

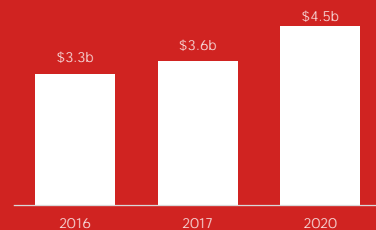
ADELAIDE

Regional Profile December 2014-2016



OVERVIEW

- While 56 per cent of visitor expenditure will be in Adelaide, approximately 44 per cent will be in Regional South Australia, far in excess of the 23 per cent of the South Australian population that live in regions.
- Adelaide has achieved 73 per cent of their 2020 target of \$4.5 billion.



Annual Visitor Summary December 2014 - December 2016

ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Visits	931,000	1,623,000	2,554,000	365,000	2,919,000
%	36%	64%	87%	13%	100%
Nights	2,161,000	5,899,000	8,060,000	7,728,000	15,788,000
%	27%	73%	51%	49%	100%
Average Length of Stay	2.3	3.6	3.2	21.2	5.4

Day Trips

Average Annual Day Trips to Adelaide 4,415,000

PURPOSE

	Holiday	VFR	Business	Other	Total
Visits	867,000	1,000,000	717,000	358,000	2,919,000
%	30%	34%	25%	12%	100%
Nights	3,574,000	5,718,000	2,061,000	4,436,000	15,788,000
%	23%	36%	13%	28%	100%
Average Length of Stay	4.1	5.7	2.9	12.4	5.4

Expenditure

Average Annual Expenditure \$ 3,300,000,000

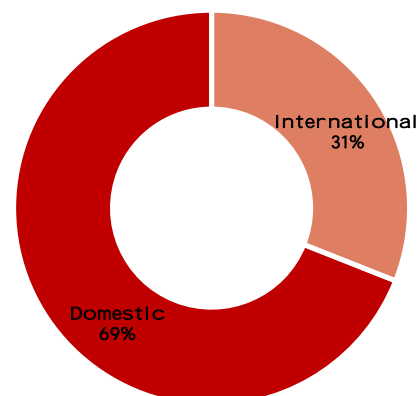
- 87 per cent of Adelaide Visitors are Domestic Visitors and 13 per cent are International Visitors.
- Domestically, 36 per cent are from within the state compared to 64 per cent from Interstate.
- 64 per cent of visitors to Adelaide are Leisure Visitors (Holiday + VFR) to Adelaide.

ADELAIDE TOURISM LISTINGS

Category	Adelaide
Event	1585
Accommodation	236
Attraction	196
Tour	97
Food and Drink	69
Destination Information	29
Hire	17
Transport	11
General Services	3
Information Services	3
Grand Total	2246

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

ADELAIDE MEDIA COVERAGE



Source: Item Count - SATC Internal - 2016

ADELAIDE

Regional Profile December 2014-2016

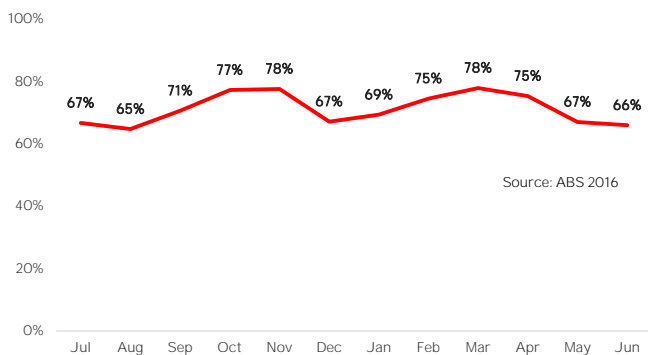


ACCOMMODATION SUPPLY

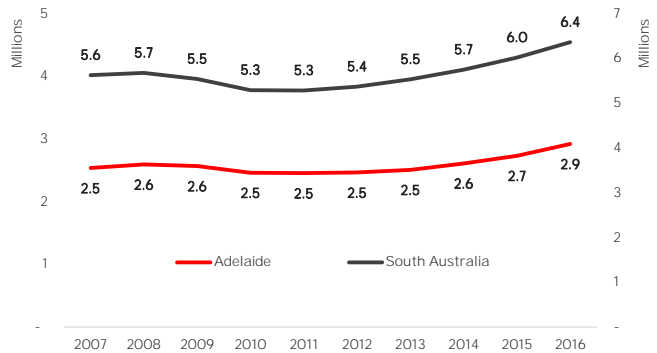
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	108
Rooms	8,162
Occupancy	71%
Takings	\$ 333,500,000

- Average occupancy for the year is 71 per cent over 108 establishment and 8,162 rooms.
- The peak months are November and March with occupancy of 78 per cent.
- Low point of the year is during the Winter months with August at 65 per cent occupancy.

Monthly Occupancy Rates Year end June 2016 - Adelaide

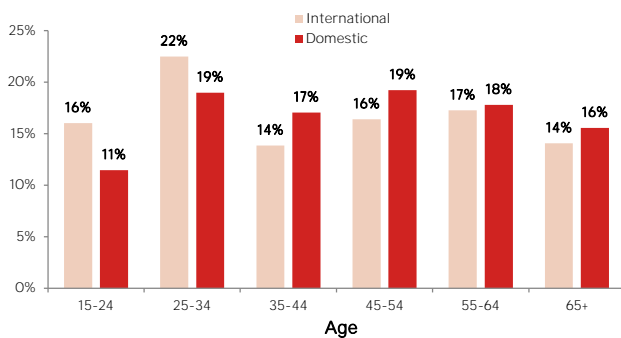


Total Overnight Visitation to Adelaide & South Australia

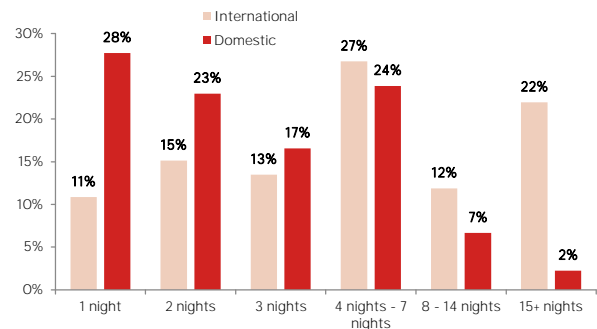


VISITOR PROFILE

Age of Visitors to Adelaide



Length of Visit to Adelaide



- International Visitors peak in the 25-34 age group at 22 per cent.
- Domestically age is pretty consistent, with a higher incidence in the 25-34 and 45-54 age group at 19 per cent.

- International Visitors prefer to stay 4-7 nights in Adelaide.
- 51 per cent of Domestic Visitors stay 1-2 nights in Adelaide.

ADELAIDE

Regional Profile December 2014-2016



DOMESTIC VISITOR PROFILE

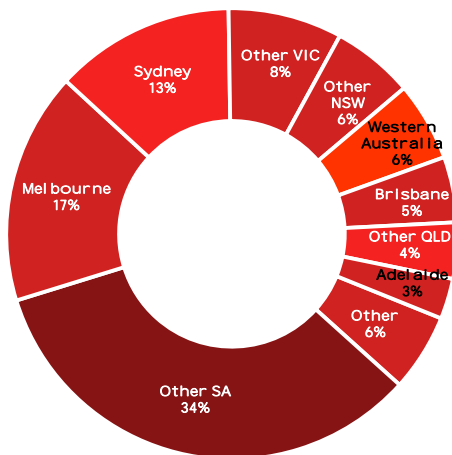
Purpose	Holiday	VFR	Other	Total
Visits	673,000	893,000	1,000,000	2,554,000
%	26%	35%	39%	100%
Nights	2,122,000	3,215,000	2,723,000	8,060,000
%	26%	40%	34%	100%
ALOS	3.2	3.6	2.7	3.2

INTERNATIONAL VISITOR PROFILE

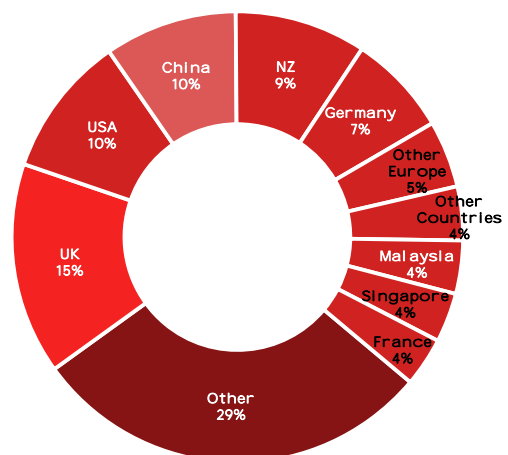
Purpose	Holiday	VFR	Other	Total
Visits	194,000	107,000	73,000	365,000
%	53%	29%	20%	100%
Nights	1,452,000	2,502,000	3,774,000	7,728,000
%	19%	32%	49%	100%
ALOS	7.5	23.4	51.7	21.2

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Adelaide



Origin of International Visitors to Adelaide



- Melbourne, at 17 per cent and Sydney at 13 per cent are Adelaide's biggest Domestic Markets.
- Regional South Australia contributes 34 per cent of visitors to Adelaide.
- Internationally, Europeans contribute 40 per cent of the visits to Adelaide followed by Asia with 33 per cent.
- Individually the biggest international markets are the United Kingdom 15 per cent, the United States 10 per cent, China 10 per cent and New Zealand 9 per cent.

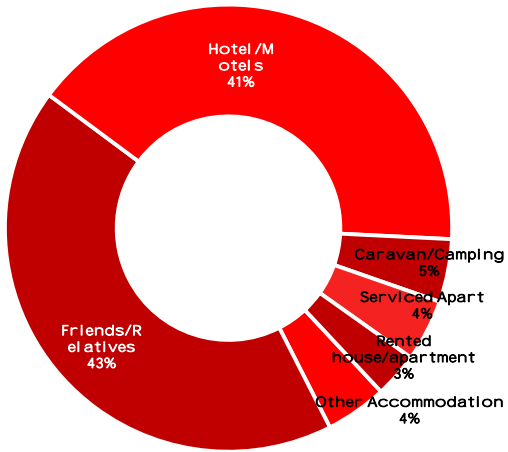
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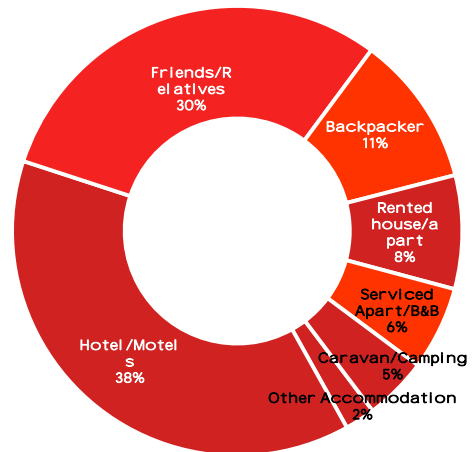


VISITOR USE OF ACCOMMODATION

Accommodation used in Adelaide for Domestic Visitors



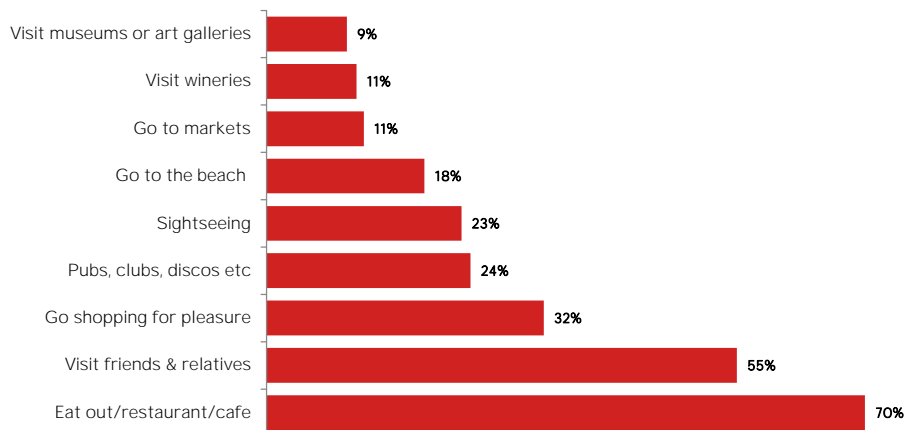
Accommodation used in Adelaide for International Visitors



- 84 per cent of Domestic Visitor nights in Adelaide 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.
- 11 per cent of international visitors stay in Backpacker accommodation.

VISITOR ACTIVITIES

Domestic Visitor Activities in Adelaide



- The most popular activity when coming to Adelaide is to eat out or visit friend or relatives.
- Other popular activities include going to the beach, visiting wineries, going to the markets and undertaking cultural experiences.

ADELAIDE

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REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

- In 2013-14, the tourism industry contributed an estimated \$2.7 billion to the Adelaide regional economy (4.1 per cent of gross regional product) and directly employed approximately 20,400 people (3.8 per cent of employment in the region).

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

- \$2.9 billion and \$2.2 billion in direct and indirect tourism output, and \$5.1 billion in total tourism output;
- \$1.5 billion and \$0.9 billion in direct and indirect tourism GVA, and \$2.4 billion in total tourism GVA;
- \$1.6 billion and \$1.1 billion in direct and indirect tourism GRP and \$2.7 billion 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.

REGIONAL INSIGHTS

- Adelaide is most associated with 'quality food and wine' especially among high income earners.
- Visiting wineries is the top activity for domestic visitors. Arts and culture is a close second.
- People like the proximity of Adelaide to the near by regions such as the Barossa and the Adelaide Hills.
- Internationally, Adelaide and surrounds rank as the top destination for International Visitors, followed by Kangaroo Island. This is largely due to its accessibility and ability to be used as a hub from which to travel regionally.

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 Phase 1 - 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. 86 35455001
Consumer Demand Product Testing Phase 1 - BDA Marketing