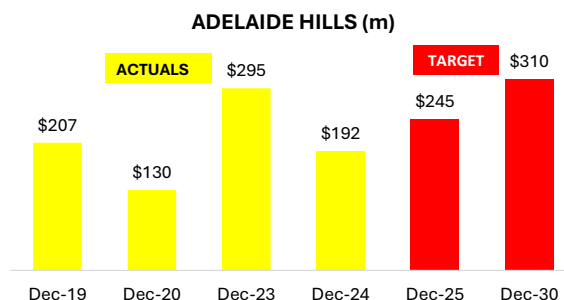




ALL DATA BASED ON THE YEAR END DECEMBER 2024

- Currently, the Adelaide Hills contributes \$192 million to the year end December 2024 South Australian expenditure of \$9.8 billion.
- The Adelaide Hills has achieved 79 per cent of their 2025 target of \$245 million and 62 per cent of their 2030 target of \$310 million.



### ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2024

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
<b>Overnight Visits</b>	106,000	85,000	191,000	9,000	200,000
<b>% of visits</b>	53%	43%	96%	5%	100%
<b>Share of Regional SA</b>	3%	8%	4%	7%	4%
<b>% Across Regional SA</b>					
	73%	24%	97%	3%	100%
% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international					
<b>Nights</b>	165,000	250,000	415,000	351,000	766,000
<b>% of nights</b>	22%	33%	54%	46%	100%
<b>Share of Regional SA</b>	2%	5%	3%	13%	5%
<b>% Across Regional SA</b>					
	57%	28%	85%	15%	100%
% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international					
<b>Average Length of Stay</b>	1.6	2.9	2.2	39.0	3.8
<b>ALOS Regional SA</b>	2.9	4.2	3.2	19.8	3.7
<b>Total Expenditure</b>					\$192,000,000
<b>Overnight Expenditure</b>	\$51,000,000	\$40,000,000	\$91,000,000	\$17,000,000	\$108,000,000
<b>Day Trip Expenditure</b>					\$84,000,000
<b>Domestic Day Trips</b>					1,118,000

- The Adelaide Hills saw 200,000 overnight visitors for the year end December 2024.
- 53 per cent of overnight visitors were from intrastate, 43 per cent from interstate and 5 per cent from overseas.
- The 106,000 intrastate overnight visitors stayed 165,000 nights with an average length of stay of 1.6 nights.
- There were 85,000 interstate overnight visitors who stayed 250,000 nights with an average length of stay of 2.9 nights
- The region saw 9,000 international visitors with an average length of stay of 39 nights and spend of \$17 million.
- 1.1 million day trips were taken to the Adelaide Hills for the year with spend of \$84 million.

ALOS = Average Length of Stay

# ADELAIDE HILLS

## REGIONAL PROFILE



### PURPOSE

	Holiday	VFR	Business	Other	Total
<b>Overnight Visits</b>	100,000	86,000	5,000	9,000	<b>200,000</b>
% of visits	50%	43%	3%	5%	<b>100%</b>
Share of Regional SA	4%	8%	1%	3%	<b>4%</b>
<b>% Across all regions</b>	<b>53%</b>	<b>24%</b>	<b>19%</b>	<b>7%</b>	<b>100%</b>

<b>Nights</b>	264,000	308,000	10,000	184,000	<b>766,000</b>
% of nights	34%	40%	1%	24%	<b>100%</b>
Share of Regional SA	3%	7%	0%	12%	<b>5%</b>
<b>% Across all regions</b>	<b>49%</b>	<b>25%</b>	<b>17%</b>	<b>9%</b>	<b>100%</b>

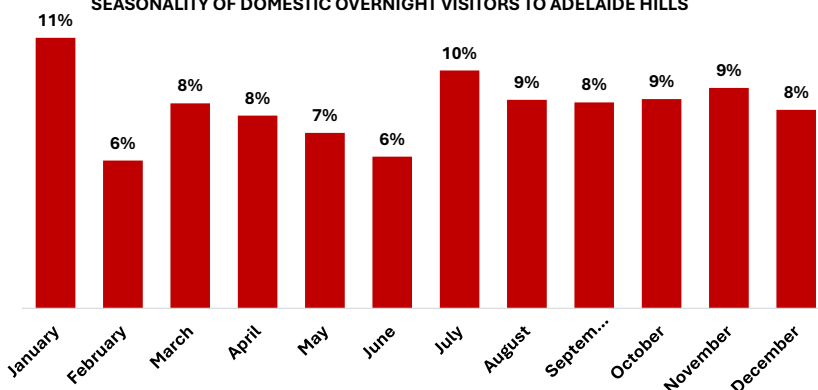
<b>Average Length of Stay</b>	2.6	3.6	2.0	20.4	<b>3.8</b>
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<b>Expenditure</b>					
<b>Annual Overnight Exp</b>	\$50,000,000	\$36,000,000	\$3,000,000	\$19,000,000	<b>\$108,000,000</b>
<b>Expenditure 2019</b>	\$38,000,000	\$46,000,000	\$3,000,000	\$12,000,000	<b>\$98,000,000</b>
<b>Av spend per night</b>	\$189	\$117	\$300	\$103	<b>\$141</b>
<b>Av spend per night Reg SA</b>	\$190	\$103	\$176	\$218	<b>\$169</b>
<b>Share of Regional SA</b>	3%	5%	1.3%	2%	<b>3%</b>

- 93 per cent of overnight visitors to the Adelaide Hills are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$189 per night compared to VFR visitors who spend \$117 per night.
- Leisure overnight visitors spent \$86 million for the year, making up 80 per cent of all overnight expenditure.

### SEASONALITY

#### SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO ADELAIDE HILLS



- National Visitor Survey data shows us that January and July are the strongest months for visitation in the Adelaide Hills.
- January is busy with the school holidays.
- July is strong on the back of the school holidays.

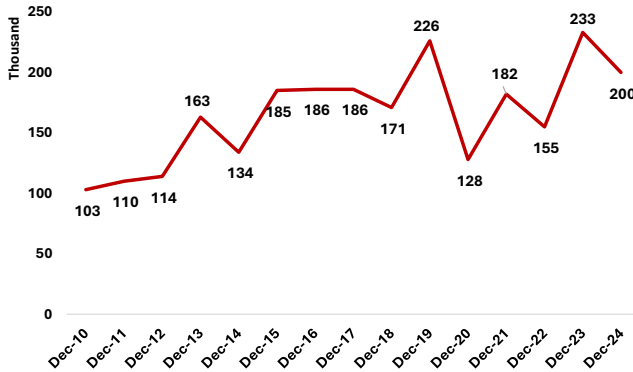
Source: NVS year end December 2024



## TOTAL OVERNIGHT VISITATION 2010 - 2024

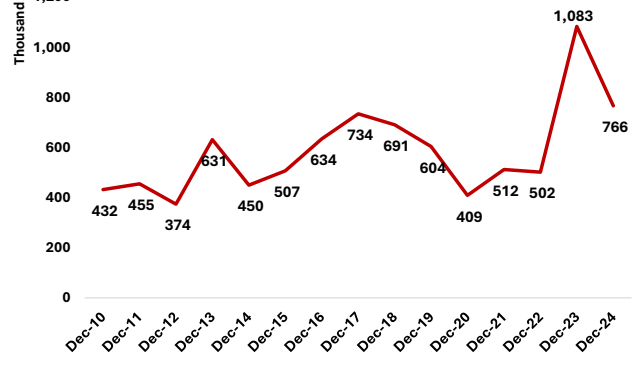
### VISITORS ADELAIDE HILLS

#### 2010 - 2024 INTERNATIONAL & DOMESTIC

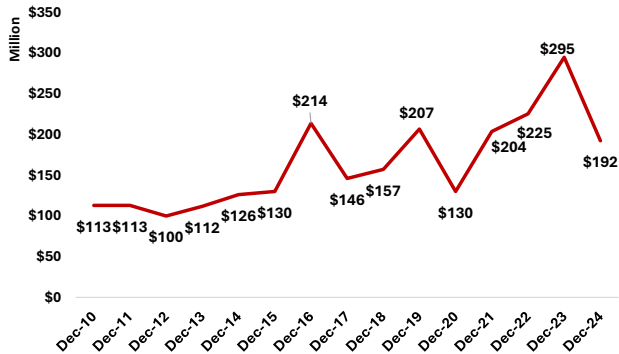


### NIGHTS ADELAIDE HILLS

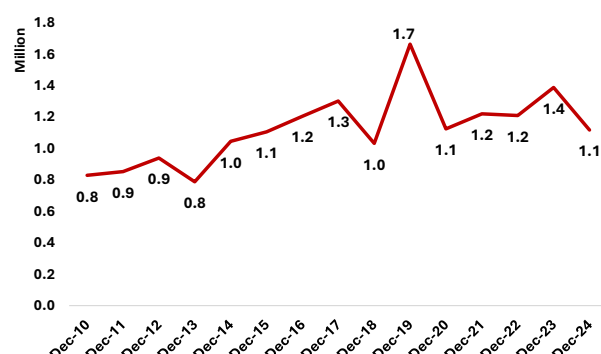
#### 2010 - 2024 INTERNATIONAL & DOMESTIC



### TOTAL EXPENDITURE ADELAIDE HILLS 2010 - 2024 - INTERNATIONAL & DOMESTIC



### DAY TRIPS ADELAIDE HILLS 2010 - 2024 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-24	Change on Dec-19	Dec-24	Change on Dec-19
Adelaide	3,933,000	0%	\$5,800,000,000	29%
Adelaide Hills	200,000	-12%	\$192,000,000	-7%
Barossa	244,000	-23%	\$287,000,000	27%
Clare Valley	222,000	9%	\$162,000,000	38%
Eyre Peninsula	455,000	-22%	\$455,000,000	-17%
Fleurieu Peninsula	727,000	-19%	\$519,000,000	-7%
Flinders Ranges and Outback	699,000	-25%	\$603,000,000	17%
Kangaroo Island	182,000	-12%	\$197,000,000	4%
Limestone Coast	807,000	4%	\$662,000,000	57%
Murray River, Lakes and Coorong	396,000	-12%	\$223,000,000	-20%
Riverland	464,000	8%	\$236,000,000	21%
Yorke Peninsula	620,000	4%	\$358,000,000	49%
Regional SA	4,615,000	-11%	\$3,950,000,000	11%
<b>South Australia</b>	<b>8,034,000</b>	<b>-6%</b>	<b>\$9,800,000,000</b>	<b>21%</b>



# ADELAIDE HILLS

## REGIONAL PROFILE



### ADELAIDE HILLS TOURISM LISTINGS

Category	# Listings
RESTAURANT	95
ACCOMM	89
ATTRACTION	67
EVENT	61
TOUR	36
DESTINFO	10
HIRE	6
GENSERVICE	3
TRANSPORT	1
Grand Total	368

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](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](https://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

## 272,000

YEAR END DECEMBER 2024

#### ACCOMMODATION LEADS

118,000  
43%

#### FOOD & DRINK LEADS

50,000  
18%

#### TOUR LEADS

21,000  
8%

#### \*OTHER LEADS

84,000  
31%

#### TOP 5

- PAVILIONS AT LENSWOOD
- STICKY RICE VILLAS
- EARTHSHIP IRONBANK
- SEQUOIA LODGE
- CLADICH PAVILIONS

#### TOP 5

- VILLETTA PORCINI
- AMBLESIDE DISTILLERS
- SIDEWOOD RESTAURANT & CELLAR DOOR
- LOST IN A FOREST
- THE LANE VINEYARD

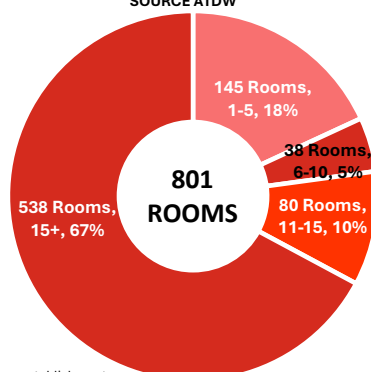
#### TOP 5

- JURLIQUE TOURS & EXPERIENCES
- STEAMRANGER HERITAGE RAILWAY
- @LENSWOOD PICK YOUR OWN
- AMBLESIDE DISTILLERS EXPERIENCES
- JURLIQUE INTERNATIONAL TOURS & EXPERIENCES

\* 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



Rooms refers to rooms per establishment

- Currently there are 84 establishments in the Adelaide Hills that accommodate guests.
- These 84 establishments account for 801 rooms across the region.
- 67 per cent of rooms fall into establishment with 15 or more rooms.
- 21per cent of rooms fall into the 1-5 room establishments.



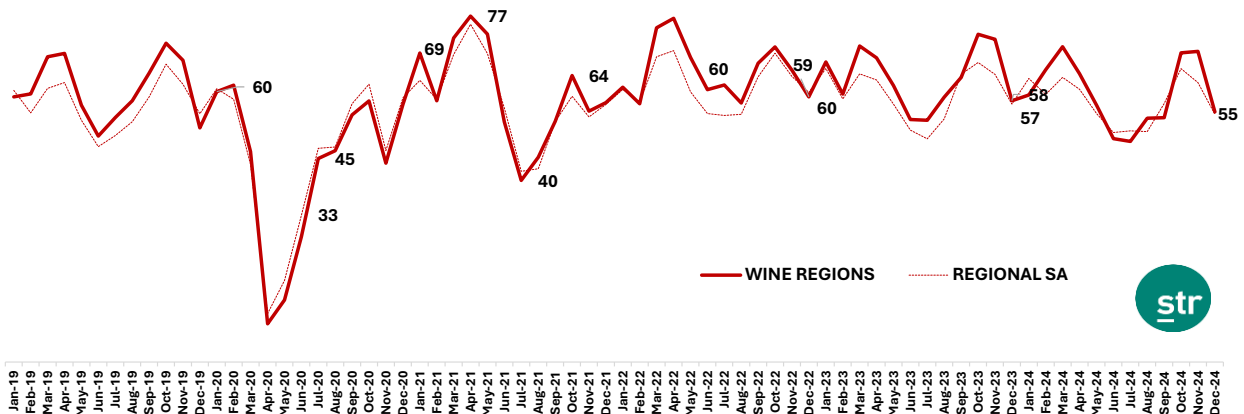


# ADELAIDE HILLS REGIONAL PROFILE



## ACCOMMODATION STR

### ACCOMMODATION OCCUPANCY WINE REGIONS

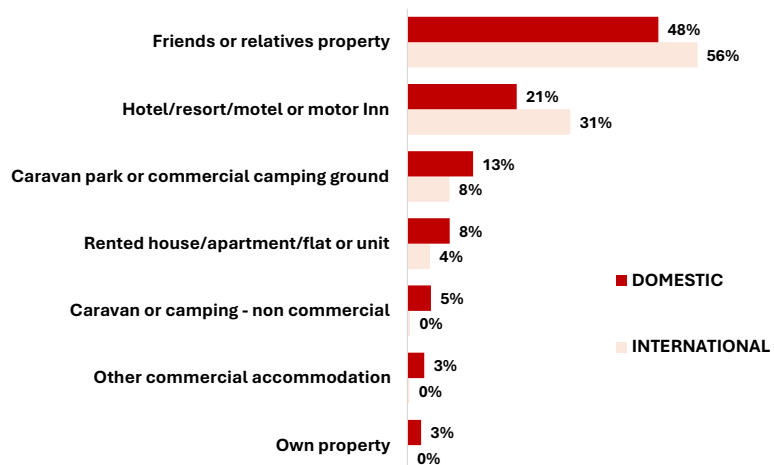


- The wine regions include accommodation data for the Adelaide Hills, the Clare Valley and the Barossa. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Wine Regions was 61%, this fell to 44% in 2020, rose to 65% in 2022, 63% in 2023 and fell in 2024 to 60%.

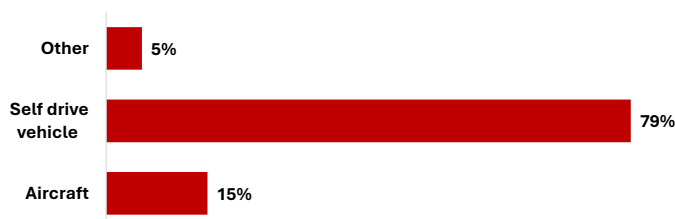
## VISITOR USE OF ACCOMMODATION

### ACCOMMODATION USED IN ADELAIDE HILLS FOR DOMESTIC VISITORS

- 48 per cent of domestic overnight visitor nights in the Adelaide Hills are spent with Friends or Relatives compared to the international market with 56 per cent.
- 21 per cent of nights were spent in Hotels, resorts and motor inn's for the Domestic market. This compares to 31 per cent for International
- 8 per cent of domestic visitors stay in a rented house or apartment. This compares to 4 per cent of international visitors who chose the same accommodation.



## TRANSPORT - DOMESTIC OVERNIGHT

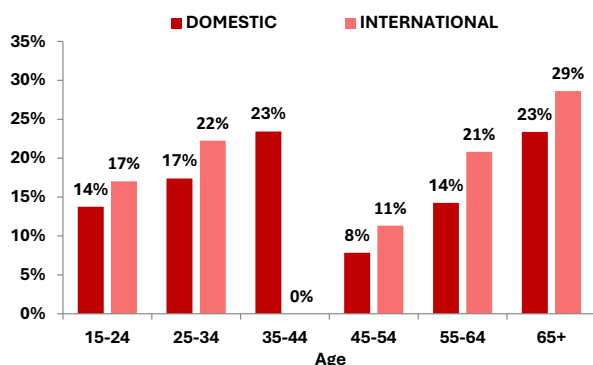


- The main method of transport used on trips to the Adelaide Hills was a self drive vehicle.
- 79% of visitors used this type of transport.
- 20% of people used another form of transport, this included planes, helicopters, buses etc.



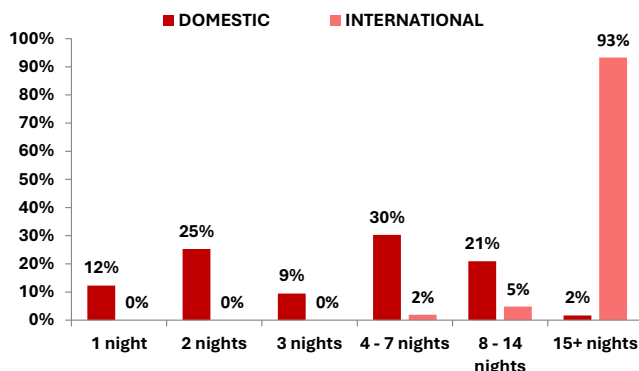
## VISITOR PROFILE

### AGE OF VISITORS TO ADELAIDE HILLS



- Overnight domestically peak in the 35-44 and the 65+ age group at 23 per cent.
- 50% of international visitors are aged 55+

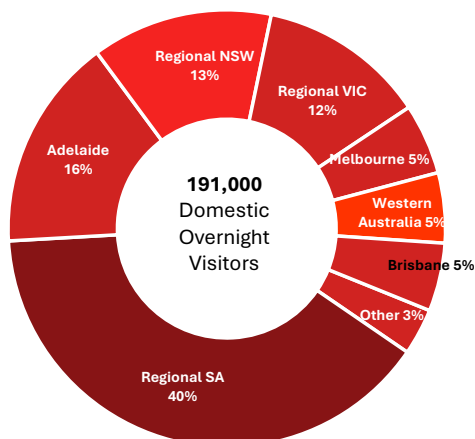
### LENGTH OF VISIT TO ADELAIDE HILLS



- 37 per cent of domestic overnight visitors like to stay 1 to 2 nights.
- 30 per cent of domestic visitors stayed 4-7 nights.
- 93 per cent of international visitors stayed 15+ nights, The majority for the purpose of employment.

## VISITOR ORIGIN

### ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO ADELAIDE HILLS

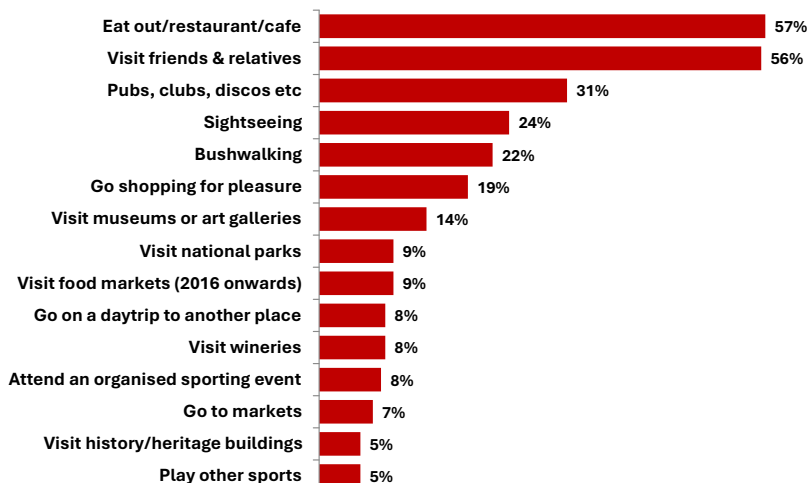


- Victoria at 17 per cent and New South Wales at 14 per cent are the Adelaide Hills biggest interstate overnight domestic markets.
- Regional South Australia contributes 40 per cent of visitors to the Adelaide Hills.
- 16 per cent of visitors come from Adelaide.

## VISITOR ACTIVITIES

- 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.

### DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN ADELAIDE HILLS





# ADELAIDE HILLS

## REGIONAL PROFILE



### REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2023-24, the tourism industry contributed an estimated \$302 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, 600 indirect jobs and a total employment impact of 2,000 people.

#### Gross Value Added (GVA)

- \$77 million and \$80 million in direct and indirect tourism GVA, and \$157 million in total tourism GVA.

#### Gross Regional Product (GRP)

- \$90 million and \$98 million in direct and indirect tourism GRP and \$188 million in total tourism GRP.

#### Tourism Consumption

##### 2023-24

##### Tourism products - directly consumed

- Takeaway and restaurant meals 18%
- Shopping (including gifts and souvenirs) 17%
- Fuel (petrol, diesel) 15%
- Long distance passenger transportation 10%
- Actual and imputed rent on dwellings 10%
- Accommodation services 6%
- Alcoholic beverages and other beverages 6%
- Food products 5%

#### Tourism Employment

##### 2023-24

##### Tourism Industries - 1,400 directly employed

- Cafes, restaurants and takeaway food services 46%
- Retail trade 22%
- Clubs, pubs, taverns and bars 9%
- Accommodation 9%
- Education and training 4%
- Cultural services 3%
- Other sports and recreation services 2%
- Road transport and transport equipment rental 2%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2024

### REGIONAL PERCEPTIONS REPORTING

- The Adelaide Hills is a well known South Australian region, best known for its wine and German heritage.
- A significant challenge for the Adelaide Hills is its strong associations with wine, which drive perceptions that the region is not a family friendly holiday destination.
- Given its proximity to Adelaide, the Adelaide Hills is also seen as a place for a day trip, weekend or short stay only, particularly among those from South Australia. It is also seen as a region that is quite expensive to stay at.

To drive increased visitation and expenditure, we recommend the Adelaide Hills:

#### Position the Adelaide Hills as being more than wine, fine dining

The strongest associations with the Adelaide Hills are Hahndorf and wine. Communicating the variety of experiences, particularly the nature and wildlife experiences, could appeal to a wider group of people, including families.

#### Promote longer stays in the Adelaide Hills

Promoting the breadth of experiences available in the Adelaide Hills along with promoting packages or accommodation options at a lower price point could also encourage longer stays in the region.

#### Drive visitation all year round, particularly in the cooler months

The cooler months were perceived as cold and wet and therefore has limited appeal. Promoting winter activities such as Winter Reds, cosy cafés with fireplaces, and the nature that is beautiful in winter could encourage visitation in those months that generally have lower appeal.

#### Region appeals to...

- Wine lovers and those seeking an 'adults only' experience
- Foodies
- Day trippers (SA Locals)
- Those seeking relaxation

Prepared by the South Australian Tourism Commission, December 2024

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 2024.

Regional Perceptions Testing - June 2022 - 3-day, online bulletin board (OBB) Approx. 40 mins of content per person, per day.

Participants were recruited as follows: — 22 Intrastate participants (70% metro, 30% regional), — 20 Interstate participants (Melbourne, Regional VIC and Sydney)

A mix of age (18-44 and 45-69) and gender was achieved across participants. Participants were willing travellers, non-rejectors of travelling to/within SA, and did not live in the region they were recruited to explore (for intrastate).

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