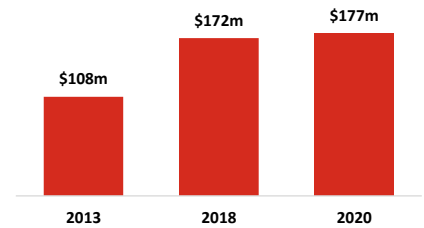




OVERVIEW

- Currently the Adelaide Hills contributes \$172 million to the December 2018 South Australian expenditure of \$6.8 billion.
- The Adelaide Hills has achieved 97 per cent of their 2020 target of \$177 million.



Annual Visitor Summary December 2016 - December 2018

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	93,000	79,000	172,000	9,000	181,000
%	54%	46%	95%	5%	100%
Nights	248,000	288,000	535,000	153,000	688,000
%	46%	54%	78%	22%	100%
Average Length of Stay	3	4	3	17	4
Domestic Day Trips					1,189,000
International Day Trips*					173,000

PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	70,000	89,000	14,000	9,000	181,000
%	39%	49%	8%	5%	100%
Nights	233,000	380,000	39,000	37,000	688,000
%	34%	55%	6%	5%	100%
Average Length of Stay	3	4	3	4	4
Expenditure					
Average Annual Expenditure				\$	172,000,000

- 95 per cent of Adelaide Hills visitors are Domestic visitors and 5 per cent are International visitors.
- Domestically, 54 per cent of visitors from within the state compared to 46 per cent from Interstate.
- 88 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.

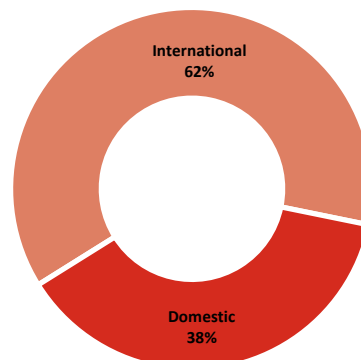
* International visitors counted as taking "International Day Trips" are also counted at the location of their overnight stay. Therefore, while they are visible as "feet on the ground" they cannot be added to the international visitor total for the region.

ADELAIDE HILLS TOURISM LISTINGS

Category	Adelaide Hills
Food and Drink	60
Event	55
Accommodation	43
Attraction	37
Tour	20
Hire	3
General Services	1
Grand Total	219

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

ADELAIDE HILLS MEDIA COVERAGE



Source: Advertising Space Rate - 2018

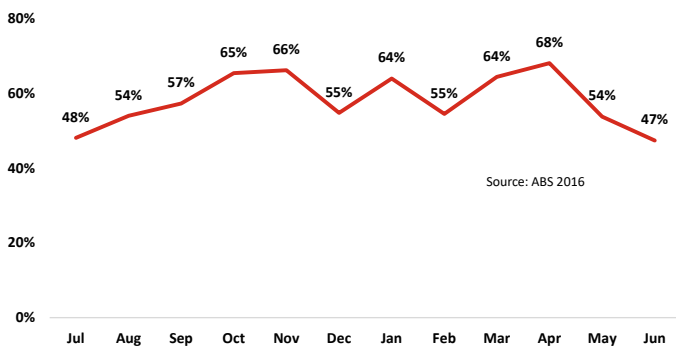


ACCOMMODATION SUPPLY

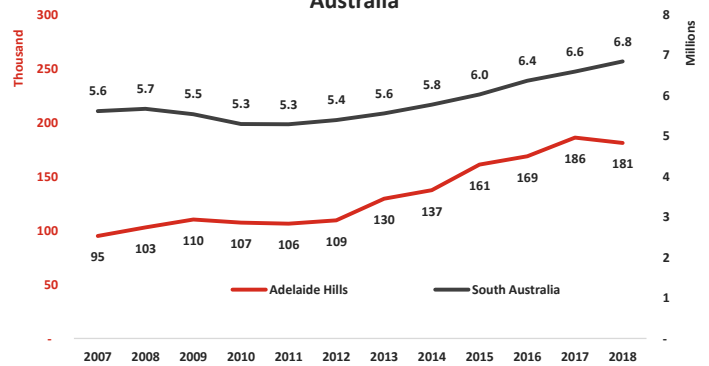
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	5
Rooms	180
Occupancy	58%
Takings	\$6,300,000

- 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.

Monthly occupancy rates year end June 2016 - Adelaide Hills

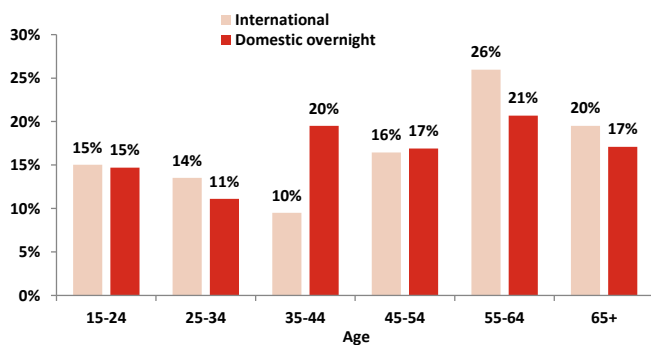


Total Overnight Visitation to Adelaide Hills & South Australia



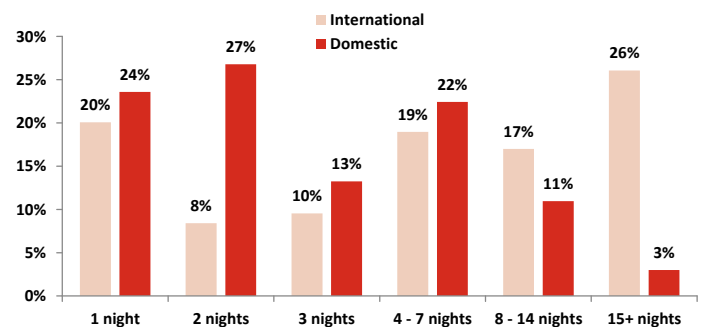
VISITOR PROFILE

Age of Visitors to Adelaide Hills



- International visitors peak in the 55-64 age group at 26 per cent.
- Domestically there is a peak in the 35-44 age group at 20 per cent

Length of Visit to Adelaide Hills



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

ADELAIDE HILLS

REGIONAL PROFILE



DOMESTIC VISITOR PROFILE

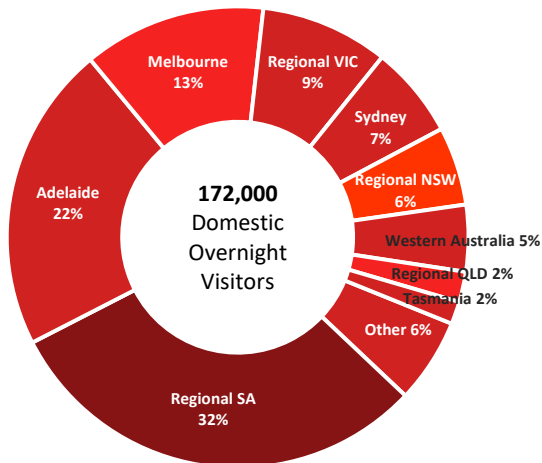
Purpose	Holiday	VFR	Other	Total
Visits	65,000	85,000	22,000	172,000
%	38%	49%	13%	100%
Nights	193,000	298,000	44,000	535,000
%	36%	56%	8%	100%
ALOS	3	4	2	3

INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	4,000	4,000	np	9,000
%	44%	44%	np	100%
Nights	39,000	82,000	32,000	153,000
%	25%	54%	21%	100%
ALOS	10	21	np	17

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Adelaide Hills



Origin of International Visitors to Adelaide Hills

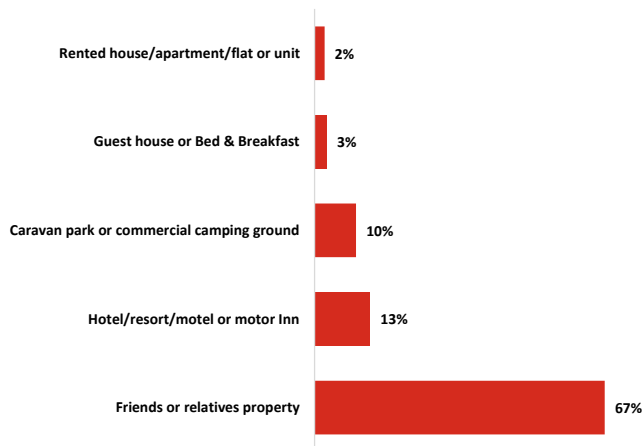


- Victoria at 21 per cent and NSW at 13 per cent are the Adelaide Hills biggest Domestic Markets.
- Regional South Australia contributes 32 per cent of visitors to the Adelaide Hills.
- Internationally, Europeans contribute 49 per cent of the visits to the Adelaide Hills followed by Asia with 22 per cent.
- Increased Asian visitation to the Adelaide Hills, up from 16 per cent in the prior year to 22 per cent.
- Individually the biggest international markets are the United Kingdom 17 per cent, the USA 14 per cent and Germany 13 per cent, per cent and New Zealand 9 per cent.

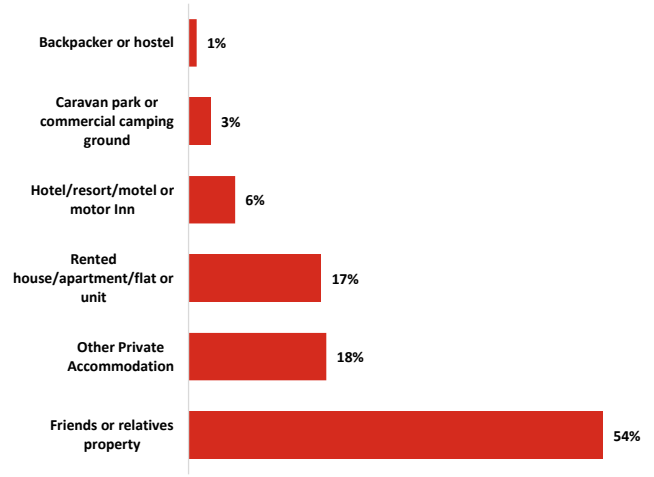


VISITOR USE OF ACCOMMODATION

Accommodation used in Adelaide Hills for Domestic Visitors



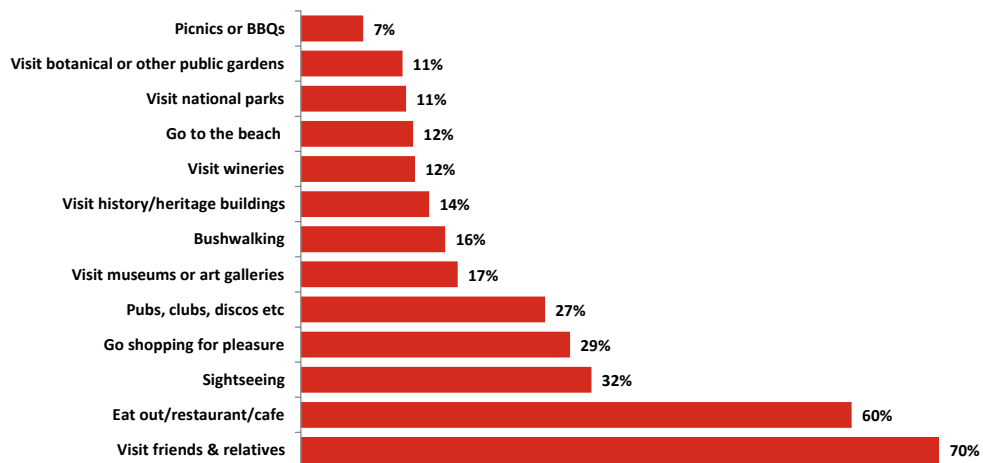
Accommodation used in Adelaide Hills for International Visitors



- 80 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 60 per cent of visitors staying with Friends or Relatives or in Hotels and similar accommodation.
- 35 per cent of international visitors prefer rented house or other private accommodation.

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.



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 2018

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 2016 to December 2018.
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. 863545001
Consumer Demand Product Testing Phase 1 - BDA Marketing

THE LANE VINEYARD, ADELAIDE HILLS

TOURISM CHAMPIONS CASE STUDY

ABOUT THE LANE VINEYARD

Located in the Adelaide Hills, The Lane Vineyard is a second generation family-run winery, dining and tasting room.

Founded by Ben's parents, John and Helen Edwards in 1993, the business prides itself on growing high quality grapes and producing the finest wine with a true sense of place.

From intimate dining to enjoying a wine flight at their 360° Panorama Tasting Room, The Lane offers visitors a unique range of experiences across the estate. Their wines receive high accolades from industry journalists and are distributed globally.

BUSINESS GROWTH

In 2005 The Lane began making their own wine on site and by the end of 2007 the tasting and dining room opened.

Today over 30,000 people visit The Lane every year for wine tastings, long lunches, corporate events, weddings and private functions.

The business employs 35 staff (17 full time and 18 casual staff members) and is a proud member of the Ultimate Winery Experiences Australia.

CHALLENGES

As a multifaceted business, The Lane relies on all staff to bring together the viticulture, wine making, distribution, tasting room and world class dining room into a seamless food and wine experience for visitors. They constantly refine and challenge at all levels, always taking a long term view. Continual staff professional development and succession planning are vital for success.

THE FUTURE

The Lane is always searching for ways to innovate and improve their customer experience and will continue to build on its reputation as one of Australia's finest wine producers.

In the next year, the business will launch an outdoor lunch/entertainment area and will focus on attracting more corporate lunches and events. Further growth into international markets and building on the success in domestic distribution are also on the agenda.

COMMUNITY IMPACT

The business works closely with an array of local organisations and engages with many local suppliers in the Adelaide Hills. These suppliers include Richard Gunner Fine Meats, Nature's Chickens (Lenswood), Echunga herbs, Ngeringa for herbs and vegetables and Section 28 for cheese.

The majority of staff at The Lane live in the Adelaide Hills and many locals use their Dining Room as an office space showcasing South Australia's unique lifestyle.

"South Australia is the engine room of the wine industry in Australia. We produce some of the greatest wines in the world with incredible diversity of styles. The quality of produce and lifestyle we have is second to none!"

The Lane Vineyard has a long term relationship with The South Australian Tourism Commission. It's important to have a state based partner that thinks global and acts local. There are so many best practice toolkits/workshops and networking sessions the SATC provide; it's really assisted putting South Australia in an enviable position both domestically and globally."

Ben Tolstoshev, General Manager –
Global Sales & Marketing, The Lane Vineyard

SOUTH AUSTRALIAN TOURISM COMMISSION COLLABORATION

The South Australian Tourism Commission has provided leadership in digital marketing, experience developments, skills development and networking opportunities as well as a range of helpful toolkits.



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