

SOUTH AUSTRALIA











The Value of Tourism

Pondalowie Bay, Yorke Peninsula

ADELAIDE
SOUTH AUSTRALIA

Government
of South Australia
South Australian
Tourism Commission

Year ending September 2023 — Date: 20th December 2023

\$	\$10.2b	Tourism Expenditure
	14.0k	International seats into Adelaide each week
	407k	International visitors
	83K	Domestic seats into Adelaide each week
	2.9M	Interstate visitors
	4.6M	Intrastate trips
	15.1M	Domestic day trips
	17.8k	Hotel rooms
	20k	Tourism business across the state
	\$180k	In tourism expenditure = 1 directly employed
	34.0K	Directly employed, (to grow direct employment by 16,000 jobs by 2030)

Sources: International and National Visitor Survey, Tourism Research Australia, Canberra; State Tourism Satellite Accounts 2021-22, Tourism Research Australia, Canberra; Accommodation data sourced from STR for 10+ rooms, October 2023, Airline data is based on seasonal schedules and is subject to change without notice.

Notes: For details of the NVS methodology changes in this release please refer to <https://www.tra.gov.au/domestic/domestic-tourism-results>

Value of Tourism in South Australia

Year ending September 2023 — Date: 20th December 2023

Total for year to September 2023

Expenditure (\$)	South Australia				Australia		
	Year Ending Jun-23	Year Ending Sep-23	Change %	Market Share	Year Ending Jun-23	Year Ending Sep-23	Change %
International (\$m)	1.0b	1.2b	↑ 21%	4.7%	21.9b	25.7b	↑ 17%
Interstate (\$m)	3.5b	3.6b	↑ 2%	7.4%	49.1b	48.7b	→ -1%
Intrastate (\$m)	3.2b	3.2b	↑ 1%	5.3%	59.2b	60.0b	↑ 1%
Day Trips (\$m)	2.2b	2.2b	→ -1%	6.6%	32.7b	33.7b	↑ 3%
Total Expenditure (\$m)	9.9b	10.2b	↑ 3%	6.1%	162.8b	168.0b	↑ 3%

Total South Australian visitor expenditure for the year end September 2023 combining International and Domestic expenditure reached a record high \$10.2 billion, up three per cent on the year-end June 2023 and in line with the national growth of three per cent.

The \$10.2 billion at September 2023 year end was well above the predicted result of \$8.8 billion. With conditions normalising, the growth experienced in recent data releases has slowed as performance is no longer driven by rapid recovery from COVID-affected periods.

Despite this strong expenditure result, all source markets (international, interstate, intrastate and day trips) remain below their pre-COVID levels in terms of number of visitors, particularly international visitors and those visiting Adelaide.

Adjusting for inflation using the CPI and expressed in 2019 dollars, this expenditure is \$8.8 billion in real terms, a record expenditure for the South Australian Visitor Economy and aligning closely with our original COVID impact prediction of \$8.8 billion.

National Visitor Survey September 2023

Expenditure (\$m)	Australia			South Australia			
	Year Ending Jun -23	Year Ending Sep -23	Change (%)	Year Ending Jun -23	Year Ending Sep -23	Change (%)	Market Share
Interstate (\$m)	\$ 49,119	\$ 48,701	→ -1%	\$ 3,528	\$ 3,597	↑ 2%	7.4%
Intrastate (\$m)	\$ 59,176	\$ 59,993	↑ 1%	\$ 3,165	\$ 3,207	↑ 1%	5.3%
Day Trips (\$m)	\$ 32,689	\$ 33,679	↑ 3%	\$ 2,243	\$ 2,224	→ -1%	6.6%
Total Domestic	\$ 140,984	\$ 142,373	→ 1%	\$ 8,937	\$ 9,027	↑ 1%	6.3%

Interstate

The interstate market has seen a small growth of \$69 million to reach a record high expenditure of \$3.6 billion at year end September 2023, up on the \$3.5 billion at June year end.

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The stable result this quarter is in stark contrast to the boom in this market throughout 2022.

Intrastate

The Intrastate market remains steady at a record high \$3.2 billion for the year end September 2023, the same result as June 2022.

The market has slowed as South Australians become more confident to travel interstate and overseas.

Day Trips

Day Trip visits and expenditure both saw a very small decline, with both down 1 per cent from the year end June 2023 to year end September 2023.

In the last quarter, this market has started to slow with visits and expenditure down on the same period in 2022.

Day trip expenditure was expected to be strong throughout the pandemic. Even so, the current \$2.2 billion is above the \$1.8 billion in our forecast model.

Regional South Australia

Regional visitor expenditure (including by international visitors) remained steady at \$4.7 billion, flat on the June 2023 and above the 2025 Regional Visitor Strategy target. Regions have been performing strongly, driven by the intrastate market and the re-emerging international market.

In contrast to this Adelaide has seen strong growth from June to September with expenditure growing 6 per cent to a record high \$5.6 billion. In the latest three months Adelaide has seen expenditure rise by \$316 million. This growth has been on the back of strong growth from the international market.

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International Visitor Survey September 2023

	Australia			South Australia			
	Year Ending Jun-23	Year Ending Sep-23	Change (%)	Year Ending Jun-23	Year Ending Sep-23	Change (%)	Market Share
Visits (000s)	5,427	6,111	↑ 13%	357	407	↑ 14%	6.7%
Nights (000s)	193,315	220,774	↑ 14%	9,717	12,018	↑ 24%	5.4%
Expenditure (\$m)	21,856	25,656	↑ 17%	1,011	1,218	↑ 21%	4.7%

The latest results to September 2023 show that international expenditure in the last quarter has grown from \$1.0 billion to a record high \$1.22 billion, well above the recovery forecast of \$727 million and the previous record high of \$1.21 billion at December 2019.

International visitation has rebounded to 407,000, still 17 per cent down on the 2019 peak of 488,000. Even with this strong growth, visitation continues to trail behind spend.

The growth in the international market has been led by the Visiting Friends and Relatives market.

The Holiday market has seen good growth from June 2023 to September 2023 with visits up 20 per cent and expenditure up 16 per cent.

We have also seen growth in the Education sector with visits and expenditure up 10 per cent and 18 per cent respectively from the June year end to the September year end.

Recent Conditions and Future Forecasts

Separate to the above detailed year end results, the SATC also receives headline figures on a monthly basis released by Tourism Research Australia. The monthly data allows us to investigate recent performance that forms part of the \$10.2 billion result outlined above.

July, August and September saw a strong resurgence growing 23 per cent, 5 per cent and 12 per cent above the same months in 2022.

This growth was led by the intrastate and international markets with willingness to travel continuing to grow, despite more recent cost of living concerns.