2024-2025 REGIONAL TOURISM SATELLITE ACCOUNT

Regional Tourism Satellite Account

The 2024–25 State Tourism Satellite Account (STSA) provides the most comprehensive measure of tourism's economic contribution to South Australia, including Gross State Product (GSP), Gross Value Added (GVA) and tourism employment (filled jobs). The latest results incorporate significant methodological improvements, including Tourism Research Australia's new Domestic Tourism Statistics (DoTS) system, revisions to the National Tourism Satellite Account and a new sub-national modelling framework, resulting in a more robust, accurate and timely assessment of tourism's contribution to the economy. As part of these revisions, historical estimates have been updated and are not directly comparable with previous releases.

The impact of these methodological revisions is evident in the tourism employment data. South Australia's previously reported 2023–24 tourism employment estimate has been revised from 41,600 to 38,600 filled jobs, reflecting changes in methodology rather than a decline in tourism employment. The revised historical series enhances the consistency and comparability of tourism economic measures, supporting more accurate trend analysis from 2018–19 onwards.

The Introduction of the Domestic Tourism Statistics (DoTS)

Tourism Research Australia (TRA) has introduced a major update to its domestic tourism data collection. From 1 January 2025, the new Domestic Tourism Statistics (DoTS) replaced the National Visitor Survey (NVS), combining traditional survey methods with large-scale mobile phone mobility data to deliver more accurate, reliable and geographically detailed tourism insights.

The introduction of DoTS, together with revisions to the Australian Bureau of Statistics' National Tourism Satellite Account (NTSA), has resulted in revisions to Tourism Satellite Account (TSA) estimates. As a result, newly published State Tourism Satellite Account (STSA) figures are not directly comparable with previously released results.

To support trend analysis, TRA has back cast state and territory TSA estimates to 2018–19 using the new methodology. This same back cast has not been done for the Regional Tourism Satellite Accounts.

The updated model provides a more rigorous and flexible framework, allowing key inputs such as population growth to be updated and enabling more timely delivery of

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STSA results in future years. It also introduces additional reporting on tourism employment, including the gender composition of the workforce and the distribution of employment across tourism-related industries.

TRA has also developed a new integrated sub-national model for STSA and RTSA reporting. The model applies a consistent methodology across state and regional levels, can be updated over time, and is benchmarked to the NTSA, providing more cohesive, consistent and timely estimates of tourism's economic contribution across Australia.

The rest of this document refers to the South Australian results for the Regional Tourism Satellite Account 2024-25.

Employment

Employment in South Australia's tourism industry grew by 1.4 per cent to 39,200 people in the year to June 2025. This follows a modest decline of 1.8 per cent in 2023–24 and suggests the visitor economy has stabilised following the strong post-pandemic rebound experienced in 2022–23.

From year end 2023-24 to year end 2024-25, Adelaide has seen modest growth with jobs up 1.7 per cent from 24,200 to 24,600. Adelaide remained the state's largest tourism employment market, accounting for 24,600 jobs or 3.1 per cent of total employment in the region.

Regional South Australia experienced minimal growth in 2024-25, up 0.9 per cent on 2023-24 from 14,400 to 14,500. Eight of the eleven regions showed growth in employment with Kangaroo Island the strongest, increasing by 8.8 per cent to 500. This was followed by the Limestone Coast, up 4.8 per cent to 1,900, the Clare Valley up 3.7 per cent to 400 and the Yorke Peninsula up 3.3 per cent to 1,500.

In contrast to this, we saw decline from the Murray River Lakes and Coorong, down 5.8 per cent, the Flinders Ranges and Outback, down 3.6 per cent and the Eyre Peninsula down 1.5 per cent.

Table 1: Direct Tourism Employment compared to 2024-25 and 2023-24

Tourism region	Filled jobs ('000)	% change on 23-24
Adelaide	**24.6**	**1.7%**
Regional South Australia	**14.5**	**0.9%**
Adelaide Hills	1.3	0.8%
Barossa	1.4	2.5%

Clare Valley	0.4	3.7%
Eyre Peninsula	1.6	-1.5%
Fleurieu Peninsula	2.4	1.9%
Flinders Ranges and Outback	1.5	-3.6%
Kangaroo Island	0.5	8.8%
Limestone Coast	1.9	4.8%
Murray River, Lakes and Coorong	1.1	-5.8%
Riverland	0.9	0.0%
Yorke Peninsula	1.5	3.3%
South Australia	**39.2**	**1.4%**

While the South Australian Tourism Commission bases its targets on the direct employment figures, the report also includes estimates of indirect employment that represents an additional 30,700 jobs across South Australia.

Gross Regional Product (GRP)

Overall GRP in 2024-25 for South Australia compared to 2023-24 rose by 2.2 per cent with Adelaide up 3.0 per cent in this period to $2.9 billion. In Regional South Australia, the GRP increased 0.8 per cent to $1.6 billion.

Seven of the eleven regions saw growth, with the Limestone Coast up 4.5 per cent, the Yorke Peninsula up 4.1 per cent, the Barossa up 3.4 per cent and Kangaroo Island up 2.6 per cent. There was also growth in the Fleurieu Peninsula, the Clare Valley and the Riverland. The largest decline came from the Murray River Lakes and Coorong down 3.4 per cent, Eyre Peninsula down 3.0 per cent and the Flinders Ranges and Outback down 2.7 per cent. In addition to this there was a minor decline in the Adelaide Hills of 0.8 per cent.

Regional Contribution of Tourism

In looking at the distribution of tourism's economic contribution and tourism employment across South Australia's regions, there are two ways of considering the data:

- Consider the amount that the region contributes to the overall tourism value for the state (i.e., tourism in Kangaroo Island contributes 1.4 per cent of the State's tourism GRP)
- Consider the proportion of contribution tourism makes to that regional economy (i.e., tourism contributes 14.9 per cent of the total GRP for Kangaroo Island).

Importantly, it is the second of these, tourism's share of the regional economy, which demonstrates the economic importance of the tourism industry to a specific region, and that is the figure presented in the Table 2 below.

The following table provides the direct contribution of tourism to each of South Australia's regions in terms of GRP and employment.

Table 2: Direct Tourism Impact GRP and Employment 2024-25

Tourism region	Gross regional product ($m)		Filled jobs (000)	
Adelaide	**$2,914**	**2.5%**	**24.6**	**3.1%**
Regional South Australia	**$1,617**	**4.1%**	**14.5**	**5.4%**
Adelaide Hills	$117	2.5%	1.3	4.0%
Barossa	$128	4.1%	1.4	6.1%
Clare Valley	$45	4.4%	0.4	5.4%
Eyre Peninsula	$186	3.8%	1.6	5.2%
Fleurieu Peninsula	$270	5.1%	2.4	6.3%
Flinders Ranges and Outback	$151	2.2%	1.5	4.3%
Kangaroo Island	$62	14.9%	0.5	16.9%
Limestone Coast	$208	3.8%	1.9	4.7%
Murray River, Lakes and Coorong	$149	5.4%	1.1	5.2%
Riverland	$115	4.6%	0.9	4.9%
Yorke Peninsula	$187	6.8%	1.5	7.8%
South Australia	**$4,531**	**2.9%**	**39.2**	**3.7%**

Origin share of tourism consumption

Tourism consumption is the total value of tourism goods and services consumed by residents and overseas visitor spread across the main tourism related products. It also includes imputation of the costs of services consumed in activities that are free of charge (i.e., museums and nature parks).

The following analysis looks at the sources of tourism consumption across different regions. This highlights the extent to which each region is dependent on a particular market for overall tourism consumption.

Kangaroo Island and Adelaide are the most exposed regions to the international market, in 2024-25 with 43 per cent and 22 per cent respectively of all international consumption in South Australia.

Table 3: Origin Share of Tourism Consumption 2024-25

Tourism Region	Same-day travel	Domestic overnight	Domestic	International overnight
Adelaide	**21%**	**57%**	**78%**	**22%**
Regional South Australia	**21%**	**73%**	**94%**	**6%**
Adelaide Hills	35%	60%	95%	5%
Barossa	48%	48%	96%	4%
Clare Valley	20%	77%	97%	3%
Eyre Peninsula	12%	85%	97%	3%
Fleurieu Peninsula	21%	74%	95%	5%
Limestone Coast	22%	73%	94%	6%
Murray River, Lakes and Coorong	24%	75%	98%	2%
Riverland	16%	80%	95%	5%
Yorke Peninsula	16%	79%	95%	5%
Flinders Ranges and Outback	16%	78%	94%	6%
Kangaroo Island	5%	52%	57%	43%
South Australia	**21%**	**63%**	**84%**	**16%**

Publication of Results

The results will be published as interactive online factsheets hosted on the Tourism Research Australia website. The South Australian Tourism Commissions corporate website will provide a link to this site to enable access to the detailed information for each region.

SUMMARY/CONCLUSION

The 2024–25 Regional Tourism Satellite Account shows South Australia's visitor economy has entered a period of stabilisation following the strong post-pandemic recovery. Tourism directly supported 39,200 jobs and generated $4.5 billion in direct GRP, with modest growth in both employment (+1.4 per cent) and economic output (+2.2 per cent).

Performance was generally positive across the state, with most regions recording growth in employment and tourism output. Adelaide remained the largest contributor to tourism activity, while regional destinations continued to benefit from tourism's significant economic contribution.

Tourism remains particularly important to regional economies, with Kangaroo Island, Yorke Peninsula, Fleurieu Peninsula and Murray River, Lakes and Coorong recording the highest dependence on tourism as a share of their local economies. Overall, the results reinforce tourism’s role as a major economic driver for South Australia, supporting jobs, businesses and regional communities across the state.

NOTES ON THE RESULTS

Note that in public reporting, the SATC consistently reports visitor expenditure, as reported by the IVS and DoTS as our primary performance metrics. Aside from the jobs figures provided in this report, the dollar figures are regarded as secondary metrics and useful primarily in comparing the Visitor Economy to other sectors on a like-for-like basis. To avoid confusion to more general audiences, we recommend continuing to report visitor expenditure as the primary metric of tourism impact in South Australia.

The 2024–25 Regional Tourism Satellite Account is the first to be produced using Tourism Research Australia's updated modelling framework, which incorporates the new DoTS data collection. By combining traditional survey data with mobile phone mobility data, DoTS provides a more accurate and detailed measure of domestic travel and underpins revised Tourism Satellite Account estimates. As a result, current results are based on a new methodology and are not directly comparable with previously published Tourism Satellite Account figures.

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