

# ADELAIDE HILLS

## REGIONAL PROFILE

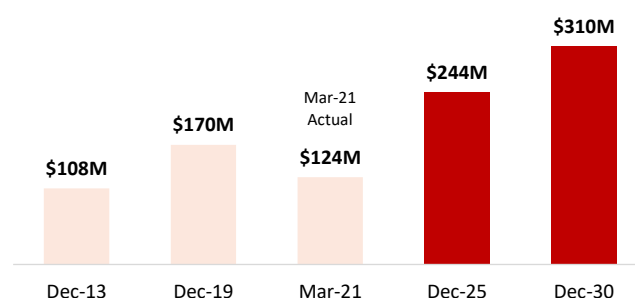


### OVERVIEW

ALL DATA BASED ON THE YEAR END MARCH 2021 - FULL YEARS WORTH OF COVID AFFECTED DATA

### ADELAIDE HILLS

- Currently the Adelaide Hills contributes \$124 million to the year end March 2021 South Australian expenditure of \$4.4 billion.
- The Adelaide Hills has achieved 51 per cent of their 2025 target of \$244 million and 40 per cent of their 2030 target of \$310 million.



### ANNUAL VISITOR SUMMARY YEAR END MARCH 2021

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
<b>Overnight Visits</b>	94,000	40,000	<b>134,000</b>	-	<b>134,000</b>
%	70%	30%	<b>100%</b>	0%	<b>100%</b>
% Across all regions	90%	10%	<b>100%</b>	0%	<b>100%</b>
Share of Regional SA	2%	9%	<b>3%</b>	0%	<b>3%</b>
<b>Nights</b>	149,000	270,000	<b>419,000</b>	0%	<b>419,000</b>
%	36%	64%	<b>100%</b>	0%	<b>100%</b>
% Across all regions	82%	18%	<b>100%</b>	0%	<b>100%</b>
Share of Regional SA	1%	10%	<b>3%</b>	0%	<b>3%</b>
<b>ALOS</b>	1.6	6.8	<b>3.1</b>	-	<b>3.1</b>
<b>ALOS Regional SA</b>	3.2	6.0	<b>3.5</b>	-	<b>3.5</b>
<b>Total Expenditure</b>					<b>124,000,000</b>
Overnight Expenditure	\$23,000,000	\$29,000,000	<b>\$52,000,000</b>	\$0	<b>\$52,000,000</b>
Day Trip Expenditure					<b>\$72,000,000</b>
<b>Domestic Day Trips</b>					<b>1,149,000</b>

- The Adelaide Hills saw 134,000 domestic overnight visitors for the year end March 2021.
- 70 per cent of overnight visitors were from intrastate and 30 per cent from interstate.
- The 94,000 intrastate overnight visitors stayed 149,000 nights with an average length of stay of 1.6 nights.
- There were 40,000 interstate overnight visitors who stayed 270,000 nights with an average length of stay of 6.8 nights
- There have been no international arrivals with borders closed.
- 1.2 million day trips were taken to the Adelaide Hills for the year with spend of \$72 million.

# ADELAIDE HILLS

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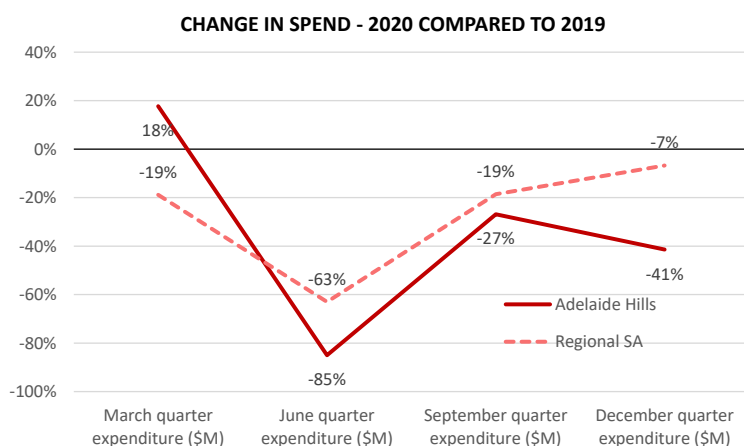


### PURPOSE

	Holiday	VFR	Business	Other	Total
<b>Overnight Visits</b>	58,000	47,000	15,000	16,000	<b>134,000</b>
%	43%	35%	11%	12%	<b>100%</b>
% Across all regions	56%	22%	18%	5%	<b>100%</b>
Share of Regional SA	2%	9%	3%	0%	<b>3%</b>
<b>Nights</b>	104,000	224,000	47,000	44,000	<b>419,000</b>
%	25%	53%	11%	11%	<b>100%</b>
% Across all regions	58%	18%	20%	3%	<b>100%</b>
Share of Regional SA	1%	8%	2%	9%	<b>3%</b>
<b>Average Length of Stay</b>	1.8	4.8	3.1	2.8	<b>3.1</b>
<b>Expenditure</b>					
Annual Expenditure	\$24,000,000	\$18,000,000	\$3,000,000	\$7,000,000	<b>\$52,000,000</b>
Av spend per night	\$231	\$80	\$64	\$159	\$124
Av spend per night Regional SA	\$213	\$126	\$132	\$511	\$191
Share of Regional SA	4%	9%	1%	4%	<b>4%</b>

- 78 per cent of overnight visitors to the Adelaide Hills are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$231 per night compared to VFR visitors who spend \$80 per night.
- Leisure overnight visitors spent \$42 million for the year, making up 81 per cent of all overnight expenditure.

### SPEND 2020 VERSUS 2019



- March quarter 2020 prior to COVID-19 was up on the March quarter in 2019.
- The Adelaide Hills saw expenditure fall by 85 per cent for the June quarter in 2020 compared to June quarter in 2019.
- The September quarter recovered to 27 per cent down on 2019.
- The December 2020 quarter was down 41 per cent compared to the December quarter in 2019.



## ADELAIDE HILLS TOURISM LISTINGS

Category	# Listings
RESTAURANT	91
ACCOMMODATION	70
ATTRACTION	59
TOUR	27
EVENT	26
DESTINATION INFORMATION	8
HIRE	5
GENERAL SERVICE	2
INFORMATION	1
TRANSPORT	1
<b>Grand Total</b>	<b>290</b>

*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](http://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

**204,000**  
YEAR END MARCH 2021

ACCOMMODATION  
LEADS  
130,000  
63%

FOOD & DRINK  
LEADS  
32,000  
16%

TOUR  
LEADS  
7,000  
3%

\*OTHER  
LEADS  
35,000  
17%

### TOP 5

- BIG4 HAHNDORF RESORT
- THE STUDIOS BY HAUS
- THE MANNA BY HAUS
- MOUNT LOFTY HOUSE
- MGALLERY BY SOFITEL

### TOP 5

- SIDEWOOD RESTAURANT CELLAR DOOR
- VILLETTA PORCINI
- AMBLESIDE DISTILLERS AT HOME BOX
- THE LANE VINEYARD
- MOUNT LOFTY HOUSE

### TOP 5

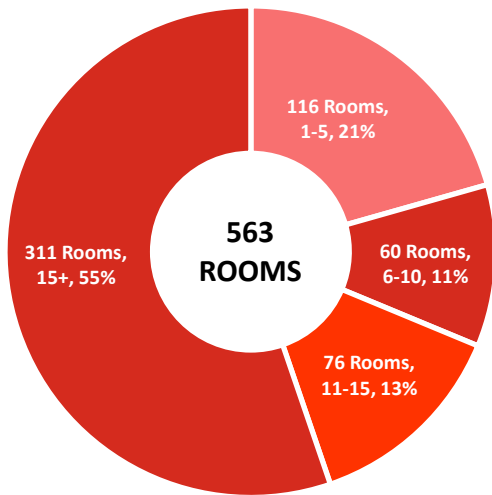
- STEAMRANGER HERITAGE RAILWAY
- PRANCING HORSE DRIVE EXPERIENCES
- PICK YOUR OWN STRAWBERRIES BEERENBERG FARM
- JURLIQUE INTERNATIONAL
- JURLIQUE FARM TOURS

\* 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



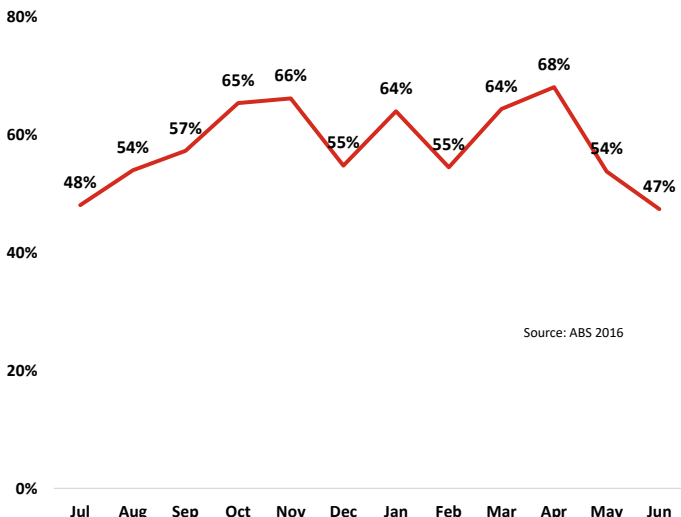
- Currently there are 70 establishments in the Adelaide Hills that accommodate guests.
- These 70 establishments account for 563 rooms ranging from 1 room to over 50.
- 55 per cent of rooms fall into establishment with 15 or more rooms.
- 21 per cent of rooms fall into the 1-5 room establishments.

ACCOMMODATION SUPPLY

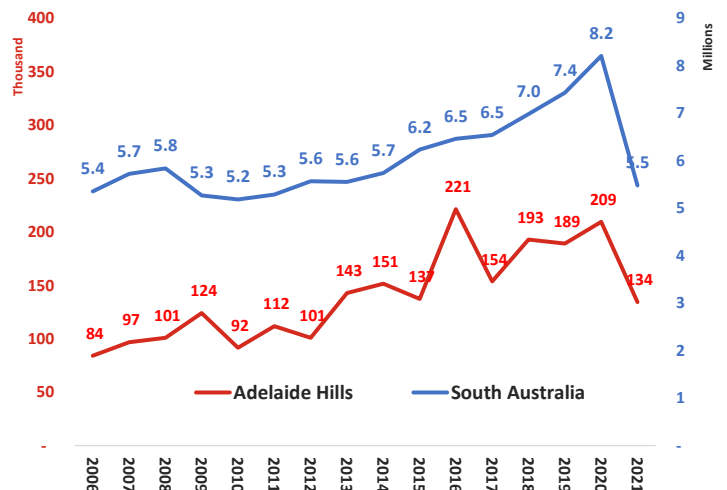
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	5
Rooms	180
Occupancy	58%
Takings	\$6,300,000

- Average occupancy for the year is 58 per cent over 5 establishments and 180 rooms.
- The peak months are November and April with occupancy of 66 and 68 per cent respectively.
- The low point of the year is during the winter months with occupancy on average dropping to 50 per cent.

MONTHLY OCCUPANCY RATES YEAR END JUNE 2016 - ADELAIDE HILLS



TOTAL OVERNIGHT VISITATION TO ADELAIDE HILLS & SOUTH AUSTRALIA

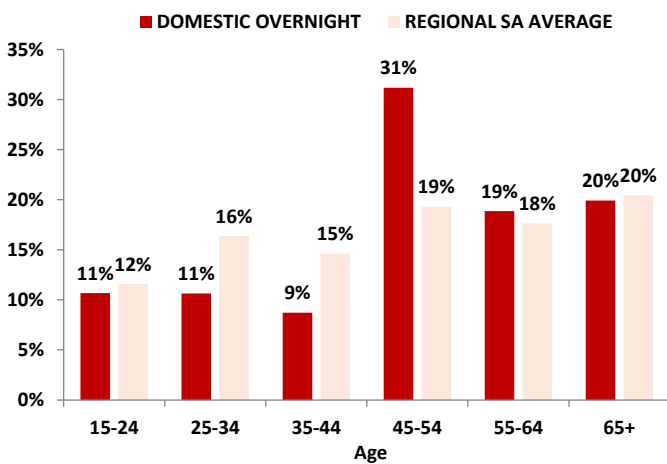


Note: Fluctuations can occur in visitation data due to small sample sizes. Prior regional profiles used data averaged over three years to smooth these fluctuations.



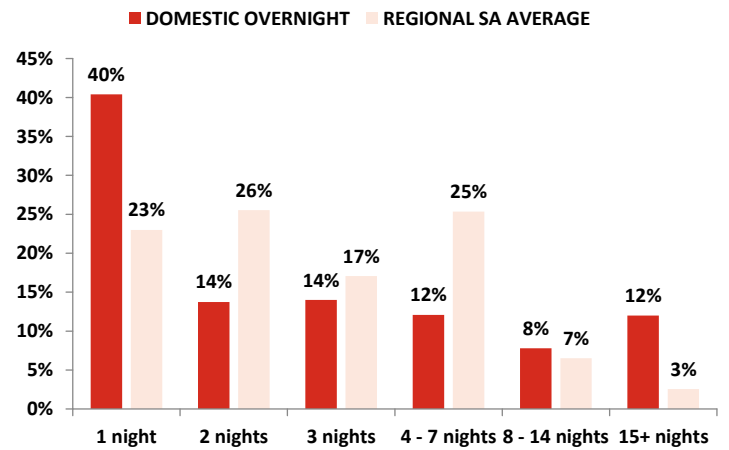
## VISITOR PROFILE

### AGE OF VISITORS TO ADELAIDE HILLS



- Overnight domestically there is a peak in the 45-54 age group at 31 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 70 per cent of all visitors.

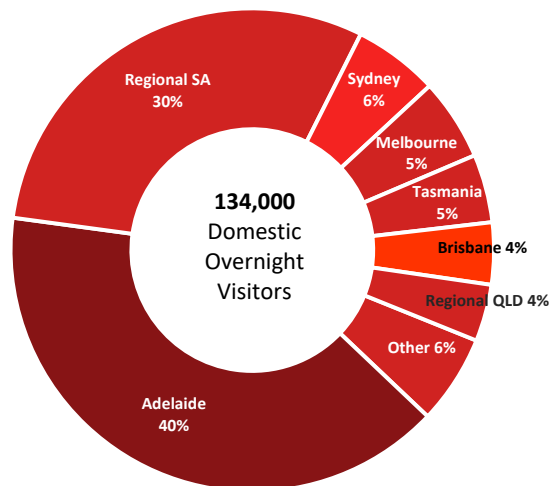
### LENGTH OF VISIT TO ADELAIDE HILLS



- 54 per cent of domestic overnight visitors like to stay 1 to 2 nights.
- The 12 per cent who stay longer than 15 nights are predominantly staying with friends and relatives.

## VISITOR ORIGIN

### ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO ADELAIDE HILLS

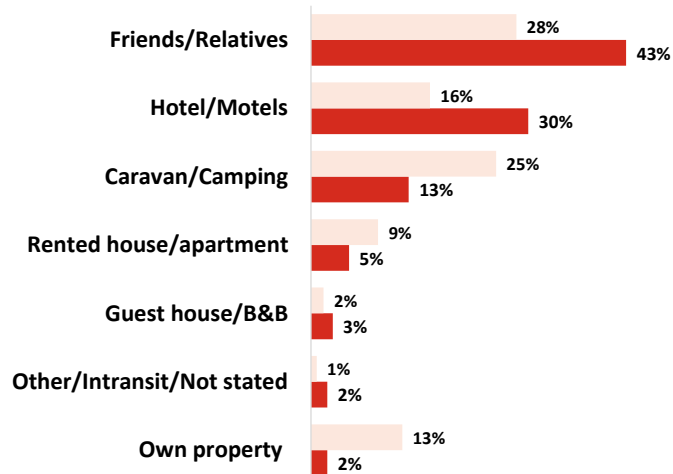


- Queensland at 8 per cent and New South Wales at 7 per cent are the Adelaide Hills biggest interstate overnight domestic markets.
- Regional South Australia contributes 30 per cent of visitors to the Adelaide Hills.
- 40 per cent of visitors come from Adelaide.



## VISITOR USE OF ACCOMMODATION

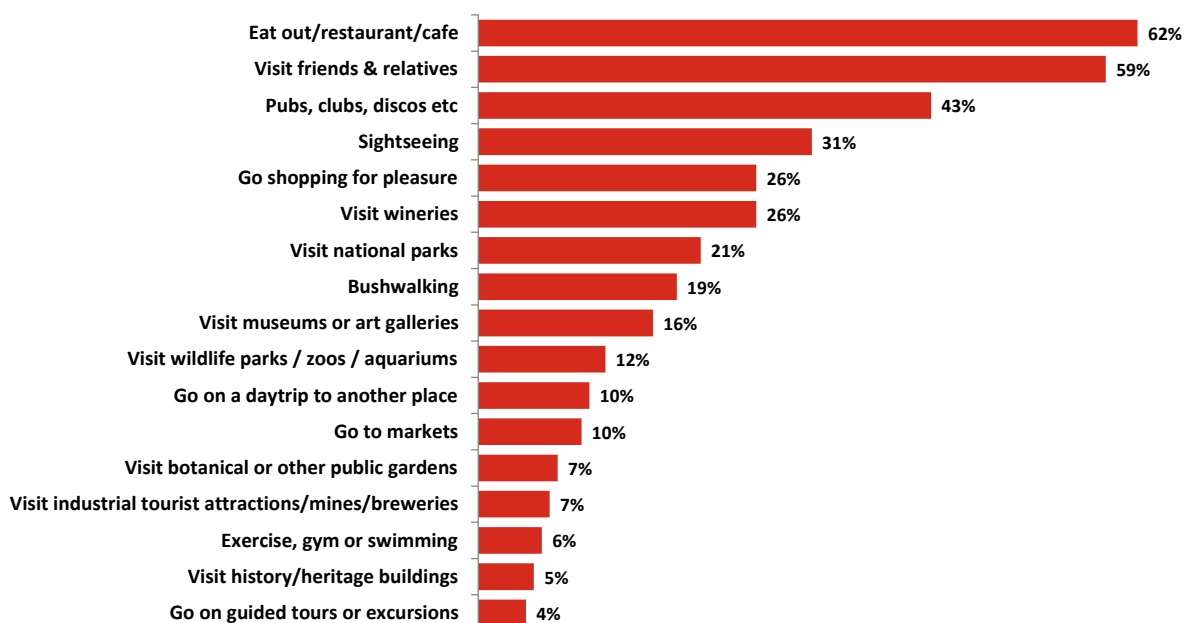
### ACCOMMODATION USED IN ADELAIDE HILLS FOR DOMESTIC VISITORS



- 73 per cent of domestic overnight visitor nights in the Adelaide Hills are spent either with Friends or Relatives or in Hotels and similar accommodation.

## VISITOR ACTIVITIES

### DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN ADELAIDE HILLS



- 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.



# ADELAIDE HILLS

## REGIONAL PROFILE



### 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**

**Tourism products** - 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**

**Tourism Industries** - 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, March 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 March 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. 86 35455001  
 Consumer Demand Product Testing Phase 1 - BDA Marketing