Australia and around the world - primarily Margaret River (a wine region known for its natural assets and spas facilities), and South Africa (known for its wine and wellness position), plus emerging Wellness Destinations
- Poor delivery of wellness experiences not meeting expectations and negatively impacting on perception
- Limited investment opportunities for boutique wellness activities and attractions (e.g. private investment favours large-scale accommodation)
- Development projects in pristine and unique environs could negatively impact the natural aesthetics and wildlife habitats



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## SOUTH AUSTRALIAN WELLNESS TOURISM INDUSTRY

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### Strategic Objectives

Wellness Tourism is a high value industry sector and will only increase in importance, as the 'new normal' emerges on the other side of the global COVID-19 pandemic. South Australia has the opportunity to position itself as a world-leading Wellness Tourism destination, through activating the state's strengths of natural assets and premium produce, as well as incorporating complementary accommodation options.

As the lead destination marketing agency for South Australia, it is appropriate for SATC to lead this Plan, to provide direction, influence, and support for the tourism industry to maximise the Wellness Tourism opportunity for the state.

The SATC's vision is for South Australia to be a world-leading Wellness Tourism destination, with an aim to establish new demand driving and supporting Wellness Tourism products and experiences over the next five years.

Demand driving wellness products and experiences will be of high appeal to the Primary Wellness Traveller, while supporting products and experiences will be more broadly appealing to a range of key SATC markets, including Secondary Wellness Travellers.

Capitalising on this fast-growing and high-value sector will support South Australia's regional visitor economy, through leveraging existing assets to attract new markets, encouraging regional dispersal and increased expenditure. Wellness Tourism experiences often have underlying themes of sustainability, which offers further flow on benefits to the environment and community.



Above

Stowaway Kangaroo Island, Kangaroo Island

OBJECTIVE	ACTION
<p>1. Industry Capability</p> <p>Provide industry capability building opportunities for new and existing Wellness Tourism operators</p>	<ul style="list-style-type: none"> <li>• Host industry engagement opportunities, including Wellness Tourism information sessions and workshops</li> <li>• Develop and distribute a range of tools and resources to assist tourism operators to engage with the Wellness Tourism sector</li> <li>• Provide business support (covering topics such as online booking functionality, customer service and managing expectations)</li> <li>• Encourage new partnerships between the South Australian tourism industry and the global Wellness Tourism network</li> <li>• Communicate research which demonstrates the growth potential of the South Australian Wellness Tourism sector</li> </ul>
<p>2. Experience &amp; Supply Development</p> <p>Encourage investment in new and existing Wellness Tourism products and experiences, and activate natural assets</p>	<ul style="list-style-type: none"> <li>• Identify existing Wellness Tourism products and experiences, and undertake a gap analysis across the state</li> <li>• Target relevant tourism businesses and operators to diversify their current offering in a way that appeals to Wellness Travellers</li> <li>• Encourage the development of new demand driving and supporting Wellness Tourism products and experiences</li> <li>• Communicate funding and investment opportunities for existing tourism operators to build new Wellness Tourism products and experiences</li> </ul>
<p>3. Marketing</p> <p>Promote and market Wellness Tourism products and experiences that are aligned with South Australia's key domestic and international target markets</p>	<ul style="list-style-type: none"> <li>• Develop a clear brand message that differentiates South Australia as a world-class Wellness Tourism destination</li> <li>• Incorporate wellness themes into existing SATC marketing initiatives</li> <li>• Utilise strategic partnerships to establish South Australia's position as a leading Wellness Tourism destination</li> <li>• Promote a range of Wellness Tourism products which appeal to Wellness Travellers and SATC's key intrastate, interstate and international markets</li> </ul>
<p>4. Collaboration</p> <p>Support the growth potential of Wellness Tourism in South Australia through fostering strong partnerships with tourism operators, private investors, industry associations, regional authorities, as well as local, state and federal government departments</p>	<ul style="list-style-type: none"> <li>• Support the initiation of a South Australian Wellness Tourism operator network</li> <li>• Facilitate and host industry networking functions</li> <li>• Seek partnerships and build relationships with key government and private stakeholders to support existing Wellness Tourism initiatives and new opportunities</li> </ul>
<p>5. Leisure and Business Events</p> <p>Encourage wellness orientated trade and consumer events to be held throughout South Australia</p>	<ul style="list-style-type: none"> <li>• Drive visitation to South Australia at key times through wellness event programming</li> <li>• Investigate opportunities to host state-wide and national wellness industry events to reinforce leadership in this sector</li> <li>• Encourage investment in regional wellness tourism events</li> <li>• Seek opportunities to leverage existing regional events and encourage incorporation of wellness themes and experiences</li> </ul>

## CONTACT US

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