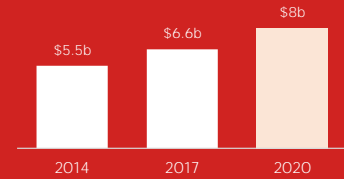




### OVERVIEW

- Currently South Australia contributes \$6.6 billion to the Australian tourism economy.
- South Australia has achieved 83 per cent of its \$8.0 billion maximum potential by 2020.



### Annual Visitor Summary December 2015 - December 2017

#### ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
<b>Overnight Visits</b>	3,866,000	2,288,000	<b>6,154,000</b>	434,000	<b>6,588,000</b>
<b>%</b>	<b>63%</b>	<b>37%</b>	<b>93%</b>	<b>7%</b>	<b>100%</b>
<b>Nights</b>	11,296,000	10,708,000	<b>22,004,000</b>	10,172,000	<b>32,176,000</b>
<b>%</b>	<b>51%</b>	<b>49%</b>	<b>68%</b>	<b>32%</b>	<b>100%</b>
<b>Average Length of Stay</b>	3	5	4	23	5
<b>Day Trips</b>					
Average Annual Day Trips to Total					13,265,000

#### PURPOSE

	Holiday	VFR	Business	Other	Total
<b>Overnight Visits</b>	2,786,000	2,059,000	1,318,000	555,000	<b>6,588,000</b>
<b>%</b>	<b>42%</b>	<b>31%</b>	<b>20%</b>	<b>8%</b>	<b>100%</b>
<b>Nights</b>	12,194,000	9,555,000	4,540,000	5,888,000	<b>32,176,000</b>
<b>%</b>	<b>38%</b>	<b>30%</b>	<b>14%</b>	<b>18%</b>	<b>100%</b>
<b>Average Length of Stay</b>	4	5	3	11	5
<b>Expenditure</b>					
Average Annual Expenditure					\$ 6,200,000,000

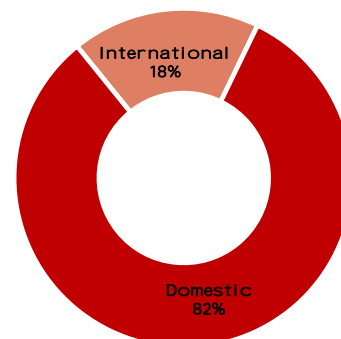
- 93 per cent of South Australian visitors are Domestic visitors and 7 per cent are International visitors.
- Domestically, 63 per cent are from within the state compared to 37 per cent from Interstate.
- 73 per cent of visitors to South Australia are Leisure Visitors (Holiday + VFR).

#### SOUTH AUSTRALIA TOURISM LISTINGS

Category	(All)
Accommodation	1714
Event	1530
Attraction	659
Food and Drink	541
Tour	264
Hire	94
Destination Information	79
General Services	16
Transport	15
Information Services	10
Journey	2
<b>Grand Total</b>	<b>4924</b>

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

#### SOUTH AUSTRALIA MEDIA COVERAGE



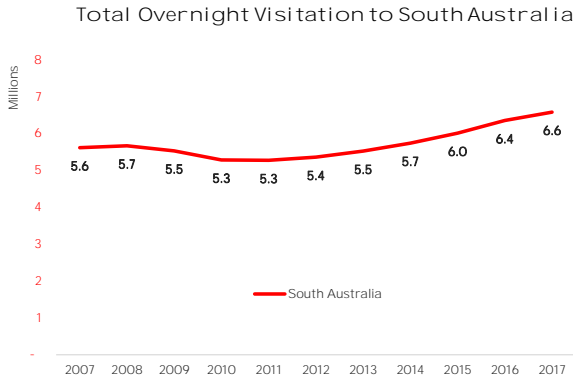
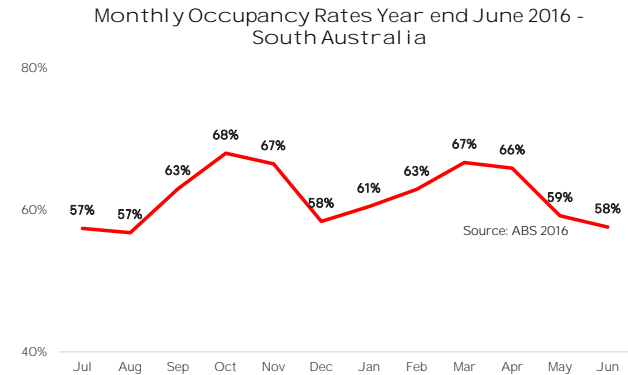
Source: Item Count - SATC Internal - 2017



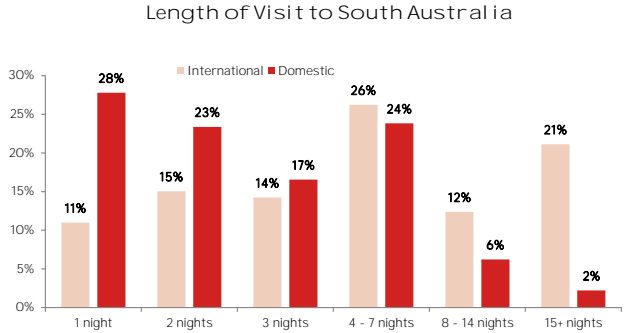
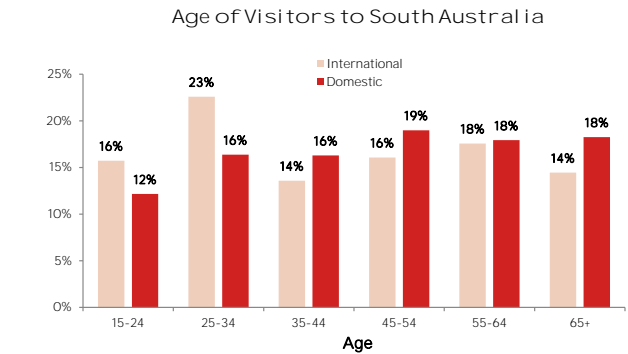
ACCOMMODATION SUPPLY

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

- Average occupancy for the year is 62 per cent over 271 establishments and 13,669 rooms.
- The peak months are March, October and November with occupancy of between 67 and 68 per cent.
- Low point of the year is during the Winter months with August at 57 per cent occupancy.



VISITOR PROFILE



- International visitors peak in the 25-34 age group at 23 per cent.
- Domestically age is pretty consistent, with a higher incidence in the 45-54 age group at 19 per cent.

- International visitors prefer to stay 4-7 nights in South Australia.
- 51 per cent of Domestic visitors stay 1-2 nights in South Australia.



### DOMESTIC VISITOR PROFILE

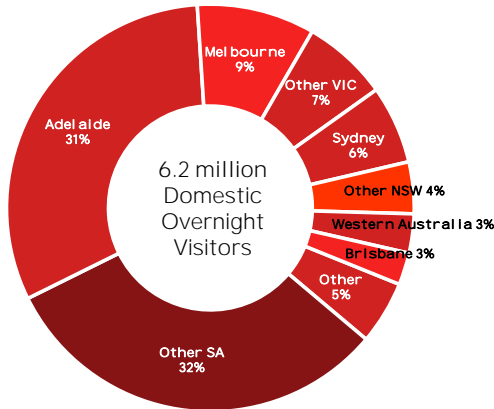
Purpose	Holiday	VFR	Other	Total
Visits	2,541,000	1,927,000	1,788,000	6,154,000
<b>%</b>	<b>41%</b>	<b>31%</b>	<b>29%</b>	<b>100%</b>
Nights	9,772,000	6,497,000	5,736,000	22,004,000
<b>%</b>	<b>44%</b>	<b>30%</b>	<b>26%</b>	<b>100%</b>
ALOS	4	3	3	3.58

### INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	245,000	133,000	87,000	434,000
<b>%</b>	<b>56%</b>	<b>31%</b>	<b>20%</b>	<b>100%</b>
Nights	2,422,000	3,058,000	4,692,000	10,172,000
<b>%</b>	<b>24%</b>	<b>30%</b>	<b>46%</b>	<b>100%</b>
ALOS	10	23	54	23

### VISITOR ORIGIN

Origin of Domestic Overnight Visitors to South Australia



Origin of International Visitors to South Australia

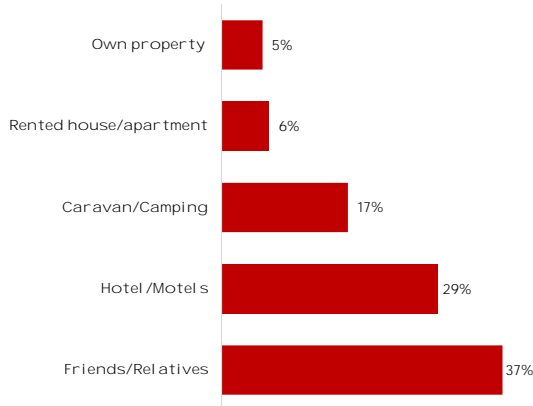


- Victoria, at 16 per cent and New South Wales at 10 per cent are South Australia's biggest Domestic Markets.
- Regionally, South Australia contributes 32 per cent of visitors.
- Internationally, Europeans contribute 39 per cent of the visits to South Australia followed by Asia with 33 per cent.
- The Asian market is becoming more important to South Australia with its close proximity and direct flights.
- Individually the biggest international markets are the United Kingdom 15 per cent, the United States 12 per cent, China 11 per cent and New Zealand 9 per cent.

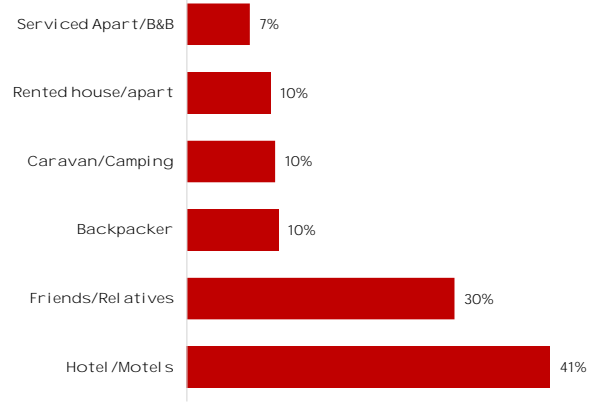


VISITOR USE OF ACCOMMODATION

Accommodation used in South Australia for Domestic Visitors



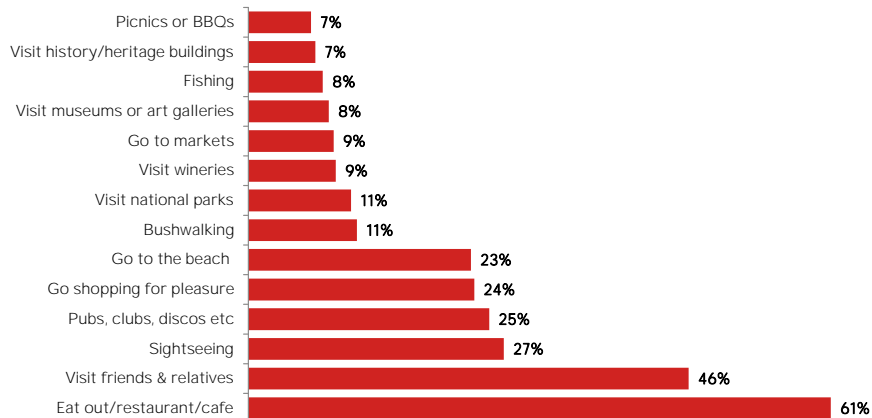
Accommodation used in South Australia for International Visitors



- 66 per cent of Domestic visitor nights in South Australia are spent either with Friends or Relatives or in Hotels and similar accommodation.
- International visitors are similar to Domestic visitors with 71 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 South Australia



- The most popular activity when coming to South Australia 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.



**REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION**

In 2016-17, the tourism industry contributed an estimated \$5.2 billion to the South Australian economy and directly employed approximately 36,000 people .

**Employment**

- 36,000 jobs for people employed directly by the tourism industry, 20,000 indirect jobs and a total employment impact of 56,000 people.

**Tourism output**

- \$5.2 billion and \$6.5 billion in direct and indirect tourism output, and \$11.8 billion in total tourism output.

**Gross Value Added (GVA)**

- \$2.8 billion and \$2.8 billion in direct and indirect tourism GVA, and \$5.6 billion in total tourism GVA.

**Gross Regional Product (GRP)**

- \$3.1 billion and \$3.1 billion in direct and indirect tourism GRP and \$6.2 billion in total tourism GRP.

**REGIONAL INSIGHTS**

**Domestic**

- South Australia 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 South Australia 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 South Australia 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