

SOUTH AUSTRALIAN
TOURISM COMMISSION

CRUISE SHIP

ACTION PLAN 2025



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**SOUTH AUSTRALIAN TOURISM COMMISSION
CRUISE SHIP ACTION PLAN 2025**

ACKNOWLEDGEMENT OF COUNTRY

Aboriginal people have made and continue to make a unique and irreplaceable contribution to the state of South Australia.

The South Australian Government acknowledges and respects Aboriginal people as the state's first people and nations and recognises Aboriginal people as traditional owners and occupants of South Australian land and waters.

The South Australian Government acknowledges that the spiritual, social, cultural, and economic practices of Aboriginal people come from their traditional lands and waters, and that Aboriginal people maintain cultural and heritage beliefs, languages and laws which are of ongoing importance today.

This plan acknowledges and respects that all tourism activity and development takes place on lands and waters traditionally owned by South Australia's Aboriginal peoples and encourages Aboriginal communities to be a part of the current and future success of the South Australian Visitor Economy.



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INTRODUCTION

Tourism is a key driver of the South Australian economy and is vital to the continued success and future growth of our state. The *South Australian Visitor Economy Sector Plan 2030* identifies the State Government's ambition for a \$12.8 billion visitor economy by the year 2030.

The following six strategic priorities have been identified:

- Marketing
- Experience & Supply Development
- Collaboration
- Industry Capability
- Leisure & Business Events
- Promoting the Value of Tourism

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

Over the past decade, the cruise industry has been the fastest growing visitor economy sector in Australia and in South Australia, contributing significantly to the state's economy. Prior to the devastating bushfires in South Australia in the summer of 2019/2020 and the significant impact of the COVID-19 global pandemic, the cruise sector contributed \$145 million to the state's economy with double digit growth in passenger numbers steady over the previous five years.

The future outlook for the safe cruise resumption in Australia looks very optimistic with strong consumer confidence despite the challenges the industry has faced since the COVID-19 pandemic began.

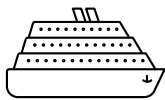
The *South Australian Tourism Commission Cruise Ship Action Plan 2025* has been developed by the SATC to ensure our state continues to be a national leader and safe destination of choice by visiting domestic and international cruise lines when the time is right.

To achieve this, we need to:

- Promote South Australian ports and anchorages as a safe destination choice;
- Ensure quality service, products and experiences are delivered to meet expectations of cruise lines and passengers;
- Encourage investment in new products, experiences and cruise destination infrastructure;
- Increase cruise line and passenger expenditure in South Australia;
- Increase safe regional dispersal from cruise lines and passengers when they visit our state.

This Action Plan provides the South Australian Government, key industry stakeholders and regional partners with clear direction, and identifies priority action areas to address over the coming five years to ensure we safely welcome visiting cruise ships and passengers to our state.

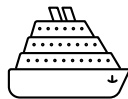
VESSEL TYPES



Mega liners

2,700 – 6,300 passengers
92,000 – 220,000 tonnes

Maximising economy of scale, these ships have limited itineraries and port options in Australia.



Cruise ships

600 – 2,700 passengers
32,000 – 92,000 tonnes

A broad market catering for mainstream itineraries/ports.



Boutique ships

300 – 600 passengers
10,000 – 32,000 tonnes

Predominantly luxury to premium market specialising in unique experiences and itineraries.



Expedition vessels

10 – 300 passengers
10,000 tonnes

Intimate experiences with adventurous itineraries, remote locations.

THE GLOBAL CRUISE INDUSTRY

The global outlook for the cruise industry over the coming years, following the unprecedented challenges of recent years with the COVID-19 pandemic, continues to be strong. Post pandemic, the industry is predicted to bounce back stronger and safer than ever, with much pent-up demand by consumers. Overcoming the challenges of the pandemic and any future pandemics, natural disasters, environmental factors and international relations will always prove challenging for deployment of cruise ships around the world, however, the industry remains innovative and reactive to these events.

*SOURCE: CLIA 2021 STATE OF THE CRUISE INDUSTRY OUTLOOK

GLOBAL FAST FACTS 2020

29.7M

passengers around the world undertook a cruise in 2019.

\$385 (USD)

average spend per passenger in port before boarding.

\$77B

loss to the global economy in the mid-March to September 2020 suspension due to COVID-19.

74%

of past cruisers are likely to cruise again in the next few years.

\$154.5B

in total output in the global economy.

\$100 (USD)

average spend per passenger in port while visiting during a cruise.

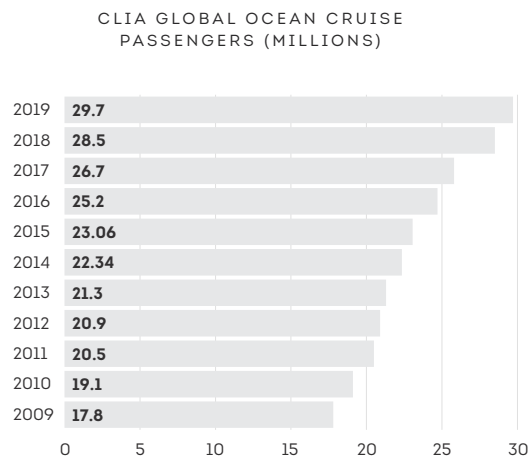
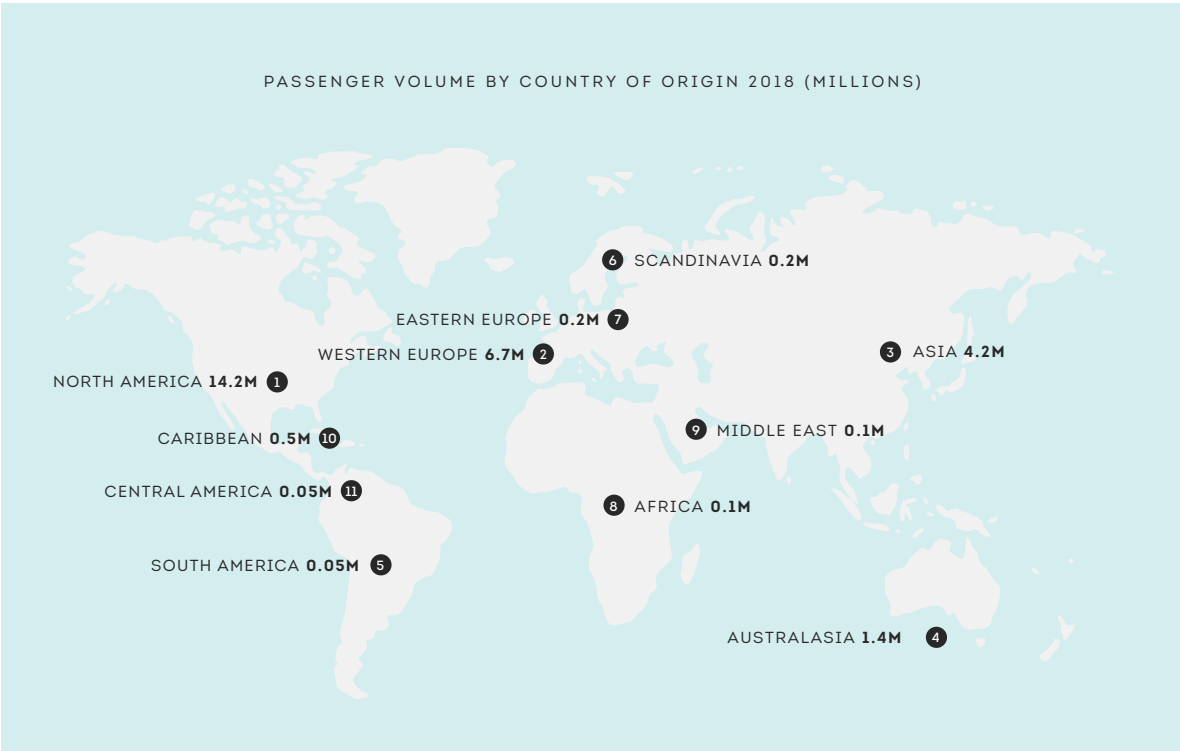
518,000

jobs lost in the mid-March to September 2020 suspension due to COVID-19.

58%

of international travellers that have never cruised before are likely to in the next few years.

*SOURCE: CLIA 2021 STATE OF THE CRUISE INDUSTRY OUTLOOK



*SOURCE: CLIA 2021 STATE OF THE CRUISE INDUSTRY OUTLOOK

THE GLOBAL
CRUISE INDUSTRY

Throughout 2020 and 2021, the cruise industry has worked tirelessly to address the impacts of COVID-19 and the resumption of safe cruising around the world. In 2022 and beyond, this will continue to be the industry's focus to commit to a safer, cleaner and more sustainable future.

SAFE GLOBAL RESUMPTION AND SUSTAINABILITY FOCUS

\$23.5B

will be invested in ships with new technologies and cleaner fuels to reduce carbon emissions.

40%

target rate of reduction in carbon emissions by 2030 compared to 2008.

24

new ships are on order due for delivery between 2021-2027 to be powered by Liquefied Natural Gas (LNG).

INNOVATIONS AND NEW MARITIME TECHNOLOGIES FOR CRUISE SHIPS

Liquefied Natural Gas (LNG)

Virtually zero sulfur emissions and up to a 20% reduction in greenhouse gas emissions.

Exhaust Gas Cleaning Systems (EGCS)

Removes 98% of sulfur content from exhaust and significantly reduces particulate matter.

Advanced Water Management Treatment Systems

Advanced waste treatment technologies that rival the best and most sophisticated shoreside treatment plants.

Shoreside Electricity

Enables cruise ships to 'plug in' and turn off their engines in the 14 ports worldwide where this capability is provided and clean power is available.

*SOURCE: CLIA 2021 STATE OF THE CRUISE INDUSTRY OUTLOOK



THE AUSTRALIAN CRUISE INDUSTRY

Prior to 2020, the cruise industry was the fastest growing sector of Australian tourism, with double digit growth year-on-year over the past decade. The COVID-19 global pandemic put a halt to the entire industry from March 2020 and for most of 2021, and we are now focused on the safe resumption of cruising in Australia in 2022.

In March 2020, the Australian Government declared a human biosecurity emergency in response to the global pandemic that restricted international cruise ships from entering Australian ports for 30 days,

until 15 April 2020. The restriction on international cruise ships has been extended every three months and currently until 17 December 2021.

Small domestic Australian flagged vessels, including True North and Coral Expeditions, have been able to operate since September 2020 with approved COVID safe management plans in some states and territories around Australia. International flagged cruise ships will endeavour to return to Australia in 2022 once restrictions are eased and when it is safe to do so.



AUSTRALIAN CRUISE INDUSTRY FAST FACTS 2019/20

\$4.7B

was contributed by the Australian cruise industry to the national economy.

55

cruise ships with a capacity of more than 100 visited at least one Australian port/destination, along with six smaller expedition vessels, all of which are Australian flagged.

1.35M

Australians went on a cruise holiday, making up 4.5% of global cruise passengers. Australians love cruising and have the highest penetration rate per capita for cruising anywhere in the world.

15,126

Full Time Employees (FTEs).

32

cruise ships with a capacity of more than 1,000 visited at least one Australian port/destination. 17 had passenger capacities of over 2,000, eight with over 3,000 and two with over 4,000.

*SOURCE: CLIA CRUISE TOURISM'S CONTRIBUTION TO THE AUSTRALIAN ECONOMY 2019/20

Despite the love of cruising by Australians prior to the global pandemic, the largest challenge for the cruise industry is knowing when the time is right for the safe introduction and gradual restart of the industry. Other significant challenges will be ensuring COVID management plans and onboard protocols are adhered to and managing destination and community expectations in welcome visiting cruise ships once again.

The future outlook for 2022 and beyond looks strong for cruising in Australia, with recent surveys still showing high consumer confidence in the sector and with the prediction that the cruise industry will bounce back fast and be larger and safer than ever before.

THE AUSTRALIAN CRUISE INDUSTRY

Key National Stakeholders

AUSTRALIAN CRUISE ASSOCIATION (ACA)

The Australian Cruise Association (ACA) is the peak cruise industry association with the aim of growing and developing the Australia and South Pacific region as one of the world's leading cruise destinations. ACA is a non-profit incorporated association formed in 1998. It is a membership organisation comprising of Australian ports, tourism agencies, cruise lines, shipping agents, inbound tour operators and companies associated with the cruise shipping industry in Australia and the South Pacific.

CRUISE LINES INTERNATIONAL ASSOCIATION (CLIA) - AUSTRALASIA

Cruise Lines International Association (CLIA) is the world's largest cruise industry trade association, providing a unified voice and leading authority of the global cruise community. CLIA supports policies and practices that foster a safe, secure, healthy and sustainable cruise ship environment and is dedicated to promoting the cruise travel experience. The organisation was established in 1975 and has over 50 cruise line members ranging from ocean liners to specialty ships and represents over 95% of the global cruise capacity. There are 15,000 global travel agencies and 25,000 travel agent members across the organisation's 15 worldwide offices.

PORTS AUSTRALIA

Ports Australia was established in 1916 and remains as the peak body representing the interests of port and marine authorities in Australia. Ports Australia provides advocacy and public outreach on a wide range of public policy and regulatory issues, and has the ability to influence agendas, ensuring that members' interests are protected. Ports Australia is well recognised as an effective and responsible contributor to debates on national issues at the federal level in Australia, as well as at an international level through their active participation in the International Association of Ports and Harbors. Through a coordinated and considered approach to common issues amongst their members, Ports Australia aims to deliver more efficient and acceptable outcomes.





THE SOUTH AUSTRALIAN CRUISE INDUSTRY

The South Australian Tourism Commission (SATC) is the lead State Government body for the cruise industry in South Australia and welcoming cruise ship visits in ports and anchorages in the state. In 2009/10 South Australia welcomed 16 cruise ship visits with 17,000 passengers and crew. In 2018/19, we welcomed 82 cruise ship visits with 167,504 passengers and crew.

Despite the challenges that the industry has faced in 2020 and 2021, the 2021/22 season is looking very exciting with numerous expedition cruise itineraries scheduled between November 2021 and March 2022.

Through the ongoing commitment from the SATC and our key partners, Adelaide and our regional destinations continue to be a popular choice for visiting cruise lines. When the time is right to welcome back cruise ships to South Australia, we will see steady growth into the future.

Notwithstanding the challenges faced by bushfires in December 2019 and January 2020 and the COVID-19 pandemic, we still welcomed 63 cruise ship visits in the 2019/20 cruise season, with an estimated \$122 million injected into the South Australian economy.

The growth projection for 2021/22 and beyond is strong, with longer-term bookings of larger and new cruise ships scheduled into our state post 2022.



Above Port Adelaide Passenger Terminal, Adelaide

South Australian Tourism Commission (SATC)

Over the past two decades the SATC has worked with a wide range of industry partners to develop, manage and grow the state's cruise industry. This is achieved through encouraging new investment into South Australia's port infrastructure, service delivery and new product development as well as playing an active role by contributing to and providing leadership for national initiatives.

With access to destination marketing materials and wide distribution channels, the SATC is best placed to leverage marketing campaigns in a way that reinforces the state's position as an appealing cruise destination.

The SATC also represents South Australia at global industry trade events and is able to facilitate and influence itinerary planning with domestic and international cruise lines.

South Australia's geographic location positioned between two key critical source market ports, Fremantle and Sydney, provides both opportunities and challenges. The SATC not only promotes South Australia as a popular home port destination for cruise lines to offer itineraries (beginning and ending the cruise in Adelaide) but also markets Adelaide and regional destinations as 'value-add' tourism propositions on interstate itineraries, with quality products and experiences for passengers that are accessible through shore excursion programs.

Having an appealing range of products and experiences for cruise lines to build unique itineraries supporting regional dispersal, has reinforced South Australia's reputation as a 'must see' destination as many of South Australia's tourism experiences are located within a day trip from the respective port or anchorage. Increasingly, Adelaide is growing in popularity as a home port destination, offering segmentation and partial turnarounds on many itineraries. A growing number of itineraries are being offered from Adelaide, including P&O Australia, Princess Cruises, Royal Caribbean Cruise Line, Holland America Line and others.

The SATC works closely with cruise lines to address product gaps in itineraries and provides guidance to industry partners and tourism operators, enabling the opportunity for businesses to engage and work with the cruise industry.

Adelaide's reputation as a destination capable of hosting large passenger turnarounds and transit visits while delivering quality service and exceptional experiences continues to grow. As we increase the number of visiting cruise ships and the ships are getting larger, it becomes more challenging to meet operational and logistical requirements with our current infrastructure.

In addition to managing the growth of visiting cruise ships and increased amount of passengers, South Australia's biggest opportunities over the coming years will be to increase the number of home porting itineraries from Adelaide, increase pre and post touring packages and continue the development of new regional ports while investing in existing infrastructure, particularly in Adelaide, Fleurieu Peninsula, Eyre Peninsula and Kangaroo Island.

It will be imperative that the SATC provides ongoing guidance and leadership to all state and local government bodies and industry partnerships in Adelaide and regional South Australia to ensure we meet the expectations of visiting cruise lines, deliver a safe and welcoming experience for passengers and maximise economic benefits to regional communities.

THE SOUTH AUSTRALIAN
CRUISE INDUSTRY

Visitation

Modern day cruise ships have been visiting South Australia for over two decades, but it has been in the last ten years that South Australia has seen significant growth in both the number of cruise ships visiting our state as well as the increase in size and passenger capacity.

16

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

82

cruise ships visits in 2018/19 with
over 170,000 passengers and crew.

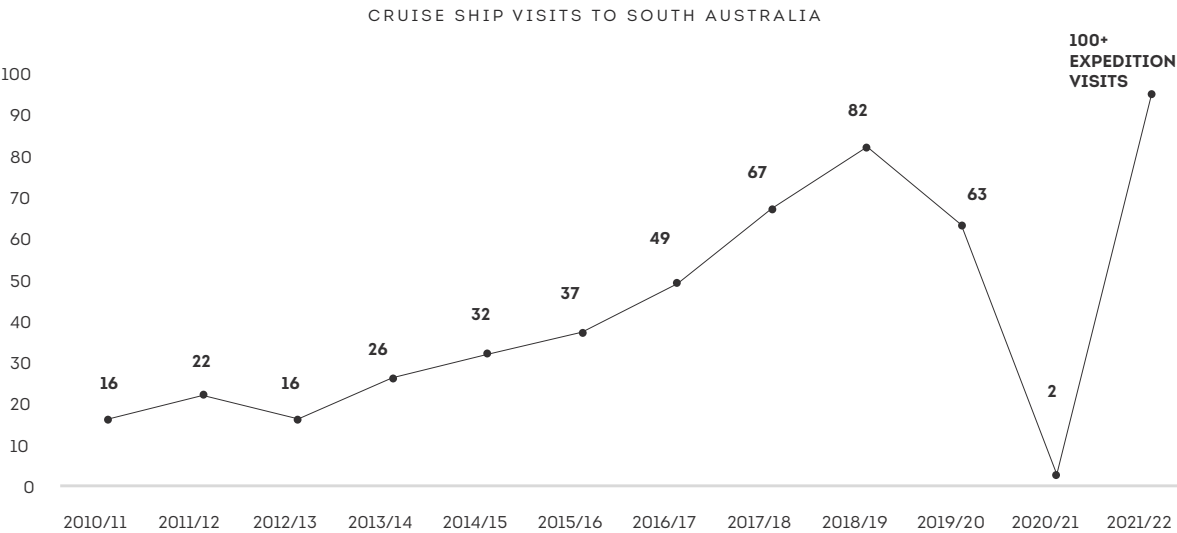
\$145M

to the state economy in
2018/19.

In 2019/20, despite the impact of the bushfires and COVID-19, South Australia still welcomed 63 cruise ship visits, over 135,000 passenger and crew and contributed \$122 million to the state economy.

The 2020/21 cruise ship season in South Australia did not see any large international flagged cruise ships due to the continued global pandemic and the Australia biosecurity emergency order in place until December 2021.

The 2021/22 cruise ship season in South Australia is looking healthy with strong bookings from expedition vessels undertaking a number of exciting new itineraries scheduled in South Australia.



Post the global COVID-19 pandemic, South Australia will continue to feature on many of the world's leading global cruise line itineraries, demonstrating that our destination is an attractive inclusion for ships visiting Australia.

Over the past five years the following cruise lines have visited South Australia: Carnival Corporation, P&O World, P&O Australia, Princess Cruises, Holland America Line, Cunard, Seabourn, Royal Caribbean Cruise Lines, Azamara Club Cruises Line, Celebrity X Cruises, Norwegian Cruise Line, Oceania Cruise, Regent Seven Seas, Cruise & Maritime Voyages, Viking Cruises, Silverseas, Hapag-Lloyd, Fred Olsen Cruise Line, Ponant, Crystal Cruises, Residences at Sea (The World), Saga Cruise Line, Japan Cruise Line, Coral Expeditions and True North.

Key South Australian Stakeholders

FLINDERS PORTS

In the year 2000, all seven South Australian commercial shipping ports were privatised and are now operated by Flinders Ports Pty Ltd. The privately-owned ports that are currently being used by cruise ships are Port Adelaide (Outer Harbor), Port Lincoln and Wallaroo, with Thevenard (Ceduna) currently being considered as a future option. By working in partnership with Flinders Ports, the SATC ensures that South Australia remains competitive and provides a high level of service to our visiting cruise lines and passengers.

DEPARTMENT FOR INFRASTRUCTURE AND TRANSPORT (DIT)

The Department for Infrastructure and Transport (DIT) is responsible for non-commercial anchorages and port infrastructure in South Australia. They are also a critical partner in supporting independent passenger movement from the Port Adelaide Passenger Terminal via the public train service.

LOCAL COUNCILS AND REGIONAL TOURISM AUTHORITIES

Local Councils and/or Regional Tourism Authorities operationally manage the meet and greet services for cruise ship visits at regional destinations with leadership provided by the SATC. The respective party is responsible for chairing regional cruise committees which comprise of local government representatives, visitor services, tour operators and businesses.

SHIPPING AGENTS

There are a number of different shipping agents that assist with managing the operational needs for a cruise line when they visit a destination. Shipping agents coordinate all shoreside support that a cruise line may require, which may include rubbish removal, fresh water, clearance with local authorities and any necessary welfare appointments for crew. They are the liaison between the cruise line, the ship staff and all other stakeholders when a ship arrives at its destination.

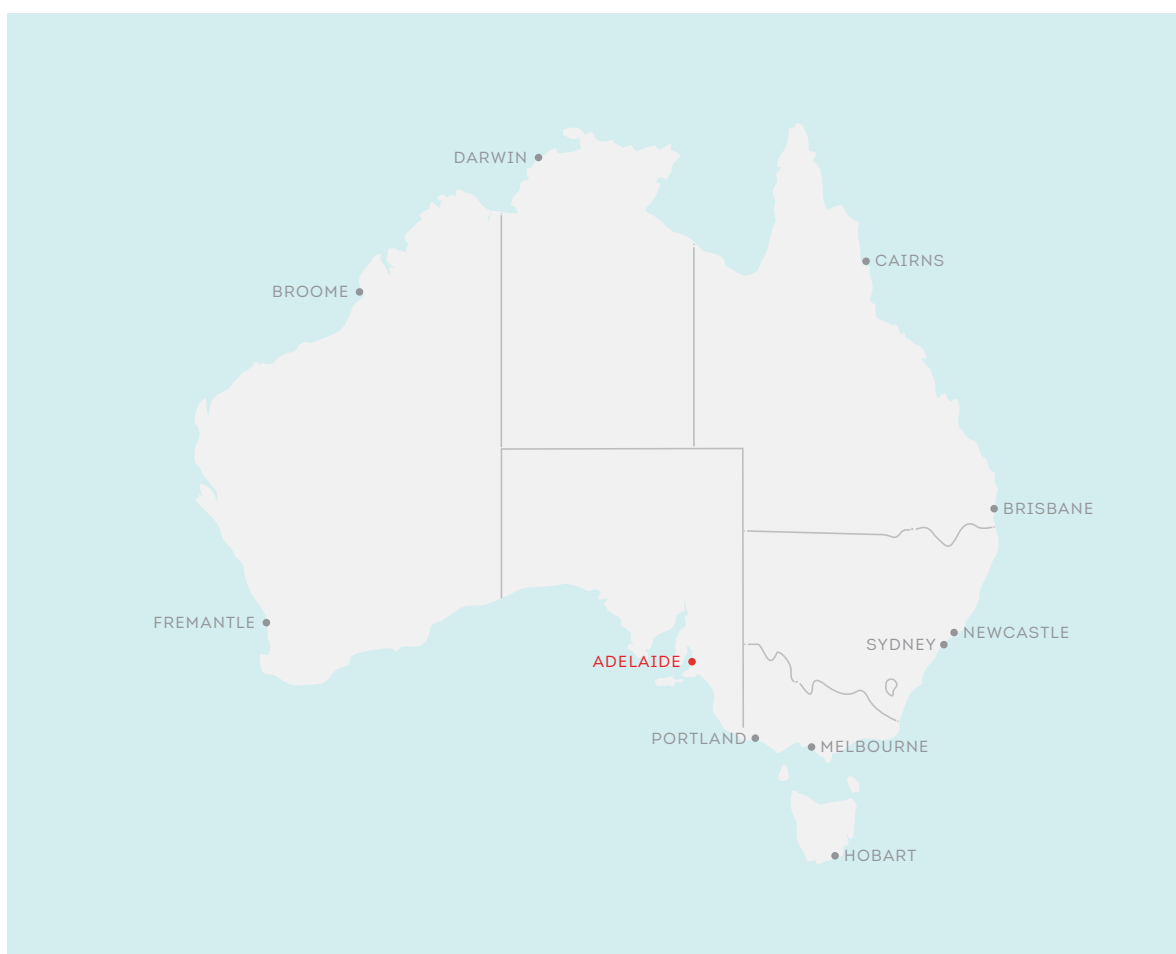
INBOUND TOUR OPERATORS (ITOS)

Inbound Tour Operators (ITOS) are contracted by the cruise lines to develop shore excursion itineraries with local products and experiences. ITOS need a variety of products and experiences in all ports and destinations in Australia to offer the cruise lines and passengers.

THE SOUTH AUSTRALIAN CRUISE INDUSTRY

Ports and Destinations

South Australia currently has three active ports and four anchorage destinations that are on cruise line itineraries. The ports are Adelaide at the Port Adelaide Passenger Terminal (Outer Harbor), Port Lincoln on the Eyre Peninsula and Wallaroo on the Yorke Peninsula. Popular anchorage destinations currently include Penneshaw on Kangaroo Island, Victor Harbor on the Fleurieu Peninsula, Coffin Bay on the Eyre Peninsula and Robe on the Limestone Coast. Expedition vessels are also visiting a number of new destinations around Eyre Peninsula including Tumby Bay and Troubridge Island on the Yorke Peninsula.



SOUTH AUSTRALIA'S CRUISE PORTS & ANCHORAGES



THE SOUTH AUSTRALIAN CRUISE INDUSTRY

Ports

PORT ADELAIDE PASSENGER TERMINAL AT OUTER HARBOR, ADELAIDE

The recently refurbished Port Adelaide Passenger Terminal, funded by the SATC and Flinders Ports, is part of the Outer Harbor shipping facility, with four berth options at the wharf for visiting cruise ships. A purpose-built passenger terminal is located in the facility alongside the wharf at Berth 2 and is a great asset for visiting cruise lines to embark and disembark passengers and crew in South Australia. 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 visiting Australia.

The purpose-built passenger terminal building and wharf facility offers a safe and secure berth for visiting ships, providing 24-hour security and flexible access in and out of the secured area. The Port Adelaide Passenger Terminal welcomes cruise lines undertaking full turnaround days where passengers embark and disembark with their luggage as well as transit day visits where passengers can undertake day tours and return to the ship to continue on their cruise.

Passengers have many transportation options; the train station is ideally located 100 metres from the passenger terminal which offers a service into the city for shopping or there are many shore excursion options available in and around Adelaide, Adelaide Hills, Barossa and McLaren Vale.

PORT LINCOLN WHARF, EYRE PENINSULA

Port Lincoln Wharf is managed by Flinders Ports and provides full navigational and logistical services for visiting ships of all sizes. As one of the deepest seaports in Australia, allowing for easy navigation, this facility offers 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 by independent travel or undertaking a shore excursion to the many world class tourism offerings in the region, including tasting local food and beverages, swimming with sealions, visiting Glen Forest Tourist Park or shucking Coffin Bay oysters from the local oyster beds.

WALLAROO WHARF, YORKE PENINSULA

Wallaroo Wharf offers a berth for small to medium sized cruise ships. The jetty is over 300 metres long and is one of the most popular regional commercial ports and a great fishing location for locals and visitors. Wallaroo is the newest port available for cruise itineraries, welcoming their first cruise ship in December 2019. Passengers visiting Wallaroo can explore the historical sites of the region, visit local providores and attractions, take a tour at Moonta Mines or head over to the Clare Valley wine region.

Anchorage

PENNESHAW, KANGAROO ISLAND

Kangaroo Island is well-established and one of the most appealing cruise destinations in Australia, providing great touring options and high return on investment for visiting cruise lines. The Penneshaw Jetty 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 many years, though the Island has seen significant growth in visits recently with the SATC's investment into the landing structure and the development of new tourism products and experiences. In 2018/19, Kangaroo Island welcomed 26 cruise ships, up from just three upon the opening of the landing pontoon structure in 2012.

VICTOR HARBOR, FLEURIEU PENINSULA

Victor Harbor offers an anchorage location where cruise lines can tender passengers ashore to the beach at the town centre or to one of the jetty options currently available.

Passengers visiting Victor Harbor can explore the township, take the horse drawn tram across to Granite Island or visit local attractions including McLaren Vale wineries, foodie experiences or wildlife parks all within an hour.

ROBE, LIMESTONE COAST

Cruise ships can tender passengers ashore at the Robe Marina. This anchorage offers passengers a range of shore excursions where visitors can explore the World Heritage Listed Naracoorte Caves, visit Mary McKillop Interpretative Centre in Penola or the famous Coonawarra wine region.

COFFIN BAY, EYRE PENINSULA

Coffin Bay is a small coastal town on the Eyre Peninsula, offering a quiet anchorage for small cruise ships and expedition vessels. It is one of South Australia's emerging cruise destinations where passengers and crew can be tendered ashore to the Coffin Bay Yacht Club Jetty, or enjoy a beach landing anywhere along the bay to walk directly into town.

There are a number of shore excursion experiences available, including shucking oysters in an operating oyster lease, exploring the Coffin Bay National Park, taking a stroll through the local shops of Coffin Bay or enjoying some fishing or water sports.

OTHER EXPEDITION CRUISE DESTINATIONS

There are a number of new expedition cruise destinations in South Australia including, but not limited to; Tumby Bay and Reevesby Island in the Eyre Peninsula, Troubridge Island in the Yorke Peninsula and Emu Bay, Vivonne Bay, Antechamber Bay and American River on Kangaroo Island.

Other anchorage destinations are being investigated for future expedition itineraries.

SITUATIONAL ANALYSIS

STRENGTHS

Destination Appeal

- South Australia is a safe and healthy destination for welcoming cruise lines and passengers.
- An appealing tourism destination for international and domestic visitors. Key international markets (pre-COVID-19) include North America, UK/Europe, NZ and the emerging cruise markets of China, SE Asia/India and Brazil.
- A range of appealing products and experiences for all target markets (nature & wildlife, food & wine, cultural & Aboriginal tourism, and luxury).
- Multiple ports/anchorage options within the state, providing an appealing itinerary and packaging opportunities for cruise lines.
- Global international air connectivity to key Australian tourism markets.
- South Australia is the national rail capital and the home of Journey Beyond Rail Expeditions. Journeys are available to and from Adelaide to Sydney, Perth, Melbourne, Brisbane and Darwin, providing exceptional package opportunities.
- Diverse range of quality experiences on offer for shore excursions from Adelaide and regional destinations.
- Australia's top pre and post touring products on offer (i.e. Kangaroo Island, The Ghan).

Infrastructure and Port Facilities

- South Australia has many options for visiting cruise lines, offering a range of commercial ports and regional anchorages.
- The Port Adelaide Passenger Terminal at Outer Harbor is our capital city port. It is a deep-water port with three cruise ship berths and a large swing basin.
- Port Lincoln is one of deepest sea ports in regional Australia.
- Penneshaw, Kangaroo Island offers a custom-built tender landing structure and passenger terminal to enable visitation growth.
- New anchorage options at Victor Harbor, Coffin Bay and islands around the Eyre Peninsula provide an appealing selling factor for our state.

Service and Delivery

- A welcoming environment with visitor services for passengers consistently implemented across all cruise destinations in South Australia.
- A partnership approach combining government and private input toward building strong relationships with cruise lines and offering flexibility in services to cater for all types of vessels.

CHALLENGES

The following challenges should be acknowledged or addressed in order to enhance the appeal of South Australia as a cruise destination:

- Funding and investment for new and enhanced infrastructure at the Port Adelaide Passenger Terminal and regional destinations.
- Awareness and appeal of South Australia as a tourism destination in key source markets.
- Perceived distance between the Port Adelaide Passenger Terminal and the Adelaide CBD.
- Continued ability to cater for the ever-increasing size of cruise ships, particularly baggage handling/layout space and passenger movement pathways.
- Resourcing and management capability of cruise ship visits within regional communities.
- Post COVID-19 pandemic consumer confidence in the health and safety of cruise travel.

OPPORTUNITIES

- New products and experiences offered to support continued growth of cruise ship visits and regional dispersal of passengers.
- Capitalising on opportunities arising from other Australian ports not being able to offer suitable infrastructure for the growing number of mega liners wanting to visit.
- Fostering partnerships with Australian Cruise Association (ACA), Cruise Line Industry Association (CLIA) and trade partners to ensure South Australia is a top consideration for cruise line itineraries.
- Leveraging the global trend towards the increasing popularity of a safe, affordable and all-inclusive cruise holiday.
- Increase homeport itineraries from Adelaide and increase overnight stays due to increased source market demand for domestic itineraries.
- Increased opportunities for travel agents to offer segmented cruise itineraries passing through South Australia.
- Working with industry partners to increase the number and variation of pre and post touring packages.
- Introduction of new destinations including anchorage opportunities at Limestone Coast, Eyre Peninsula and Fleurieu Peninsula, increasing regional dispersal.
- Expedition cruising along South Australia's regional coastlines.

THREATS

The following threats may hinder South Australia's ability to welcome cruise ship arrivals in the future:

- Natural disasters.
- Global health pandemics, for example, COVID-19.
- Geographic location – a non-essential service port with limited stores and lack of fuel available.
- Competition from Australian and international ports.
- Additional availability of berths in Sydney (the primary entry point to Australia).
- Increasing fuel prices and taxes on cruise lines visiting Australia.
- Multi-purpose passenger terminals and wharf areas may prioritise other industries in future, restricting the operating capacity for cruise ship visitation.

STRATEGIC OBJECTIVES

OBJECTIVES	ACTIONS
1. Promote South Australian ports and anchorages as a safe and highly appealing cruise destination;	<ul style="list-style-type: none"> • Develop and deliver presentations to promote South Australian destinations to existing and targeted cruise lines, showcasing South Australian products, services and infrastructure, inclusive of all new COVID-19 safe measures. • Ensure regular engagement with cruise lines and key partners to build and maintain long-term relationships. • Attend trade shows, events and industry functions to promote South Australia as a safe and appealing cruise destination. • Develop new and innovative opportunities for cruise line itinerary planners and inbound tour operators for shore excursion programs. • Develop new products and experiences that will assist to drive demand and attract new itineraries to South Australia. • Provide leadership and work with cruise lines and industry partners to facilitate itinerary development. • Continue membership of Australian Cruise Association and maximise marketing and publicity opportunities. • Ensure product and marketing alignment with Tourism Australia where required.
2. Ensure quality service, products and experiences are delivered to meet expectations of cruise lines and passengers;	<ul style="list-style-type: none"> • Provide a welcoming and safe environment for passengers across all South Australian cruise destinations. • Develop and maintain strong relationships with all state industry stakeholders to ensure mutually beneficial outcomes. • Provide resources, advice and leadership to Local Government and regional tourism operators, ensuring quality delivery of services and experiences in regional ports and anchorages. • Educate industry partners and regional communities on cruise line expectations and required delivery of services. • Provide advice and support to Local Government and Regional Tourism Authorities to manage operations of regional cruise ship visits. • Partner with Flinders Ports to successfully plan, develop and manage safe cruise ship arrivals at Outer Harbor, Port Lincoln and Wallaroo including the development of COVID-19 management plans. • Maintain existing local government partnerships and investigate opportunities for additional support and sponsorship for cruise ship arrivals in Kangaroo Island, Victor Harbor, Eyre Peninsula and Limestone Coast. • Work with cruise lines and Inbound Tour Operators (ITOs) to ensure the best products and experiences are included in shore excursion programs and are being offered to passengers.

OBJECTIVES

ACTIONS

- | OBJECTIVES | ACTIONS |
|---|---|
| 3. Encourage investment in new products, experiences and destination infrastructure; | <ul style="list-style-type: none">• Share research and insights into growth opportunities and future infrastructure requirements to partners and industry stakeholders.• Encourage investment into new and existing infrastructure by government and the private sector.• Communicate data and research to South Australian industry partners (e.g. ports, agents, state government agencies, local government, operators) to demonstrate the benefits of the cruise industry to the state economy and economic returns on investment.• Review South Australia's existing port infrastructure and identify future regional investment requirements.• Work with the Department for Infrastructure and Transport (DIT) to ensure cruise industry requirements are represented and captured in the 50 Year Port Strategy development.• Identify new destinations and required infrastructure to facilitate cruise ship visits.• Contribute to collaborative initiatives at a national level when appropriate. |
| 4. Increase cruise line and passenger expenditure in South Australia; | <ul style="list-style-type: none">• Promote South Australia as a pre and post touring option for cruise itineraries with ITOs and cruise lines.• Encourage partnerships between trade partners and retail agents to promote and sell intrastate and interstate product packages.• Provide guidance and leadership to industry partners, regional tourism bodies and operators to ensure they are working in partnership and delivering to expectations of cruise lines.• Provide tools, resources and opportunities for tourism operators to participate in and engage with the cruise industry and visiting cruise passengers. |
| 5. Increase safe regional dispersal from cruise lines and passengers when they visit our state; | <ul style="list-style-type: none">• Collate and distribute research and insights to industry partners on tourism products and experiences and regional distribution opportunities.• Promote South Australian shore excursion products and experiences to ITOs and cruise lines, highlighting COVID safe management plans.• Provide guidance and advice to regional cruise committees, ensuring operators maximise potential economic returns for the respective region whilst delivering a safe cruise arrival for cruise passengers and the community.• Increase the number of regional products and experiences involved in for shore excursion programs for cruise lines.• Work with regional partners to acknowledge and capitalise on creating a unique point of difference to increase destination appeal on itineraries.• Work with regional partners to develop new cruise destinations for future itineraries.• Foster cross border relationships and investigate opportunities to leverage interstate cruise ship visits (e.g. rail and sail partnerships with Western Australia & develop shore excursions tour offerings in the Limestone Coast for visiting cruise ships to Portland, Victoria). |

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