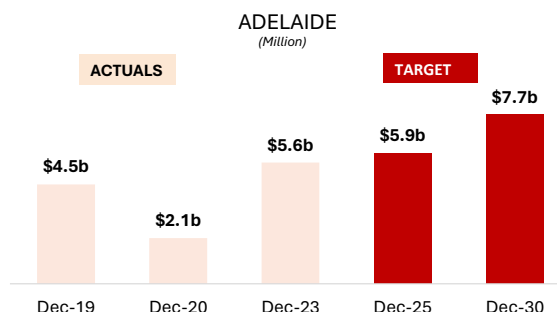




## OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2023

- Currently, Adelaide contributes \$5.6 billion to the year end December 2023 South Australian expenditure of \$10.1 billion.
- Adelaide has achieved 95 per cent of its 2025 target of \$5.9 billion and 73 per cent of their 2030 target of \$7.7 billion.



## ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2023

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
<b>Overnight Visits</b>	1,029,000	2,001,000	<b>3,030,000</b>	392,000	<b>3,422,000</b>
% of visits	30%	58%	<b>89%</b>	11%	<b>100%</b>
<b>Share of SA</b>	22%	74%	<b>41%</b>	89%	<b>44%</b>
<hr/>					
<b>% Across SA</b>	60%	35%	<b>94%</b>	6%	<b>100%</b>
<small>% Across SA: percentage of visits across total SA that are intrastate, interstate or international</small>					
<b>Nights</b>	2,415,000	7,696,000	<b>10,112,000</b>	11,797,000	<b>21,908,000</b>
% of nights	11%	35%	<b>46%</b>	54%	<b>100%</b>
<b>Share of SA</b>	18%	62%	<b>39%</b>	84%	<b>55%</b>
<hr/>					
<b>% Across SA</b>	33%	31%	<b>65%</b>	35%	<b>100%</b>
<small>% Across SA: percentage of nights across total SA that are intrastate, interstate or international</small>					
<b>Average Length of Stay</b>	2.3	3.8	<b>3.3</b>	30.1	<b>6.4</b>
<b>ALOS South Australia</b>	2.8	4.6	<b>3.5</b>	32.0	<b>5.1</b>
<hr/>					
<b>Total Expenditure</b>					<b>\$5,505,000,000</b>
<b>Overnight Expenditure</b>	\$2,317,000,000	\$1,227,000,000	<b>\$3,544,000,000</b>	\$1,094,000,000	<b>\$4,638,000,000</b>
<b>Day Trip Expenditure</b>					<b>\$867,000,000</b>
<hr/>					
<b>Domestic Day Trips</b>					<b>5,236,000</b>

- Adelaide saw 3.4 million overnight visitors for the year end December 2023.
- 30 per cent of overnight visitors were from intrastate, 58 per cent from interstate and 11 per cent from overseas.
- The 1.0 million intrastate overnight visitors stayed 2.4 million nights with an average length of stay of 2.3 nights.
- There were 2.0 million interstate overnight visitors who stayed 7.7 million nights with an average length of stay of 3.8 nights
- The region saw 392,000 international visitors with an average length of stay of 30.1 nights and spend of \$1.1 billion.
- 5.2 million day trips were taken to and within the Adelaide for the year with spend of \$867 million.

ALOS = Average Length of Stay



## PURPOSE

	Holiday	VFR	Business	Other	Total
<b>Overnight Visits</b>	1,023,000	1,344,000	755,000	320,000	<b>3,422,000</b>
% of visits	30%	39%	22%	9%	<b>100%</b>
Share of SA	32%	51%	45%	67%	<b>44%</b>
<b>% Across SA</b>	<b>41%</b>	<b>33%</b>	<b>21%</b>	<b>6%</b>	<b>100%</b>

<b>Nights</b>	4,112,000	10,916,000	2,021,000	4,860,000	<b>21,908,000</b>
% of nights	19%	50%	9%	22%	<b>100%</b>
Share of SA	33%	70%	33%	86%	<b>55%</b>
<b>% Across SA</b>	<b>31%</b>	<b>39%</b>	<b>15%</b>	<b>14%</b>	<b>100%</b>

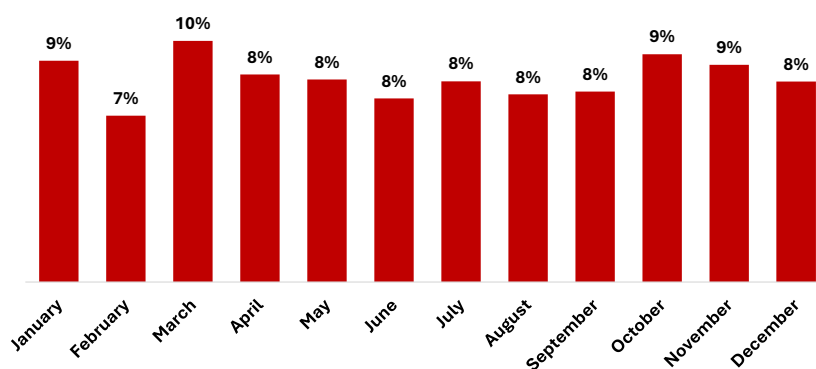
<b>Average Length of Stay</b>	<b>4.0</b>	<b>8.1</b>	<b>2.7</b>	<b>15.2</b>	<b>6.4</b>
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Expenditure					
<b>Annual Expenditure</b>	\$1,279,000,000	\$1,092,000,000	\$862,000,000	\$1,405,000,000	<b>\$4,638,000,000</b>
<b>Expenditure 2019</b>	\$951,000,000	\$733,000,000	\$847,000,000	\$1,338,000,000	<b>\$3,868,000,000</b>
<b>Av spend per night</b>	\$311	\$100	\$427	\$289	\$212
<b>Av spend per night SA</b>	\$253	\$103	\$245	\$290	\$198
<b>Share of SA</b>	3%	5%	1.3%	2%	3%

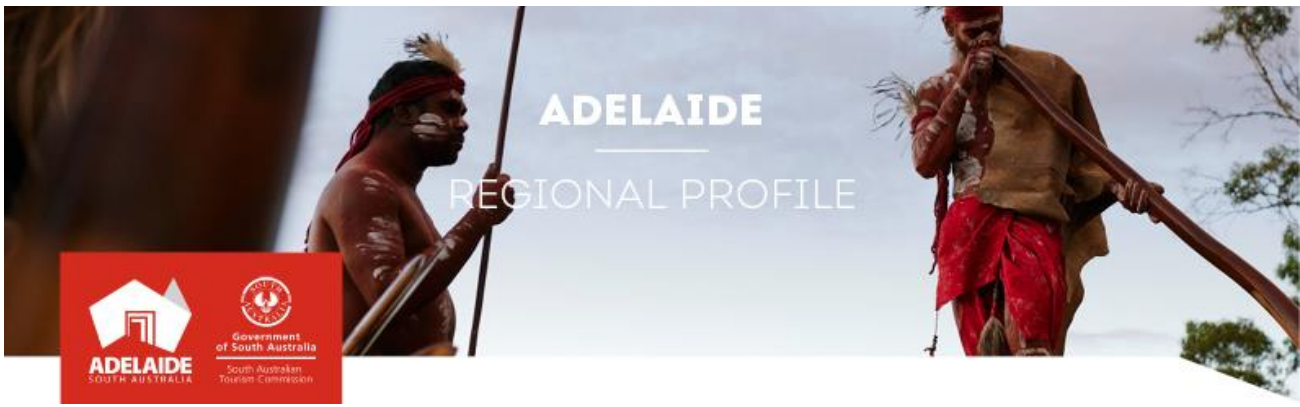
- 69 per cent of overnight visitors to Adelaide are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$311 per night compared to VFR visitors who spend \$100 per night.
- Leisure overnight visitors spent \$2.4 billion for the year, making up 51 per cent of all overnight expenditure.
- There are 755,000 business visitors who stay 2.0 million nights with spend of \$862 million.

## SEASONALITY

### SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO ADELAIDE

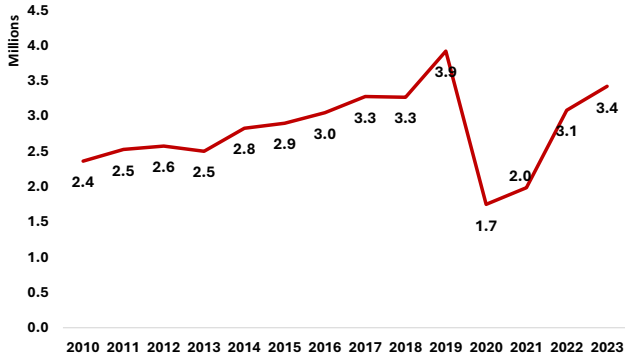


- National Visitor Survey data shows us that in 2023 January, March, October and November are the strongest months for visitation on the Adelaide.
- March is the busiest month for the year with the Fringe, Festival and the March long weekend.
- October and November also strong with school holidays and the conference season.

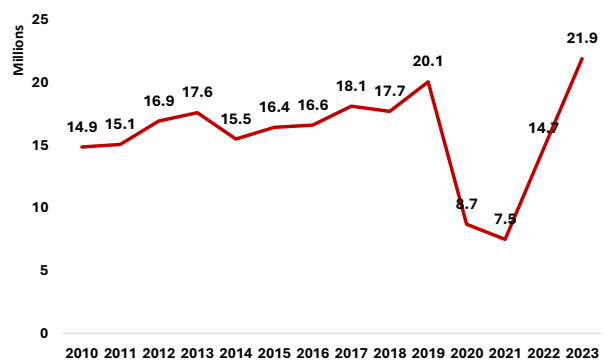


**TOTAL OVERNIGHT VISITATION 2010 - 2022**

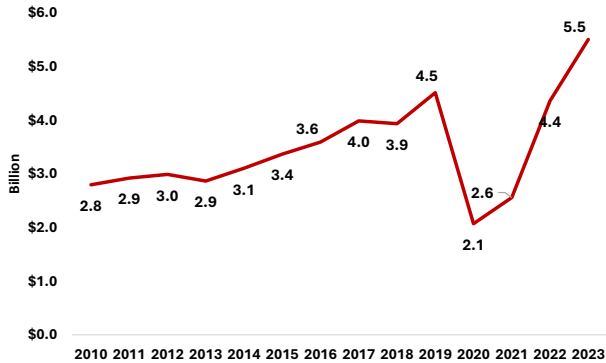
**VISITORS ADELAIDE 2010 - 2023 - International and Domestic**



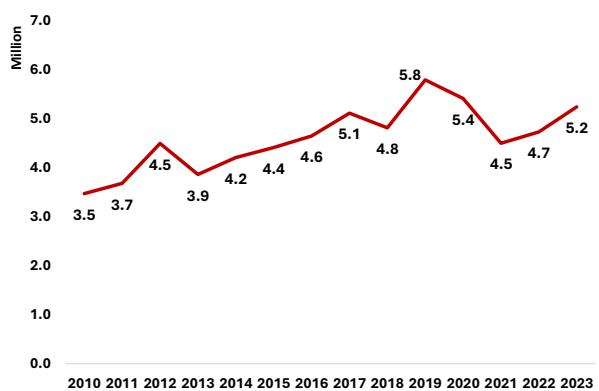
**NIGHTS ADELAIDE 2010 - 2023 - International and Domestic**



**TOTAL EXPENDITURE ADELAIDE 2010 - 2023 - International and Domestic**



**DAY TRIPS ADELAIDE 2010 - 2023 - 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-23	Change on Dec-19	Dec-23	Change on Dec-19
Adelaide	3,422,000	-13%	\$5,500,000,000	22%
Adelaide Hills	233,000	3%	\$293,000,000	42%
Barossa	343,000	8%	\$261,000,000	16%
Clare Valley	226,000	11%	\$191,000,000	62%
Eyre Peninsula	537,000	-8%	\$591,000,000	7%
Fleurieu Peninsula	868,000	-4%	\$837,000,000	50%
Flinders Ranges and Outback	761,000	-18%	\$610,000,000	19%
Kangaroo Island	205,000	-1%	\$280,000,000	47%
Limestone Coast	763,000	-2%	\$520,000,000	24%
Murray River, Lakes and Coorong	363,000	-20%	\$373,000,000	33%
Riverland	322,000	-25%	\$239,000,000	22%
Yorke Peninsula	530,000	-11%	\$384,000,000	60%
Regional SA	4,830,000	-7%	\$4,630,000,000	30%
<b>South Australia</b>	<b>7,835,000</b>	<b>-9%</b>	<b>\$10,140,000,000</b>	<b>25%</b>



**ADELAIDE TOURISM LISTINGS**

Category	# Listings
Event	434
Food & Drink	355
Attraction	182
Accommodation	165
Tour	140
Hire	26
Transport	16
General Services	8
Destination Information	4
Information Services	3
<b>Grand Total</b>	<b>1333</b>

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](https://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)

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

**ADELAIDE  
AUSTRALIAN TOURISM DATA WAREHOUSE  
LEADS  
859,000  
YEAR END DECEMBER 2023**



**TOP 5**

- ADELAIDE SHOWGROUND CARAVAN PARK
- BRIGHTON BEACHFRONT HOLIDAY PARK
- EOS BY SKYCITY
- LOST IN MOUNT OSMOND
- SKYLINE RETREAT
- DISCOVERY PARKS ADELAIDE BEACHFRONT

**TOP 5**

- RESTAURANT BOTANIC
- FUGAZZI BAR & DINING ROOM
- PENFOLDS MAGILL ESTATE RESTAURANT
- AFRICOLA
- 2KW BAR & RESTAURANT

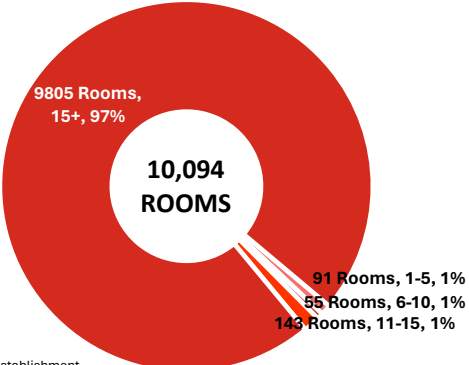
**TOP 5**

- THE GHAN
- ADELAIDE ZOO EXPERIENCES
- THE OVERLAND
- ADELAIDE HAUNTED HORIZONS GHOST TOURS
- TEMPTATION SAILING

Other refers to leads for events, destination information, attractions, general services, hire and transport

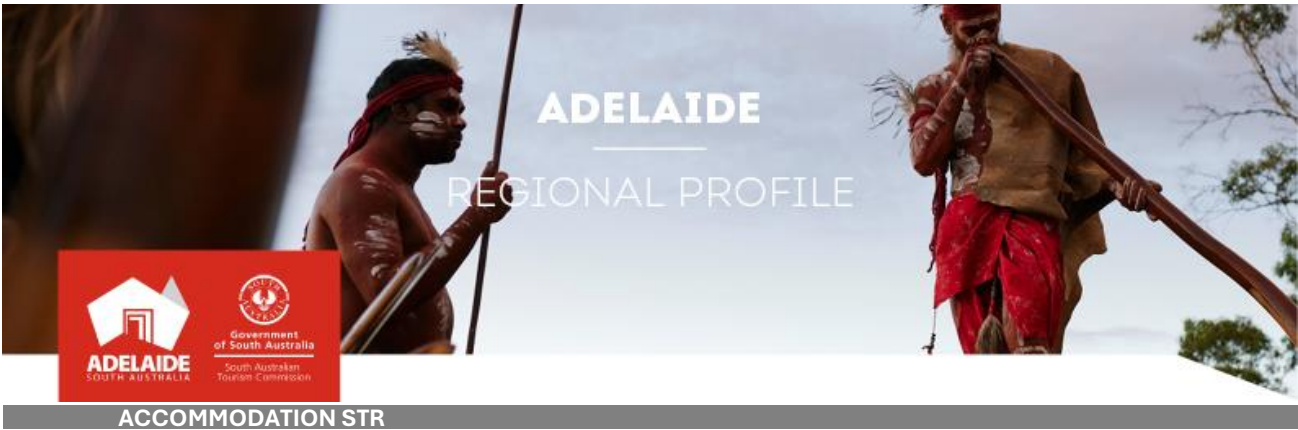
**ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE**

**ROOMS IN THE ADELAIDE  
SOURCE ATDW**



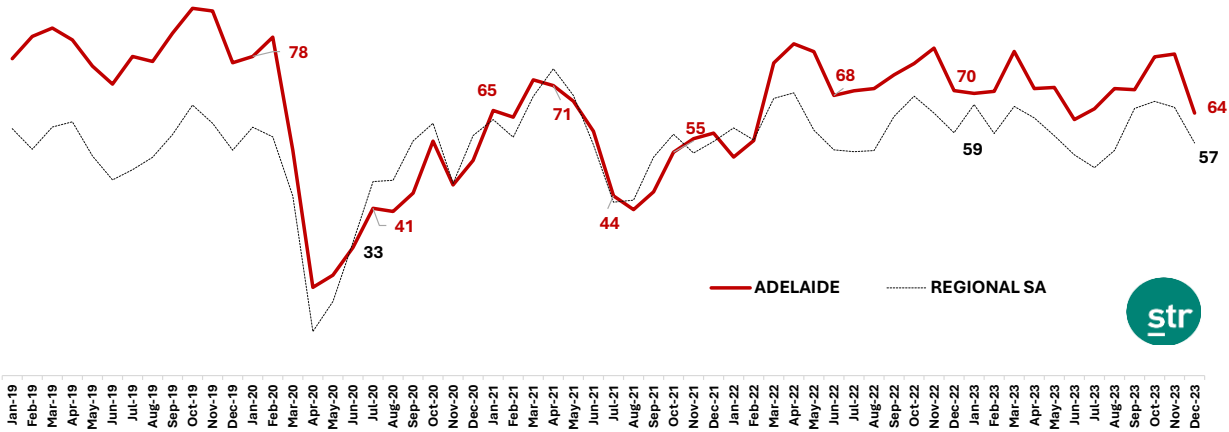
- Currently there are 161 establishments on Adelaide that accommodate guests.
- These 161 establishments account for 10,094 rooms across the region.
- 97 per cent of rooms fall into establishment with 15 or more rooms.
- 3 per cent of rooms fall into the 1-14 room establishments.

Rooms refers to rooms per establishment



**ACCOMMODATION STR**

**ACCOMMODATION OCCUPANCY REGIONAL SA**

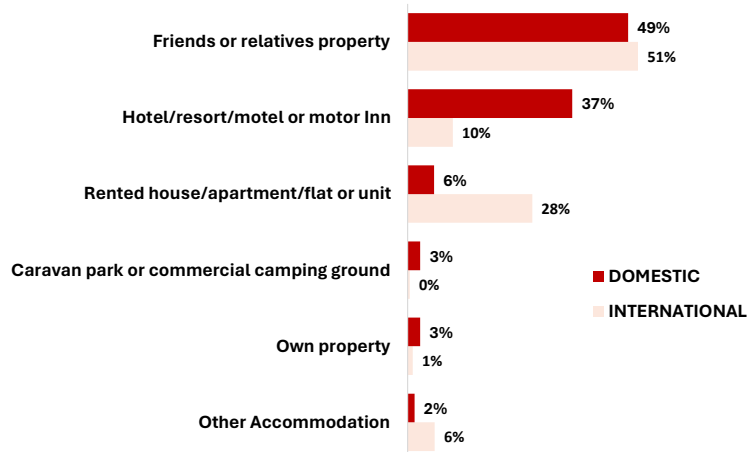


- Adelaide saw average occupancy of 81 per cent in 2019, this fell to 48 per cent in 2020, rose to 58 per cent in 2021, 71 per cent in 2022 and 71 per cent again in 2023.
- Adelaide occupancy in 2023 was down 10 percentage points on 2019, however it needs to be remembered that room stock has grown by 13 per cent, with an extra 1,200 new rooms across the Adelaide region.

**VISITOR USE OF ACCOMMODATION**

**ACCOMMODATION USED IN ADELAIDE FOR DOMESTIC AND INTERNATIONAL VISITORS**

- 49 per cent of domestic overnight visitor nights to Adelaide are spent with Friends or Relatives compared to the international average of 51 per cent.
- 37 per cent of domestic and 10 per cent of international visitors stayed in a Hotel/resort/motel or motor inn.
- 3 per cent of domestic visitors to the Adelaide stay in a caravan park.
- 6 per cent of domestic visitors and 28 per cent of international visitors stay in a rented house/apartment/flat or unit.

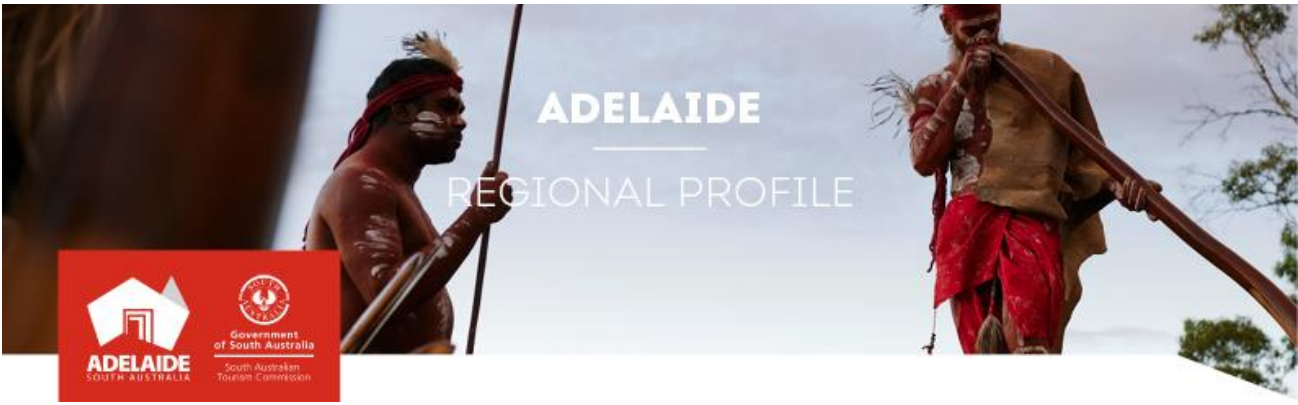


**TRANSPORT**



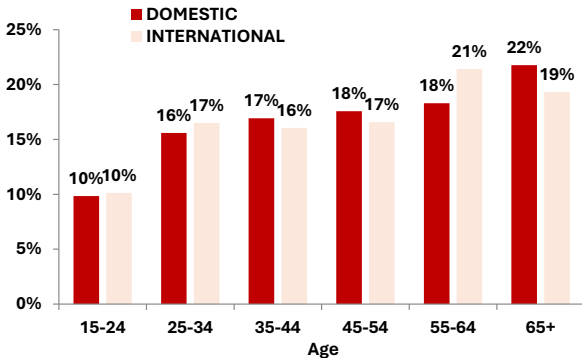
- The main method of transport used on trips to Adelaide was a self drive vehicle.
- 50% of visitors used this type of transport.
- 48% of visitors arrived by aircraft





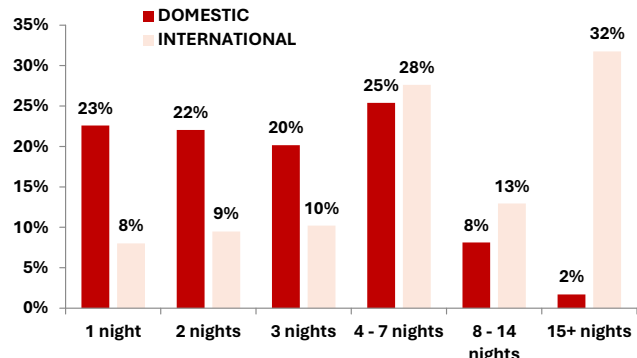
**VISITOR PROFILE**

**AGE OF VISITORS TO ADELAIDE**



- In the domestic market the 55+ is the strongest age group with 40 per cent of visitors.
- The International market is also strongest for the 55+ age group with 40 per cent of all visits.

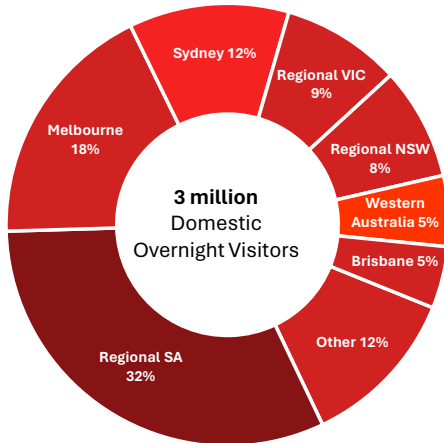
**LENGTH OF VISIT TO ADELAIDE**



- 45 per cent of domestic overnight visitors like to stay 1 to 2 nights. Domestic market also strong in the 4-7 nights with 25%.
- 28 per cent of international visitors stay 4-7 nights.
- 32 per cent stay longer than 15 nights driven by the education market.

**VISITOR ORIGIN**

**ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO ADELAIDE**

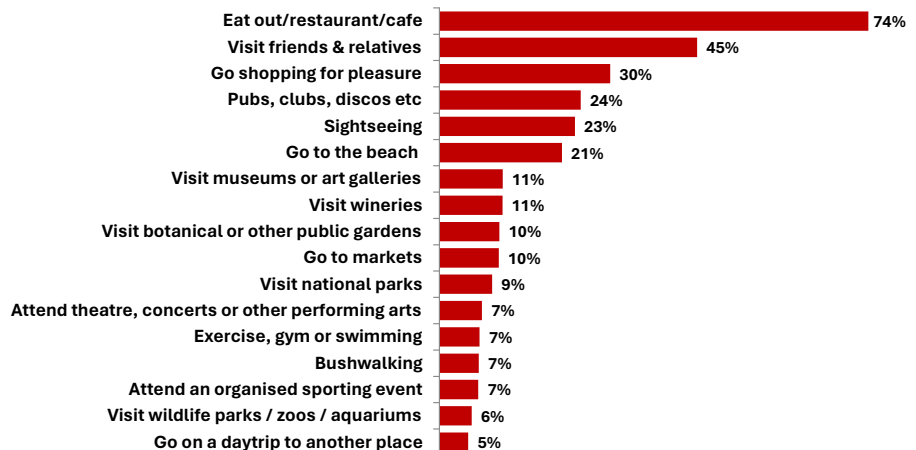


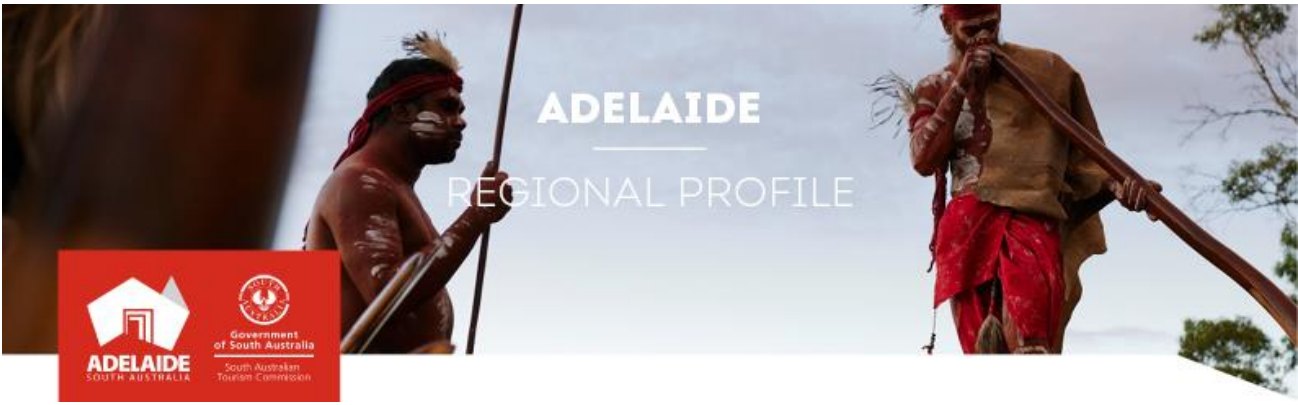
- Victoria at 27 per cent and New South Wales at 20 per cent are Adelaide's biggest interstate overnight domestic markets.
- Regional South Australia contributes 32 per cent of visitors to Adelaide.
- 5 per cent of visitors are from Brisbane and 5 per cent from Western Australia.

**VISITOR ACTIVITIES**

- The most popular activity when coming to Adelaide 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, going to the beach and seeing the sights.

**DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN ADELAIDE**





**REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION**

In 2021-22, the tourism industry contributed an estimated \$2.2 billion to the Adelaide economy and directly employed 16,600 people.

**Employment**

- 15,300 jobs for people employed directly by the tourism industry, 5,500 indirect jobs and a total employment impact of 20,800 people.

**Gross Value Added (GVA)**

- \$1.1 billion and \$700 million in direct and indirect tourism GVA, and \$1.8 billion in total tourism GVA.

**Gross Regional Product (GRP)**

- \$1.2 billion and \$899 million in direct and indirect tourism GRP and \$2.1 billion in total tourism GRP.

**Tourism Consumption**

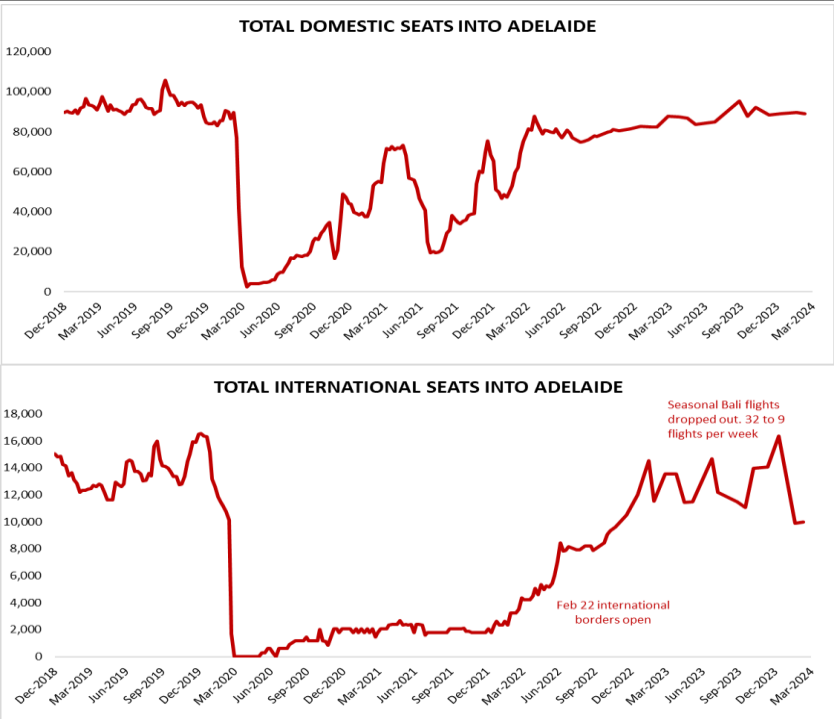
2021-22 Tourism products - directly consumed	
• Takeaway and restaurant meals	19%
• Shopping (including gifts and souvenirs)	16%
• Fuel (petrol, diesel)	11%
• Long distance passenger transportation	10%
• Accommodation services	10%
• Food products	7%
• Alcoholic beverages and other beverages	7%
• Recreational, cultural and sporting services	6%

**Tourism Employment**

2021-22 Tourism Industries - 15,300 directly employed	
• Cafes, restaurants and takeaway food services	32%
• Retail trade	21%
• Accommodation	10%
• Air, water and other transport	10%
• Travel agency and tour operator services	7%
• Clubs, pubs, taverns and bars	7%
• Other sports and recreation services	5%
• All other industries	3%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2022

**AIRLINE DATA**



- Domestic seats have recovered well and are back to similar levels as to the pre-COVID 2019.
- The domestic market has seen strong recovery since early 2022.
- International seats have recovered well, however still below 2019 levels.
- This was predicted as we are still waiting on Emirates, China Southern and Cathay Pacific to return whilst also exploring new airlines from the US and Japan.

Prepared by the South Australian Tourism Commission, December 2023  
 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 2023.  
 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