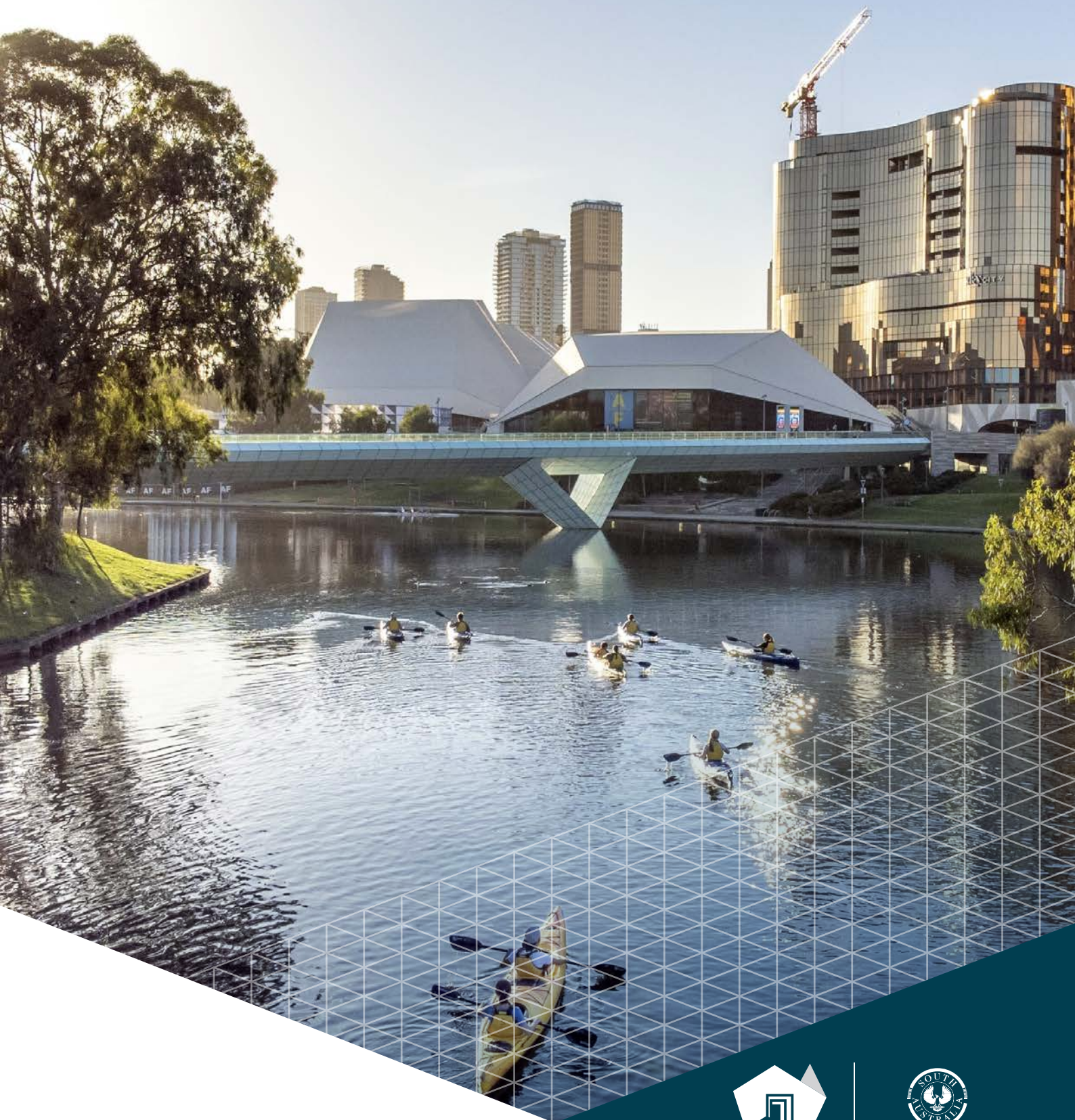



South Australia Tourism investment





Invest SA is a dedicated team of investment and business professionals within the Department for Trade and Investment that can connect investors with opportunities, industry networks, and other government agencies in the tourism sector. They provide bespoke client management services to companies looking to develop tourism offerings in South Australia.

The **Invest SA Tourism team** focuses on the attraction of major investment into the state's AUD\$10.1 billion tourism sector, including delivery of new infrastructure and product through:

- facilitating engagement across key government departments
- identifying and promoting tourism investment opportunities
- fostering partnerships with existing South Australian operators and investors
- encouraging further investment in South Australia's tourism infrastructure and accommodation assets
- increasing South Australia's destination appeal.

Invest SA maintains a portfolio of opportunities via their website invest.sa.gov.au/sectors/tourism.

Roof Climb Adelaide Oval

Image courtesy of South Australian Tourism Commission

The **South Australian Tourism Commission (SATC)** is committed to growing the state's tourism industry and increasing its contribution to the South Australian economy. The SATC markets South Australia intrastate, interstate and internationally to ensure the state is a compelling part of any Australian or international holiday. It concentrates on developing and communicating the state's competitive strengths – good living, festivals and events, premium food and wine, and accessible natural experiences.

The SATC has a dedicated **Destination Development group** that assists developers and operators with new and refreshed tourism infrastructure and experiences in South Australia. The Destination Development group focuses on the following main areas: Aviation Development, Cruise Development and Experience Development.

southaustralia.com

tourism.sa.gov.au

¹ Source: Tourism Research Australia, Year ending December 2023

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Our strengths = your opportunity



**Adelaide named
"Australia's coolest city"
by Wall Street Journal
(October 2023)**



**Kangaroo Island named
Lonely Planet's #2
must-visit global
destination for 2024.²**



**AUD\$10.1 billion
tourism expenditure.³**



**39.8 million
visitor nights³**



**Year-round conference
seasons and a world-class
festival, sporting and
leisure events calendar
are driving record high
room night occupancy
rates over 90%**



**2.4 million domestic
overnight visitors staying
in hotel/motel/resort
accommodation with
AUD\$2.6 billion spend
(2023). Average length of
stay was 2.5 nights with
average spend per night
of AUD\$430³**



**69,800 total tourism
jobs contribution to
economic employment
– representing 7.1% of
South Australia's
labour force⁴**



**Diverse range of visitor
experiences and unique
landscapes from snorkelling
with giant cuttlefish on the
Eyre Peninsula – the only
place in the world where
giant cuttlefish predictably
aggregate annually on
mass, to the Flinders
Ranges – the only place
on Earth where 350 million
years of near-continuous
geological sequence
can be seen.**



**Over 700 wineries
and more than
500 cellar doors
– with 200 cellar doors
within a one-hour drive
of Adelaide's central
business district**

² The Guardian, October 2023

³ Tourism Research Australia, Year ending December 2023

⁴ Tourism Research Australia, State Tourism Satellite Account, 2022-23 and ABS Labour Force June 2023

Introducing South Australia

World-class tourism regions	Iconic natural landscapes and wine tourism regions with attractive experiences and the opportunity for high-end accommodation investment.
Globally recognised	Unique nature and wildlife experiences from world-class national parks, unrivalled wine regions and beaches, offering one of the most exciting and diverse landscapes.
Centrally connected	Direct flights from all Australian capital cities providing the opportunity for international visitors to extend their leisure travel in South Australia.
Renewable energy leader	Global leader in integrating wind, solar and battery energy systems into the state's energy network with 74% of the state's energy produced through wind and solar in 2023. Our innovative reputation supports the eco-tourism offering of environmentally sustainable and culturally responsible accommodation and nature-based experiences.
Attractive regulations	Stamp duty abolished on commercial premise acquisitions. Zero payroll tax applies when total annual wages are under AUD\$1.5 million.



What SA offers investors



Invest SA helps to facilitate:

- Identifying a suitable location
- Connections across government for approvals
- Attracting and retaining highly-skilled staff
- Introductions to industry partners and networking opportunities
- Planning and cross-government delivery of investment projects
- Introductions to industry partners and collaboration opportunities

Sustainable economic growth

The Government of South Australia is committed to the growth of the state's tourism economy, with over AUD\$4 billion of tourism investment projects in the pipeline.⁵

The tourism industry is an important contributor to the state's economic activity, generating jobs and export dollars by attracting interstate and international visitors. With high visitation numbers, the industry is flourishing. The Government of South Australia is now committed to growing the state's visitor economy to AUD\$12.8 billion, with the creation of 16,000 new tourism jobs by 2030⁶.

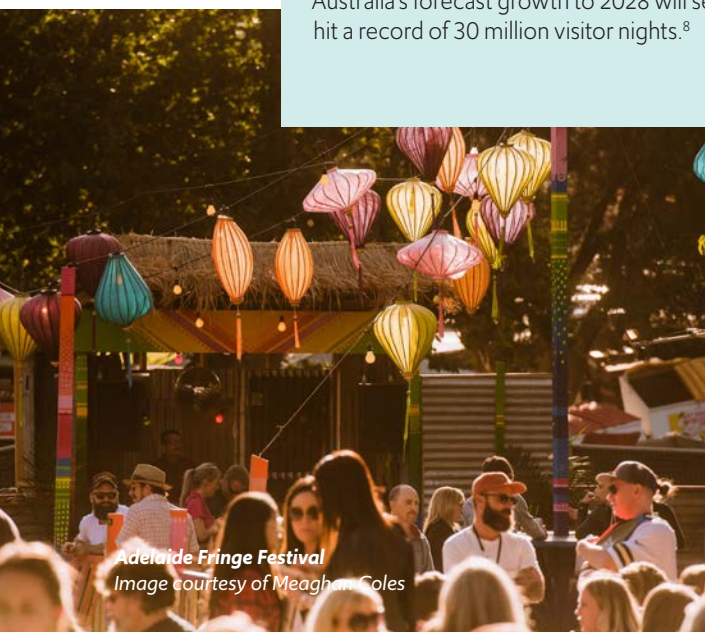
And all the signs are pointing to this target being achieved.

Strong travel demand in recent times has seen the number of passengers through the Adelaide Airport return to levels experienced back in 2018-19. For the September quarter 2023, the airport welcomed over 2.1 million passengers boosted by additional international capacity and strong growth in leisure-driven school holiday demand from domestic travellers⁷. South Australia's forecast growth to 2028 will see it on track to hit a record of 30 million visitor nights.⁸

With the return in visitor numbers, there has been a noticeable change in spending with a strong rebound in spend across both international and domestic travellers. For domestic overnight visitors in particular, who contribute to around a third in overall visitor numbers, their average daily spend maintained its highest level in the twelve months to December 2023, at AUD\$256 compared with pre-pandemic average spend of AUD\$187 - December 2019.⁸

A major drawcard for our visitors includes world-class year-round festivals, jam-packed sporting and leisure events calendar and buzzing conference seasons. Together these have been driving record high room night occupancy rates:

- record occupancy over South Australia's key festival period across February and March 2024 and the conference season and Australian Masters Games from September to October 2023⁹
- record 9,984 occupied room nights reached during Harvest Rock II Festival (October 2023) which generated more than AUD\$11.5 million in hotel bookings over the festival period.⁹



Adelaide Fringe Festival
Image courtesy of Meaghan Coles

Businesses are backing tourism

The number of tourism-related businesses are increasing, with average growth of 2.5% each year since 2016-17.¹⁰

South Australians love exploring their own backyard

South Australian tourism is strongly underpinned by domestic demand. Currently, Australians who are travelling are spending more, whether it be for a holiday, visiting friends and relatives, or for business⁸. Domestic travel supports regional tourism and smooths tourism seasonality.

⁵ Investment projects in South Australia, Government of South Australia, Department of Treasury and Finance (October 2023)

⁶ Tourism Plan 2023

⁷ Adelaide Airport Limited September Quarter 2023

⁸ Tourism Research Australia

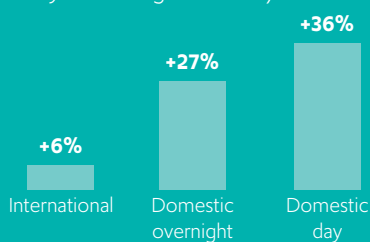
⁹ South Australian Tourism Commission, STR

¹⁰ Tourism Research Australia, Tourism Businesses in Australia 2021-22

Growth of overnight domestic visitor expenditure for South Australia by purpose of visit (year ending Dec 2019 to year ending Dec 2023)



South Australian tourism strongly underpinned by domestic demand (percentage change in visitor expenditure between year ending Dec 2019 to year ending Dec 2023)



Source: Tourism Research Australia

- Domestic expenditure in South Australia (i.e. day and overnight) reached AUD\$8.9 billion for year ending December 2023, an increase of 29% from December 2019
- Domestic day trip expenditure increased by 36% to AUD\$2.3 billion
- South Australian traveller expenditure was around 1.5 times larger than interstate visitor spend

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

There is significant opportunity to invest in new bucket-list experience infrastructure and premium accommodation infrastructure across South Australia.

The growing number of world-class festivals, international sporting events and conference offerings in the Adelaide central business district and regional South Australia, sees accommodation demand continuing to increase. Since 2020, Adelaide has seen the opening of 10 new hotels of the highest international standards, with growing investment from international hotel brands and occupancy rates well above sustainable levels. These new hotels provide a combined total of 1,467 additional rooms (2020 to 2023) in response to the ever-growing demand for quality leisure and business accommodation.

Accommodation demand is expected to increase. A greater diversity of accommodation offerings, including premium economy and four-star properties, are adding to Adelaide's appeal and support for the state's growing visitor economy. Further opportunities exist for additional hotel developments and the refurbishment of existing properties in key locations. Reflecting the increasing demand for accommodation outside of the central business district, there are a number of hotel developments progressing in residential areas including Port Adelaide and Glenelg, providing investors with diverse opportunities. New or refreshed accommodation will be needed to support the growing skilled workforce and business leaders, particularly as South Australia's presence in defence, renewable energy, green economy, space, food manufacturing and other key sectors increases.

New hotels opened in the Adelaide central business district 2020 to 2023

Adelaide Oval Hotel	138 rooms
Crowne Plaza	320 rooms
EOS by SkyCity Hotel	120 rooms
Tom's Court Hotel	71 rooms
Majestic Hotel	91 rooms
Hotel Indigo	145 rooms
Sofitel Adelaide	251 rooms
La Loft	88 rooms
Vibe Hotel	123 rooms
TRYP Hotel	120 rooms

Adelaide central business district hotel developments underway or announced

AUD\$200 million Marriott International Hotel development – expected completion date 2024 with 285 rooms

AUD\$400 million Market Square redevelopment at the Adelaide Central Market featuring Treehouse Hotel – expected completion date 2026 with 248 rooms

AUD\$180 million Hyatt Regency Hotel with 285 rooms

AUD\$400 million Keystone Tower with 240 rooms



Adelaide offers accommodation investors opportunities to acquire and refurbish existing hotels or repurpose office buildings for tourism use.

Pelligra Group recently embarked on a major internal and external upgrade of an ageing office building on King William Street. Opening in 2024, Veriu Adelaide will become a 'landmark' mixed-use development in the city, featuring 111 serviced apartments, including a mix of studios, interconnecting studios and one-bedroom suites, conference facilities and a gym.

Accommodation growth

- AUD\$3.9 billion in domestic visitor spend on commercial accommodation in year ending December 2023¹¹
- 71% average occupancy for Adelaide hotels in 2023, 61% in regional South Australia¹²
- Across Australia, four out of South Australia's 12 tourism regions were in the top 20 highest occupancy rates in 2022-23 (Adelaide Hills, Eyre Peninsula, Adelaide and Limestone Coast)¹²

Adelaide named Australia's 'coolest city' by Wall Street Journal, October 2023

¹¹ Tourism Research Australia
¹² STR

Adelaide
Image courtesy of joeyjoenes

A growing regional economy

Regional tourism is thriving, with South Australia's unique and diverse natural assets and experiences, quality fresh produce and internationally recognised wine regions. South Australia's diverse landscape offers distinctive product offerings and significant investment potential, with expenditure in regional South Australia representing 46 cents in every tourism dollar spent in the state.¹³

Demand for regional accommodation has been consistently strong over the last two years, with the average daily revenue per available room growing 6% from 2022 to 2023, while occupancy rate remained steady at 61%. The latest results for 2024 suggest that this will continue, with revenue achieving record results for the month of January and February since 2013.¹⁴

For the year ending December 2023, regional visitor expenditure was AUD\$4.6 billion, a significant increase of 30% from the year ending December 2019.¹³

Opportunities exist for investors to develop iconic accommodation and experiences in regional South Australia, expand tourism offerings and leverage increased demand in the state's regions.

The Government of South Australia has directly supported regional tourism investment through its AUD\$122 million Economic Recovery Fund.

Key objectives of the Economic Recovery Fund (Regional Tourism Infrastructure Development) included:

- developing or enhancing tourism infrastructure, or facilitating new private sector investment in building new accommodation in areas of need within regional South Australia
- supporting private projects that require infrastructure builds or upgrades to better provide a tourism experience, such as new attractions
- Invest SA works with proponents to identify available State and Federal funding programs.

South Australian regional developments underway or announced

Monarto Zoo Resort and Glamping	78 rooms, conference, function and restaurant spaces, and luxury eco-glamping facilities
Stirling Golf Club – Mt Lofty Estate	56 units, 32 multi-bedroom apartments, 124 rooms
Lancemore – McLaren Vale Resort	124 rooms, 250 pax conference venue, 100 seat restaurant
The Oscar at Seppeltsfield	71 balcony rooms and suites, fine dining restaurant, roof-top bar with 360-degree views
Nexus Hotel Barossa	80 rooms, 270-degree views of the Barossa Valley

¹³ Tourism Research Australia

¹⁴ STR



Watervale Hotel, located in South Australia's Clare Valley wine region, named Best Culinary Experience Hotel in the World for 2023¹⁵

Watervale Hotel, Clare Valley
Image courtesy of South Australian Tourism Commission



Seal Bay Conservation Park, Kangaroo Island
Image courtesy of South Australian Tourism Commission



Kangaroo Island named Lonely Planet's #2 must-visit global destination for 2024¹⁶

¹⁵ Luxlife Magazine's Travel and Tourism Awards, 2023

¹⁶ The Guardian, October 2023

Regional growth development

South Australia is known for delivering some of the world's best food and drink experiences, led by the production of globally recognised wines. Also leading the way with experiential travel, South Australia's natural landscape lends itself to off-grid cabins, eco-pods and luxury accommodation with an integration of sustainable and cultural leisure experiences.

Exceptional food and drink experiences

South Australia is dubbed the Great Wine Capital of Australia and is internationally recognised for producing some of the best Australian wines. From the Barossa Valley and the Adelaide Hills, to the Clare Valley and Coonawarra, over 680 wineries and more than 340 cellar doors offer a diverse range of wines and unbeatable cellar door experiences – and 200 of those cellar doors are within a one-hour drive of Adelaide. The one-of-a-kind d'Arenberg Cube cellar door, situated within the d'Arenberg vineyards in McLaren Vale, is a five-storey Rubik's cube-like design, inspired by the puzzle that is wine-making. It houses a museum, restaurant, exhibition space and a tasting room featuring award-winning wines. Seppeltsfield, an iconic Barossa Valley winery, is home to the longest lineage of single vintage wines anywhere in the world and offers the rare opportunity to sample Para Vintage Tawny from your birth year, straight out of the barrel.

Immersive nature and wildlife experiences

We are now in a time dubbed by Tourism Australia as the "Great Reconnect." As travellers actively seek new nature-based and adventure experiences, South Australia is one of the most pristine wilderness destinations that deliver on the needs and motivations of these individuals.

South Australia is the only place in Australia, and one of the few places globally, where you can cage dive with great white sharks. South Australia's Eyre Peninsula is the only place in the world where giant cuttlefish predictably aggregate en masse annually, and one of only three locations in the world where you can snorkel or dive with these unique animals.

Located only 20 minutes from the Adelaide central business district, Cleland Wildlife Park is one of the few places in Australia where you can hold a koala and walk amongst native wildlife in their natural habitat. Covering over 35 hectares, Cleland Wildlife Park provides a range of opportunities to get up-close to some of South Australia's most iconic wildlife.

The Flinders Ranges are a range of mountains stretching 400 kilometres in length and are the only place where 350 million years of near-continuous geological sequence can be seen. Wilpena Pound is the crowning jewel in the heart of the Flinders Ranges, a remarkable natural bowl-like amphitheatre which is 17 kilometres long and 8 kilometres wide. Travellers can explore the ancient ranges in many ways, from walking along the Heysen Trail, flying over in a helicopter, or driving along the Aboriginal Dreaming Trail.

South Australia is open to investment opportunities that expand the diversity of experiences for tourists at these exclusive locations.

2023 international and national award winners:

- **#1 Luxury Hotel in Australia & South Pacific 2023 and #1 Small Hotel Award in Australia & South Pacific 2023** – Mount Lofty House (Adelaide Hills)¹⁷
- **Best Culinary Experience Hotel in the world for 2023** – Watervale Hotel (Clare Valley)¹⁸
- **Restaurant & Bar Design Awards 2023 – 'Best Overall Bar' and 'Best Australia & Pacific Restaurant/Bar'** – Luma Restaurant & Bar (Adelaide)¹⁹
- **World's Best Vineyards Awards 2023 – South Australian wineries in the top 100** – d'Arenberg #17, Henschke #26, Penfolds Magill Estate #44, Seppeltsfield Barossa #98²⁰
- **2023 International Wine & Spirit Competition – Kangaroo Island Spirits awarded the highest accolade** – a Gold Outstanding medal for its O Gin²¹
- **International Champion Award 2022** – Taylors Estate Shiraz 2020 (Clare Valley)²²
- **Wine Bar of the Year 2023** – Jennie Wine Bar (Adelaide)²³

¹⁷ 2023 Travellers' Choice Best of the Best Awards, Trip Advisor

¹⁸ LUXlife Magazine's Travel and Tourism Awards 2023

¹⁹ Restaurant & Bar Design Awards 2023

²⁰ World's Best Vineyards Awards 2023

²¹ 2023 International Wine & Spirit Competition

²² Great Champions Awards, Vinus 2022, Argentina

²³ Australian Bartender Bar Awards 2023



Monarto Safari Park, Murray River, Lakes & Coorong
Image courtesy of Zoos SA/ Adrian Mann

Iconic bucket-list attractions are increasing the length of visitor stays and demand for quality accommodation.

The Cliffs Kangaroo Island, Penneshaw Pub & Seafront assets

In 2025, The Cliffs Kangaroo Island will deliver one of the world's bucket-list golfing destinations. As part of their investment across the state, Pelligra is investing heavily in tourism, particularly on Kangaroo Island. This development will include a world-class championship golf course, clubhouse, restaurants, pro shop and practice facilities along with purpose built, on-site accommodation. The Cliffs Kangaroo Island is expected to draw upwards of 40,000 tourists from across the globe in its first year.

Encircled by jaw-dropping coastline, mesmerizing natural wonders and abundant wildlife, this investment complements the nature-based tourism experiences on Kangaroo Island, where visitors can walk amongst the sea lion colony on Seal Bay; wander through the gigantic boulders at Remarkable Rocks which have been shaped by the erosive forces of wind, sea spray and rain over 500 million years; and explore Flinders Chase National Park, known for its dense bushland, soaring cliffs, untouched white sandy beaches and abundance of native wildlife.

Monarto Safari Park - located at Monarto

Monarto Safari Park is the largest open-range safari experience outside of Africa. Located just over an hour from Adelaide, the park attracted nearly 200,000 visitors last year following an AUD\$16.8 million upgrade to build a new visitor centre. A further AUD\$60 million expansion of Monarto Safari Park is in progress as a joint initiative between Zoos SA and investor, Gerry Ryan OAM. Opening in 2024, the expansion will feature a 78-room luxury safari resort and provide visitors their first opportunity to stay in deluxe accommodation at the park. The development will include conference facilities, function and restaurant spaces, as well as luxury eco-glamping facilities with lodge. The visitor experience includes the premium Lion 360 experience as well as the largest walk-through lemur experience in the world. Monarto Safari Park is a welfare accredited facility that is renowned for its role in conservation of critically endangered species.

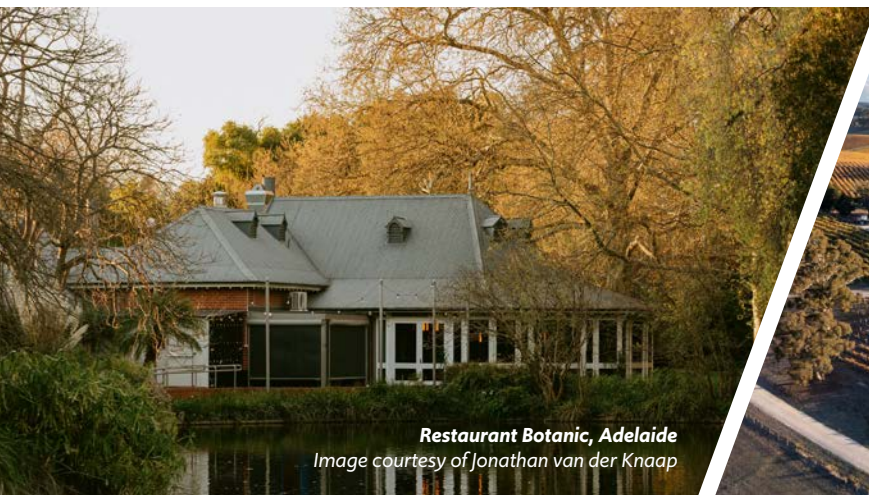
Shell V Power Motorsport Park at The Bend

Located approximately 80 minutes from Adelaide, this AUD\$150+ million precinct offers further proof that regional South Australia is ideal for world-class tourism infrastructure and accommodation investment. Attracting an additional 339,000 visitors to the region annually since opening in 2018, the Shell V-Power Motorsport Park at The Bend includes a 7.77-kilometre racing circuit - one of the world's longest permanent circuits, second only to Nürburgring in Germany - as well as on-site accommodation through the 100-room Rydges Pit Lane Hotel and the BIG4 The Bend Holiday Park.

The international, award-winning motorsport facility hosts an array of events each year including the Supercars Championship endurance event and the Asia Talent Cup - part of the International MotoFest.

South Australian tourism destinations

South Australia's tourism sector is underpinned by its reputation as a world-class holiday destination with unique experiences. From the rugged coastline and diverse wildlife of Kangaroo Island, to some of Australia's oldest and premier vineyards in the Barossa Valley wine region, and Port Lincoln, one of the few places globally where you can cage-dive with great white sharks - these regions hold the ability to accommodate greater visitor demand and are primed for further investment opportunities.



Restaurant Botanic, Adelaide
Image courtesy of Jonathan van der Knaap



Adelaide Hills
Image courtesy of South Australian Tourism Commission

Adelaide

Surrounded by lush parklands, Adelaide is known for its food and wine culture, an array of quality alfresco restaurants and bars, world-class festivals and events, and a thriving arts scene.

Key attractions:

- Restaurant Botanic - named 2022 Restaurant of the Year²⁴
- Adelaide Botanic Gardens – an oasis in the heart of the city spanning 50 hectares
- Adelaide Oval – described as one of the most picturesque sporting grounds in the world
- Penfolds Magill Estate – one of the world's few urban vineyards
- Adelaide Zoo - see the Southern Hemisphere's only breeding pair of Giant Pandas.

Average visits: domestic day 5.3 million; domestic overnight 3 million; international overnight 400,000²⁷

Adelaide Hills

Distance from the Adelaide central business district 31.0 kilometres. Famous for cool-climate wines, rolling vineyards, natural bushland and fresh produce.

Key attractions:

- Mount Lofty House – #1 Luxury Hotel in Australia & South Pacific 2023 and #1 Small Hotel Award in Australia & South Pacific 2023²⁵
- Woodside Cheese Wrights and Section28 Artisan Cheeses – both international gold award winners²⁶
- Lot 100 Restaurant, Adelaide Hills Distillery – makers of the international award winning '78 Degrees' Gin
- Cleland Wildlife Park, National Motor Museum, Mount Lofty Summit, Beerenberg Farm, and the German town of Hahndorf.

Average visits: domestic day 1.4 million; domestic overnight 200,000; international overnight 15,000²⁷

²⁴ Gourmet Travellers' Awards, 2022

²⁵ 2023 Travelers' Choice Best of the Best Awards, Trip Advisor

²⁶ SA Dairy Awards, 2023

²⁷ Tourism Research Australia



Barossa Valley Ballooning, Barossa Valley
Image courtesy of Exploring9to5



Walla Walla, Clare Valley
Image courtesy of Seven Hills Winery

Barossa Valley

Distance from the Adelaide central business district 75.0 kilometres. Over 80 cellar doors offering some of the most awarded wines in the world and some of Australia's internationally acclaimed culinary experiences.

Key attractions:

- Daily hot air balloon flights over some of the oldest vines in the world, home to iconic cellar doors including Henschke, Rockford Wines, Seppeltsfield, and Jacob's Creek.

Average visits: domestic day 850,000; domestic overnight 300,000; international overnight 15,000²⁸

Clare Valley

Distance from the Adelaide central business district 142.4 kilometres. The region offers more than 50 cellar doors located between Auburn and Clare, along a 40-kilometre bicycle corridor. It is known for its signature wine, Riesling.

Key attractions:

- Watervale Hotel - named the Best Culinary Experience Hotel in the world for 2023²⁹, walk or cycling the Riesling Trail, explore historic Mintaro and Martindale Hall, sample Taylors Estate's 2020 Shiraz - crowned the best wine in the world.³⁰

Average visits: domestic day 400,000; domestic overnight 200,000; international overnight 5,000²⁸



Experience Coffin Bay, Eyre Peninsula
Image courtesy of Tourism Australia



d'Arenberg Cube, Fleurieu Peninsula
Image courtesy of South Australian Tourism Commission

Eyre Peninsula

Distance from the Adelaide central business district 636.5 kilometres. Boasts world-renowned seafood, luxury accommodation and abundant wildlife.

Key attractions:

- Sampling the fresh and famous Coffin Bay oysters, rare opportunities to snorkel with protected giant cuttlefish and cage dive with great white sharks, swim with sea lions, Lake McDonnell - the Instagrammable pink Salt Lake, spectacular viewing experience of the Southern Right Whale at Fowlers Bay.

Average visits: domestic day 600,000; domestic overnight 500,000; international overnight 20,000²⁸

Fleurieu Peninsula

Distance from the Adelaide central business district 87.8 kilometres. Some of South Australia's finest coastal, scenic and culinary experiences, discovering charming towns including McLaren Vale.

Key attractions:

- d'Arenberg Cube, world-renowned wine labels and gastronomic experiences, Naiko Retreat - 2023 SA Tourism Awards Hall of Fame winner.³¹

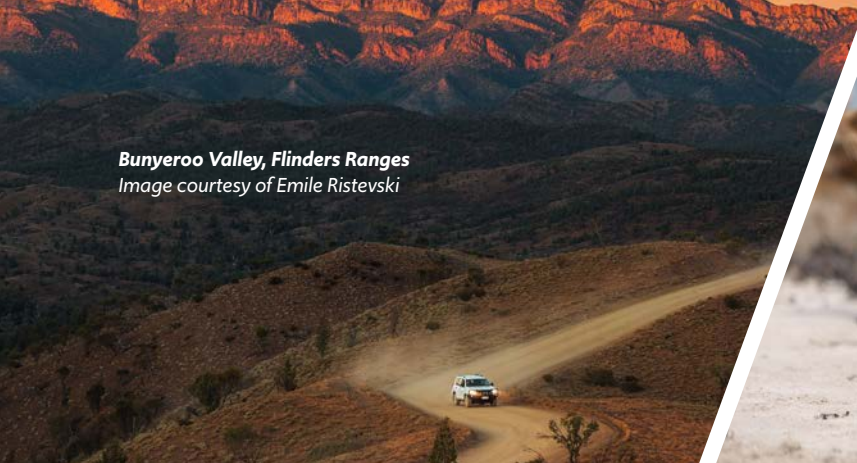
Average visits: domestic day 3.0 million; domestic overnight 800,000; international overnight 30,000²⁸

²⁸ Tourism Research Australia

²⁹ Luxlife Magazine's Travel and Tourism Awards, 2023

³⁰ VINUS International Wine & Spirits competition, International Champion 2022

³¹ TICS, 2023



Bunyeroo Valley, Flinders Ranges
Image courtesy of Emile Ristevski



Seal Bay Conservation Park Kangaroo Island
Image courtesy of Kangaroo Island Tourism Alliance

Flinders Ranges & Outback

Distance from the Adelaide central business district 427.9 kilometres. Rugged 540-million-year landscape surrounded by ancient mountain ranges, spectacular gorges and sheltered creeks.

Key attractions:

- Wilpena Pound in the heart of the north Flinders Ranges offering a remarkable natural bowl-like amphitheatre, 4WD tours, waterholes and rare wildlife and plants
- Nilpena Ediacara National Park – world's oldest fossil site and listed on Australia's National Heritage List, ancient Aboriginal cave paintings and St Mary Peak – the tallest mountain in the Flinders.

Average visits: domestic day 600,000; domestic overnight 750,000; international overnight 40,000³²

Kangaroo Island

Distance from the Adelaide central business district 210.0 kilometres. Kangaroo Island named Lonely Planet's #2 must-visit global destination for 2024³³. Offering one of the world's most pristine wilderness destinations with a raw and rugged coastline, impeccably clear waters, natural wonders and wildlife, mouth-watering food and wine, or visit the Kangaroo Island Spirits' distillery and sample one of the best gins in the world.³⁴

Key attractions:

- Seal Bay Conservation Park - Australia's third largest sea lion colony, Flinders Chase National Park
- Remarkable Rocks, Admirals Arch, swim with wild dolphins
- The Enchanted Fig Tree gastronomic dining experience – nestled within a 120-year-old fig tree.

Average visits: domestic day 70,000; domestic overnight 150,000; international overnight 40,000³²



Umpherston Sinkhole, Limestone Coast
Image courtesy of Offroad Images

Limestone Coast

Distance from the Adelaide central business district 306.5 kilometres. Home to some of South Australia's most spectacular natural wonders, cellar doors, restaurants and fresh produce.

Key attractions:

- Mount Gambier's landmark attraction – the ever-changing Blue Lake situated within a dormant volcanic crater
- Umpherston Sinkhole, Naracoorte Caves National Park – South Australia's only UNESCO World Heritage site
- Coonawarra wine region – producing some of the world's best Cabernet, unspoilt seaside towns of Robe and Kingston, dine on succulent Southern Rock Lobster.

Average visits: domestic day 800,000; domestic overnight 700,000; international overnight 40,000³²

³² Tourism Research Australia

³³ The Guardian, October 2023

³⁴ International Wine & Spirits Competition, Gold Outstanding medal winner



**International Dark Sky Reserve,
Murray River, Lakes & Coorong**
Image courtesy of Laszlo Bilki

Murray River, Lakes & Coorong

Distance from the Adelaide central business district 638 kilometres. The Murray River, one of the world's longest navigable rivers, embodies natural beauty and boasts a wealth of native produce, breathtaking scenery and Australian wildlife.

Key attractions:

- Australia's only International Dark Sky Reserve
- Monarto Safari Park – the largest open-range safari experience outside Africa
- Shell V Power Motorsport Park at The Bend
- Cruise aboard the Murray Princess - the Southern Hemisphere's largest inland paddle-wheeler
- Stay at the award-winning Bridgeport Hotel overlooking the Murray River.³⁵

Average visits: domestic day 1.1 million; domestic overnight 400,000; international overnight 10,000³⁶



Riverland
Image courtesy of South Australian Tourism Commission

Riverland

Distance from the Adelaide central business district 174 kilometres. Accommodation ranging from five-star luxury and off-grid cabins nestled in nature, floating downstream on a houseboat, to camping and caravan locations.

Key attractions:

- Houseboating on the Murray River, water-based activities, local produce, native bird life.

Average visits: domestic day 450,000; domestic overnight 350,000; international overnight 10,000³⁶



Corny Point, Yorke Peninsula
Image courtesy of Ben Goode

Yorke Peninsula

Distance from the Adelaide central business district 183 kilometres. Destination for outdoor enthusiasts and adventure seekers with fishing, boating, surfing, swimming, camping, bushwalking and wildlife experiences, along 700 kilometres of pristine coastline.

Key attractions:

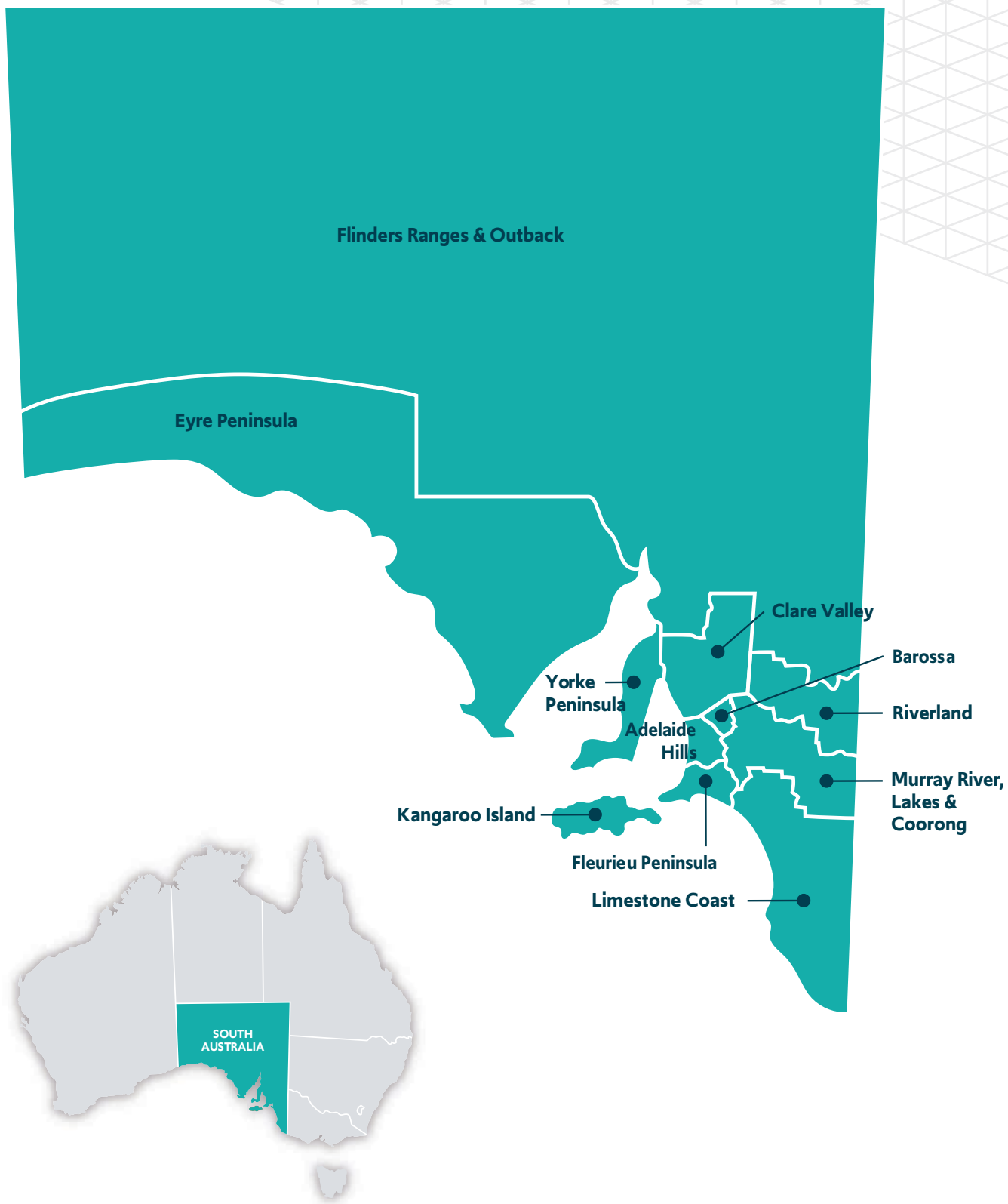
- Dhilba Guuranda-Innes National Park
- Cape Spencer Lighthouse, book a deep-sea fishing charter and experience some of the most sensational deep, off-shore reef and blue water game fishing
- Explore the rich mining heritage of the Copper Coast towns of Kadina, Wallaroo and Moonta.

Average visits: domestic day 700,000; domestic overnight 550,000; international overnight 10,000³⁶

³⁵ SA Tourism Awards, 2023, Silver award

³⁶ Tourism Research Australia

Regions of South Australia



Experience development

Wellness tourism

South Australia is well-placed to capitalise on existing strengths, including nature-based experiences and premium produce, to position the state as a world-leading wellness tourism destination.

Across the world, an increasing number of tourists are being drawn to holidays that have a focus on health and wellness. Australia was ranked 14th in the world as a wellness tourism destination in 2019. For South Australia, the 16,400 international wellness travellers visiting the state accounted for 7 per cent of the national total.³⁷

A growth in luxury accommodation properties, with dedicated wellness facilities, are due to open in the coming years, including Lancemore (McLaren Vale) and Oscar Seppeltsfield (Barossa). Luxury hotel brand, Eos by SkyCity, opened in the heart of the Adelaide central business district at the end of 2020, offering a dedicated spa and wellness centre, recognised as Adelaide's most exclusive day spa. These properties will act as core demand driving products, positioning South Australia as a world-leading wellness tourism destination.

Best Luxury Lodge Australia

Connecting nature and indulgence, and located amid world-class food and wine, the Adelaide Hills is the perfect destination for a curated wellness tourism experience. Winner of the Best Luxury Lodge Australia, Hotel Management Awards in 2021, Sequoia Lodge's 30-acre nature setting is nestled between the Adelaide Hills Botanic Gardens and acres of national park with three thermal hot pools and an award-winning day spa. Traversing the picturesque Adelaide Hills, encompassing native bushland, vineyards, rich farmland and historic towns, is the 1,200-kilometre Heysen Trail, one of Australia's premium walking experiences. Sequoia Lodge's visitors can enjoy scenic and tranquil nature walks along the Heysen Trail between vineyard-based yoga classes and premium local produce. This region provides a great opportunity to capitalise on existing infrastructure, with working agricultural (food and wine) landscapes, historic settlements, abundant wildlife and an unspoilt environment to grow this thriving wellness tourism industry.

³⁷ Wellness Tourism Factsheet produced in 2021, SATC

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

AUD\$91 million

Wellness Tourism trips undertaken by PWT³⁸

AUD\$88 billion

Value of the PWT market segment

8%

PWT global growth per annum

89%

Of all 830 million Wellness Tourism trips are undertaken by SWT³⁹

AUD\$551 billion

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

10%

SWT Global growth per annum

Source: Global Wellness Tourism Economy 2018, Global Wellness Institute



"Wellness Tourism is not only beneficial for the consumer and communities, but also drives a strong expenditure outcome for operators. Studies by the Global Wellness Institute reveal that the Wellness Tourism sector generates \$15 billion in Australia alone (90% from domestic visitors) and is growing at twice the rate of average travel expenditure.

The types of experiences sought for a wellness travel experience can be so broad. It could be immersing in nature, ensuring you eat amazing local fresh produce, digitally detoxing, or doing yoga, a hike or walk – the list is endless.

This type of travel is booming because the demands of daily life continue to increase for us all. With advances in technology, we are so much more digitally connected and 'on' and that increases the pace and intensity of our modern lives. So, when we travel, the opportunity to look after ourselves inside and out becomes more and more important.

South Australia is currently leading the way in sector development in this space. Events such as Wellness Wander and Wellfest in Adelaide are driving consumer interest and activating the sector across varying business offerings."

Katherine Droga, Founder Droga & Co., Well Traveller, Wellness wander, Wellness Tourism Summit, Chair of the Global Wellness Institute Tourism Initiative

³⁸ Primary Wellness Travellers: those who travel with the main motivation being to fulfil their wellness needs

³⁹ Secondary Wellness Travellers: those who incorporate a wellness activity during their leisure or corporate trip with any main purpose other than wellness

Agritourism

South Australia is set to become a world-leading agritourism destination, supporting increasing demand for on-farm tourism accommodation and experiences showcasing the state's renowned wine and produce.

Adelaide is part of the exclusive group of Great Wine Capitals – an internationally renowned network strengthening the state's reputation for premium food and wine tourism. South Australia, the historic heart of Australian wine, is indisputably Australia's wine state, growing over 50 per cent of the winegrapes that go into Australian wines. South Australian wine also has more than a 50 per cent share of premium Australian wine sales, domestically and abroad.

Beerenberg Farm, located 30 minutes from Adelaide in the German town of Hahndorf, is known for its award-winning jams, chutneys, gourmet relishes and sauces. The farm provides unique experiences, from filling up your basket with freshly hand-picked juicy strawberries, to providing onsite cooking demonstrations and sampling delicious farm-made ice cream with freshly churned milk.

The stunning coastline of the Eyre Peninsula is known as Australia's seafood hot-spot with Coffin Bay renowned for its oysters in restaurants around Australia. Visitors wanting to learn how the oysters are harvested was the catalyst in creating a unique dining experience, the only tour in the world where you can sit in the water and taste fresh oysters straight out of the sea.

South Australia currently attracts 10% of Australia's farm and farm gate visitors and is setting an ambitious goal to grow visitor spend to AUD\$295 million by December 2025.⁴⁰

Case Study: Mayura Station, Canunda

Mayura Station is located in South Australia's Limestone Coast region. With naturally sculptured rolling hills and fertile soils, a moderate climate, sparkling clean water and reliable rainfall, it is in the heart of some of the best farming country in South Australia. Capitalising on the growing agritourism industry, Mayura Station provides an award-winning boutique on-farm, paddock-to-plate dining experience featuring its pure wagyu beef.

⁴⁰ South Australia Agritourism sector plan 2025, South Australian Tourism Commission

Mayura Station, Limestone Coast
Image courtesy of South Australian Tourism Commission

Centrally located, globally accessible

South Australia's central location makes it the ideal gateway to access the Australian market, the Asia-Pacific region and beyond.

Aviation development

Adelaide Airport, located 30 minutes from the Adelaide central business district, hosts direct flights to most major airports in the Asia-Pacific region and the Middle East. Other Asia-Pacific, European and North American direct flights are a short connection away.

New international airline route opportunities are being explored as tourism increases. Re-establishing existing routes and developing new routes from South-East Asia, China, the USA, Japan and New Zealand are high priorities. Domestic routes are essential to deliver international visitors to South Australia from interstate airports as part of their Australia-wide itineraries. Domestic and international aviation services underpin both business and leisure travel into South Australia.

Cruise ship attraction

Over the past decade, the cruise industry has been the fastest growing visitor economy sector in South Australia, contributing a record high \$215 million into the state's economy in 2022-23, supporting 704 jobs.⁴¹

There were 103 full and expedition cruise ship visits to South Australia in 2022-23 with over 227,900 passengers and crew.⁴¹

The 2023-24 season saw 124 visits locked in.

Popular destinations for large cruise ships include:

- Adelaide at the Port Adelaide Passenger Terminal (Outer Harbor)
- Port Lincoln on the Eyre Peninsula
- Wallaroo on the Yorke Peninsula
- Penneshaw on Kangaroo Island

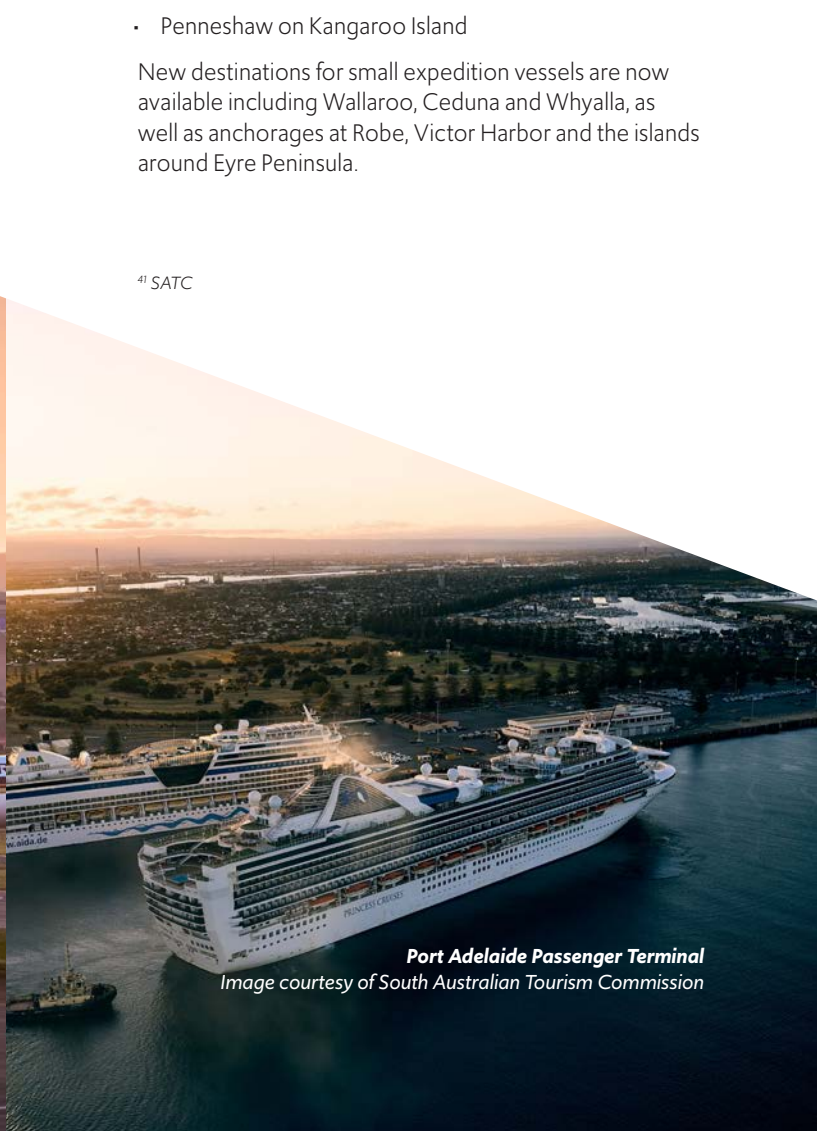
New destinations for small expedition vessels are now available including Wallaroo, Ceduna and Whyalla, as well as anchorages at Robe, Victor Harbor and the islands around Eyre Peninsula.

⁴¹ SATC



Adelaide Airport

Image courtesy of South Australian Tourism Commission



Port Adelaide Passenger Terminal

Image courtesy of South Australian Tourism Commission



WOMADelaide
Image courtesy of Grant Hancock

Australia's most cost competitive city

South Australia's competitive business environment supports commercial success and scaling of operations.

South Australia offers a suitably skilled and scalable workforce with competitive labour costs and high staff retention rates, which are unique to the Australian workforce. Adelaide development costs are one of the lowest in mainland Australia.

Staff retention rates, 5+ years in current main job (% of employed)



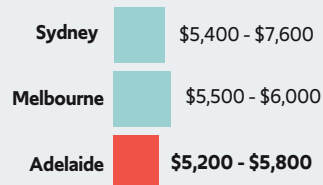
Source: Australian Bureau of Statistics - Job Mobility [Table 1.2 - Labour mobility, retrenchments and duration of employment by state and territory, February 2023]

Development costs

Multi storey 5 star hotel, restaurants, public areas, air conditioning, excluding fitout per square metre



Fitout to 5 star hotel per room



Source: Napier and Blakely July 2023

Sequoia, Adelaide Hills
Image courtesy of
Mish and Kirk

Hospitality and tourism industry providers

A diverse range of accredited providers support South Australia's thriving hospitality and tourism workforce, and industry investment. In 2023, over 5,500 international students were enrolled in food/hospitality/tourism courses, and this has doubled on numbers from 2019⁴². These enrolments signify a substantial pipeline of students providing multi-cultural and diverse language work-force capabilities.

Le Cordon Bleu Adelaide

11kms from CBD

Offers vocational, undergraduate and postgraduate programs in partnership with the TAFE SA Regency International Centre for Tourism, Hospitality and Food Studies and the University of South Australia. Programs designed with input from industry.

University of South Australia

Adelaide central business district

The Bachelor of Business (Tourism, Event and Hospitality Management) is recognised globally; accredited by both AACSB International and EFMD (EQUIS) – the world's leading accreditation bodies.

TAFE SA

Adelaide central business district

Three-year degree in Bachelor of Tourism, Hospitality and Events Management with a strong focus on business and management skills.

International College of Hotel Management (ICHM)

Adelaide central business district

With 30+ years of success, ICHM is one of the world's leading Hospitality in Business schools with its long-established Bachelor of Business (Hospitality Management) and Master of International Hotel Management.

Adelaide Culinary Institute

Adelaide central business district

The institute offers purpose-built facilities and specialises in Australian native foods, working with communities and promoting Australian Indigenous herbs and spices. ACI provides training and assessment in nationally accredited qualifications.

Salford College of Business and Hospitality

Adelaide central business district

One of the largest and longest running private training providers in Australia.

Australian Business and Culinary Institute

Adelaide central business district

Established RTO approved by ASQA, offering nationally recognised industry tailored courses, catering to the needs of international students.

Quality College of Australia

3kms from CBD

Over 28 years' experience and established connections in the hospitality industry, the college offers programs across cookery, hospitality, management, and leadership. The unique partnership with Hospitality Jobs Australia assists both international and domestic students in securing work and placement.

Flinders University

13kms from CBD

The Bachelor of Tourism and Events Management is an industry-focused degree, for employment in a variety of positions.



Advantage Adelaide – live, work & play

South Australia is a great place to live, work and play. The capital, Adelaide, is consistently ranked as one of the most liveable cities in the world.

Adelaide is a progressive, cosmopolitan capital offering a premium lifestyle with world-renowned festivals, major sporting events and iconic locations, such as the Barossa Valley, Kangaroo Island and Flinders Ranges.

South Australia's innovative, cost competitive and agile nature is luring more young talent, and the ability to rapidly scale and provide skilled workers in critical sectors has caught the attention of world-class companies.

We're forging global partnerships and leveraging our position as one of the most liveable and safest cities to grow the state and opportunities for everyone.

There's a strong commitment to collaboration among industries with specialist precincts, such as the Tonsley Innovation District and Lot Fourteen, encouraging companies to thrive.

- **Shortest commute times of the three major cities on the East Coast.** ⁴³
- **One of the lowest cost of living capital cities in Australia** ⁴⁴
- **Adelaide's median house price is \$731,800 – 38 per cent lower than Sydney** ⁴⁵

⁴³ Real Insurance November 2022

⁴⁴ Mercer 2023 Cost of Living city ranking – Sydney 58, Melbourne 67, Brisbane 84, Perth 97, Adelaide 102

⁴⁵ Australian Bureau of Statistics, December quarter 2023



East End Unleashed, Adelaide CBD
Image courtesy of Joseph Nes

South Australia – the Festival State

Each year Events South Australia, a division of the South Australian Tourism Commission, sponsors and manages a range of major, regional and community events and festivals, complemented by blockbuster one-off events to ensure a balance across the year.

The events calendar features international and national drawcards which include the Australian Masters Games, WOMADelaide and Illuminate Adelaide. Additional well-known cultural and arts events complement the calendar with key events including Adelaide Fringe, Tasting Australia, Adelaide Cabaret Festival, Adelaide Festival, and the OzAsia Festival. South Australia also hosts globally renowned sporting events including LIV Golf Adelaide, winner of the World's Best Golf Event of the Year 2023, cycling's Tour Down Under, the Adelaide 500 car race, Adelaide Motorsport Festival and the Adelaide Rally.

In 2024, the festival season attracted tens of thousands of people to South Australia from interstate. Adelaide Fringe figures show that 55,000 visitors attended the festival from interstate which made up 38 per cent of all ticket sales. Foot traffic data also recorded a huge boost in visitation right across Adelaide's CBD.

- **Most affordable unit rents and second most affordable house rents of any Australian capital city⁴⁶**
- **Affordable and accessible childcare**
- **Good public transport and no toll roads**
- **Great public and private schools**
- **Adelaide's three public universities are ranked in the top 1% of the estimated 26,000 higher education institutions in the world.⁴⁷**

⁴⁶ Domain Rental Report, December 2023

⁴⁷ Source: Times Higher Education World University Rankings 2024 and qs.com

- Jan – **SANTOS Tour Down Under + Adelaide International**
- Feb / Mar – **Adelaide Fringe Festival**
- Mar – **WOMADELAIDE + Adelaide Festival**
- April – **Gather Round + LIV Golf**
- May – **Tasting Australia**
- June – **Adelaide Cabaret Festival**
- July – **Illuminate Adelaide**
- Oct / Nov – **OzAsia Festival**
- Nov – **VAILO 500**

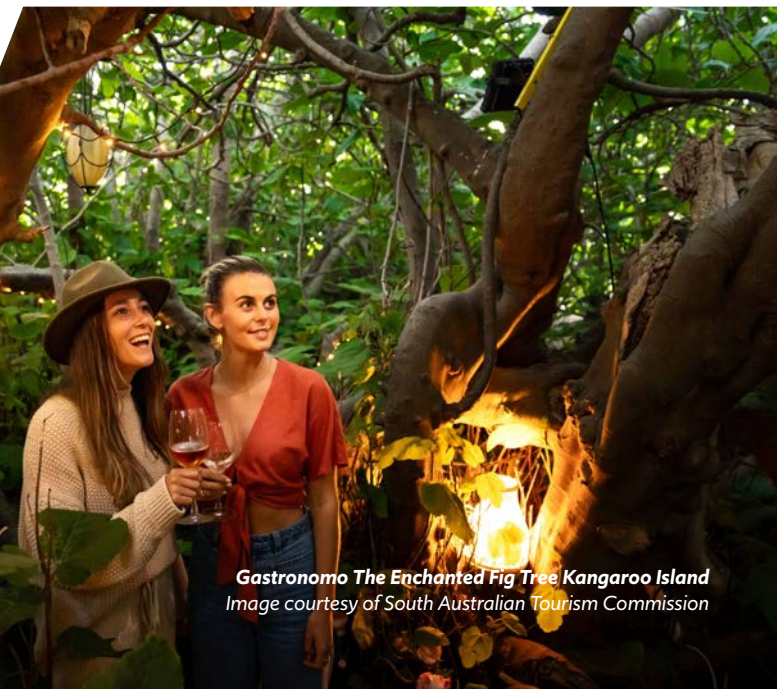


*Garden of Unearthly Delights
Image courtesy of South Australian Tourism Commission*





Barristers Block, Adelaide Hills
Image courtesy of South Australian Tourism Commission



Gastronomo The Enchanted Fig Tree Kangaroo Island
Image courtesy of South Australian Tourism Commission



d'Arenberg Cube, McLaren Vale
Image courtesy of South Australian Tourism Commission/ d'Arenberg Cube



Experience Coffin Bay, Eyre Peninsula
Image courtesy of Tourism Australia





*Kingsford The Barossa - acquired by Salter Brothers in 2023, major suite and spa expansion announced 2024
Image courtesy of Adam Bruzzone*

Let's talk

Please contact Invest SA or the South Australian Tourism Commission

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