

ADELAIDE HILLS

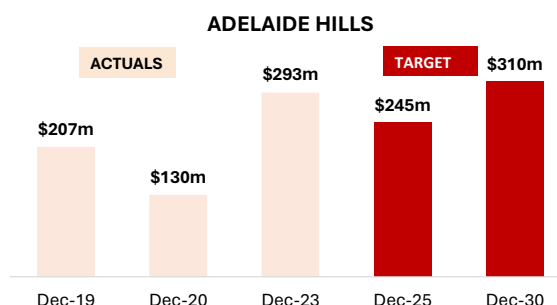
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2023

- Currently, the Adelaide Hills contributes \$293 million to the year end December 2023 South Australian expenditure of \$10.1 billion.
- The Adelaide Hills has achieved 100 per cent of their 2025 target of \$245 million and 95 per cent of their 2030 target of \$310 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2023

ORIGIN						
	Intrastate	Interstate	Total Domestic	International	Total	
Overnight Visits	158,000	59,000	217,000	16,000	233,000	
% of visits	68%	25%	93%	7%	100%	
<i>Share of Regional SA</i>	3%	2%	3%	4%	3%	
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% Across Regional SA	60%	35%	94%	6%	100%	
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>						
Nights	414,000	191,000	605,000	467,000	1,072,000	
% of nights	39%	18%	56%	44%	100%	
<i>Share of Regional SA</i>	3%	2%	2%	3%	3%	
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% Across Regional SA	33%	31%	65%	35%	100%	
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>						
Average Length of Stay	2.6	3.2	2.8	29.2	4.6	
ALOS Regional SA	2.8	4.6	3.5	32.0	5.1	
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Total Expenditure						\$293,000,000
Overnight Expenditure	\$74,000,000	\$44,000,000	\$119,000,000	\$30,000,000	\$149,000,000	
Day Trip Expenditure						\$144,000,000
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Domestic Day Trips						1,388,000

- The Adelaide Hills saw 233,000 overnight visitors for the year end December 2023.
- 68 per cent of overnight visitors were from intrastate, 25 per cent from interstate and 7 per cent from overseas.
- The 158,000 intrastate overnight visitors stayed 414,000 nights with an average length of stay of 2.6 nights.
- There were 59,000 interstate overnight visitors who stayed 191,000 nights with an average length of stay of 3.2 nights
- The region saw 16,000 international visitors with an average length of stay of 29.2 nights and spend of \$30 million.
- 1.4 million day trips were taken to the Adelaide Hills for the year with spend of \$144 million.

ALOS = Average Length of Stay

ADELAIDE HILLS

REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	93,000	117,000	14,000	10,000	233,000
% of visits	40%	50%	6%	4%	100%
Share of Regional SA	3%	4%	1%	2%	3%
% Across all regions	41%	33%	21%	6%	100%

Nights	253,000	699,000	46,000	74,000	1,072,000
% of nights	24%	65%	4%	7%	100%
Share of Regional SA	2%	4%	1%	1%	3%
% Across all regions	31%	39%	15%	14%	100%

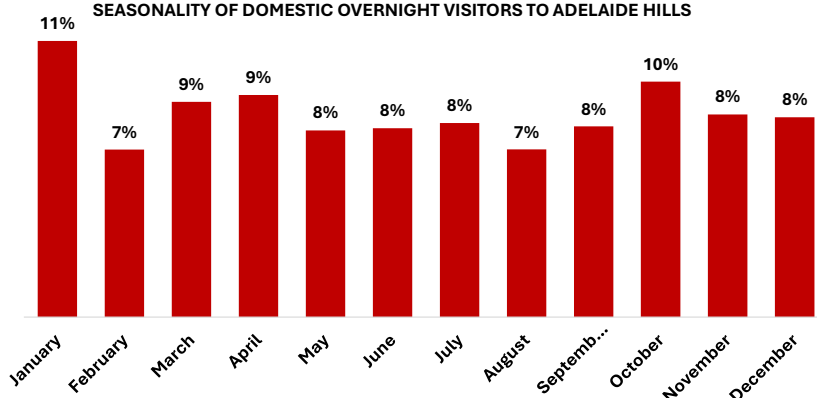
Average Length of Stay	2.7	6.0	3.3	7.4	4.6
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Expenditure					
Annual Expenditure	\$57,000,000	\$62,000,000	\$9,000,000	\$20,000,000	\$149,000,000
Expenditure 2019	\$38,000,000	\$46,000,000	\$3,000,000	\$12,000,000	\$98,000,000
Av spend per night	\$225	\$89	\$196	\$270	\$139
Av spend per night Reg SA	\$224	\$109	\$155	\$297	\$181
Share of Regional SA	3%	5%	1.3%	2%	3%

- 90 per cent of overnight visitors to the Adelaide Hills are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$225 per night compared to VFR visitors who spend \$89 per night.
- Leisure overnight visitors spent \$119 million for the year, making up 80 per cent of all overnight expenditure.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO ADELAIDE HILLS

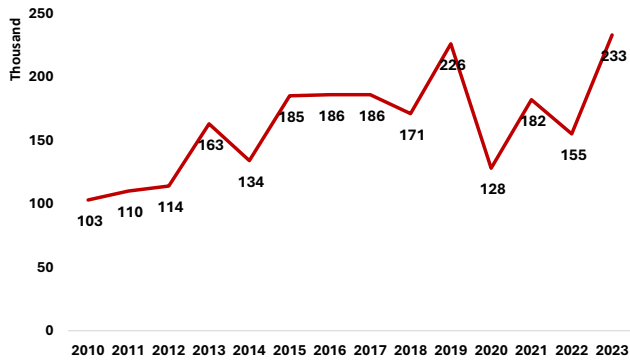


- National Visitor Survey data shows us that January and October are the strongest months for visitation in the Adelaide Hills.
- January is busy with the school holidays.
- April and October are strong on the back of the school holidays.

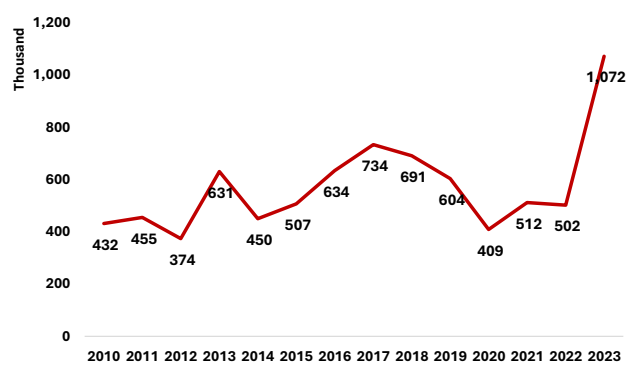


TOTAL OVERNIGHT VISITATION 2010 - 2022

VISITORS ADELAIDE HILLS 2010 - 2022
International and Domestic



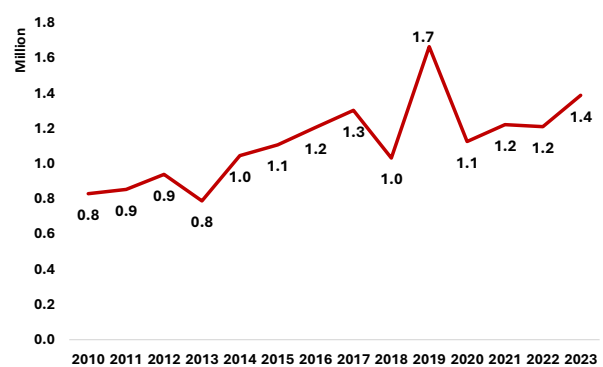
NIGHTS ADELAIDE HILLS 2010 - 2022
International and Domestic



TOTAL EXPENDITURE ADELAIDE HILLS 2010 - 2023
- International and Domestic



DAY TRIPS ADELAIDE HILLS 2010 - 2022
Domestic



Note: Fluctuations can occur in visitation data due to small sample sizes. Prior regional profiles used data averaged over three years to smooth these fluctuations.

Regions	Visits		Expenditure	
	Dec-23	Change on Dec-19	Dec-23	Change on Dec-19
Adelaide	3,422,000	-13%	\$5,500,000,000	22%
Adelaide Hills	233,000	3%	\$293,000,000	42%
Barossa	343,000	8%	\$261,000,000	16%
Clare Valley	226,000	11%	\$191,000,000	62%
Eyre Peninsula	537,000	-8%	\$591,000,000	7%
Fleurieu Peninsula	868,000	-4%	\$837,000,000	50%
Flinders Ranges and Outback	761,000	-18%	\$610,000,000	19%
Kangaroo Island	205,000	-1%	\$280,000,000	47%
Limestone Coast	763,000	-2%	\$520,000,000	24%
Murray River, Lakes and Cooroo	363,000	-20%	\$373,000,000	33%
Riverland	322,000	-25%	\$239,000,000	22%
Yorke Peninsula	530,000	-11%	\$384,000,000	60%
Regional SA	4,830,000	-7%	\$4,630,000,000	30%
South Australia	7,835,000	-9%	\$10,140,000,000	25%

ADELAIDE HILLS REGIONAL PROFILE



ADELAIDE HILLS TOURISM LISTINGS

Category	# Listings
Food & Drink	86
Accommodation	85
Attraction	56
Event	38
Tour	29
Destination Information	9
Hire	6
General Services	3
Transport	2
Information Services	1
Grand Total	316

Note: some listings have multiple categories of accommodation
Source: Australian Tourism Data Warehouse
Categories above defined at - <https://tourism.sa.gov.au/support/atdw>

The **Australian Tourism Data Warehouse (ATDW)** is Australia's national platform for digital tourism information. Eligible tourism businesses can create a listing for their accommodation, tour, food and drink establishment, event and more, free of charge. These listings appear on websites such as southaustralia.com

An **ATDW lead** is generated when a user performs one of the following actions when viewing an ATDW product page on southaustralia.com:

- Website click through (via visit website button or website URL)
- Book now button click
- Claim deal button click
- Clicking on contact email address to start writing email
- Clicking on a phone number to start a phone call (mobile only)

ADELAIDE HILLS AUSTRALIAN TOURISM DATA WAREHOUSE LEADS

134,000

YEAR END DECEMBER 2023

ACCOMMODATION LEADS

47,000
35%

FOOD & DRINK LEADS

25,000
18%

TOUR LEADS

11,000
8%

*OTHER LEADS

51,000
38%

TOP 5

- PAVILIONS AT LENSWOOD
- THORNGROVE MANOR HOTEL
- SEQUOIA LODGE EXCLUSIVE ADULTS ONLY LUXURY
- CARRIAGE HOUSE 1884
- ALDGATE VALLEY BED AND BREAKFAST

TOP 5

- VILLETTA PORCINI
- SIDEWOOD RESTAURANT & CELLAR DOOR
- SHAW + SMITH
- GREEN VALLEY STRAWBERRIES & CAFE
- GRUNTHAL BREW

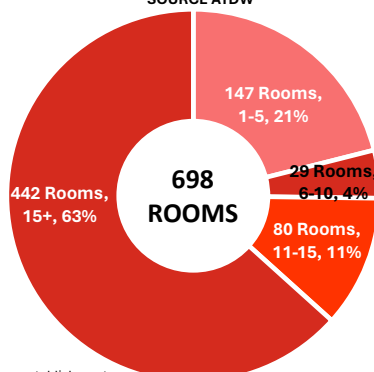
TOP 5

- THE BEERENBERG FAMILY FARM EXPERIENCE
- JURLIQUE TOURS & EXPERIENCES
- LENSWOOD PICK YOUR OWN
- TEMPLEWOOD HORSE RIDING CENTRE
- AMBLESIDE DISTILLERS EXPERIENCES

* Other refers to leads for events, destination information, attractions, general services, hire and transport

ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE ROOMS IN THE ADELAIDE HILLS

SOURCE ATDW



Rooms refers to rooms per establishment

- Currently there are 83 establishments in the Adelaide Hills that accommodate guests.
- These 83 establishments account for 698 rooms across the region.
- 63 per cent of rooms fall into establishment with 15 or more rooms.
- 21 per cent of rooms fall into the 1-5 room establishments.

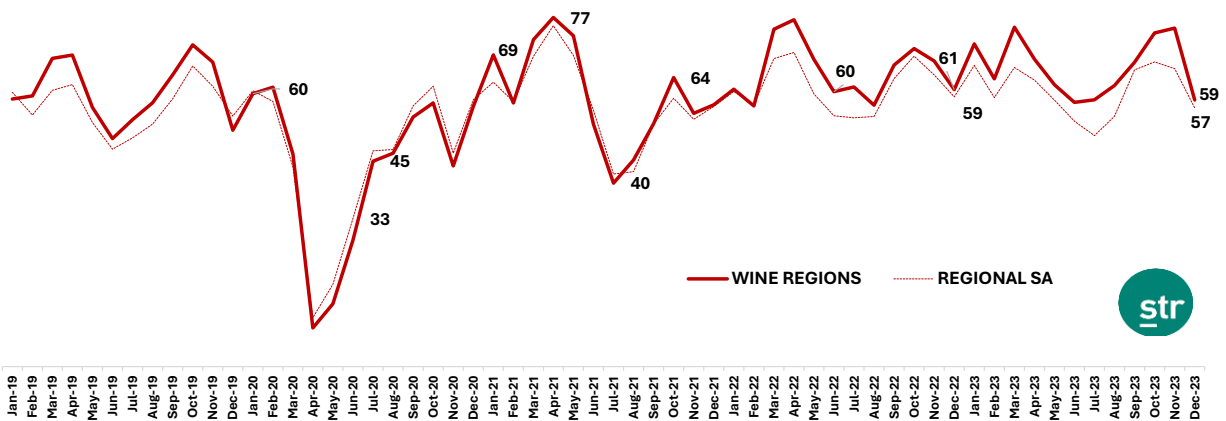


ADELAIDE HILLS REGIONAL PROFILE



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY WINE REGIONS

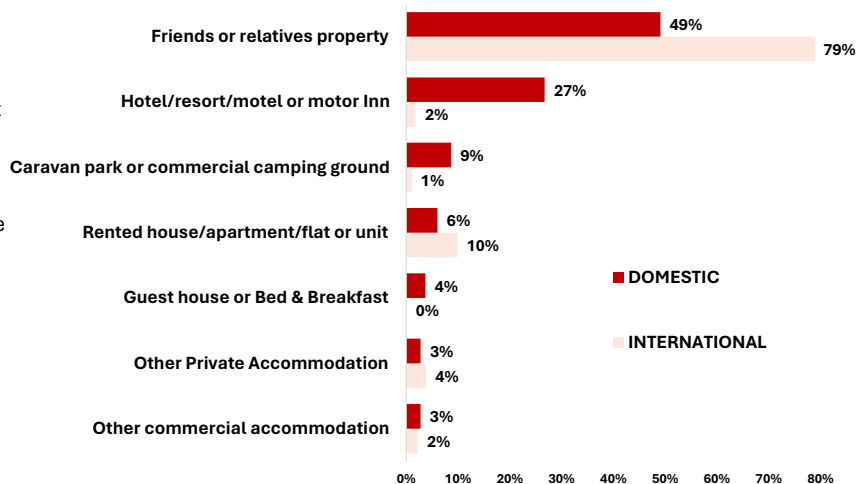


- The wine regions include accommodation data for the Adelaide Hills, the Clare Valley and the Barossa. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Wine Regions was 61%, this fell to 44% in 2020, rose to 65% in 2022 and grew again in 2023 to 66%.

VISITOR USE OF ACCOMMODATION

ACCOMMODATION USED IN ADELAIDE HILLS FOR DOMESTIC VISITORS

- 49 per cent of domestic overnight visitor nights in the Adelaide Hills are spent with Friends or Relatives compared to the international market with 79 per cent.
- 27 per cent of nights were spent in Hotels, resorts and motor inn's for the Domestic market.
- 6 per cent of domestic visitors stay in a rented house or apartment. This compares to 10 per cent of international visitors who chose the same accommodation.



TRANSPORT

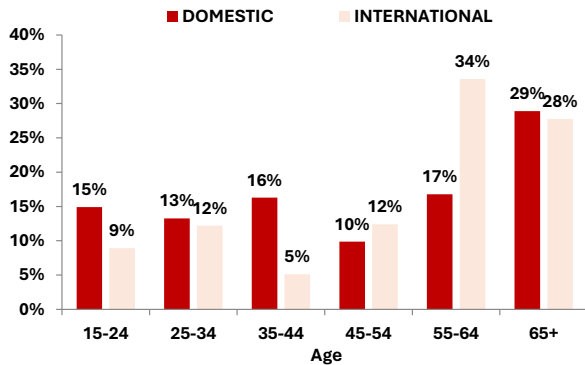


- The main method of transport used on trips to the Adelaide Hills was a self drive vehicle.
- 86% of visitors used this type of transport.
- 15% of people used another form of transport, this included planes, helicopters, buses etc.



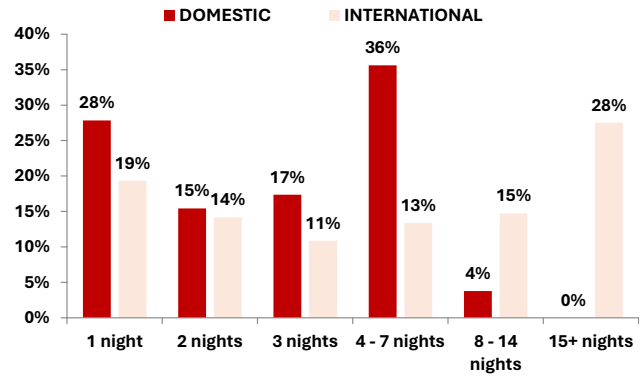
VISITOR PROFILE

AGE OF VISITORS TO ADELAIDE HILLS



- Overnight domestically there is a peak in the 65+ age group at 29 per cent.
- International visitors peaked in the 55-64 at 34 per cent and 65+ group at 28 per cent.

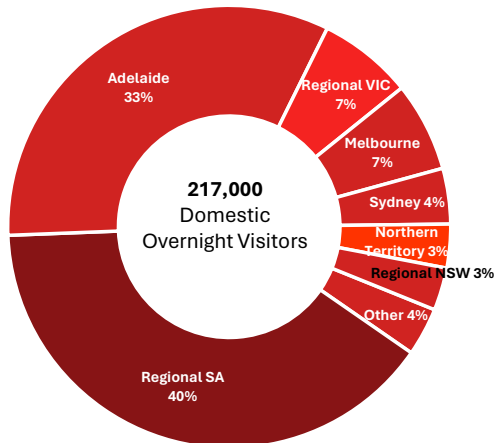
LENGTH OF VISIT TO ADELAIDE HILLS



- 43 per cent of domestic overnight visitors like to stay 1 to 2 nights.
- 36 per cent of domestic visitors stayed 4-7 nights.
- 28 per cent of international visitors stayed 15+ nights for the purpose of employment.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO ADELAIDE HILLS

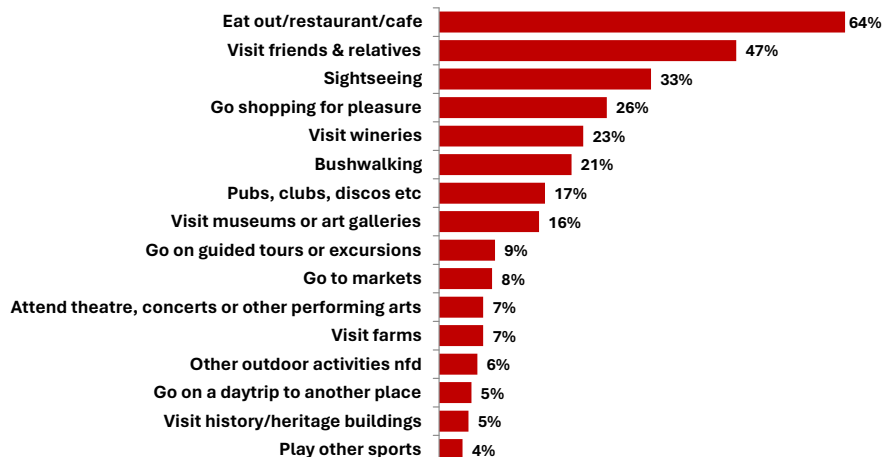


- Victoria at 14 per cent and New South Wales at 8 per cent are the Adelaide Hills biggest interstate overnight domestic markets.
- Regional South Australia contributes 40 per cent of visitors to the Adelaide Hills.
- 33 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

- The most popular activity when coming to the Adelaide Hills is to eat out at a restaurant or cafe.
- Other popular activities include visiting a friend or relative, visiting wineries, bushwalking, visiting national parks, going to markets and seeing the sights.

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN ADELAIDE HILLS



ADELAIDE HILLS

REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2021-22, the tourism industry contributed an estimated \$165 million to the Adelaide Hills regional economy and directly employed approximately 1,100 people.

Employment

- 1,100 jobs for people employed directly by the tourism industry, 300 indirect jobs and a total employment impact of 1,400 people.

Gross Value Added (GVA)

- \$48 million and \$44 million in direct and indirect tourism GVA, and \$92 million in total tourism GVA.

Gross Regional Product (GRP)

- \$50 million and \$56 million in direct and indirect tourism GRP and \$107 million in total tourism GRP.

Tourism Consumption

2021-22 Tourism products - directly consumed	
• Shopping (including gifts and souvenirs)	23%
• Takeaway and restaurant meals	19%
• Fuel (petrol, diesel)	13%
• Long distance passenger transportation	7%
• Food products	6%
• Alcoholic beverages and other beverages	6%
• Accommodation services	5%
• Recreational, cultural and sporting services	5%

Tourism Employment

2021-22 Tourism Industries - 1,100 directly employed	
• Cafes, restaurants and takeaway food services	48%
• Retail trade	22%
• Clubs, pubs, taverns and bars	10%
• Accommodation	8%
• Travel agency and tour operator services	3%
• All other industries	3%
• Other sports and recreation services	2%
• Air, water and other transport	2%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2022

REGIONAL PERCEPTIONS REPORTING

- The Adelaide Hills is a well known South Australian region, best known for its wine and German heritage.
- A significant challenge for the Adelaide Hills is its strong associations with wine, which drive perceptions that the region is not a family friendly holiday destination.
- Given its proximity to Adelaide, the Adelaide Hills is also seen as a place for a day trip, weekend or short stay only, particularly among those from South Australia. It is also seen as a region that is quite expensive to stay at.

To drive increased visitation and expenditure, we recommend the Adelaide Hills:

Position the Adelaide Hills as being more than wine, fine dining	The strongest associations with the Adelaide Hills are Hahndorf and wine. Communicating the variety of experiences, particularly the nature and wildlife experiences, could appeal to a wider group of people, including families.
Promote longer stays in the Adelaide Hills	Promoting the breadth of experiences available in the Adelaide Hills along with promoting packages or accommodation options at a lower price point could also encourage longer stays in the region.
Drive visitation all year round, particularly in the cooler months	The cooler months were perceived as cold and wet and therefore has limited appeal. Promoting winter activities such as Winter Reds, cosy cafés with fireplaces, and the nature that is beautiful in winter could encourage visitation in those months that generally have lower appeal.
Region appeals to...	<ul style="list-style-type: none"> – Wine lovers and those seeking an 'adults only' experience – Foodies – Day trippers (SA Locals) – Those seeking relaxation

Prepared by the South Australian Tourism Commission, December 2023

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 year end December 2023.

Regional Perceptions Testing - June 2022 - 3-day, online bulletin board (OBB) Approx. 40 mins of content per person, per day.

Participants were recruited as follows: - 22 Intrastate participants (70% metro, 30% regional), - 20 interstate participants (Melbourne, Regional VIC and Sydney)

A mix of age (18-44 and 45-69) and gender was achieved across participants. Participants were willing travellers, non-rejectors of travelling to/within SA, and did not live in the region they were recruited to explore (for intrastate).

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