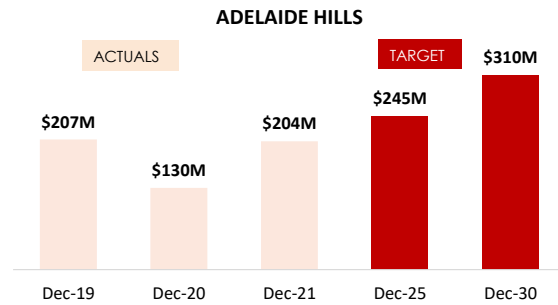




OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2021

- Currently the Adelaide Hills contributes \$204 million to the year end December 2021 South Australian expenditure of \$6.2 billion.
- The Adelaide Hills has achieved 83 per cent of their 2025 target of \$245 million and 66 per cent of their 2030 target of \$310 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2021

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	119,000	64,000	184,000	1,000	184,000
%	65%	35%	100%	1%	100%
<i>Share of Regional SA</i>	3%	5%	3%	10%	3%
<hr/>					
<i>% Across Regional SA</i>	76%	23%	100%	0%	100%
<hr/>					
Nights	244,000	288,000	532,000	1,000	533,000
%	46%	54%	100%	0%	100%
<i>Share of Regional SA</i>	2%	3%	2%	0%	2%
<hr/>					
<i>% Across Regional SA</i>	60%	38%	98%	2%	100%
<hr/>					
Average Length of Stay	2.1	4.5	2.9	1.0	2.9
ALOS Regional SA	3.0	6.2	3.7	-	3.8
<hr/>					
Total Expenditure					\$204,000,000
Overnight Expenditure	\$39,000,000	\$36,000,000	\$75,000,000	\$0	\$75,000,000
Day Trip Expenditure					\$129,000,000
<hr/>					
Domestic Day Trips					1,221,000

- The Adelaide Hills saw 184,000 domestic overnight visitors for the year end December 2021.
- 65 per cent of overnight visitors were from intrastate and 35 per cent from interstate.
- The 119,000 intrastate overnight visitors stayed 244,000 nights with an average length of stay of 2.1 nights.
- There were 64,000 interstate overnight visitors who stayed 288,000 nights with an average length of stay of 4.5 nights
- There have been limited international arrivals with borders closed.
- 1.2 million day trips were taken to the Adelaide Hills for the year with spend of \$129 million.

ALOS = Average Length of Stay

ADELAIDE HILLS

REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	76,000	65,000	28,000	15,000	184,000
%	41%	35%	15%	8%	100%
<i>Share of Regional SA</i>	3%	4%	3%	3%	3%
<i>% Across all regions</i>	49%	28%	18%	8%	100%

Nights	142,000	290,000	76,000	25,000	533,000
%	27%	54%	14%	5%	100%
<i>Share of Regional SA</i>	1%	5%	2%	1%	2%
<i>% Across all regions</i>	50%	26%	17%	8%	100%

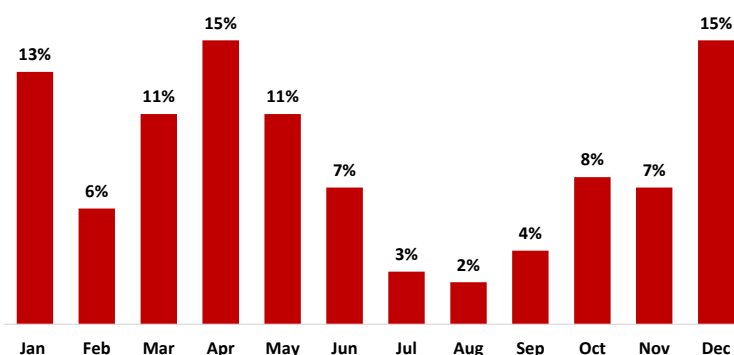
Average Length of Stay	1.9	4.5	2.7	1.7	2.9
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Expenditure					
Annual Expenditure	\$38,000,000	\$24,000,000	\$4,000,000	\$9,000,000	\$75,000,000
Expenditure 2019	\$38,000,000	\$46,000,000	\$3,000,000	\$12,000,000	\$98,000,000
Av spend per night	\$268	\$83	\$53	\$360	\$141
Av spend per night Reg SA	\$154	\$58	\$84	\$80	\$112
Share of Regional SA	3%	4%	5%	2%	3%

- 77 per cent of overnight visitors to the Adelaide Hills are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$268 per night compared to VFR visitors who spend \$83 per night.
- Leisure overnight visitors spent \$62 million for the year, making up 83 per cent of all overnight expenditure.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO ADELAIDE HILLS



Source: NVS year end December 2021

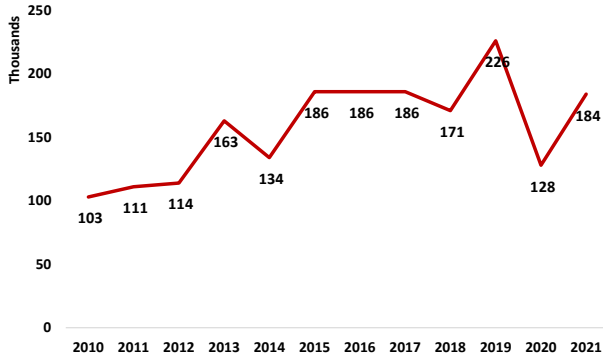
Page 2

- National Visitor Survey data shows us that January, April and December are the strongest months for visitation in the Adelaide Hills.
- January is busy with the school holidays.
- April is busy with Easter and School holidays.
- December is strong on the back of the Holidays and end of year celebrations.

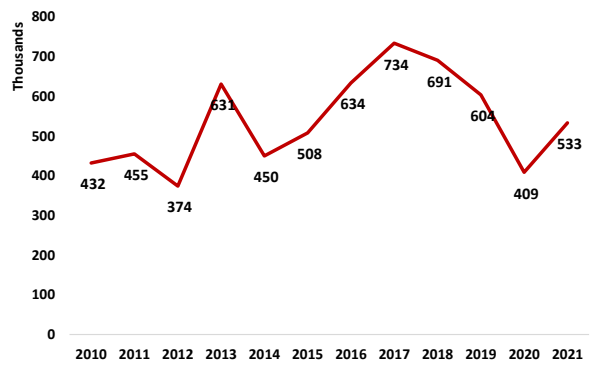


TOTAL OVERNIGHT VISITATION 2010 - 2021

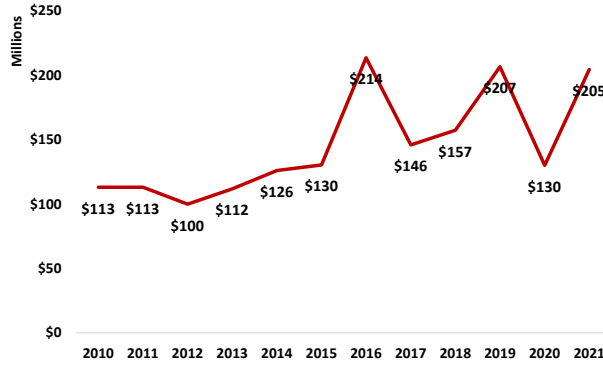
VISITORS ADELAIDE HILLS 2010 - 2021 - International and Domestic



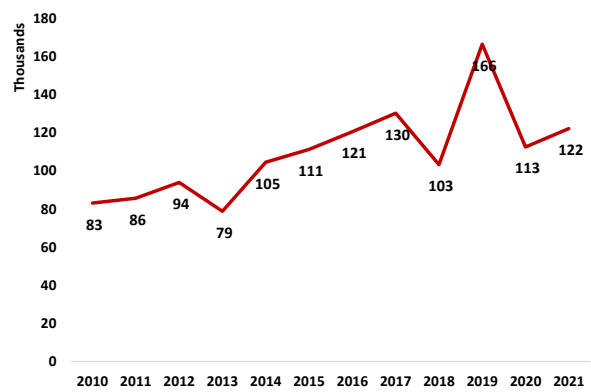
NIGHTS ADELAIDE HILLS 2010 - 2021 - International and Domestic



TOTAL EXPENDITURE ADELAIDE HILLS 2010 - 2021 - International and Domestic



DAY TRIPS ADELAIDE HILLS 2010 - 2021 - 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-21	Change on Dec-19	Dec-21	Change on Dec-19
Adelaide	1,982,000	-49%	2,549,700,000	-44%
Adelaide Hills	184,000	-18%	204,500,000	-1%
Barossa	230,000	-28%	291,600,000	29%
Clare Valley	282,000	38%	171,700,000	46%
Eyre Peninsula	482,000	-17%	488,400,000	-11%
Fleurieu Peninsula	894,000	-1%	662,900,000	19%
Flinders Ranges and Outback	638,000	-31%	359,700,000	-30%
Kangaroo Island	189,000	-9%	238,500,000	25%
Limestone Coast	610,000	-21%	438,600,000	4%
Murray River, Lakes and Coorong	391,000	-13%	211,200,000	-25%
Riverland	345,000	-20%	231,600,000	19%
Yorke Peninsula	620,000	4%	279,500,000	16%
Regional SA	4,424,000	-14%	3,601,600,000	1%
South Australia	6,077,000	-29%	6,151,300,000	-24%



ADELAIDE HILLS REGIONAL PROFILE



ADELAIDE HILLS TOURISM LISTINGS

Category	# Listings
Accommodation	71
Food and Drink	71
Attraction	55
Event	33
Tour	27
Destination Information	7
General Services	4
Hire	3
Information Services	1
Transport	1
Grand Total	273

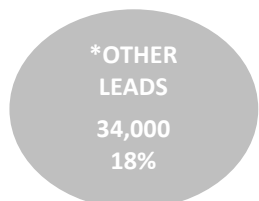
Note: some listings have multiple categories of accommodation
Source: Australian Tourism Data Warehouse
Categories above defined at - <https://tourism.sa.gov.au/support/atdw>

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
186,000
YEAR END DECEMBER 2021**



TOP 5

- BIG4 HAHNDORF RESORT
- PAVILIONS AT LENSWOOD
- MOUNT LOFTY HOUSE MGALLERY BY SOFITEL
- STICKY RICE VILLAS
- ADELAIDE HILLS RETREATS THE NEST

TOP 5

- VILLETTA PORCINI
- SIDEWOOD RESTAURANT CELLAR DOOR
- THE LANE VINEYARD
- STICKY RICE COOKING SCHOOL
- THE URAIDLA HOTEL

TOP 5

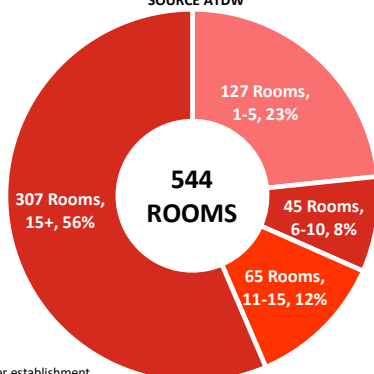
- STEAMRANGER HERITAGE RAILWAY
- JURLIQUE INTERNATIONAL
- AMBLESIDE DISTILLERS EXPERIENCES
- TOURING ADELAIDE SOUTH AUSTRALIA
- PICK YOUR OWN STRAWBERRIES BEERENBERG FARM

* 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



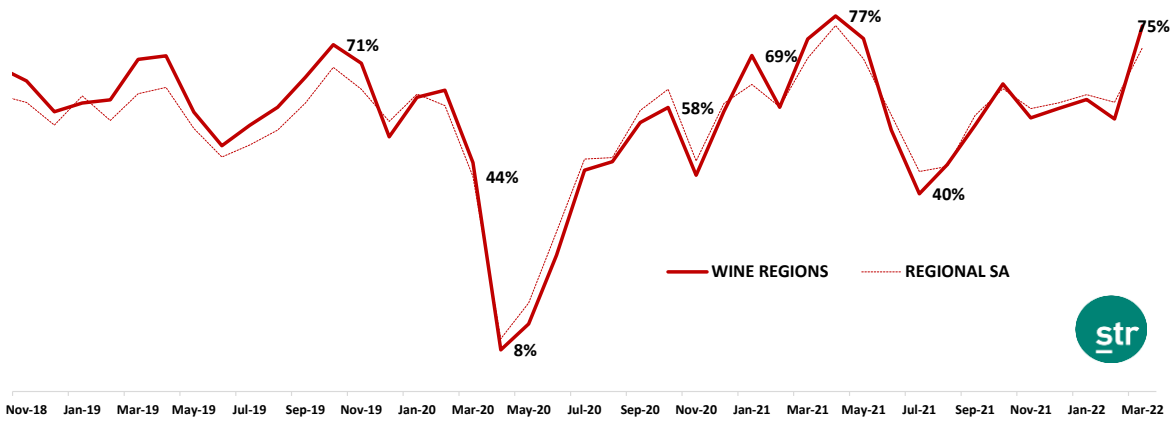
- Currently there are 71 establishments in the Adelaide Hills that accommodate guests.
- These 71 establishments account for 544 rooms across the region.
- 56 per cent of rooms fall into establishment with 15 or more rooms.
- 23 per cent of rooms fall into the 1-5 room establishments.

Rooms refers to rooms per establishment



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY WINE REGIONS

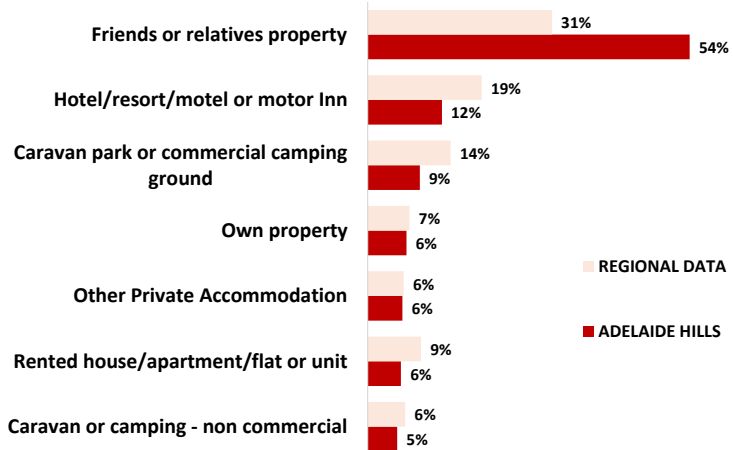


- The wine regions include accommodation data for the Adelaide Hills, the Clare Valley and the Barossa. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Adelaide Hills was 61%, this fell to 44% in 2020, rose to 60% in 2021 and for the first 3 month of 2022 the average is 63%.

VISITOR USE OF ACCOMMODATION

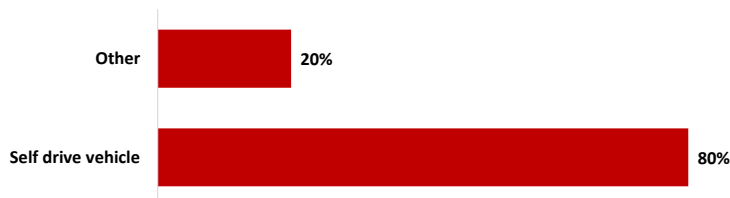
ACCOMMODATION USED IN ADELAIDE HILLS FOR DOMESTIC VISITORS

- 54 per cent of domestic overnight visitor nights in the Adelaide Hills are spent either with Friends or Relatives compared to the SA regional average of 31 per cent.
- 12 per cent stay in Hotels and similar accommodation, down on the regional average of 19 per cent.



TRANSPORT

TRANSPORT ADELAIDE HILLS DECEMBER 2021

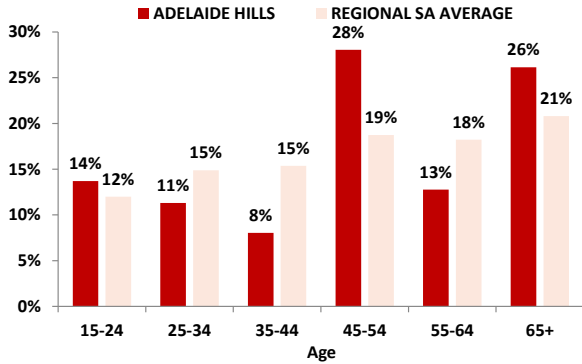


- The main method of transport used on your trips to the Adelaide Hills was a self drive vehicle.
- 80% of visitors used this type of transport.
- 20% of people used another form of transport, this included planes, helicopters, buses etc.



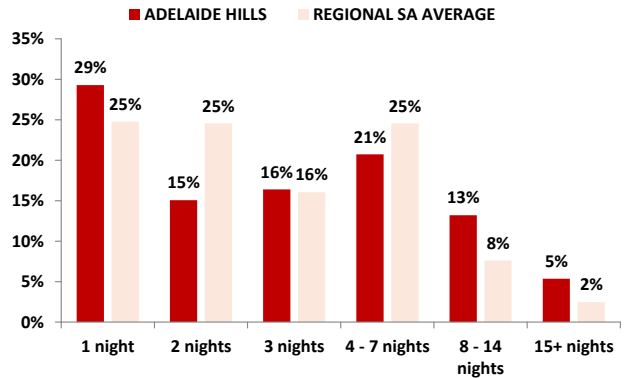
VISITOR PROFILE

AGE OF VISITORS TO ADELAIDE HILLS



- Overnight domestically there is a peak in the 45-54 age group at 28 per cent.
- This is well above the average of 19 per cent for the 45-54 age group for regional SA.
- 45+ age groups account for 67 per cent of all visitors.

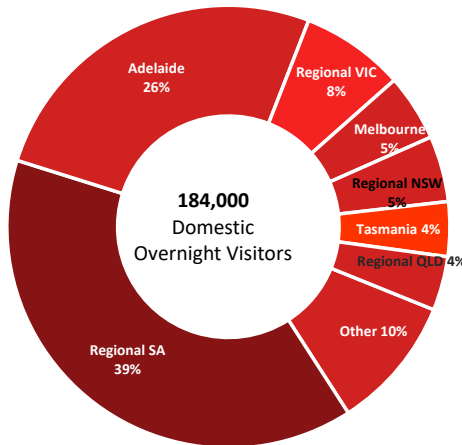
LENGTH OF VISIT TO ADELAIDE HILLS



- 29 per cent of domestic overnight visitors like to stay 1 night.
- The 18 per cent who stay longer than 8 nights are predominantly staying with friends and relatives or working in the region.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO ADELAIDE HILLS

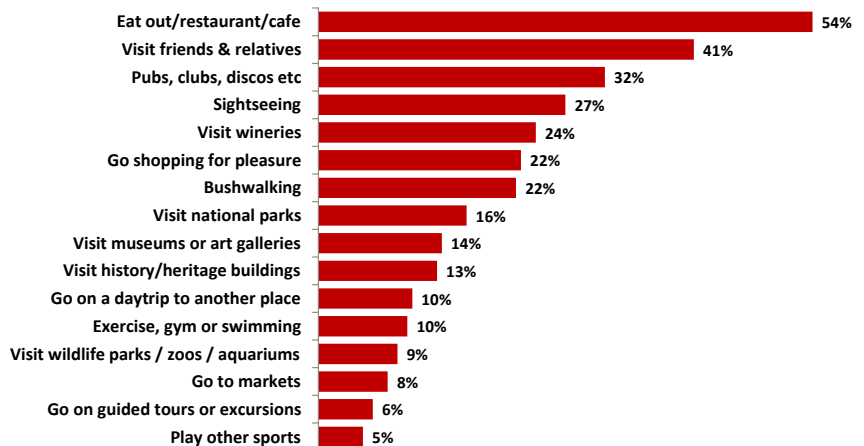


- Victoria at 13 per cent and New South Wales at 9 per cent are the Adelaide Hills biggest interstate overnight domestic markets.
- Regional South Australia contributes 39 per cent of visitors to the Adelaide Hills.
- 26 per cent of visitors come from Adelaide.

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





REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2019-20, the tourism industry contributed an estimated \$211 million to the Adelaide Hills regional economy and directly employed approximately 1,400 people.

Employment

- 1,400 jobs for people employed directly by the tourism industry, 400 indirect jobs and a total employment impact of 1,800 people.

Gross Value Added (GVA)

- \$66 million and \$55 million in direct and indirect tourism GVA, and \$121 million in total tourism GVA.

Gross Regional Product (GRP)

- \$70 million and \$70 million in direct and indirect tourism GRP and \$140 million in total tourism GRP.

Tourism Consumption

2019–20 <i>Tourism products</i> - directly consumed
• 18% Shopping (including gifts and souvenirs)
• 17% Takeaway and restaurant meals
• 12% Fuel (petrol, diesel)
• 12% Long distance passenger transportation
• 6% Alcoholic beverages and other beverages
• 6% Food products
• 5% Travel agency and tour operator services
• 5% Accommodation services

Tourism Employment

2019–20 <i>Tourism Industries</i> - 1,400 directly employed
• 40% - 552 - Cafes restaurants and takeaway food services
• 21% - 298 - Retail trade
• 8% - 106 - Clubs, pubs, taverns and bars
• 7% - 91 - Accommodation
• 6% - 88 - Education and training
• 5% - 64 - Travel agency and tour operator services
• 4% - 53 - Cultural services

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2020

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

- A key priority for the Adelaide Hills 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.
- 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.

Prepared by the South Australian Tourism Commission, December 2021

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 2021.

Consumer Demand Product Testing Phase 1 - BDA Marketing - 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.

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