

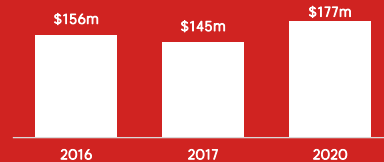
ADELAIDE HILLS

Regional Profile December 2014-2016



OVERVIEW

- Currently the Adelaide Hills contributes \$156 million to the December 2016 South Australian expenditure of \$5.8 billion.
- The Adelaide Hills has achieved 88 per cent of their 2020 target of \$177 million.



Annual Visitor Summary December 2014 - December 2016

ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Visits	89,000	71,000	160,000	8,000	168,000
%	56%	44%	95%	5%	100%
Nights	187,000	240,000	427,000	97,000	524,000
%	44%	56%	81%	19%	100%
Average Length of Stay	2.1	3.4	2.7	12.1	3.1

Day Trips

Average Annual Day Trips to the Adelaide Hills

1,120,000

PURPOSE

	Holiday	VFR	Business	Other	Total
Visits	63,000	78,000	13,000	14,000	168,000
%	38%	46%	8%	8%	100%
Nights	180,000	282,000	26,000	35,000	524,000
%	34%	54%	5%	7%	100%
Average Length of Stay	2.9	3.6	2.0	2.5	3.1

Expenditure

Average Annual Expenditure

\$ 156,000,000

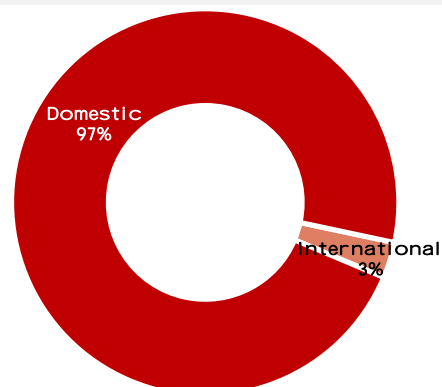
- 95 per cent of Adelaide Hills visitors are Domestic Visitors and 5 per cent are International Visitors.
- Domestically, 56 per cent are from within the state compared to 44 per cent from Interstate.
- 85 per cent of visitors to the Adelaide Hills are for Leisure Visitors (Holiday + VFR).

ADELAIDE HILLS TOURISM LISTINGS

Category	Adelaide Hills
Event	181
Accommodation	81
Food and Drink	65
Attraction	55
Tour	16
Information Services	2
Destination Information	1
Hire	1
Grand Total	402

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

ADELAIDE HILLS MEDIA COVERAGE



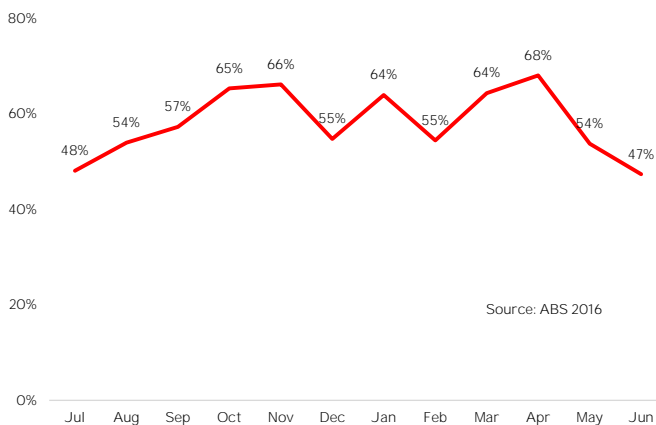
Source: Item Count - Internal 2016



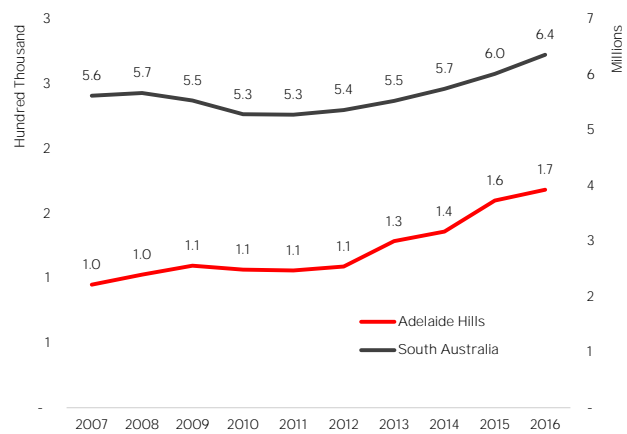
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	5
Rooms	180
Occupancy	58%
Takings	\$ 6,300,000

- Average occupancy for the year is 58 per cent over 5 establishment and 180 rooms.
- The peak months are November and April with occupancy of 66 and 68 per cent respectively.
- The low point of the year is during the winter months with occupancy on average dropping to 50 per cent.

Monthly Occupancy Rates Year end June 2016 - Adelaide Hills

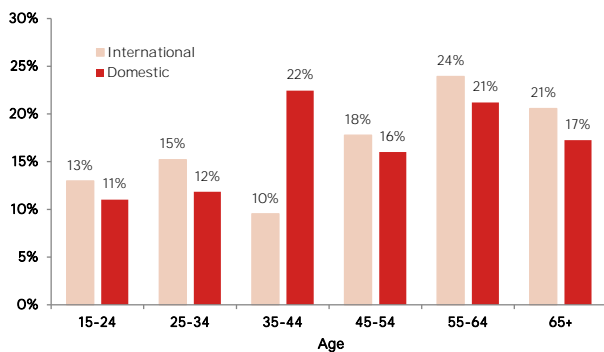


Total Overnight Visitation to Adelaide Hills & South Australia

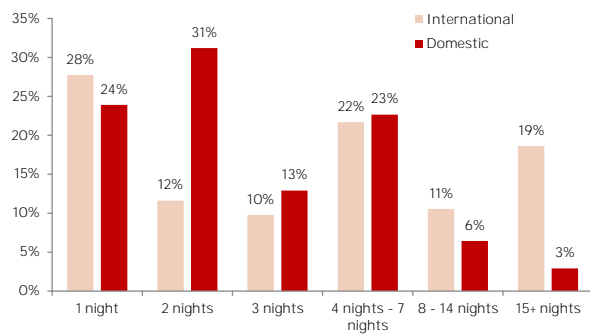


VISITOR PROFILE

Age of Visitors to Adelaide Hills



Length of Visit to Adelaide Hills



- International Visitors peak in the 55-64 age group at 24 per cent.
- Domestically there is a peak in the 35-44 age group at 22 per cent.
- International Visitors prefer to stay 1 night in the Adelaide Hills.
- 55 per cent of Domestic Visitors like to stay 1 to 2 nights.

ADELAIDE HILLS

Regional Profile December 2014-2016



DOMESTIC VISITOR PROFILE

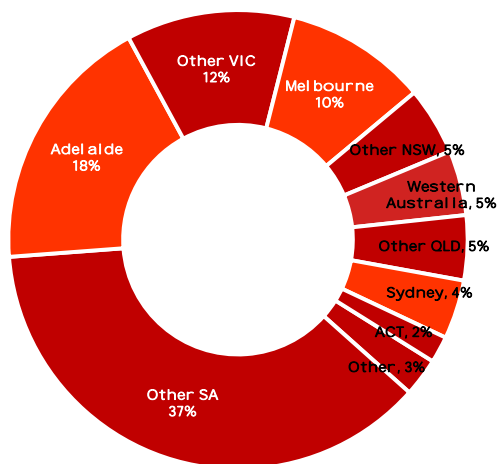
Purpose	Holiday	VFR	Other	Total
Visits	59,000	75,000	27,000	160,000
%	37%	47%	17%	100%
Nights	155,000	218,000	53,000	427,000
%	36%	51%	12%	100%
ALOS	2.6	2.9	2.0	2.7

INTERNATIONAL VISITOR PROFILE

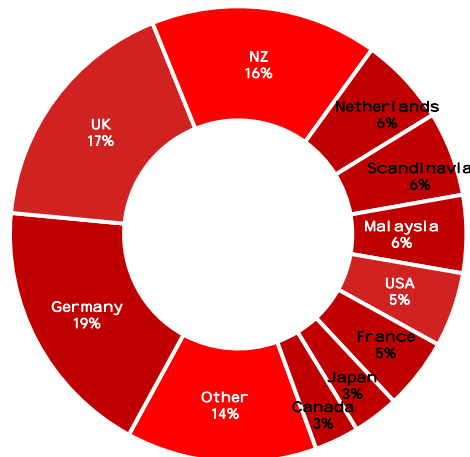
Purpose	Holiday	VFR	Other	Total
Visits	4,000	3,000	1,000	8,000
%	50%	38%	13%	100%
Nights	25,000	63,000	8,000	97,000
%	26%	65%	8%	100%
ALOS	6.3	21.0	8.0	12.1

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Adelaide Hills



Origin of International Visitors to Adelaide Hills

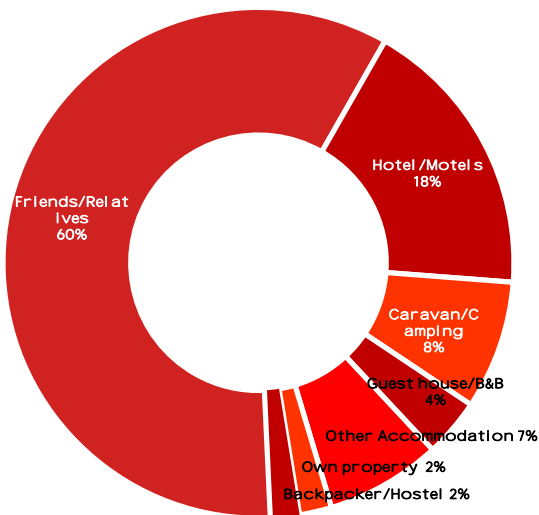


- Victoria at 22 per cent and NSW at 9 per cent are the Adelaide Hills biggest Domestic Markets.
- Regional South Australia contributes 37 per cent of visitors to the Adelaide Hills.
- Internationally, Europeans contribute 60 per cent of the visits to the Adelaide Hills followed by Asia with 13 per cent.
- Individually the biggest international markets are Germany 19 per cent, the United Kingdom 17 per cent and New Zealand 16 per cent.

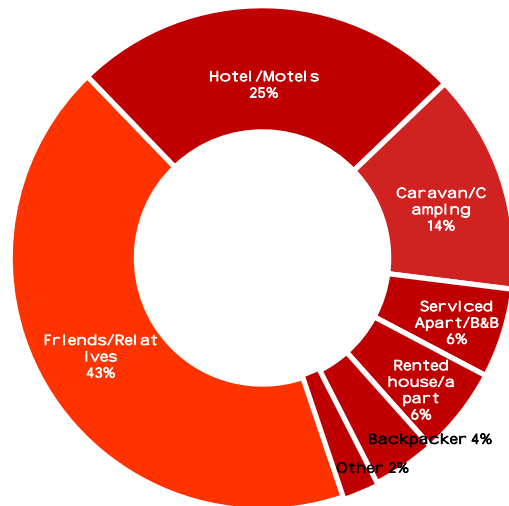


VISITOR USE OF ACCOMMODATION

Accommodation used in Adelaide Hills for Domestic Visitors



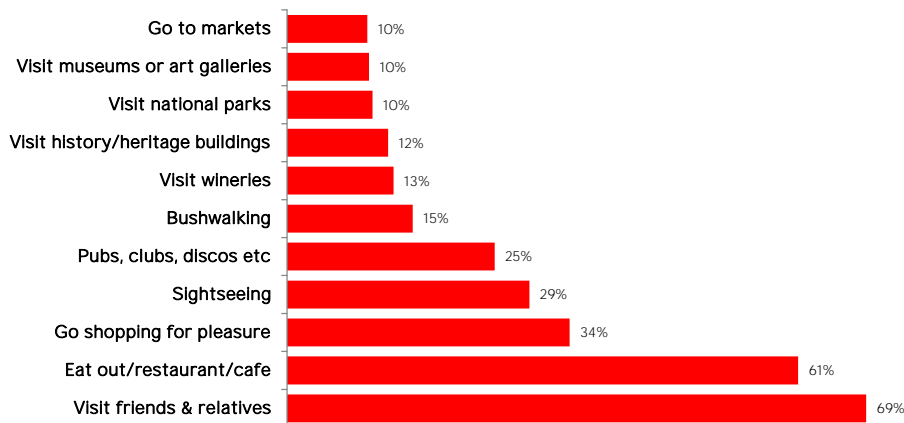
Accommodation used in Adelaide Hills for International Visitors



- 78 per cent of Domestic Visitor nights in the Adelaide Hills are spent either with Friends or Relatives or in Hotels and similar accommodation.
- International visitors are similar to Domestic visitors with 68 per cent of visitors staying with Friends or Relatives or in Hotels and similar accommodation.
- 14 per cent of international visitors prefer Caravan and Camping.

VISITOR ACTIVITIES

Domestic Visitor Activities in Adelaide Hills



- The most popular activity when coming to the Adelaide Hills is to visit friend or relatives.
- Other popular activities include Eating out at a restaurant or cafe, visiting wineries and seeing the sights



- In 2013-14, the tourism industry contributed an estimated \$260 million to the Adelaide Hills regional economy (12.4 per cent of gross regional product) and directly employed approximately 1,100 people (5.5 per cent of regional employment).

In 2013-14, the tourism activity in Adelaide generated:

- \$97 million and \$423 million in direct and indirect tourism output, and \$520 million in total tourism output;
- \$49 million and \$178 million in direct and indirect tourism GVA, and \$227 million in total tourism GVA;
- \$53 million and \$207 million in direct and indirect tourism GRP and \$260 million in total tourism GRP; and 20,400 jobs for people employed directly by the tourism industry, 9,000 indirect jobs and a total employment impact of 29,400 people. 1,100 jobs for people employed directly by the tourism industry, 1,700 indirect jobs and a total employment impact of 2,800 people.

REGIONAL TOURISM ACCOUNT INFORMATION

Highly appealing but perceived as having limited activities.

Interstate

- Hahndorf village provides an appealing point of difference but is seen as lacking a distinct identity.
- Originality and available activities are the main obstacles.

Intrastate

- Quality of wineries and close proximity to Adelaide make it popular.
- Authenticity and serenity of Hahndorf offers a relaxed family environment.

International

- Adelaide Hills is popular due to its close proximity to Adelaide and its popular wineries.
- Popular with the Asian Market who are less likely to disperse to further regions.

Appeal data is from the consumer surveying conducted for the SATC by BDA Marketing Planning. Sample of 800 interstate travellers and 400 interstate travellers, followed by eight focus groups in Adelaide, Sydney and Melbourne. Comments relating to International appeal are sourced from the Consumer Demand Project run by Tourism Australia in 9 priority markets, with a sample of 500 per market.

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
Consumer Demand Product Testing - BDA Marketing

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