

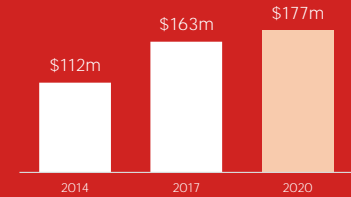
# ADELAIDE HILLS

## Regional Profile



### OVERVIEW

- Currently the Adelaide Hills contributes \$163 million to the December 2017 South Australian expenditure of \$6.6 billion.
- The Adelaide Hills has achieved 92 per cent of their 2020 target of \$177 million.



### Annual Visitor Summary December 2015 - December 2017

#### ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	101,000	77,000	178,000	7,000	186,000
%	57%	43%	96%	4%	100%
Nights	246,000	262,000	508,000	111,000	619,000
%	48%	52%	82%	18%	100%
Average Length of Stay	2	3	3	16	3
Domestic Day Trips					1,206,000
International Day Trips*					173,000

#### PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	70,000	88,000	15,000	12,000	186,000
%	38%	47%	8%	6%	100%
Nights	223,000	325,000	30,000	41,000	619,000
%	36%	53%	5%	7%	100%
Average Length of Stay	3	4	2	3	3
Expenditure					
Average Annual Expenditure					163,000,000

- 96 per cent of Adelaide Hills visitors are Domestic visitors and 4 per cent are International visitors.
- Domestically, 57 per cent of visitors from within the state compared to 43 per cent from Interstate.
- 85 per cent of visitors to the Adelaide Hills are for Leisure visitors (Holiday + VFR).
- On average 1.2 million day trips are taken to the Adelaide Hills each year, with an extra 173,000 international day trips.

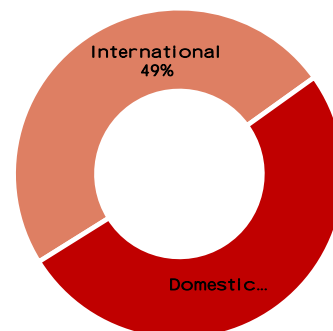
\*International visitors counted as taking 'International Day Trips' are also counted at the location of their overnight stay. Therefore, while they are visible as 'feet on the ground' they cannot be added to the international visitor total for the region.

#### ADELAIDE HILLS TOURISM LISTINGS

Category	Adelaide Hills
Accommodation	51
Attraction	43
Destination Information	3
Event	80
Food and Drink	64
Hire	1
Tour	15
Grand Total	257

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

#### ADELAIDE HILLS MEDIA COVERAGE



Source: Item Count - SATC Internal - 2017

# ADELAIDE HILLS

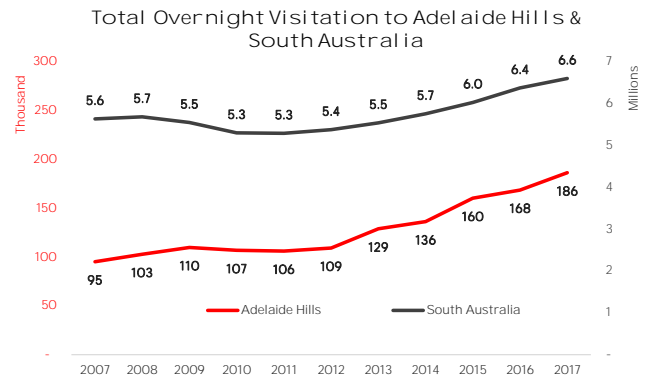
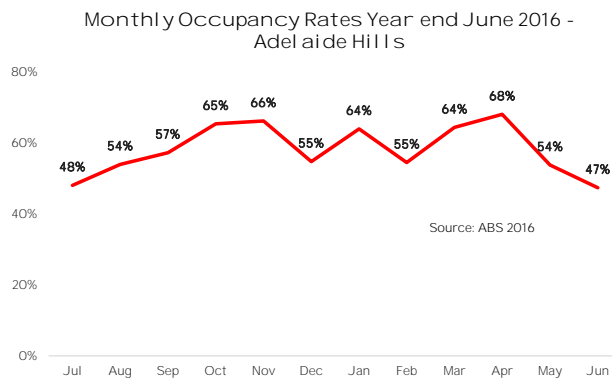
## Regional Profile



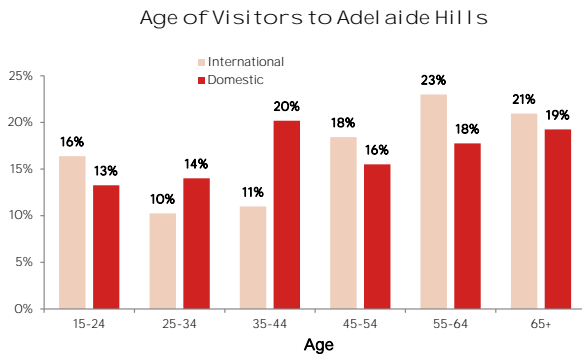
### ACCOMMODATION SUPPLY

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

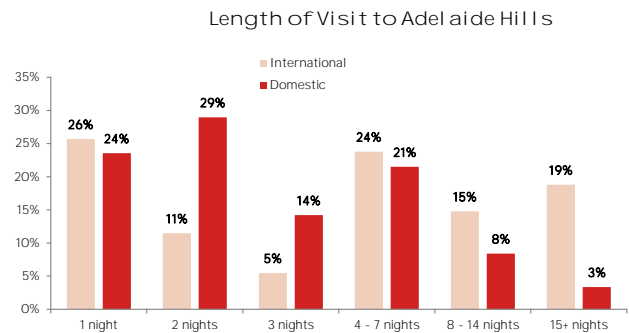
- Average occupancy for the year is 58 per cent over 5 establishments and 180 rooms.
- The peak months are November and April with occupancy of 66 and 68 per cent respectively.
- The low point of the year is during the winter months with occupancy on average dropping to 50 per cent.



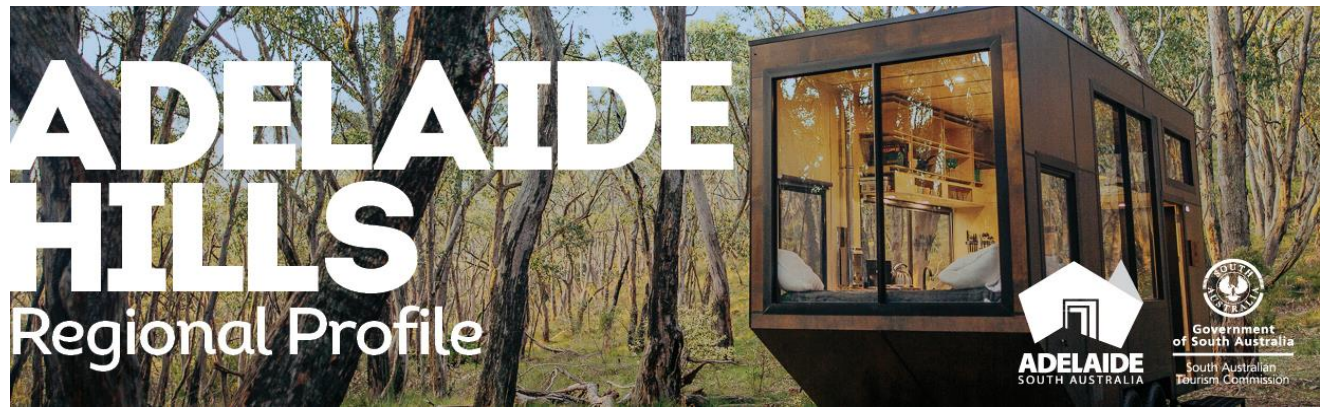
### VISITOR PROFILE



- International visitors peak in the 55-64 age group at 23 per cent.
- Domestically there is a peak in the 35-44 age group at 20 per cent



- International visitors prefer to stay 1 night in the Adelaide Hills.
- 53 per cent of Domestic visitors like to stay 1 to 2 nights.



### DOMESTIC VISITOR PROFILE

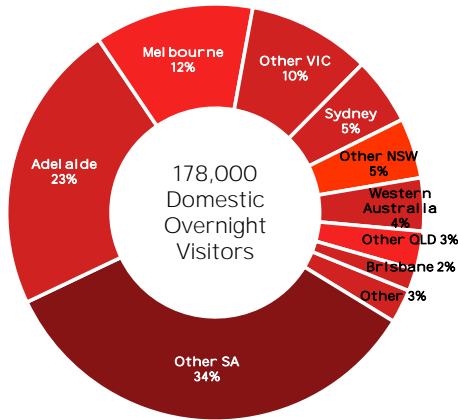
Purpose	Holiday	VFR	Other	Total
Visits	67,000	85,000	27,000	178,000
%	38%	48%	15%	100%
Nights	194,000	266,000	48,000	508,000
%	38%	52%	9%	100%
ALOS	3	3	2	3

### INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	4,000	3,000	np	7,000
%	57%	43%	np	100%
Nights	29,000	59,000	23,000	111,000
%	26%	53%	21%	100%
ALOS	7	20	np	16

### VISITOR ORIGIN

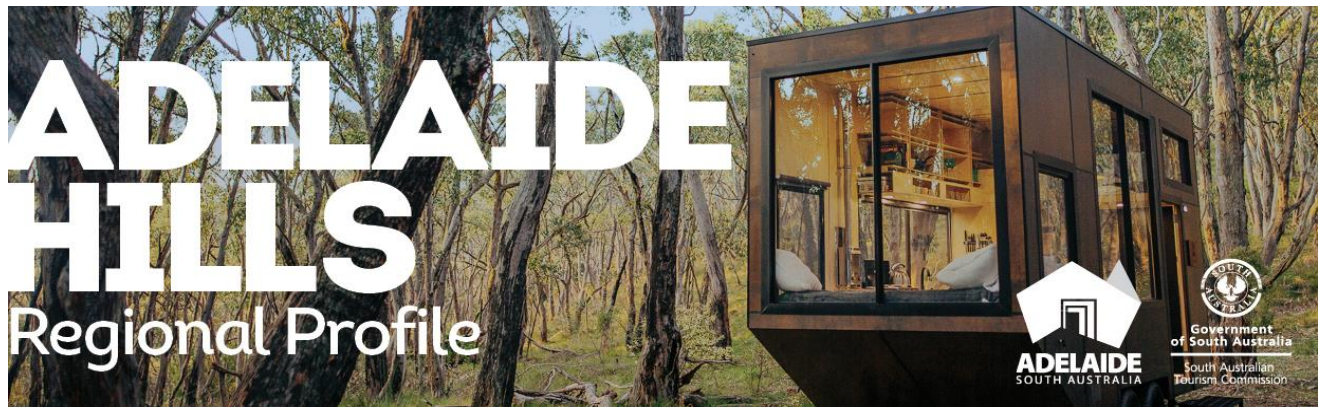
Origin of Domestic Overnight Visitors to Adelaide Hills



Origin of International Visitors to Adelaide Hills

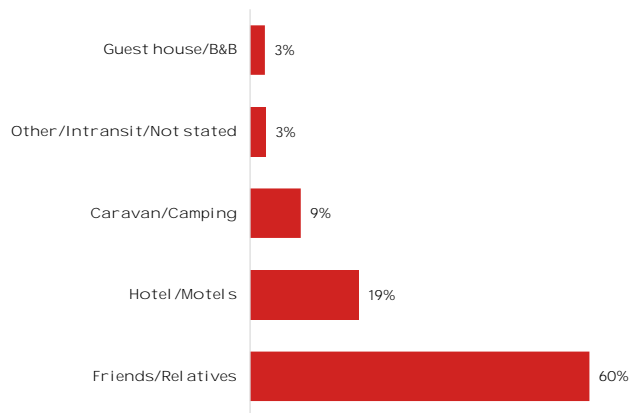


- Victoria at 22 per cent and NSW at 10 per cent are the Adelaide Hills biggest Domestic Markets.
- Regional South Australia contributes 34 per cent of visitors to the Adelaide Hills.
- Internationally, Europeans contribute 58 per cent of the visits to the Adelaide Hills followed by Asia with 16 per cent.
- Individually the biggest international markets are Germany 19 per cent, the United Kingdom 18 per cent and New Zealand 13 per cent.

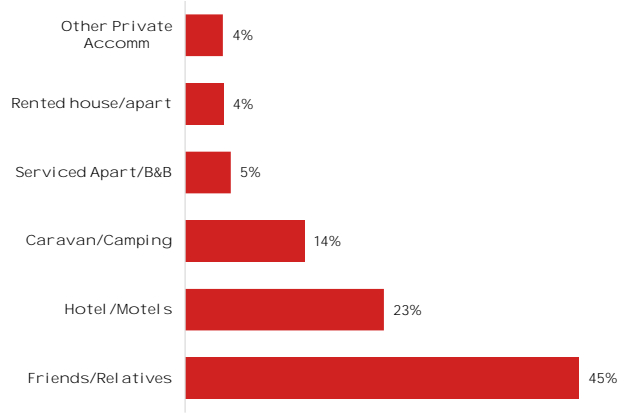


## VISITOR USE OF ACCOMMODATION

Accommodation used in Adelaide Hills for Domestic Visitors



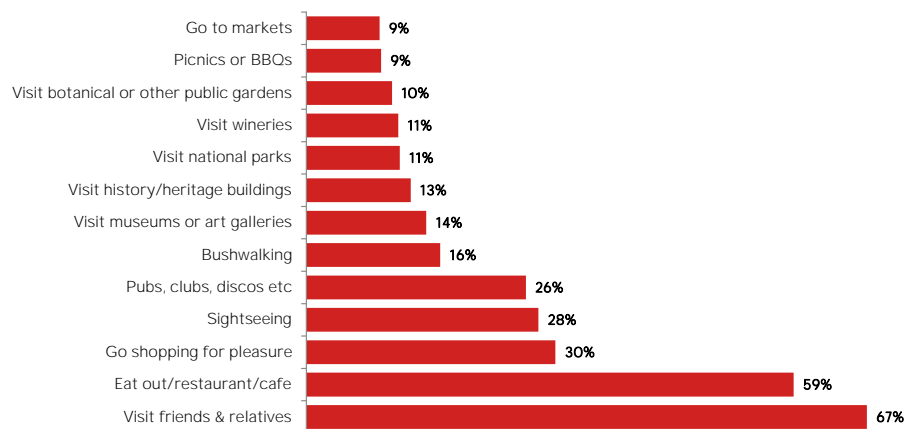
Accommodation used in Adelaide Hills for International Visitors



- 79 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, museums, art galleries and seeing the sights.

# ADELAIDE HILLS

## Regional Profile



### REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2016-17, the tourism industry contributed an estimated \$126 million to the Adelaide Hills regional economy and directly employed approximately 1,200 people.

#### Employment

- 1,200 jobs for people employed directly by the tourism industry, 400 indirect jobs and a total employment impact of 1,600 people.

#### Tourism output

- \$118 million and \$127 million in direct and indirect tourism output, and \$245 million in total tourism output.

#### Gross Value Added (GVA)

- \$63 million and \$54 million in direct and indirect tourism GVA, and \$117 million in total tourism GVA.

#### Gross Regional Product (GRP)

- \$66 million and \$60 million in direct and indirect tourism GRP and \$126 million in total tourism GRP.

### REGIONAL INSIGHTS

#### Interstate

- Many villages including Hahndorf provide an appealing point of difference.

#### Intrastate

- Authenticity and serenity of many villages including Hahndorf offer a relaxed family environment.

#### International

- Adelaide Hills and particularly Hahndorf is popular due to its close proximity to Adelaide, nature and wildlife experiences and its popular wineries.

#### Regional Visitor Strategy Priorities

- Adelaide Hill's priority is to capitalise on its proximity to Adelaide through collaboration and partnerships.
- The region aims to convert more visitors to stay overnight and increase visitor spend.

#### Accommodation moving forward

- Advocate for the development of new rooms and room upgrades.
- Encourage development of a new 5-star property around Hahndorf and accommodation linked to adventure trails, nature, wildlife and wellness.

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.  
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. 8635455001  
Consumer Demand Product Testing Phase 1 - BDA Marketing