

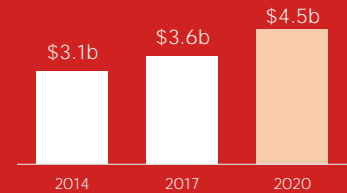
# ADELAIDE

## Regional Profile



### OVERVIEW

- While 59 per cent of visitor expenditure will be in Adelaide, approximately 39 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 80 per cent of their 2020 target of \$4.5 billion.



### Annual Visitor Summary December 2015 - December 2017

#### ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
<b>Overnight Visits</b>	1,009,000	1,648,000	<b>2,657,000</b>	391,000	<b>3,048,000</b>
<b>%</b>	<b>38%</b>	<b>62%</b>	<b>87%</b>	<b>13%</b>	<b>100%</b>
<b>Nights</b>	2,371,000	6,086,000	<b>8,456,000</b>	8,281,000	<b>16,737,000</b>
<b>%</b>	<b>28%</b>	<b>72%</b>	<b>51%</b>	<b>49%</b>	<b>100%</b>
<b>Average Length of Stay</b>	2	4	3	21	5
<b>Day Trips</b>					
Average Annual Day Trips to Adelaide					4,697,000

#### PURPOSE

	Holiday	VFR	Business	Other	Total
<b>Overnight Visits</b>	926,000	1,042,000	732,000	372,000	<b>3,048,000</b>
<b>%</b>	<b>30%</b>	<b>34%</b>	<b>24%</b>	<b>12%</b>	<b>100%</b>
<b>Nights</b>	3,896,000	5,895,000	2,100,000	4,846,000	<b>16,737,000</b>
<b>%</b>	<b>23%</b>	<b>35%</b>	<b>13%</b>	<b>29%</b>	<b>100%</b>
<b>Average Length of Stay</b>	4	6	3	13	5
<b>Expenditure</b>					
Average Annual Expenditure					3,600,000,000

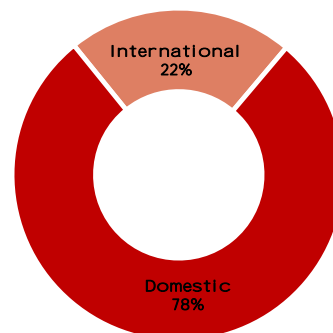
- 87 per cent of Adelaide visitors are Domestic visitors and 13 per cent are International visitors.
- Domestically, 38 per cent are from within the state compared to 62 per cent from Interstate.
- 64 per cent of visitors to Adelaide are Leisure visitors (Holiday + VFR) to Adelaide.

#### ADELAIDE TOURISM LISTINGS

Category	Adelaide
Accommodation	167
Attraction	123
Destination Information	7
Event	746
Food and Drink	93
General Services	6
Hire	25
Information Services	1
Tour	93
Transport	8
<b>Grand Total</b>	<b>1269</b>

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

#### ADELAIDE MEDIA COVERAGE



Source: Item Count - SATC Internal - 2017

# ADELAIDE

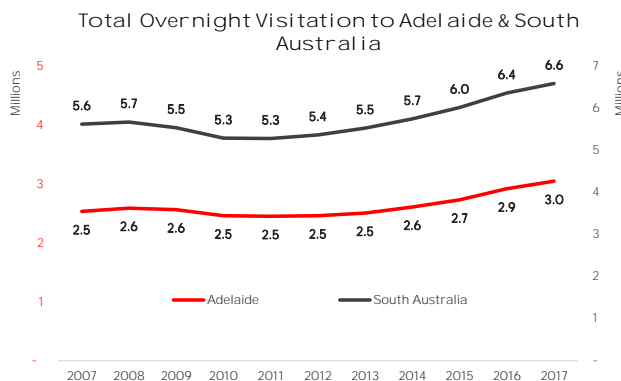
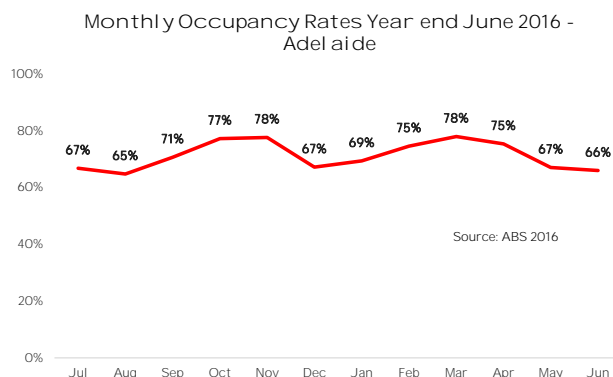
## Regional Profile



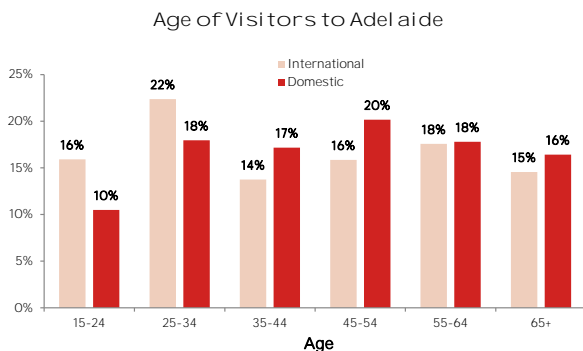
### ACCOMMODATION SUPPLY

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

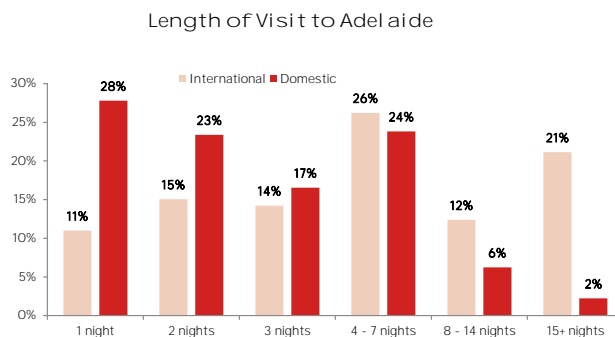
- Average occupancy for the year is 71 per cent over 108 establishments and 8,162 rooms.
- The peak months are March and November with occupancy of 78 per cent.
- Low point of the year is during the Winter months with August at 65 per cent occupancy.



### VISITOR PROFILE



- International visitors peak in the 25-34 age group at 22 per cent.
- Domestically age is pretty consistent, with a higher incidence in the 45-54 age group at 20 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



### DOMESTIC VISITOR PROFILE

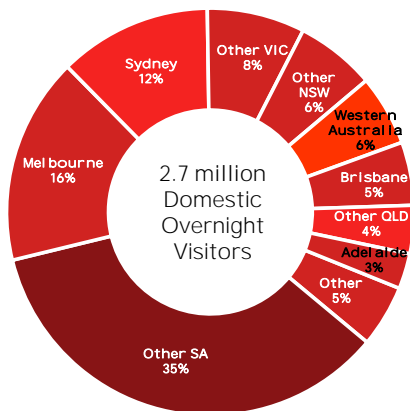
Purpose	Holiday	VFR	Other	Total
Visits	720,000	927,000	1,028,000	2,657,000
%	27%	35%	39%	100%
Nights	2,353,000	3,303,000	2,803,000	8,456,000
%	28%	39%	33%	100%
ALOS	3	4	3	3.18

### INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	207,000	115,000	77,000	391,000
%	53%	29%	20%	100%
Nights	1,544,000	2,592,000	4,145,000	8,281,000
%	19%	31%	50%	100%
ALOS	7	23	54	21

### VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Adelaide



Origin of International Visitors to Adelaide



- Melbourne, at 16 per cent and Sydney at 12 per cent are Adelaide's biggest Domestic Markets.
- Regional South Australia contributes 35 per cent of visitors to Adelaide.
- Internationally, Europeans contribute 38 per cent of the visits to Adelaide followed by Asia with 34 per cent.
- The Asian market is becoming more important to Adelaide and South Australia with its close proximity and direct flights.
- Individually the biggest international markets are the United Kingdom 15 per cent, the United States 11 per cent, China 11 per cent and New Zealand 9 per cent.

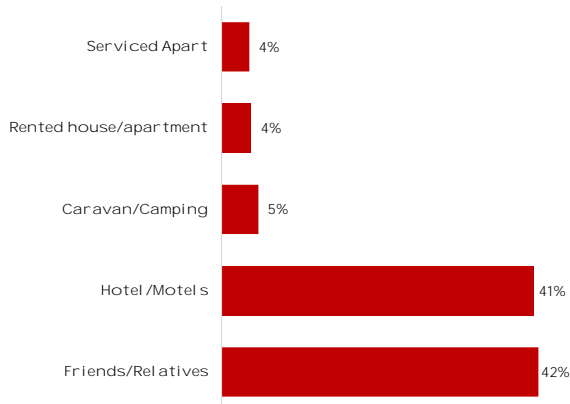
# ADELAIDE

## Regional Profile

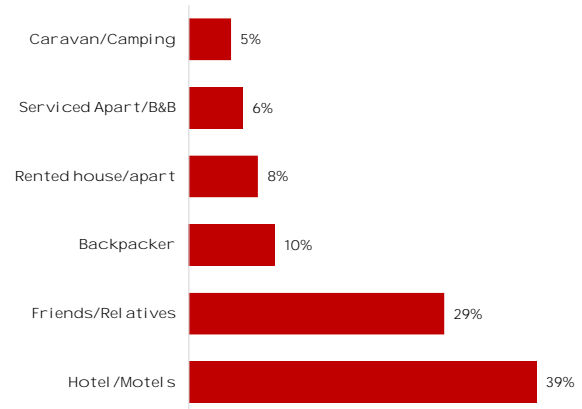


### VISITOR USE OF ACCOMMODATION

Accommodation used in Adelaide for Domestic Visitors



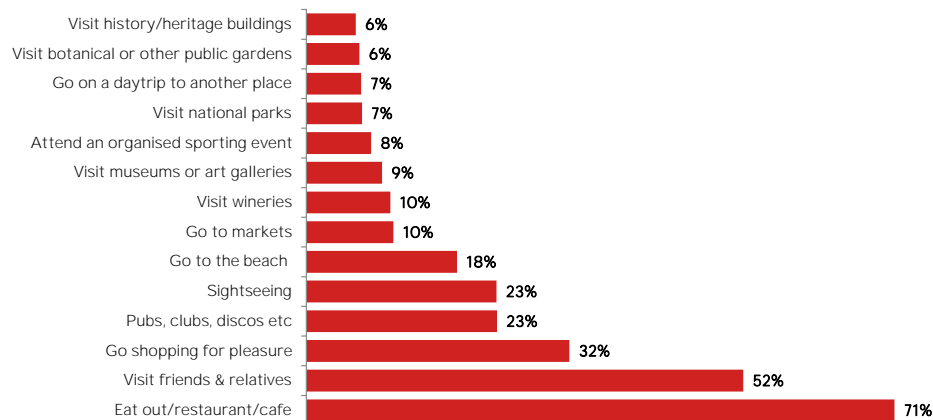
Accommodation used in Adelaide for International Visitors



- 83 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.
- 10 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

## Regional Profile



### REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2016-17, the tourism industry contributed an estimated \$3.5 billion to the Adelaide regional economy and directly employed approximately 20,000 people .

#### Employment

- 20,000 jobs for people employed directly by the tourism industry, 9,000 indirect jobs and a total employment impact of 29,000 people.

#### Tourism output

- \$3.5 billion and \$2.9 billion in direct and indirect tourism output, and \$6.4 billion in total tourism output.

#### Gross Value Added (GVA)

- \$1.9 billion and \$1.2 billion in direct and indirect tourism GVA, and \$3.1 billion in total tourism GVA.

#### Gross Regional Product (GRP)

- \$2.0 billion and \$1.4 billion in direct and indirect tourism GRP and \$3.5 billion in total tourism GRP.

### REGIONAL INSIGHTS

#### Domestic

- 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.

#### International

- Internationally Adelaide is ranked at number 6 for good food and wine, clearly the highest with New Zealanders who have a greater awareness of Australian destinations.
- Germany and the UK rank Adelaide in the top 5 for food and wine.
- 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.

#### Aviation

- Adelaide Airport currently has 9 international airlines flying direct, equating to 13,000 seat per week.
- 63 per cent of all visitors to the state arrive through Adelaide airport.

#### CBD Occupancy

- Occupancy driven by events such as the Tour Down Under, 89 per cent, the Adelaide 500, 91 per cent and the

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 11 priority markets, with a sample of 1,600 per market.

Prepared by the South Australian Tourism Commission, December 2017

**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 2015 to December 2017.

**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. Consumer Demand Product Testing Phase 1 - BDA Marketing