

# WELLNESS TOURISM

FACT SHEET



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WHAT IS WELLNESS TOURISM?

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TRAVEL FOR THE PURPOSE AND PURSUIT OF MAINTAINING AND ENHANCING ONE'S PERSONAL HEALTH AND WELLBEING.



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## WELLNESS TOURISM SECTOR IN SOUTH AUSTRALIA

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The South Australian Tourism Commission (SATC) is committed to growing and supporting the Wellness Tourism sector in South Australia and recognises its growth potential over the coming years. The SATC provides tourism operators with support by sharing relevant industry knowledge and advice, providing educational tools and resources, and facilitating partnerships to create desirable and saleable experiences suitable for the state's target markets.

The *SATC Wellness Tourism Action Plan 2025* provides the South Australian Government, key industry stakeholders and regional partners with clear direction and priority action areas that will support us in reaching our state's Wellness Tourism potential.

### KEY RECOMMENDATIONS IDENTIFIED IN THE ACTION PLAN



#### **1. INDUSTRY CAPABILITY**

Provide industry capability building opportunities for new and existing Wellness Tourism operators.



#### **2. EXPERIENCE & SUPPLY DEVELOPMENT**

Encourage investment in new and existing Wellness Tourism products and experiences, and activate natural assets.



#### **3. MARKETING**

Promote and market Wellness Tourism products and experiences that are aligned with South Australia's key domestic and international target markets.



#### **4. COLLABORATION**

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. LEISURE & BUSINESS EVENTS**

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.

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

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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### THE WELLNESS TRAVELLER



**Affluent**



**Educated**



**Experienced  
travellers**



**Early  
adopters**



**Care about  
others**

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Above

Greenly Beach, Eyre Peninsula

WELLNESS TOURISM: A GLOBAL SNAPSHOT

**91 million**

Wellness Tourism trips undertaken by PWT<sup>1</sup>

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**8%**

Global growth per annum

—

**\$88 billion**

Value of the PWT market segment

—

**89%**

Of all 830 million Wellness Tourism trips are undertaken by SWT<sup>2</sup>

—

**10%**

Global growth per annum

—

**\$551 billion**

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

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SOURCE: GLOBAL WELLNESS TOURISM ECONOMY 2018, GLOBAL WELLNESS INSTITUTE

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

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



Above

Eyre Peninsula

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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

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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.

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.

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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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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.



Above Murray River Walk, Riverland

## CONTACT US

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### WEBSITES

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[tourism.sa.gov.au](http://tourism.sa.gov.au)

