

SOUTH AUSTRALIA

The Value of Tourism

Pondalowie Bay, Yorke Peninsula

ADELAIDE
SOUTH AUSTRALIA

Government of South Australia
South Australian Tourism Commission

Year ending September 2021 — Date: 22nd December 2021

\$	\$5.9B	Tourism Expenditure
	<1k	International seats into Adelaide each week
	9k	International visitors
	45K	Domestic seats into Adelaide each week
	1.5M	Interstate visitors
	4.7M	Intrastate trips
	12.9M	Domestic day trips
	16k	Hotel rooms
	19k	Tourism business across the state
	\$187k	In tourism expenditure = 1 directly employed
	40.4k	Directly employed, (to grow direct employment by 16,000 jobs by 2030)

Sources: International and National Visitor Survey, Tourism Research Australia, Canberra; State Tourism Satellite Accounts 2019-20, Tourism Research Australia, Canberra; Accommodation data sourced from STR for 10+ rooms, for the Year to November 2021, Airline data is based on seasonal schedules and is subject to change without notice.

Notes: For details of the NVS methodology changes in this release please refer to <https://www.tra.gov.au/domestic/domestic-tourism-results>

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2020 Crises: An Unprecedented Impact

Leading up to the crises of 2020, the Visitor Economy in South Australia was growing strongly with the record setting December 2019 result of \$8.1 billion in visitor expenditure. This was the achievement of some significant milestones one year early, including the headline target of \$8.0 billion, the regional target of \$3.55 billion and the Nature Based Tourism target of \$1.4 billion. The tourism jobs target of 41,000 was also very nearly achieved before the crisis began.

In early January 2020, when Australian attention was heavily focussed on the catastrophic bushfires, the COVID-19 crisis was beginning to spread outside of China. This was followed in March with mandatory quarantine requirements and border closures, resulting in significant impacts upon the international, intrastate and interstate markets.

The results for the year end March 2021 saw the visitor economy reach its lowest point of \$3.4 billion reflecting a full years' worth of COVID affected data. From this point on South Australia has begun to emerge from the full impact of the COVID-19 pandemic with June 2021 growing to \$5.8 billion and the year-end September 2021 reaching \$5.9 billion.

Total for year to September 2021

In the latest data to the year-end September 2021 we are starting to emerge from the full impact of the COVID-19 pandemic.

Total expenditure in the year to September 2021 was \$5.9 billion, down 27 per cent on the visitor economy high in December 2019 (\$8.1 billion).

Expenditure (\$)	South Australia				Australia		
	Year Ending Dec-19	Year Ending Sept-21	Change %	Market Share	Year Ending Dec-19	Year Ending Sept-21	Change %
International (\$m)	1,206	34	-97%	4.1%	31,438	812	-97%
Interstate (\$m)	2,656	1,726	-35%	8.8%	37,405	19,539	-48%
Intrastate (\$m)	2,555	2,671	5%	6.5%	43,287	41,408	-4%
Day Trips (\$m)	1,660	1,495	-10%	8.2%	26,338	18,257	-31%
Total Expenditure (\$m)	8,077	5,925	-27%	7.4%	138,469	80,015	-42%

There has been limited international visitors to South Australia in the past 12 months with border closures. This compares to only 18 months ago when the year end results for December 2019 saw both international visits and expenditure at record highs.

Current performance fell to \$34 million in the 12 months to September 2021, a decline of 97 per cent on December 2019. A small amount of international visitor expenditure has

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continued, due to a small number of visitors from New Zealand who visited during the brief window of border opening in May and June 2021.

Domestic overnight expenditure (intrastate and interstate) was down 16 per cent compared to the year-end December 2019. Interstate expenditure was down 35 per cent compared to intrastate that was up 5 per cent. With no international travel and a limited ability to travel interstate many South Australians have looked to holiday within the State.

South Australian Expenditure September 2021

Day Trips 25%

Intrastate 45%

Interstate 29%

International 1%

National Visitor Survey September 2021

Expenditure (\$m)	Australia			South Australia			
	Year Ending Dec-19	Year Ending Sept-21	Change (%)	Year Ending Dec-19	Year Ending Sept-21	Change (%)	Market Share
Interstate (\$m)	\$ 37,405	\$ 19,539	-48%	\$ 2,656	\$ 1,726	-35%	8.8%
Intrastate (\$m)	\$ 43,287	\$ 41,408	-4%	\$ 2,555	\$ 2,671	5%	6.5%
Day Trips (\$m)	\$ 26,338	\$ 18,257	-31%	\$ 1,660	\$ 1,495	-10%	8.2%
Total Domestic	\$ 107,030	\$ 79,203	-26%	\$ 6,871	\$ 5,892	-14%	7.4%

- South Australia attracted 6.1 million domestic overnight trips, down 29 per cent on December 2019.
- There were 23.3 million domestic nights in South Australia, a decline of 17 per cent on December 2019.
- Total domestic expenditure in South Australia was \$5.9 billion, down 27 per cent on the high of \$6.9 billion in December 2019.
- Day trips expenditure was down 10 per cent to \$1.5 billion.

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International Visitor Survey September 2021

	Australia			South Australia			
	Year Ending Dec-19	Year Ending Sept-21	Change (%)	Year Ending Dec-19	Year Ending Sept-21	Change (%)	Market Share
Visits (000s)	8,709	155	-98%	488	9	-98%	5.8%
Nights (000s)	274,477	10,425	-96%	10,938	423	-96%	4.1%
Expenditure (\$m)	31,438	812	-97%	1,206	34	-97%	4.1%

- International visits and expenditure in South Australia have fallen by 98 and 97 per cent respectively compared to December 2019 when both visits and expenditure were at record highs.
- Visitation has fallen by 98 per cent to 9,000.
- Expenditure has fallen by 97 per cent to \$34 million.
- Nights have fallen 96 per cent to 423,000.
- A small amount of international visitor expenditure is likely to have continued, driven by long staying visitors, primarily international students and those visiting friends and relatives. We've also seen a small increase in international visitor expenditure due to a small number of visitors from New Zealand who visited during the brief window of border opening in May and June 2021.
- International research conducted in 2020 shows that appeal for South Australia remains strong, but these markets cannot recover until COVID-19 is under control and the international borders have reopened.