

SOUTH AUSTRALIA

Regional Profile December 2014-2016

Innes National Park, Yorke Peninsula



OVERVIEW

- Currently South Australia contributes \$6.3 billion to the Australian tourism economy.
- South Australia has achieved 79 per cent of its \$8.0 billion maximum potential by 2020.

Annual Visitor Summary December 2014 - December 2016

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total visits
Visits	3,712,000	2,245,000	5,957,000	404,000	6,360,000
%	62%	38%	94%	6%	100%
Nights	10,739,000	10,153,000	20,892,000	9,455,000	30,347,000
%	51%	49%	69%	31%	100%
Average Length of Stay	2.9	4.5	3.5	23.4	4.8
Day Trips					
Average Annual Day Trips to South Australia					12,700,000
PURPOSE					
	Holiday	VFR	Business	Other	Total
Visits	2,683,000	1,962,000	1,285,000	549,000	6,360,000
%	42%	31%	20%	9%	100%
Nights	11,381,000	8,963,000	4,284,000	5,718,000	30,347,000
%	38%	30%	14%	19%	100%
Average Length of Stay	4.2	4.6	3.3	10.4	4.8
Expenditure					
Average Annual Expenditure				\$	5,815,000,000

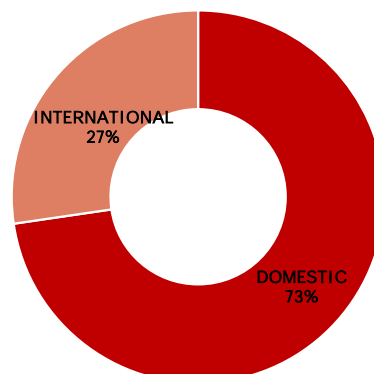
- 87 per cent of Adelaide Visitors are Domestic Visitors and 13 per cent are International Visitors.
- Domestically, 36 per cent are from within the state compared to 64 per cent from Interstate.
- 64 per cent of visitors to Adelaide are Leisure Visitors (Holiday + VFR) to Adelaide.

SOUTH AUSTRALIAN TOURISM LISTINGS

Category	South Australia
Event	3408
Accommodation	2138
Attraction	1056
Food and Drink	568
Destination Information	299
Tour	286
Hire	74
Information Services	56
Transport	21
General Services	13
Journey	1
Grand Total	7920

Note: some listings have multiple categories of accommodation
Source: Australian Tourism Data Warehouse

SOUTH AUSTRALIAN MEDIA COVERAGE



Source: Item Count - SATC Internal - 2016

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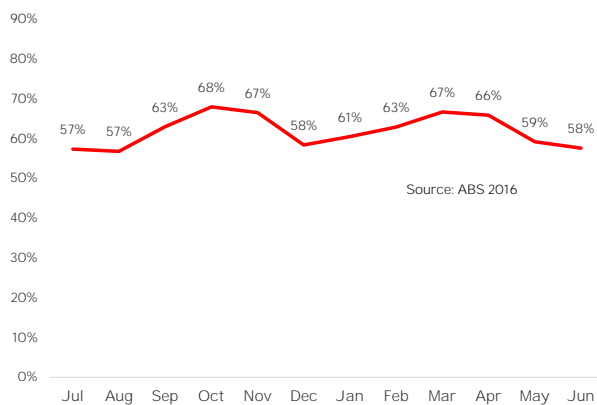


ACCOMMODATION SUPPLY

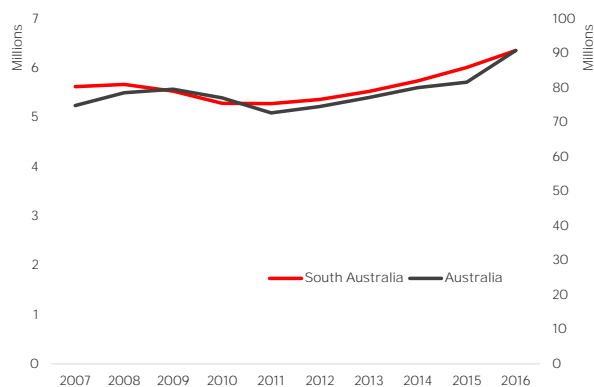
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	271
Rooms	13,669
Occupancy	62%
Takings	\$ 466,100,000

- Average occupancy for the year is 62 per cent over 271 establishment and 13,669 rooms.
- The peak months are October and November along with March and April.
- Low point of the year is during the Winter months of July and August with 57 per cent.

Monthly Occupancy Rates Year end June 2016 - South Australia

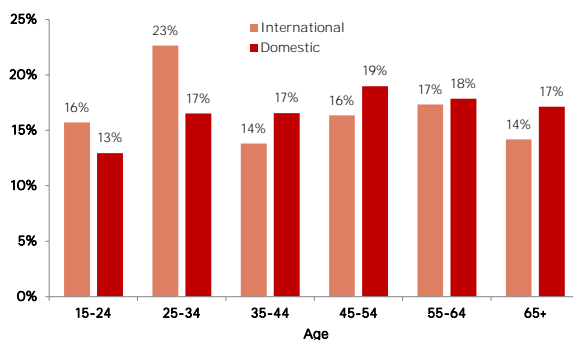


Total Visitation to South Australia & Australia



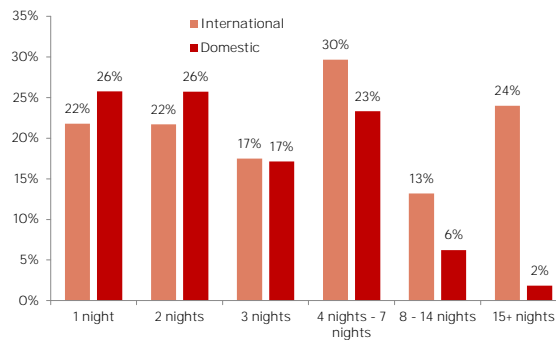
VISITOR PROFILE

Age of Visitors to South Australia



- International Visitors peak in the 25-34 age group at 23 per cent.
- Domestically there is a peak in the 45-54 age group at 19 per cent.

Length of Visit to South Australia



- International Visitors prefer to stay 4-7 nights in South Australia.
- Domestic Visitors are likely to stay 1-2 nights.

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Domestic Visitor Profile

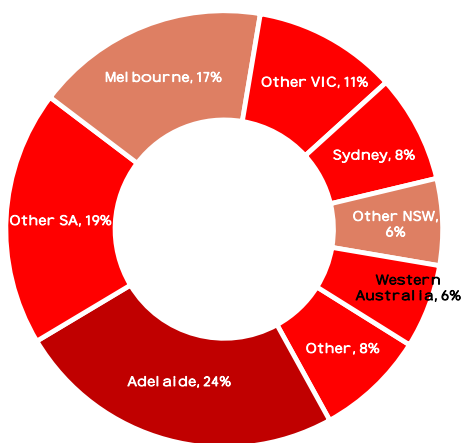
Purpose	Holiday	VFR	Other	Total
Visits	2,455,000	1,840,000	1,751,000	5,957,000
%	41%	31%	29%	100%
Nights	9,144,000	6,076,000	5,671,000	20,892,000
%	44%	29%	27%	100%
ALOS	3.7	3.3	3.2	3.5

International Visitor Profile

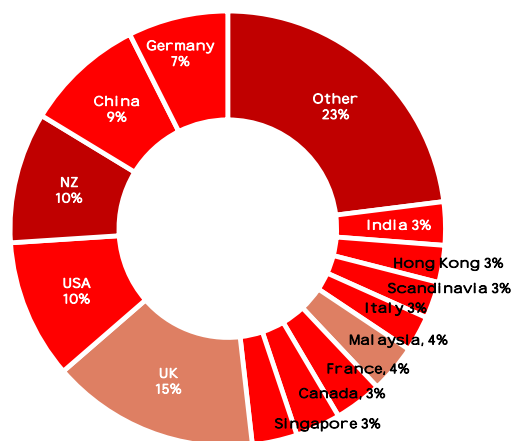
Purpose	Holiday	VFR	Other	Total
Visits	228,000	122,000	84,000	404,000
%	56%	30%	21%	100%
Nights	2,237,000	2,887,000	4,331,000	9,455,000
%	24%	31%	46%	100%
ALOS	9.8	23.7	51.6	23.4

Visitor Origin

Origin of Domestic Overnight Visitors to South Australia



Origin of International Visitors to South Australia



- Victoria at 43 per cent and New South Wales at 28 per cent constitute the biggest Interstate Markets for South Australia.
- Melbourne contributes 24 per cent of Victoria's total and Sydney contributes 17 per cent of the New South Wales total.
- Among International Visitors, Europeans contribute 41 per cent of the visits to South Australia with the United Kingdom contributing 15 per cent.

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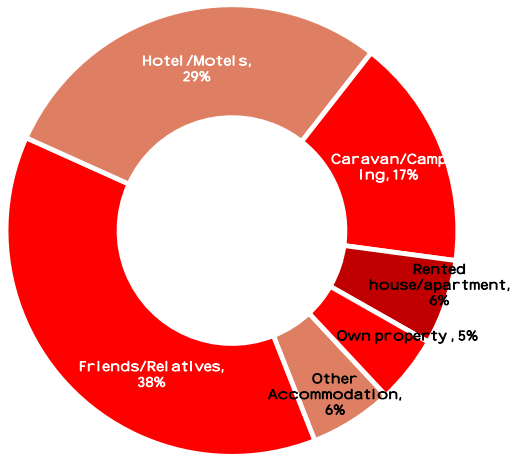
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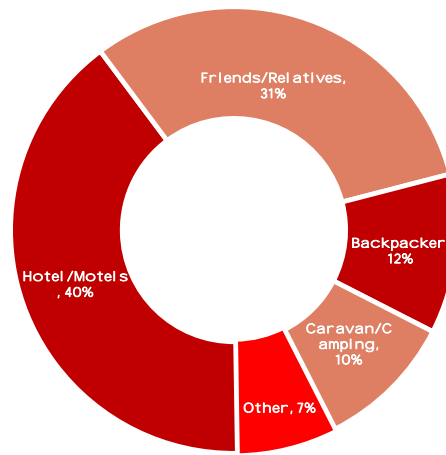


Visitor Use of Accommodation

Accommodation used in South Australia for Domestic Visitors



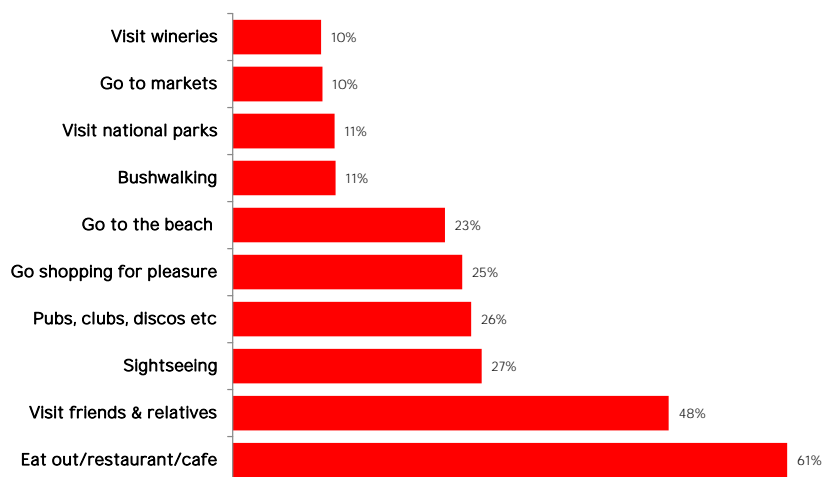
Accommodation used in South Australia for International Visitors



- 55 per cent of Domestic Visitor nights in South Australia are spent either with Friends or Relatives or in Hotels and similar accommodation.
- The International Market is similar to the Domestic Market with 43 per cent of visitors staying with Friends or Relatives or in Hotels and similar accommodation.

Visitor Activities

Domestic Visitor Activities in South Australia



- The most popular activity when visiting South Australia is to eat out or dine in restaurant or cafe.
- Other popular activities include visiting friends and relatives and sightseeing.

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REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

- In 2013-14 the tourism industry directly contributed \$2.4 billion to South Australia's economy and directly employed approximately 32,100 people.

In 2013-14, the tourism activity in South Australia generated:

- \$4.3 billion and \$6.0 billion in direct and indirect tourism output, and \$10.3 billion in total tourism output;
- \$2.2 billion and \$2.5 billion in direct and indirect tourism GVA, and \$4.7 billion in total tourism GVA;
- \$2.4 billion and \$2.9 billion in direct and indirect tourism GRP and \$5.3 billion in total tourism GRP; and
- 32,100 jobs for people employed directly by the tourism industry, 24,500 indirect jobs and a total employment impact of 56,600 people.

Prepared by the South Australian Tourism Commission, December 2016

Sources Unless otherwise stated, all data in this report is from the International Visitor and National Visitor Surveys (IVS and NVS) Conducted by Tourism Research Australia. These Sources are based on sample surveys and as with all sample surveys, are subject to sampling errors. Caution is required in interpreting some estimates, in particular, regional estimates can be affected by small sample sizes and can be subject to a high level of sampling error. Regional data should accordingly be used with a high level of caution and treated as being for indicative purposes only. Data refers to visitors 15 years and over. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from December 2014 to December 2016

Notes and Abbreviations Totals may not add to 100% due to rounding. VFR: Visiting Friends and Relatives. np: Not Published due to small sample size. ALOS: Average Length of Stay
ABS: Survey of Tourism Accommodation. Hotels, Motels, Guest houses and Serviced Apartments with 15 or more rooms. Cat. No. 8635455001