

# ADELAIDE

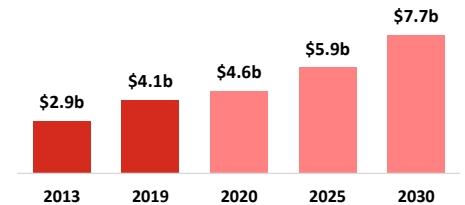
## REGIONAL PROFILE



### OVERVIEW

ALL DATA BASED ON THE ANNUAL AVERAGE FOR THE 3 YEARS TO THE YEAR END DECEMBER 2019 AND RELATES TO DATA PRIOR TO COVID-19 RESTRICTIONS

- At December 2019 56 per cent of visitor expenditure occurs in Adelaide with 44 per cent in Regional South Australia, far in excess of the 23 per cent of the South Australian population that live in regions.
- At December 2019 Adelaide has achieved 89 per cent of their 2020 target of \$4.6 billion and 53 per cent of their 2030 target of \$8.1 billion.



### Annual Visitor Summary December 2017 - December 2019

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	1,145,000	1,922,000	3,068,000	421,000	3,489,000
%	37%	63%	88%	12%	100%
Nights	2,849,000	7,037,000	9,886,000	8,738,000	18,624,000
%	29%	71%	53%	47%	100%
Average Length of Stay	2	4	3	21	5
Day Trips					
Average Annual Day Trips to Adelaide					5,234,000

PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	1,022,000	1,183,000	882,000	434,000	3,489,000
%	29%	34%	25%	12%	100%
Nights	4,077,000	6,472,000	2,484,000	5,591,000	18,624,000
%	22%	35%	13%	30%	100%
Average Length of Stay	4	5	3	13	5
Expenditure					
Average Annual Expenditure	\$ 1,225,000,000	\$ 810,000,000	\$ 793,000,000	\$ 1,317,000,000	\$ 4,100,000,000

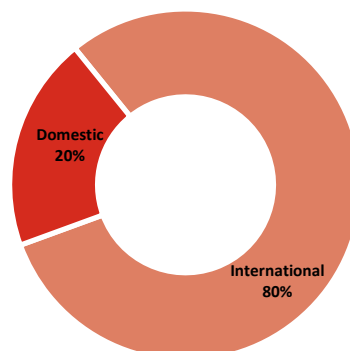
- 88 per cent of Adelaide visitors are Domestic visitors and 12 per cent are **International** visitors.
- Domestically, 37 per cent are from within the state compared to 63 per cent from **Interstate**.
- 63 per cent of visitors to Adelaide are either visiting friends and relatives or on a holiday.

### ADELAIDE TOURISM LISTINGS

Category	Adelaide Region
Event	423
Food and Drink	186
Accommodation	161
Attraction	149
Tour	109
Hire	20
General Services	9
Transport	6
Destination Information	4
Information Services	2
Journey	1
Grand Total	1070

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

### ADELAIDE MEDIA COVERAGE



Source: Advertising Space Rate - SATC Internal - 2018

# ADELAIDE

## REGIONAL PROFILE



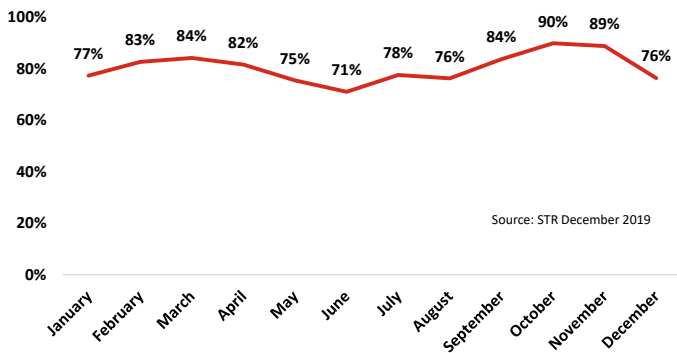
### ACCOMMODATION SUPPLY

#### Hotels, Motels and Service Apartments with 10+ rooms

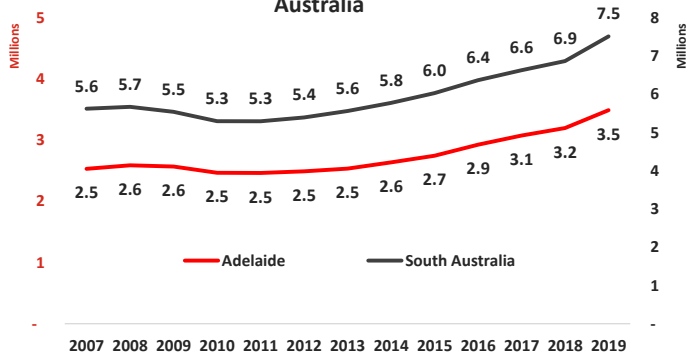
Establishments	127
Rooms	9,086
Occupancy	80%
Takings	\$27,644,000

- Average occupancy for the year is 80 per cent over 127 establishments and 9,086 rooms.
- The peak months are October and November with occupancy of 90 and 89 per cent.
- Low point of the year is during the Winter months with June at 72 per cent occupancy.

#### Monthly Occupancy Year end December 2019

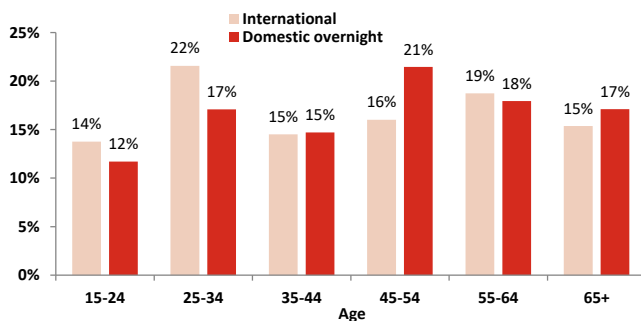


#### Total Overnight Visitation to Adelaide & South Australia

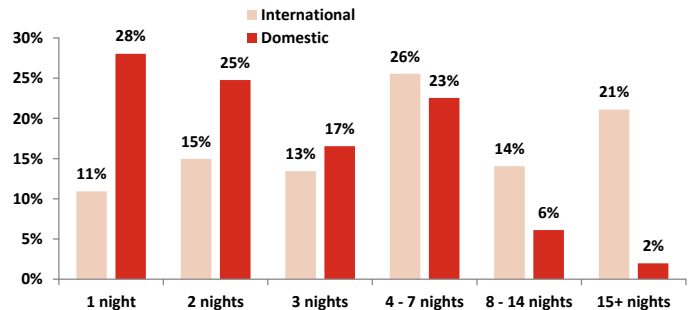


### VISITOR PROFILE

#### Age of Visitors to Adelaide



#### Length of Visit to Adelaide



- International visitors peak in the 25-34 age group at 22 per cent.
- Domestically age is pretty consistent, with a higher incidence in the 45-54 age group at 21 per cent.

- International visitors prefer to stay 4-7 nights in Adelaide.
- 53 per cent of Domestic visitors stay 1-2 nights in Adelaide.

# ADELAIDE

## REGIONAL PROFILE



### DOMESTIC VISITOR PROFILE

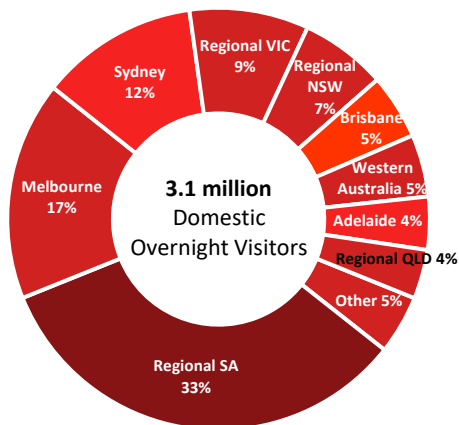
Purpose	Holiday	VFR	Other	Total
Visits	810,000	1,050,000	1,228,000	3,067,000
%	26%	34%	40%	100%
Nights	2,686,000	3,721,000	3,479,000	9,885,000
%	27%	38%	35%	100%
ALOS	3	4	3	3

### INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	211,000	134,000	87,000	421,000
%	50%	32%	21%	100%
Nights	1,392,000	2,751,000	4,595,000	8,738,000
%	16%	31%	53%	100%
ALOS	7	21	53	21

### VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Adelaide



Origin of International Visitors to Adelaide



- Melbourne, at 17 per cent and Sydney at 12 per cent are Adelaide's biggest Domestic Markets.
- Regional South Australia contributes 33 per cent of visitors to Adelaide.
- Internationally, Europeans and Asians contribute 73 per cent of the visits to Adelaide.
- The Asian market is becoming more important to Adelaide and South Australia with its close proximity and direct flights.
- Individually the biggest international markets are the United Kingdom 14 per cent, China 14 per cent, the United States 11 per cent, and New Zealand 8 per cent.

# ADELAIDE

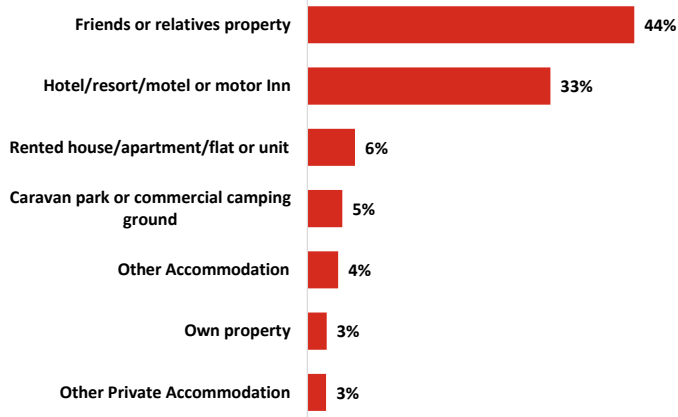
## REGIONAL PROFILE



### VISITOR USE OF ACCOMMODATION

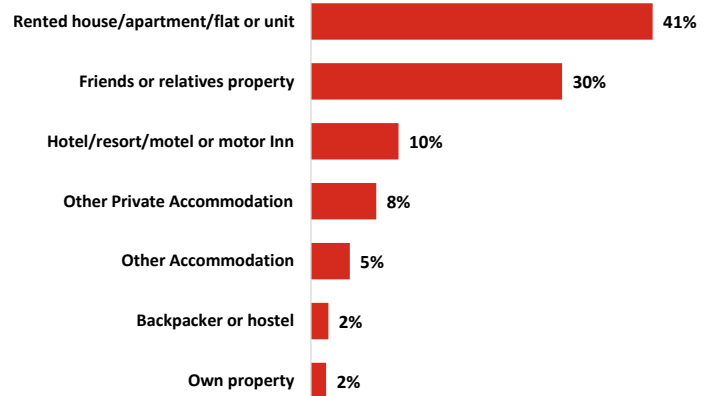
#### Accommodation used in Adelaide for Domestic

##### Visitors



#### Accommodation used in Adelaide for International

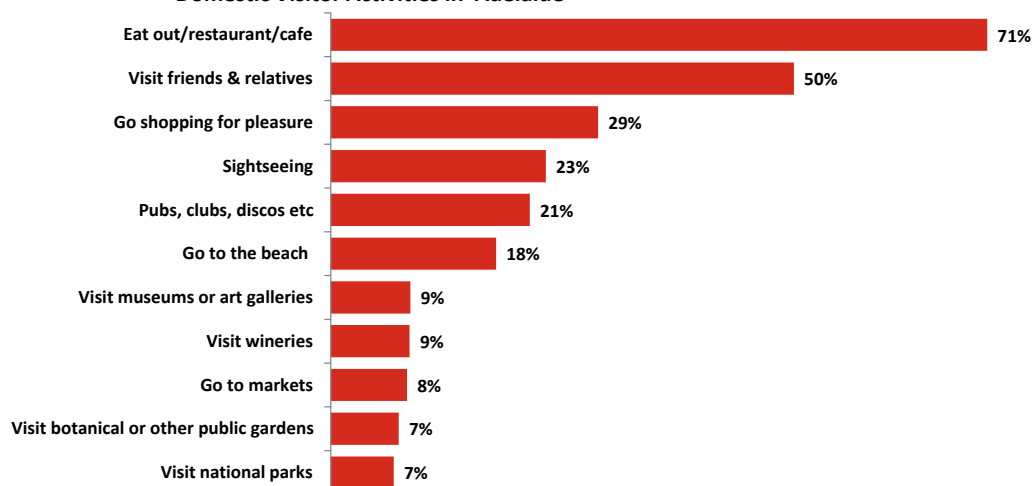
##### Visitors



- 77 per cent of **Domestic** visitor nights in Adelaide are spent either with Friends or Relatives or in Hotels and similar accommodation.
- **International** visitors spend 71 per cent of visitor nights staying in a rented houses/apartment/falt or unit or with Friends or Relatives.
- 2 per cent of **international** visitor nights are in Backpacker accommodation.

### VISITOR ACTIVITIES

#### Domestic Visitor Activities in Adelaide



- The most popular activity when coming to Adelaide is to eat out or visit friend or relatives.
- Other popular activities include going to the beach, visiting wineries, going to the markets and undertaking cultural experiences.

# ADELAIDE

## REGIONAL PROFILE



### REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2017-18, the tourism industry contributed an estimated \$7.0 billion to the Adelaide regional economy and directly employed approximately 22,000 people.

#### Employment

- 22,000 jobs for people employed directly by the tourism industry, 10,000 indirect jobs and a total employment impact of 32,000 people.

#### Tourism output

- \$3.7 billion and \$3.2 billion in direct and indirect tourism output, and \$7.0 billion in total tourism output.

#### Gross Value Added (GVA)

- \$2.0 billion and \$1.4 billion in direct and indirect tourism GVA, and \$3.4 billion in total tourism GVA.

#### Gross Regional Product (GRP)

### REGIONAL INSIGHTS

#### Domestic

- Adelaide is associated with 'quality food and wine' especially among high income earners.
- Visiting wineries is an important activity for domestic visitors. Arts and culture is a close second.
- People like the proximity of Adelaide to the near by regions such as the Barossa and the Adelaide Hills.

#### International

- Internationally Adelaide is ranked at number 6 for good food and wine, clearly the highest with New Zealanders who have a greater awareness of Australian destinations.
- Germany and the UK rank Adelaide in the top 5 for food and wine.
- Internationally, Adelaide and surrounds rank as the top destination for International visitors, followed by Kangaroo Island. This is largely due to its accessibility and ability to be used as a hub from which to travel regionally.

#### Aviation

- Adelaide Airport currently has 9 international airlines flying direct, equating to 13,000 seat per week.
- 63 per cent of all visitors to the state arrive through Adelaide airport.

#### CBD Occupancy

- Occupancy driven by events such as the Santos Tour Down Under, 86 per cent, the Superloop Adelaide 500, 87 per cent and the Fringe and Festival in February and March.

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

Prepared by the South Australian Tourism Commission, December 2019

**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 2017 to December 2019.

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. 86 35455001.  
Consumer Demand Product Testing Phase 1 - BDA Marketing



# Tourism Champions Case Study

# MAJESTIC HOTELS GROUP, ADELAIDE



## ABOUT THE MAJESTIC HOTELS GROUP

Established in 1986, the Majestic Hotels Group is a local family owned and operated business.

The Majestic Hotels Group was born when the Culshaw family opened the Apartments on the Park in the Adelaide CBD, becoming the first serviced apartments in South Australia.

Eoin Loftus, Chief Executive Officer of the Culshaw Group of Companies incorporating the Majestic Hotels Group has been with the company for 24 years, starting his career with the group as a Porter.

## BUSINESS GROWTH

For over 30 years the business has enjoyed growth – starting with one property and 25 employees to five properties and 140 employees across the state today.

The Majestic Hotels Group portfolio consists of:

- ▶ Majestic Roof Garden Hotel (Adelaide CBD)
- ▶ Culshaw's Restaurant (Adelaide CBD)
- ▶ Majestic Minima Hotel (North Adelaide)
- ▶ Majestic Old Lion and Tynte Street Apartments (North Adelaide)
- ▶ Majestic Oasis Apartments (Port Augusta)

Recognised at many industry awards.

Most recently at the 2017 South Australian Tourism Awards, Owner, John Culshaw won the Outstanding Contribution by an Individual award for creating an estimated 1,000 jobs over the past 30 years.

## CHALLENGES

Providing consistency for customers across five different properties so they always receive the same service, wherever they are. This is delivered by providing staff with continuous professional development.

## THE FUTURE

Developing a new 84 room Majestic All Suite Hotel in North Adelaide, due to open in 2020. This \$50 million project will create opportunity for 35 additional staff.

Continue to invest in staff to retain them for the long-term. Out of 140 employees, 19 have been with the group for 10 years or more.

Further grow occupancy across all the Majestic Hotels Group properties.

## COMMUNITY IMPACT

Over 50 per cent of the mini bar at the Majestic Roof Garden Hotel is made up of South Australian products such as Robern Menz Fru Chocs, Charlesworth Nuts and O'Leary Walker Wines.

'Dare to care' initiative where care packages are provided to the homeless in Adelaide's South Parklands.

Money is raised for these care packages through fundraising activities. For every bottle of Majestic Hotels Group bottled water that is sold, up to \$1 is donated to this cause.

*"We have enjoyed a great relationship with the South Australian Tourism Commission over the years. With SATC support, we were able to transform the Majestic Minima Hotel into a unique art hotel and it's been going from strength to strength."*

*"I've spent over 20 years working in South Australia's tourism industry and I absolutely love it. The industry is very collaborative and is focussed on helping the state win, not just individual businesses."*

*Eoin Loftus, Chief Executive Officer of the Culshaw Group of Companies incorporating the Majestic Hotels Group*

## SOUTH AUSTRALIAN TOURISM COMMISSION COLLABORATION

Received SATC funding in 2012-13 to turn the Majestic Minima Hotel into a world first art hotel. Around 46 rooms were transformed by over 40 South Australian artists.

Hosted media at the Majestic Hotels Group through the SATC's familiarisations program resulting in local, national and international media coverage.



Government of South Australia

South Australian Tourism Commission