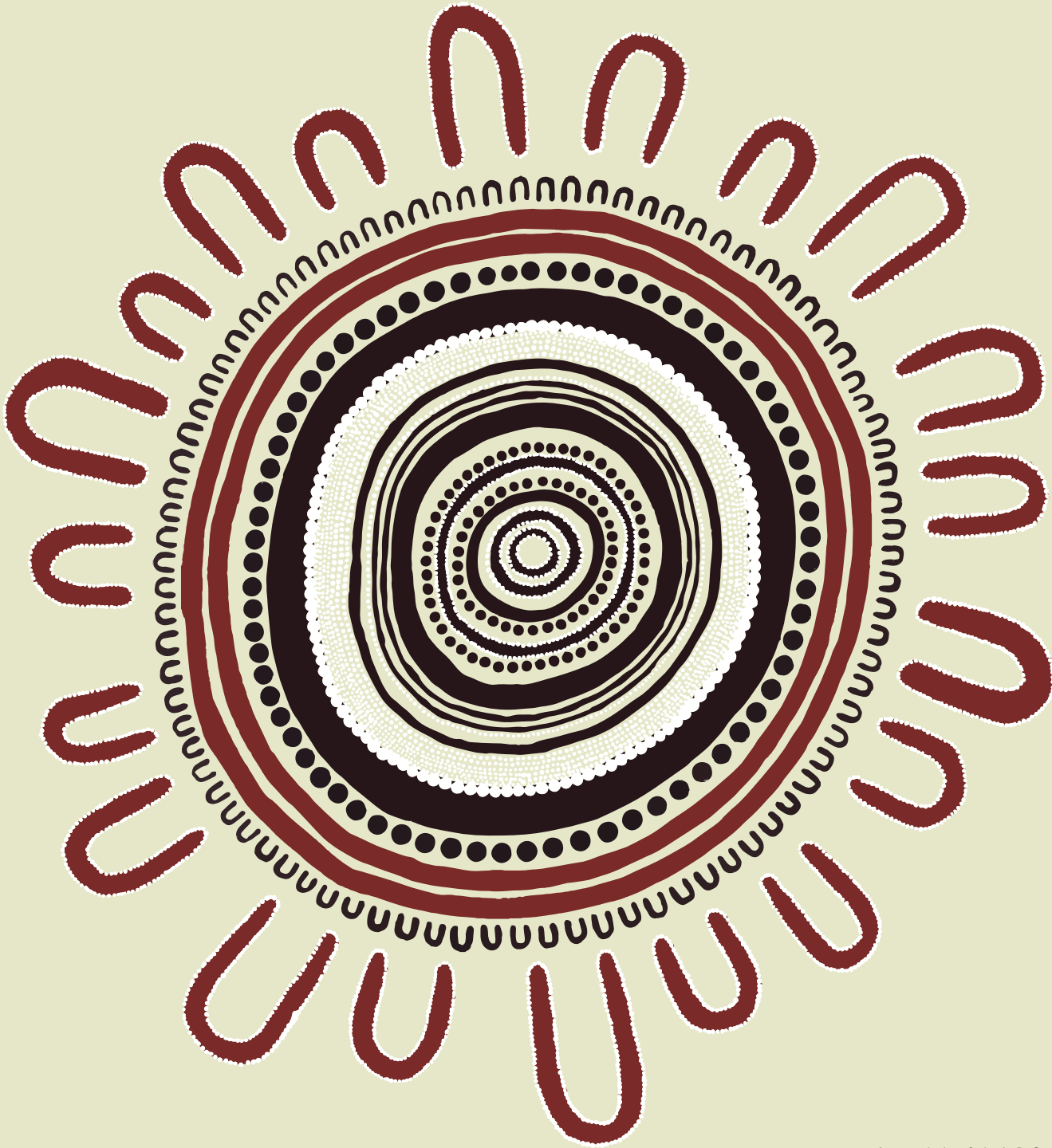


TOURISM PLAN 2030



ACKNOWLEDGEMENT OF COUNTRY

The South Australian Tourism Commission acknowledges and respects Aboriginal people as the State’s first people and nations, and recognises Aboriginal people as the traditional owners of the land and occupants of South Australian land and waters.



(Cover image) Yacca Lookout,
Willow Springs Station,
Flinders Ranges & Outback

Artwork by Gabriel Stengle
Kurna, Ngarrindjeri,
Narungga and Wirangu artist

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MESSAGE FROM THE MINISTER FOR TOURISM

Tourism is at the heart of South Australia’s success.

It’s an industry that brings in more than \$9.8 billion each year, and this Plan outlines a strategy to grow that figure to \$12.8 billion by 2030.

We know that our tourism industry is more than just dollars —it provides meaningful jobs for more than 40,000 South Australians, which means 1 in 25 workers in our State is part of this vibrant sector. And in our regional communities, the impact of tourism is even more significant, supporting local economies and livelihoods.

Tourism is also the backbone of more than 20,000 businesses across the State, most of which are small businesses. These businesses, in turn, support an extensive supply chain that reaches into every corner of our economy.

With the State Government’s investment in major events like AFL Gather Round and the international LIV Golf tournament, and ongoing success of our established events like the Santos Tour Down Under, Adelaide Fringe, Adelaide Festival and WOMAdelaide, South Australia has been in the spotlight, showing the world what we have to offer.

We know that our food and wine are the best in the country. Our breathtaking natural landscapes are second to none. And when it comes to festivals and events, we do them the South Australian way — creating unforgettable experiences for everyone who visits.

The State Government is committed to investing in the growth of the Visitor Economy – prioritising increasing marketing investment, aviation and cruise access and of course, our major events and festivals.

When we invest in growing tourism, we’re not just boosting small businesses and the State’s prosperity—we’re also enriching the cultural fabric that makes South Australia so unique.

To everyone who works tirelessly in our Visitor Economy, thank you for your passion and dedication. You are the driving force behind South Australia’s tourism success.



Zoe Bettison
**The Hon Zoe Bettison MP
Minister for Tourism**

MESSAGE FROM THE CHAIR OF THE SOUTH AUSTRALIAN TOURISM COMMISSION

Our State’s Visitor Economy is powered by thousands of dedicated individuals, each contributing to unforgettable experiences that draw travellers from near and far to South Australia.

When interstate and overseas visitors spend their money in South Australia, it supports our local businesses and contributes towards paying for the community services that we all enjoy. Tourism is a powerful economic contributor and tax revenue generator to the State.

A lot has changed since the Visitor Economy Sector Plan 2030 was published in 2019. While the toughest impacts of the pandemic are behind us, challenges remain—particularly with workforce availability and shifting travel behaviours influenced by rising living costs and high interest rates, as well as changing preferences and customer choices.

Earlier this year, the South Australian Tourism Commission unveiled an exciting new destination brand platform for our State. Centred on the theme of ‘Celebrating the Simple Pleasures,’ we are inviting everyone to experience the unique charm of South Australia.

Importantly, we are inviting our entire industry to help us tell this unique South Australian story.

It’s no secret that I’m passionate about seeing small businesses thrive. By unlocking new opportunities and leveraging our competitive edge, we can empower local enterprises to grow and succeed.

There is enormous potential for the Visitor Economy in South Australia. As a preferred holiday destination amongst Australians we currently rank sixth out eight states – so we need to keep investing in tourism and ensure we are channelling our investment in the right areas to deliver the best results.

Achieving the bold targets laid out in this Plan will take a collective effort. Industry and government must work hand-in-hand to realise this shared vision. Our thinking needs to be bold and creative. We need to act like a disruptor and tap into that famous SA spirit of entrepreneurship.

So let us seize this moment together.

With your support, South Australia’s Visitor Economy can reach new heights, delivering unforgettable experiences for our guests while strengthening our communities and the economy.



David Koch
**David Koch
Chair
South Australian
Tourism Commission**

SOUTH AUSTRALIAN
TOURISM PLAN 2030

*“Our Visitor Economy
can best achieve its
ambitions when we
work together.”*



EXECUTIVE SUMMARY

This South Australia Tourism Plan 2030 responds to today's operating environment and maps out a strategy to grow the Visitor Economy to \$12.8 billion by 2030.

The visitor is at the centre of our strategy which focuses on three key strategic areas:

- 1. Increasing appeal to drive demand.
- 2. New and evolving products and experiences.
- 3. Tourism – a force for good.

Increasing appeal to drive demand requires delivering a long-term destination brand platform, simplifying and doubling-down on our State's strengths as well as growing access to and from key markets.

New and evolving products and experiences requires partnering with industry to grow our distinct product offering, supporting our industry to tell the South Australian story, working together to create a “True South” visitor experience that reinforces the South Australian identity, as well as building industry capability and nurturing innovation.

Tourism as a force for good is about making a positive economic, social and environmental contribution to communities, taking a leadership position on regenerative and inclusive tourism nationally, enabling Aboriginal storytelling on Country, and highlighting South Australia's sustainable tourism credentials.

The South Australian Tourism Commission and Tourism Industry Council of South Australia will work together with our industry to advance this ambition. Our distinct offering in nature, food, wine and drink, as well as events and festivals continue to be the key competitive drivers for South Australia, and sit at the core of the South Australian tourism experience.

SOUTH AUSTRALIAN TOURISM PLAN AT A GLANCE

Our Purpose:

Connecting the world with our people and place so South Australia thrives.

Our Vision:

To inspire globally and to be valued locally for our positive impact.

Our Industry Goals:

Based on the South Australian Tourism Plan 2030, the following strategic goals have been identified:

- Increase appeal and consideration of South Australia to grow demand on the journey to be a top three destination.
- Deliver greater economic, social and environmental benefits for all of South Australia.
- Contribute \$12.8 billion from visitor expenditure to the South Australian economy by 2030.
- Position South Australia's sustainability credentials and propel South Australia to be recognised as a top three sustainable destination.
- Develop a pipeline of demand driving products and experiences, including events, that deliver on the South Australian brand promise.
- Ensure tourism is valued as a key industry by community and government.

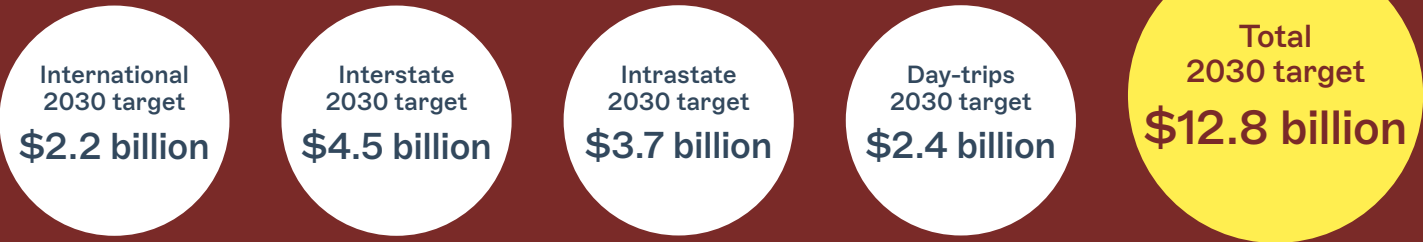
Our Target

Grow the Visitor Economy to \$12.8 billion

Our Ambition

Increase appeal as an Australian tourism destination from 6th to 3rd

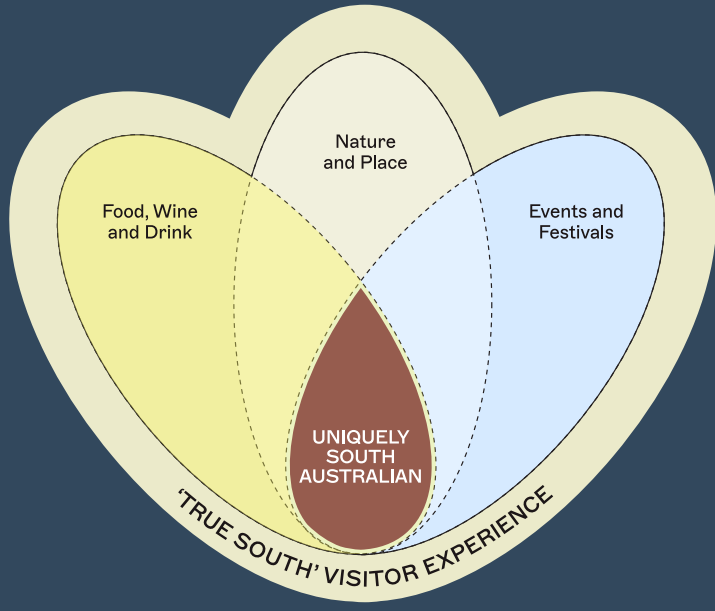
Our Markets



Our Strategic Focus



Our Competitive Drivers



Our Brand

Celebrate the **SIMPLE PLEASURES**

What we heard from our industry

In late 2024, SATC engaged with all 12 tourism regions to discuss the revised Plan. Overall, the strategic direction was well received.

There was strong alignment with key Competitive Drivers; Food, Wine and Drink and Events & Festivals. Nature and Place stood out as a major strength, though seen as less clearly defined.

Arts, Aboriginal culture, storytelling, and heritage emerged as recurring priorities and should be woven into our Competitive Drivers.

The “True South” theme struck a chord, with a shared belief in staying authentic—celebrating community, culture, sustainability, and South Australia’s unique story.

On sustainability and regenerative tourism, many agreed South Australia has the potential to lead—provided efforts are genuine.

Overall, the feedback indicated general support of the strategic direction.

Alignment with other plans

The South Australia Tourism Plan 2030 acknowledges and embraces the following strategies and has integrated their core objectives into its strategic focus and outcomes. These strategies include:

- **Agritourism Strategy 2025**
- **Recreational Fishing Tourism Strategy 2030**
- **South Australian International Tourism Strategy 2025**
- **South Australian Tourism Commission Cruise Ship Action Plan 2025**

Within this overall framework, the following State and Federal Government strategies are also relevant:

- South Australian Economic Statement: The South Australian Government’s strategy for a smart, sustainable and inclusive economy.
- The Re-Imagined Visitor Economy (THRIVE 2030): The Australian Government’s national strategy for the long-term sustainable growth of the Visitor Economy.

Destination Management Plans

To support regional tourism, the SATC in partnership with the Regional Tourism Organisations is developing Destination Management Plans for each region to identify the opportunities, barriers and community aspiration for tourism in each of the States regions. This aims to accelerate greater outcomes and benefits for our tourism regions. These plans will outline actions to enhance visitor experiences, support local businesses and foster sustainable tourism that benefits communities and the environment.

DMPs replace the South Australian Regional Visitor Strategy, which concludes in 2025, and will align with this South Australia Tourism Plan 2030.

(1)



(2)

(1) Karawirra, Barossa
(2) East End Unleashed, Adelaide



CHAPTER 1

Our Visitor Economy.

(3)



(4)

(3) Hither & Yon, Fleurieu Peninsula (4) From Salt & Soil, Eyre Peninsula

“Simple pleasures are the last healthy refuge in a complex world.”

Oscar Wilde

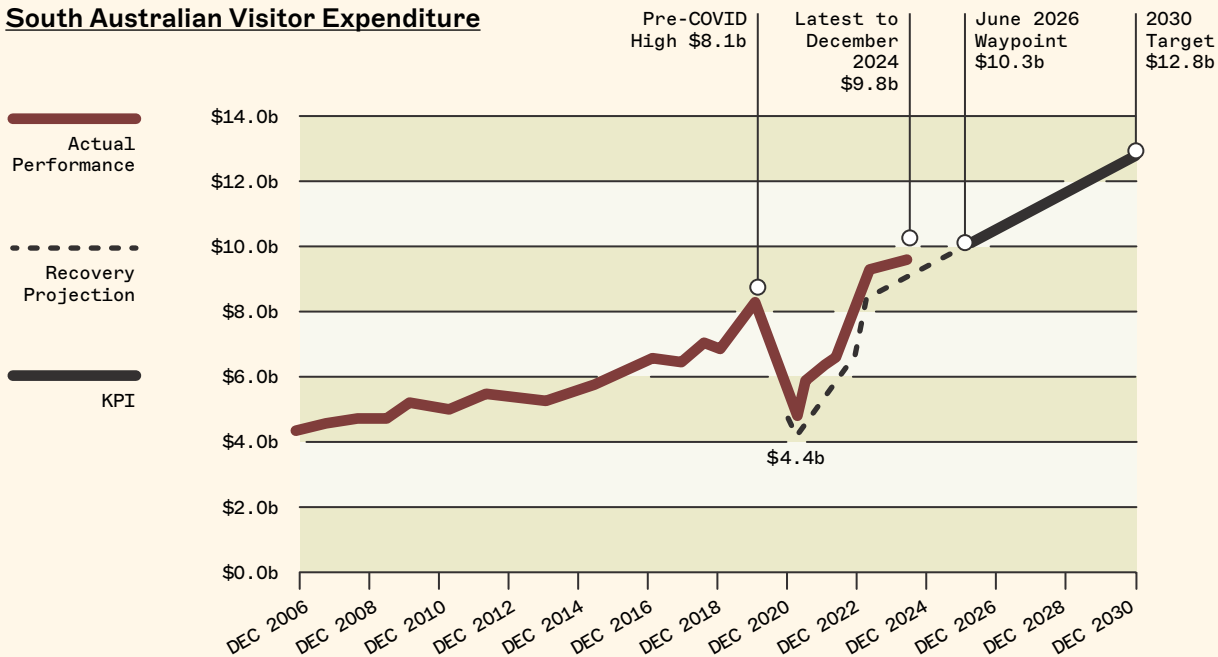


OUR 2030 VISION

While the Visitor Economy has undergone unprecedented disruption since 2019, our industry remains a significant component of South Australia's prosperity, contributing \$9.8 billion to the State's economy in 2024. While this is almost \$2.0 billion higher than pre-COVID levels, we have seen an easing since peaking at \$10.3 billion in September 2023.

Cost-of-living challenges are putting downward pressure on demand at a time where consumers are wanting to travel more than ever. Recovery in international markets is tempered by uncertainty in China, while increased flight volumes into Adelaide Airport are counterbalanced by an increased consciousness of sustainable travel options and our climate change impacts.

South Australian Visitor Expenditure



Despite overperforming against forecasts set in 2019, we have retained our target of \$12.8 billion by 2030.

This factors in a downward forecasting of our international target, driven almost entirely by a softening of the China market since COVID-19, as well as continued cost-of-living pressures expected to impact the Australian economy in the near term.

Overall, there is optimism in the long-term forecasts for the Visitor Economy, with Tourism Research Australia predicting 4.7% annual growth through to 2029, driven by the international market (8.0% annual growth) as full recovery is achieved with modest growth predicted in the domestic market (3.8% annual growth).

Market	December 2024	2030 Target
International	\$1.3 billion	\$2.2 billion
Interstate	\$3.7 billion	\$4.5 billion
Intrastate	\$2.9 billion	\$3.7 billion
Day-trips	\$1.8 billion	\$2.4 billion
TOTAL	\$9.8 billion	\$12.8 billion

Visitor Expenditure targets outlined in this Plan are based on Tourism Research Australia datasets and the methodology for the domestic component on these datasets was significantly improved in 2025. Targets in this Plan will be reviewed once the impact of this new methodology is fully understood.

OUR VISITOR ECONOMY ECOSYSTEM

The Visitor Economy is one of South Australia's most dynamic and rapidly growing industries, contributing significantly to the State's success.

Importantly, the Visitor Economy expands beyond leisure tourism, including spending by all visitors to South Australian destinations. This includes anyone traveling beyond their usual surroundings—whether for a holiday, to reconnect with visiting friends and relatives (VFR), attend events, conduct business, study, or work—as long as it's not their regular daily commute.

Collaboration – a 'Team SA' approach

Our Visitor Economy can best achieve its ambitions when we work together. Delivering on the targets of achieving \$12.8 billion by 2030 and increasing our appeal from 6th to 3rd requires a 'Team SA' approach. This means joining together and telling the same story of South Australia to our customers interstate and overseas. It means tackling difficult problems together – and being prepared to innovate together.

Key partners in the Visitor Economy in South Australia.

- **South Australia's tourism operators:** more than 20,000+ businesses, big and small who seek to provide experiences and accommodation for our State's visitors.
- **The South Australian Tourism Commission:** our State's tourism organisation, responsible for statewide destination marketing and public relations, event delivery and support and destination/industry development, as well as airline and cruise attraction.
- **Tourism Industry Council of South Australia:** plays a key role in industry advocacy and development and is the peak body for the local tourism industry in our State .
- **Tourism Australia:** the Commonwealth tourism body tasked with international marketing for Australia, as well as coordinating roadshows to influence people to travel to Australia, including for events.
- **Regional Tourism Organisations:** through Regional Development Australia and local council areas, support South Australia's 12 tourism regions.
- **Local Councils:** South Australia's 68 councils play a strong role in supporting tourism, particularly through local services, infrastructure and events.
- **Regional Development Australia:** administered by the Commonwealth Government to bring together agencies in the interest of regional communities.
- **Industry Associations:** including but not limited to the Australian Hotels Association, Festival City Adelaide, Restaurant and Caters Association, Caravan and Camping Association, Parks SA.
- **Adelaide Airport Limited:** manages our capital city's airport, which hosts direct flights to most major destinations across the Asia-Pacific and the Middle East.
- **Flinders Port Holdings:** is South Australia's leading port operator with seven ports including the Port Adelaide Passenger Terminal which can cater for the largest of cruise liners.
- **Event organisers and venues:** event partners, both big and small, play a key role in driving visitation to South Australia.
- **Aviation and cruise industry:** local and international airline and cruise partners.



International Education

International education: is critical to South Australia's Visitor Economy. The sector was the State's largest export worth \$3.2 billion in 2023/24 and achieved a record 59,000 international student enrolments in South Australia in 2024.

On an average international flight to Adelaide, 16 per cent of passengers are international students. Beyond their own tourism spend, 65 per cent of students are visited by family and friends during their studies.

International students are also vital to the workforce, from filling part-time and casual roles in hospitality through to professional roles as diverse as chefs and hotel and tourism management across the state. Coming from over 130 countries, they bring valuable language skills and international market and cultural insights.

These students become important advocates for South Australia on social media and on return to their home countries.

StudyAdelaide: plays the lead role in attracting international students and positioning Adelaide as a leading study destination and supports them to have a rewarding experience while they are in South Australia.

Business Events

Business events: conferences, meetings, tradeshow and exhibitions—play a significant role in the Visitor Economy, attracting thousands of visitors and generating substantial financial benefits.

This is particularly the case for the Adelaide CBD, which hosted over 150 business events in 2024, drawing over 55,000 interstate and overseas delegates. These business events generated more than \$320 million for the State economy.

Importantly, travellers coming for business events tend to stay longer, and provide a higher average spend than leisure visitors. A business event delegate spends \$1,165 a day whilst in Adelaide on accommodation, food and beverage and experiences.

Business events also have the benefit of driving strategic and commercial partnerships for the State, providing an economic tail that endures well into the future, and business event delegates often return as leisure visitors, or as permanent residents.

Business Events Adelaide: plays a leading role in attracting domestic and international business events to Adelaide, while venues including the Adelaide Convention Centre, Adelaide Oval, National Wine Centre and major hotels host thousands of business event visitors each year.

Strengthening Regional Tourism

Growing tourism in our regions is critical to dispersing the benefits of tourism across our States and supporting regional communities to thrive.

To strengthen regional tourism the SATC has led a body of work with input from the Regional Tourism Organisations and tourism stakeholders to identify the resource, communication, governance and strategic alignment requirements to better support our regions.

This included the opportunity to introduce regionally-led Destination Management Zones, starting with a pilot zone to increase capacity and provide consistent governance structures as well as the development of Destination Management Plans to identify regional priorities and achieve strategic alignment between the State and regions."

(5)



(6)



"It's the millions of little memories that make up truly good days. Like years in a wine cellar, they all add up."

(5) Lincoln National Park, Eyre Peninsula
(6) Brand's Laira, Limestone Coast

JOB IN THE VISITOR ECONOMY

South Australia’s Visitor Economy supports more than 41,600 jobs —which is more than three times the size of the mining industry in the State.

While restaurants, tour services, and accommodation providers make up a significant portion of these jobs, they account for only half of the total employment in the sector. This highlights the vast reach of the Visitor Economy, which extends far beyond frontline tourism roles.

An additional 29,900 South Australians are indirectly employed through the ripple effects of visitor spending.

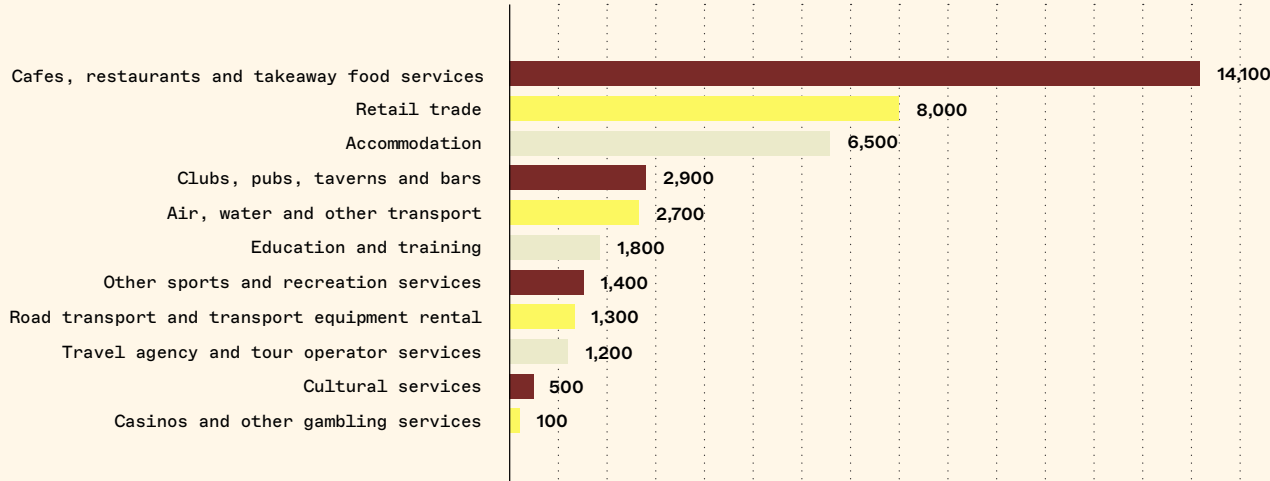
At its core, the Visitor Economy is driven by small businesses. More than 20,000 tourism-related businesses operate across South Australia, many of which dedicate their entire workforce to this sector.

Nearly 8,000 of these are sole proprietorships or partnerships—small-scale tour operators, boutique accommodation providers, retailers, and transport services. Among those that employ staff, most have fewer than 20 employees, reinforcing the industry’s role as a critical engine for small business growth.

Workforce challenges are facing many sectors across Australia and globally. To support the growth in tourism jobs it is important that we work with relevant stakeholders to continue to ensure skills development of the current workforce and to continue to attract people to the sector.

Tourism is mainly delivered by small business, so we must continue to support operators in building capability, capacity and resilience to navigate the changing operating environment.

Tourism Jobs in the South Australian Visitor Economy
Tourism Research Australia, State Tourism Satellite Account, as at June 2024



OUR AUDIENCE

(7) Longbottom Beach, Yorke Peninsula

An era of disruption

Since the first Visitor Economy Sector Plan 2030 was published in 2019, the world has undergone unprecedented changes and upheaval.

Accenture’s Global Disruption Index—a comprehensive measure of economic, social, geopolitical, climate, consumer, and technological shifts—reveals that disruption surged by 200% from 2017 to 2022 and climbed an additional 33% in 2023. By comparison, the Index rose only 4% between 2011 and 2016.

The COVID-19 pandemic reshaped our industry and stands at the forefront of these disruptions. Additionally, global geopolitical tensions, such as Russia’s invasion of Ukraine and conflicts in the Middle East and market disruption from USA trade tariffs, have compounded these challenges. Domestically, Australia has faced a housing affordability crisis, interest rate hikes, and substantial cost-of-living pressures.

At home, natural disasters like the Murray River flood of 2022-23, the Kangaroo Island bushfires of 2020, and widespread drought in 2024 have further tested our industry’s resilience.

Changing consumer needs

Technological revolutions, particularly the rise of AI, are reshaping business operations, productivity, workforce needs, supply chains, and the way tourism is experienced.

Consumer behaviour is evolving in this new landscape. Sustainability and positive community impact are becoming central to travel choices, while emerging markets such as India, along with the mindful Gen Z and Gen Alpha, are redefining the traveller demographic.

Research by the SATC in 2024 sheds light on the transformed consumer mindsets that will shape travel in 2025 and beyond.

This research indicates that the pandemic instilled a deeper appreciation for life, emphasising the unpredictability of the future and the urgency to seize the moment. Travel, once a luxury, is now seen as an essential part of living fully—an opportunity to create memories and cherish experiences.

The post-COVID era is seen as a time to prioritise life’s experiences, particularly those shared with others.

This renewed zest for authentic adventures and a deeper appreciation for what Australia offers positions our industry for a promising future – particularly if we focus on what makes us distinct.

(7)





OUR MARKETS

There are four key markets within South Australia's Visitor Economy, each vital yet distinct. Their behaviours, itineraries, booking patterns, and, most notably, expenditure per visitor, vary greatly.

This diverse array of markets presents tailored opportunities for enhancing South Australia's tourism appeal and economic impact.

(9)



International visitors

These tend to be long-staying, high-spending guests from both the Eastern and Western hemispheres, often visiting for diverse reasons such as holidays, visiting friends and relatives (VFR), education or business.

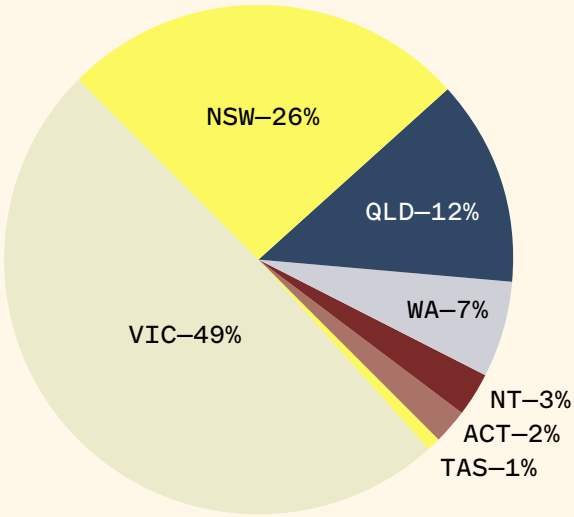
Growth opportunity
There are significant growth opportunities within priority international markets including United States, China, India, South East Asia and Japan.
SATC focus
Unlocking the full potential of this opportunity will require further investments in international marketing and airline attraction. Working alongside Tourism Australia to drive trade and promotional partnership opportunities, including hosting the Australian Tourism Exchange in 2026.
Industry focus
Consider how products and experiences cater to growing international markets. Connection with international trade via attendance at trade events. Interaction with the SATC international team and undertaking travel to relevant international markets to meet with key partners. Express interest to the SATC team about working with international markets so that they can support knowledge development around trade and distribution pathways to connect product with international consumers. Consider becoming an Australian Tourism Export Council (ATEC) member. Attend the annual SATC Industry Forum to hear insights and updates from the SATC International team.

Interstate overnight visitors

Primarily from Victoria and New South Wales, these visitors exhibit moderate spending. They have a basic understanding of South Australia's attractions, although their perceptions may be outdated or incomplete.

While a smaller overall number of visitors, interstate visitors spend almost twice as much as intrastate visitors due to the higher cost of travelling here and increased reliance on tourism operators once they arrive.

Interstate Visitors to South Australia



(10)



Intrastate overnight visitors

South Australians exploring their own State fall into this category. On average, they are lower spenders, usually embarking on short trips to familiar spots. With a solid grasp of local attractions, their travel plans are typically spontaneous, with short booking lead times outside of public and school holidays.

Growth opportunity
South Australians take at least one holiday in South Australia annually, with an average stay of 2.9 nights. The opportunities to grow this market are by increasing the number of trips taken per year amongst existing intrastate travellers and by encouraging extended stays amongst existing intrastate travellers.
SATC focus
Destination marketing will continue to target the intrastate market as it remains a significant proportion of our Visitor Economy.
Industry focus
Consider how your product/experience delivers on the destination brand promise and create opportunities for your guests to Celebrate the Simple Pleasures.
Familiarise yourself with SATC brand guidelines, including photography and tone of voice, to help ensure any content you create aligns with the State's destination brand platform.
Participate in SATC tactical marketing campaigns to stimulate short-term demand.
Create compelling offers to extend stays and increase visitor expenditure.

(11)



Domestic day trip visitors

Comprising Australians on short trips lasting more than four hours but without overnight stays, this group is primarily leisure-focused, with some business travel.

Despite their lower individual yield, the volume makes their cumulative contribution substantial, particularly for regions surrounding Adelaide. Many day trips occur within a tourism region (e.g. Port Lincoln residents visiting Coffin Bay), as well as regional residents visiting Adelaide for shopping, appointments or for sporting events.

Growth opportunity
Day trips predominantly consist of South Australians traveling locally, with 13 million day trips recorded every year and 98% of those trips by South Australians.
Subsequently, the main opportunity to grow this market is to increase number of day trips taken by South Australians and increase the expenditure per day trip.
SATC focus
Drive demand for day trips by positioning them as micro-moments of “self-care” and time for connection.
Industry focus
Reinforce Simple Pleasures of day trips.
Participate in SATC tactical marketing campaigns to stimulate short-term demand.
Use your own digital and social media channels to stay top-of-mind and drive (repeat) visitation.

CHAPTER 2

Our Strategic Focus.

(12)



(13)



(12) The Dairyman, Barossa
(13) Kuti Shack, Fleurieu Peninsula

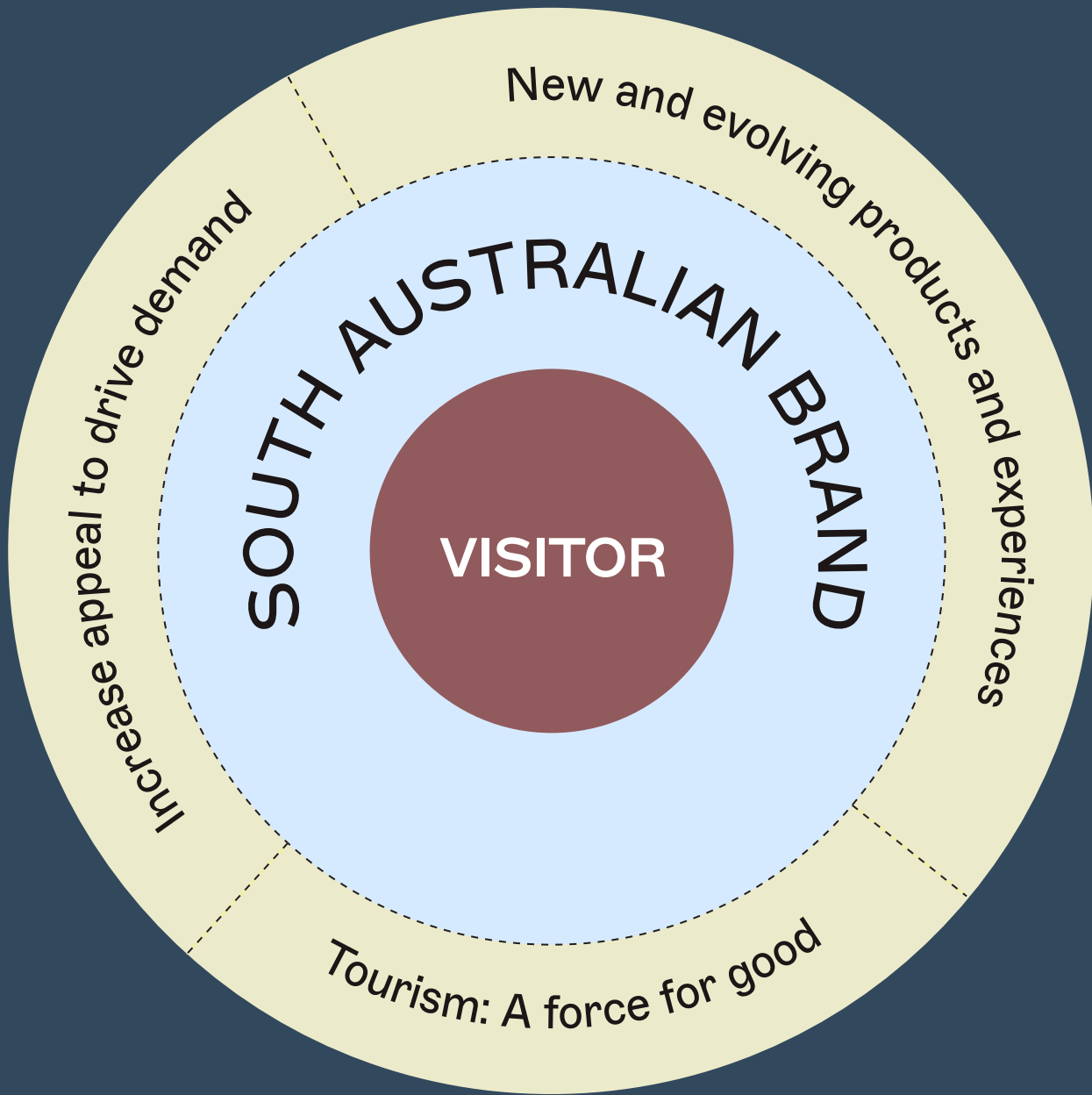


(Heaven is) “a just-picked, perfectly ripe white peach, still warm from the day’s sunshine.”

Maggie Beer

OUR STRATEGIC FOCUS AREAS

Our Strategic Focus Areas provide the roadmap for achieving the targets set out in this Plan, while remaining adaptable to changing circumstances. They help us to focus our resources, guide decision making, align our stakeholders, measure progress, and drive innovation.



INCREASE APPEAL TO DRIVE DEMAND

What we will do:

1. Deliver a long-term destination brand platform.
2. Simplify and double-down on our strengths.
3. Grow access to and from key markets.

Increasing South Australia’s appeal as a destination will drive an uplift in visitation across all regions and is a key step towards realising our goal of growing the Visitor Economy to \$12.8 billion by 2030.

To increase appeal South Australia has needed a distinct, unique and long-term brand proposition that showcases our competitive advantages. Launched in April 2025, ‘Celebrate the Simple Pleasures’ is a reflection of what South Australians value and highlights the abundance of simple pleasures readily available in our State, creating moments that make travel and life meaningful. This positions South Australia as a sanctuary for the burnt-out and overwhelmed, as well as for those seeking greater connection and meaning.

Key to this is simplifying and doubling-down on our State’s brand strengths. In this regard, we have reconfirmed the three Competitive Drivers as outlined in the previous version of the Visitor Economy Sector Plan 2030 and further extended this strategy to reflect a distinct South Australian way of delivering them. They are:

- Nature and Place
- Food, Wine and Drink.
- Events and Festivals.

Consistently aligning the South Australian proposition to these three Competitive Drivers helps to simplify our story and help our audience understand what makes South Australia unique. For more on our State’s Competitive Drivers, see page 32.

Growing Access to South Australia

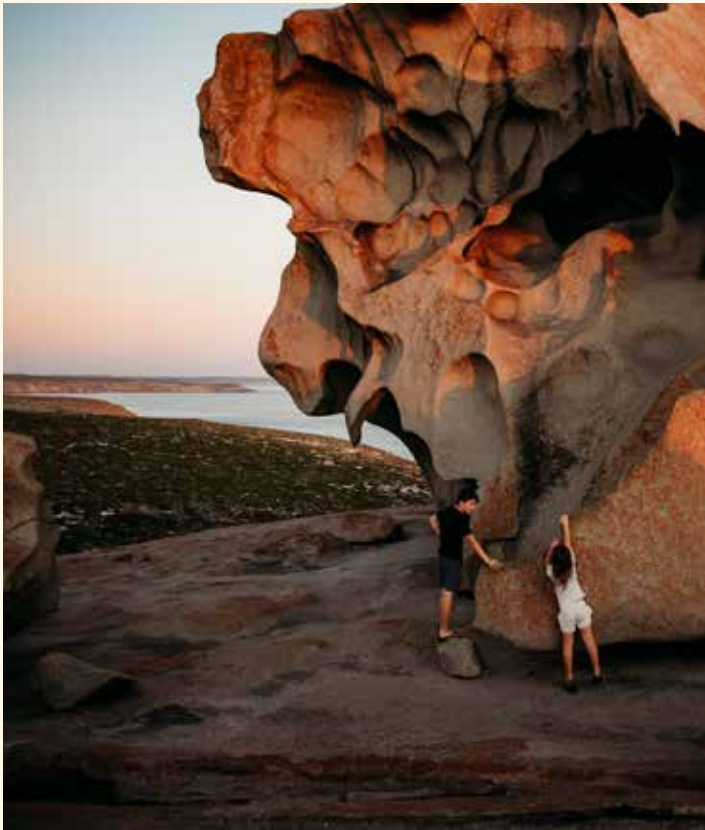
Re-establishing aviation and cruise access into Adelaide and to regional South Australia has been a priority for the SATC since the pandemic. Increasing aviation and cruise access enhances our State’s appeal as a destination, primarily as it allows better convenience and accessibility, positioning South Australia as highly connected, and catering to diverse travel preferences.

Targeting new international aviation routes, including India and Japan will help open up new growth opportunities for our industry in these important markets while increasing cruise visitation to South Australian ports – including our regional ports – will enable further dispersal.

How we will do it:

- South Australia will continue to deliver a distinct, long-term brand platform for South Australia and work with our industry to support the delivery of it at a regional level.
- Marketing and public relations will focus on reinforcing our State’s Competitive Drivers and we will work with our Regional Tourism Organisations to drive alignment.
- SATC will work with its partners including Adelaide Airport Ltd to target key international markets for increased aviation access; India and Japan.
- Increase our international marketing activity to continue to drive growth in our international markets, targeting \$2.2 billion by 2030.
- Collaborate with Business Events Adelaide and Study Adelaide through joint planning to facilitate consistent messaging to market.

(14)



TOURISM—A FORCE FOR GOOD

What we will do:

1. Create a ‘True South’ visitor experience with our industry where people, place and planet are celebrated.
2. Be guided by Aboriginal wisdom and support Aboriginal people to tell their stories of culture on country.
3. Take a leadership position on regenerative and inclusive tourism nationally.
4. Grow South Australia’s sustainable tourism credentials positioning us as a top 3 sustainable tourism destination.

In addition to its economic benefits, we know that tourism can be a positive force within communities through:

- Connecting people with place and each other
- Creating a platform for Aboriginal storytelling on country
- Championing sustainability
- Championing inclusiveness
- Promoting a destination as a potential place of future residence positioning positively with national and international audiences
- Generating State pride

In our evolving operating environment, there are changing expectations from visitors and communities that tourism must make a positive, rather than extractive, impact on place. For example, 75% of global travellers say that environmental impact of their travel plays a role in their decisions and 32% said it plays a major role. There is an opportunity for South Australia to take a national leadership position in tourism being a force for good, and we can do so through a “True South” visitor experience. A True South visitor experience is our South Australian way of doing things where people, place and planet are celebrated.

This involves being guided by Aboriginal wisdom, embedding regenerative and inclusive principles, and being committed to inclusion – delivering this through our South Australian hospitality.

A regenerative approach recognises the impact of tourism on the entire ecosystem (economic, social, environment) and focuses not only on doing no harm but on doing more good, leaving the community and environment better than we found it. South Australia already has strong sustainability credentials, but this is not being reflected in the perception of our State as a tourism destination where, in a tight field, we currently rank 7 out of 8 states and territories.

Our State is known globally as a leader in the use of renewable energy, and we were the first to introduce a container deposit scheme and ban single use plastics. We also have great examples of where our industry is delivering sustainable tourism experiences and supporting regenerative initiatives. Being an inclusive tourism destination not only expands our market reach, but also enhances customer satisfaction and loyalty, as travellers feel valued and welcomed regardless of their circumstances.

By demonstrating our “True South” hospitality, we will welcome people of all abilities, ages, and backgrounds, including those with disabilities, elderly travellers, families with young children, and others with specific needs

How we will do it:

- SATC and TiCSA to co-design, with industry and experts, the ‘True South’ visitor experience.
- Develop and implement a set of pilot initiatives designed to support the South Australian tourism industry to deliver a True South experience that shifts the dial on regenerative and inclusive tourism experience delivery.
- Work in partnership with South Australian Aboriginal Tourism Operators Council to further develop Aboriginal tourism in South Australia, ensuring Aboriginal stories are owned and told by Aboriginal people.
- Promote existing and new tourism successes as a force for good to highlight South Australia’s sustainability credentials and to showcase our True South visitor experience.
- Develop and monitor an annual action plan that is mutually supported by industry and government.
- Position South Australia’s events and festivals as a force for good by working with Festival City Adelaide to establish sustainability, inclusivity, diversity and accessibility guidelines, supported by educational tools and embedded into event evaluations, sponsored event KPIs and procurement processes.
- Recognise and measure the broader social and community impacts of events beyond economic return and actively communicate their value.
- Use events as a testing ground and catalyst for long-term legacy outcomes, including the development of enduring tourism products.

Our joint commitment.

A powerful opportunity lies ahead for our industry.

The South Australian Tourism Commission and the Tourism Industry Council of South Australia are joining forces to drive industry leadership in respect for culture, community, and country.

Our vision is to position South Australia as a global leader in three key areas:

- **Aboriginal tourism**
Ensuring that Aboriginal cultural stories are owned and shared with our visitors by Aboriginal people.
- **Regenerative tourism**
Leaving every place we touch in better shape than we found it.
- **Inclusive tourism**
Creating an environment where everyone feels truly welcome in South Australia.

We do this not just because it’s the right thing to do, but because it’s a significant growth opportunity. Global travellers are seeking authentic Aboriginal experiences to connect with the world’s oldest living culture. They are increasingly mindful of their impact and want to ensure their travels support, rather than harm, our planet. And with 1.3 billion people globally facing accessibility challenges, inclusivity is not just an option—it’s essential.

Fundamentally, everyone should feel welcome in South Australia.

In partnership with industry champions, including the South Australian Aboriginal Tourism Operators Council, we are committed to driving real action and change.

Our ambition is to be recognised as a global leader. One that ensures the entire community shares in the benefits of a thriving, responsible, and inclusive tourism industry.



Emma Terry
Chief Executive Officer
SATC



Shaun de Bruyn
Chief Executive
TiCSA



NEW AND EVOLVING PRODUCTS AND EXPERIENCES

What we will do:

- 1. Partner with industry to grow a diverse and brand aligned product offering.
- 2. Support our industry to tell the South Australian story.
- 3. Build industry capability and nurture innovation.

To grow the Visitor Economy and boost appeal, South Australia must offer distinct, competitive products and experiences.

Addressing barriers to supply will help unlock investment and support the development of unique, evolving offerings that meet visitor needs.

Collaboration with other government bodies, like the State Planning Commission and Department for Environment and Water, is vital to realise the full potential of tourism products.

The Celebrate the Simple Pleasures destination marketing platform provides a unique opportunity to unite industry under a single, compelling narrative. A consistent place brand story will strengthen visitor perception and increase consideration.

On-ground experience is key to appeal, driven by meaningful moments and authentic hospitality.

Our operators deliver a uniquely South Australian experience – “True South” hospitality – rooted in humility, respect, personalisation, and a deep connection to nature.

This ethos strengthens emotional ties with our State and is widely embraced by the industry.

As technology and AI evolve rapidly, adaptability is essential. SATC is committed to helping industry harness innovation and invest in a sustainable future.

How we will do it:

- Address barriers to investment, such as planning and finance, with the aim of delivering new products and experiences.
- Grow the offering of brand-aligned products and experiences in South Australia, including those targeted towards growing international markets.
- Grow industry capability on emerging challenges such as AI, through programs such as the Experience Development Program.



"A True South visitor experience is our South Australian way of doing things where people, place and planet are celebrated."



CHAPTER 3

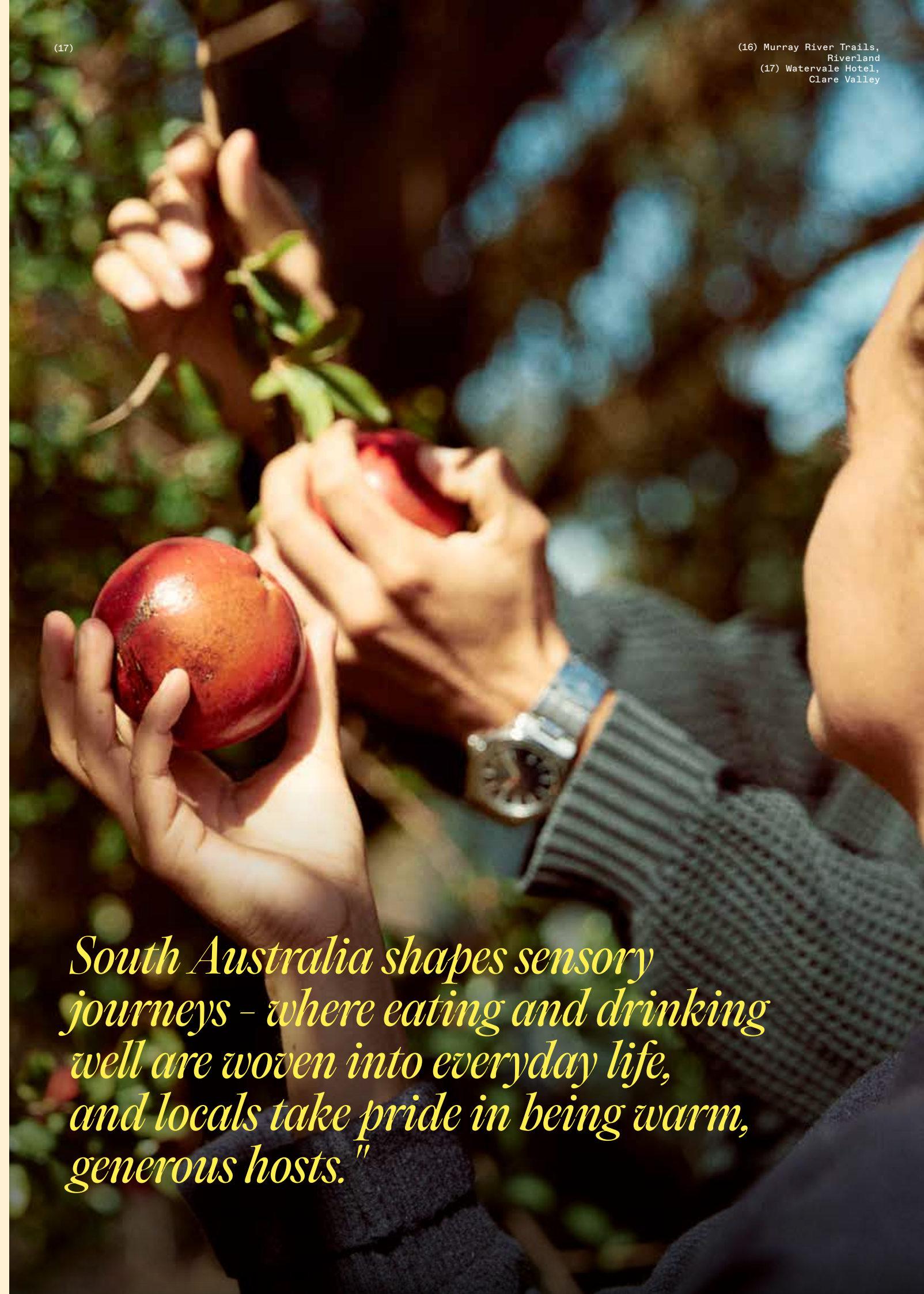
Our Competitive Drivers.

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(17)

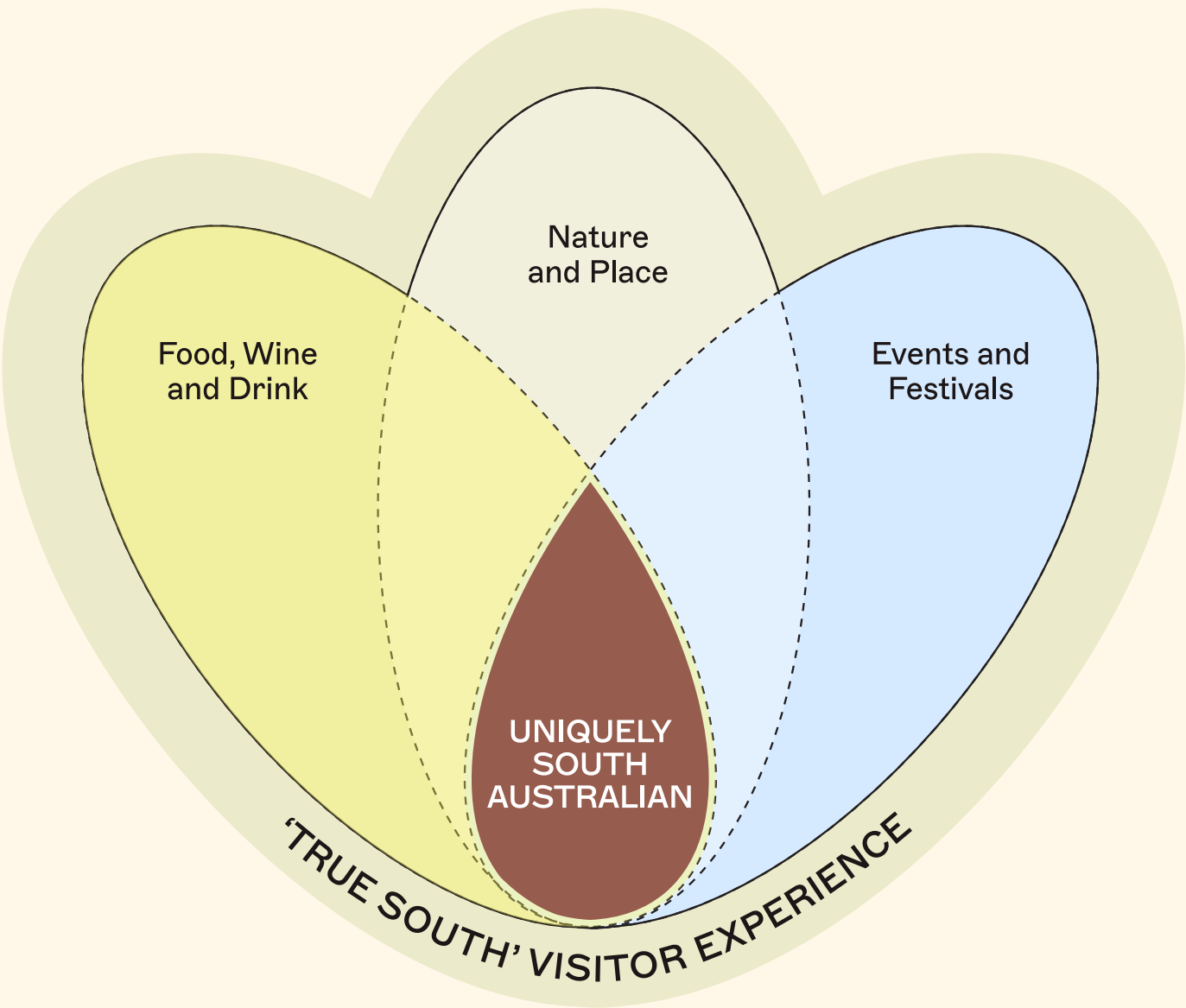
(16) Murray River Trails,
Riverland
(17) Watervale Hotel,
Clare Valley




South Australia shapes sensory journeys – where eating and drinking well are woven into everyday life, and locals take pride in being warm, generous hosts."

OUR STATE'S COMPETITIVE DRIVERS

Our Competitive Drivers are South Australia's strengths that drive appeal —when they work together, they create a unique South Australian experience.



Our State's Competitive Drivers are:



—Nature and Place
“Good natured”



—Food, Wine and Drink
“A good meal fills the plate and everyone’s invited”



—Events and Festivals
“We Festival”

NATURE AND PLACE

Good Natured.

South Australia is a place of beauty and balance. It spans rugged peaks, steep vineyard valleys, desert dunes and intricate coastlines.

A distinct colour palette, abundant wildlife and landscapes where light moves unobstructed create a warmth that extends from place to people. Nature drives much of the South Australian psyche and lifestyle.

Its capital city, Adelaide, is a case in point. Rather than a city with parks, it's a city within a park. Adelaide was also the first city in Australia and second in the world to be awarded National Park City status.

South Australia is home to endemic species including the vivid Sturt's desert pea, the yellow-footed rock wallaby, southern hairy-nosed wombat and Kangaroo Island dunnart.

South Australia shares the mighty Murray – one of the world's longest navigable rivers – with Victoria and New South Wales.

Our marine environment is equally rich, supporting unique wildlife such as the annual aggregation of giant cuttlefish in Whyalla. Southern right whales use the sheltered waters of the Great Australian Bight to calve their young. The Eyre Peninsula offers one of the world's only shark cage diving experiences, while visitors swim with dolphins and curious seals.

Our Nature story spans back millenia with Ediacaran fossils at Nilpena—evidence of the first complex animals on Earth—and continues in the Limestone Coast, where the remains of megafauna lie fossilised within an ancient cave system.

Aboriginal cultural heritage lies at the heart of the South Australian story. The experience of Aboriginal dreaming and culture crosses the entire State.

Beyond nature, built environments reflect our history, culture and way of life. Distinct architectural heritage – vine-covered verandas, mallee brush fences, buildings crafted from sandstone and bluestone – create a uniquely South Australian aesthetic.

There is also a strong crossover between the State's natural beauty, food and wine offerings and celebrated events. While South Australia is globally recognised for its culinary excellence, its untouched landscapes offer some of the world's best nature-based experiences.

As travellers increasingly seek deeper connections to nature, South Australia has a unique opportunity to elevate its reputation as a leading destination for immersive, enriching natural experiences.

Nature and Place Strategies

1. Develop and build our natural icons through consistent imagery, storytelling and demonstrating how people can experience them. Examples include the Murray River, Flinders Ranges (Wilpena and Nilpena Ediacaran), Naracoorte Caves and Kangaroo Island.
2. Celebrate our endemic flora and fauna through images, storytelling and further developing sensitive tourism experiences.
3. Show how you can experience Australian wildlife icons in uniquely and easy to encounter.
4. Collaborate with the Department for Environment and Water and our national parks to develop and further activate nature-based experiences.
5. Find opportunities to connect visitors to nature from simple gestures through to more immersive and in-depth experiences.
6. Develop Aboriginal-led experiences to tell the deeper story of place.
7. Connect visitors on a deeper level through regenerative principles and citizen science opportunities.

"South Australia is a dramatic tapestry of eye-popping terrain, from its rusty-hued outback and emerald-hilled wine regions to its wildlife-rife islands and peninsulas."

Esquire

FOOD, WINE AND DRINK

A good meal fills the plate and everyone's invited.

Food is a way of life in South Australia, bringing people together while fostering a sense of belonging and connection to the land.

Good food and wine are key factors when choosing a holiday destination, and South Australia stands out as a compelling choice. Our State is blessed with a Mediterranean climate and the conditions to nourish a variety of produce.

Long, hot summers and mild, wet winters make South Australia ideal for growing a diverse collection of fruits, vegetables, grains and nuts, together with its famous grapes.

Eighty per cent of the nation's premium wine is made in South Australia. From bold reds like shiraz and grenache in the Barossa and Coonawarra to elegant Riesling and Chardonnay in McLaren Vale, the Adelaide Hills and Clare Valley, the State's diversity in wine is unmatched.

South Australia is among 12 Great Wine Capitals globally and offers more than 200 cellar doors within an hour of Adelaide, along with some of the world's oldest vines and the National Wine Centre. It's home to revered brands such as Penfolds, Yalumba, Henschke, Wirra Wirra and Jacobs Creek, which sit alongside a diverse community of independent winemakers.

Such strong wine credentials make it essential to leverage this reputation and tell a broader story – one that highlights South Australia's thriving food and beverage scene. Vibrant distilling and craft brewing industries produce exceptional spirits, cider, beer and a variety of unique non-alcoholic drinks.

While renowned for world-class wine regions, the State's reputation in food and drink goes far beyond the vineyard.

South Australia shapes sensory journeys – where eating and drinking well are woven into everyday life, and locals take pride in being warm, generous hosts.

With an abundance of high-quality local ingredients, the joy of sharing great meals has fostered a culture that is relaxed, inclusive and best savoured with family and friends.

This unique approach to food, wine and hospitality sets South Australia apart.

The State's reputation is built on the variety and quality of its agricultural produce – from fresh seafood to expertly crafted wines – and backed by a rich viticultural heritage.

South Australia's rich culinary heritage spans thousands of years, blending ancient tradition with modern innovation. Aboriginal people have used the lands and waters of South Australia as sources of food for millennia, providing a deep connection to Country.

A vast coastline and marine biodiversity support commercial fishing in South Australia. Port Lincoln on the Eyre Peninsula is home to Australia's largest fishing fleet, with seafood specialties including crab, rock lobster, abalone, Coffin Bay oysters, King George whiting, Coorong mullet, kingfish and tuna.

Restaurants beneath Kangaroo Island fig trees, fine dining in the Adelaide Botanic Garden, oyster vending machines in Coffin Bay and feral tasting plates offered in the outback are among our standout culinary experiences.

The Adelaide Central Market is loved by locals and visitors, with fresh produce and artisan goods presented by families who have shared their passion for generations.



Food, Wine and Drink Strategies

- 1. Stories on every plate: dialling up and distinct South Australian point of view on food, wine and drink.
- 2. Leverage the strength in wine to tell the broader South Australian food and drink story, through marketing and public relations.
- 3. Tell more stories about unique experiences and hero food and produce in the State including wine, seafood (pipis, Coffin Bay Oysters, King George Whiting, Spencer Gulf prawns), stone and citrus fruit as well as wheat and barley.
- 4. Showcase local producers and artisans, particularly in regional South Australia, as well as new and emerging food and wine industry personalities that can tell the South Australian story and act as a proof point.
- 5. Amplify the story of sustainable food practices.
- 6. Work with the tourism, events and hospitality industry to bring the food and wine experience to life, creating spaces and moments where people can come together, even strangers. Foster a sense of generosity and celebration.
- 7. Support industry to champion local products and produce.
- 8. Develop more signature dishes and food and wine experiences that you can only access in South Australia.
- 9. Work with primary producers to develop agritourism experiences, creating news ways for people to experience food from the source.



“When we festival, we blur the lines between audience and artist, stranger and friend. We co-create joy, share voices and turn togetherness into action.”

EVENTS AND FESTIVALS

We festival.

Events and festivals are a crucial part of South Australia’s cultural and tourism story.

They create all-important jobs by driving many thousands of people to the State each year, helping to share our people, place and world-class experiences through valuable media exposure and broadcast coverage.

What differentiates events and festivals within the broader tourism offering is that they provide an immediate reason for people to travel.

In South Australia events and festivals are seen through a different lens. Long referred to as ‘The Festival State’, we pride ourselves on celebrations that go beyond their venues – joyfully extending to cities, regions and businesses. In South Australia ‘We Festival’, not as a noun but rather as a verb.

The proof points are clear. We have internationally acclaimed arts and cultural festivals such as the Adelaide Festival (first of its kind in Australia), the Adelaide Fringe (second largest in the world) and the trailblazing WOMADelaide. Our biggest sporting events, too, are turned into festivals. The Santos Tour Down Under is not just a bike race but a festival of cycling and AFL Gather Round is a festival of football.

(22) WOMADelaide, Adelaide
(23) AFL Gather Round, Adelaide Hills

South Australia stands apart with its dedicated peak body, Festival City Adelaide helping existing events and festivals to thrive. The SATC works with the Major Events Attraction Committee to attract exciting new events, while the SATC also plays a hands-on role in delivering major events to world-class standards.

The State’s events and festivals calendar is varied, inclusive and respected for the strength of its offerings. In addition to major events, the State hosts regional events that are one with their community and place – among them the Barossa Vintage Festival, South Australian Wooden Boat Festival and Clare Valley Gourmet Week.

In South Australia our events are about connection, community, diversity, hospitality and transformation of both people and place. They are about celebrating what we love most: food, wine, culture and nature. The sheer simple pleasures and joy of life.

Our events and festivals share a sense of warmth, generosity and energy that is lived every day and true to every South Australian.

(23)



Events and Festivals Strategies

1. Ensure events amplify South Australia’s story.

- Support and grow events that champion and showcase our unique characteristics, Competitive Drivers and our Simple Pleasures brand story.
- Let events spill out and engage with nature and the built environment in new and innovative ways.
- Honour Aboriginal South Australians and their ongoing connection to country.
- Create a sense of community by enabling people to engage in different ways including the use of free elements to provide greater access.
- Events should consider how local food, wine and beverages can be incorporated. The standard of hospitality and food quality is high here and our events should reflect this.

2. Supporting our regions.

- Consider opportunities for cross-regional or local government collaboration, establishing economies of scale, to expand and amplify the regional event offering.
- Establish support frameworks to nurture long-term sustainability of regional events by providing training and capacity building programs, in partnership with Festival City Adelaide.
- Provide greater data and insights for regions to develop events and festivals and their impact on the local region.
- Where practical, incentivise Adelaide-based events and festivals and build into contracts the need to deliver elements into regions.
- Identify key regional events and wrap further support to grow the event to drive interstate and international visitation.

3. Events – a force for good.

- See strategies outlined on page 28.

4. Continue evolving our calendar of demand-driving events to combat seasonality.

- Leverage our competitive advantage of size and proximity to build a calendar which promotes opportunities for collaboration and creates stories through complimentary programming.
- Further develop the winter and off-peak event offering.
- Extend or utilise existing events as an umbrella for more associated events across South Australia.
- Pursue exclusive and innovative new formats to stay relevant to audiences and continue to position South Australia as a leader in festivals and events, as recently proven with AFL Gather Round and LIV Golf Adelaide.
- Provide consumer insights to events so they can continue to evolve and innovate to align to changing consumer needs.
- Work with Festival City Adelaide to deliver a program that supports events to continue to innovate.
- Work closely with government partners to align and support our investments.

5. A collaborative platform for growth.

- Leverage the "Simple Pleasures" to promote the unique offering of South Australia’s events and festivals calendar.
- Better showcase the comprehensive depth and breadth of festivals and events listed on southaustralia.com through a revamp of the directory and encouragement of local and regional events to register on the ATDW database.
- Clarify and communicate the pathway for State Government support, and in doing so support the work of Festivals City Adelaide to maintain a portal for all funding opportunities.
- Use the new brand platform to delve deeper into festivals and events using storytelling techniques.
- Collaborate with third parties to inspire new generations of students and overcome the lack of skilled workers.
- With partners, facilitate opportunities for regular information sharing, collaboration, upskilling and networking to support a strong event ecosystem.
- Use our major events as a platform to drive further investment to South Australia.

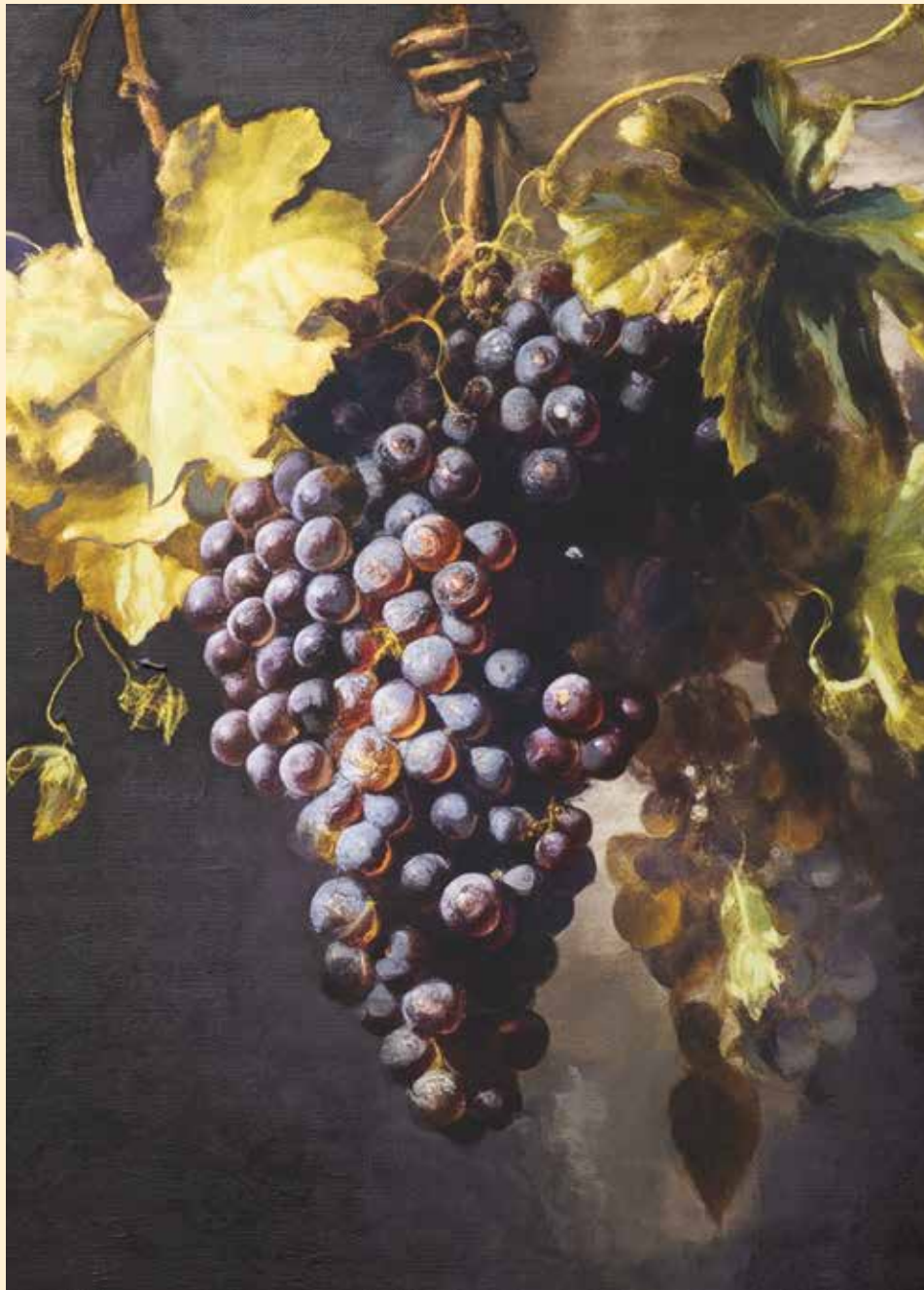
(24)

(24) Santos Tour Down Under, Fleurieu Peninsula



CHAPTER 4

Our Brand.



"In South Australia, any which way you turn, you're met with an abundance of these simple things that replenish you."



CELEBRATE THE SIMPLE PLEASURES

South Australia's destination marketing campaign is an invitation to celebrate South Australia's simple pleasures. The overlooked triumphs that build to form moments that make travel and life meaningful.

The brand platform sheds light on the abundance of simple pleasures readily available in our State, positioning South Australia as a sanctuary for the burnt-out and overwhelmed.

Developed by the South Australian agency, Frame, the brand platform and associated campaign are a celebration of local creativity and culture.

Coming to life through a tapestry of works created by local artists, photographers, makers, and innovators, the campaign intimately captures the spirit and essence of South Australia.

Traditionally, tourism marketing features a single hero television spot. The Simple Pleasures campaign is a marked departure from the expected, featuring a series of episodic content that entices potential visitors to partake in South Australia's quintessential experiences.

Over its duration the brand work will cover our regions, feature our competitive drivers (Food, Wine and Drink, Nature and Place and Events and Festivals) and deliver initiatives that combat seasonality and respond to changing market conditions.

“South Australia has been designed so you can enjoy an easy, endless supply of simple pleasures.”



Why Simple Pleasures?

A good life isn't measured by a few big moments, over-hyped then over in an instant. It's the millions of little memories that make up truly good days. Like years in a wine cellar, they all add up. When you move through the world with your eyes open.

Breathing in every detail, every step, every sip. You're no longer sight-seeing. You're place-being. Fully present. Fully immersed. Open to the pleasures of every simple moment.

South Australia has been designed with this simple promise at its core. A place where these simple pleasures are the ones that hit the deepest.

In South Australia, any which way you turn, you're met with an abundance of these simple things that replenish you.



MEASURING
SUCCESS

(27) Second Valley,
Fleurieu Peninsula

(27)



	December 2019 (pre-COVID)	December 2024 (latest available)	December 2030 Target
Demand Side — (Expenditure)			
Total Visitor Expenditure	\$8.1b	\$9.8b	\$12.8b
Interstate Overnight	\$2.7b	\$3.7b	\$4.5b
Intrastate Overnight	\$2.6b	\$2.9b	\$3.7b
Day Trips	\$1.7b	\$1.8b	\$2.4b
International	\$1.2b	\$1.3b	\$2.2b
Leisure Events	\$383m	\$546m	\$750m
Adelaide Expenditure	\$4.5b	\$5.8b	\$7.7b
Regional Expenditure	\$3.6b	\$4.0b	\$5.1b
Supply Side			
Weekly Airline Seats (Domestic)	84,000	87,200	93,200
Weekly Airline Seats (International)	13,200	13,900	20,200
Tourism Jobs	38,600	41,600 (June 2024)	46,000
Accessible Tourism (ATDW listings that actively welcome people with access needs)	Not available	1,998	2,500
Brand Health			
Interstate Appeal	6th	6th	4th, with longer term ambition of 3rd
Perception of Food and Wine (interstate)	2nd	1st	1st
Perception of Distinctive Dining and Fresh Regional Produce	3rd	3rd	1st
Perception of Festivals (interstate)	4th	3rd	3rd
Tourism Sustainability	Not available	7th	3rd
Tourism Sentiment	Not available	Benchmark to be developed	To be confirmed

Visitor Expenditure targets outlined in this Plan are based on Tourism Research Australia datasets and the methodology for the domestic component on these datasets was significantly improved in 2025. Targets in this Plan will be reviewed once the impact of this new methodology is fully understood.

SOUTH AUSTRALIA

"South Australians share a joyful appreciation for what really counts; the simple things that make life meaningful."

"And it turns out this way of seeing the world might just catch on if we let it."

Celebrate the
SIMPLE PLEASURES

**SOUTH
AUSTRALIA**



Government of South Australia
South Australian Tourism Commission

tourism.sa.gov.au