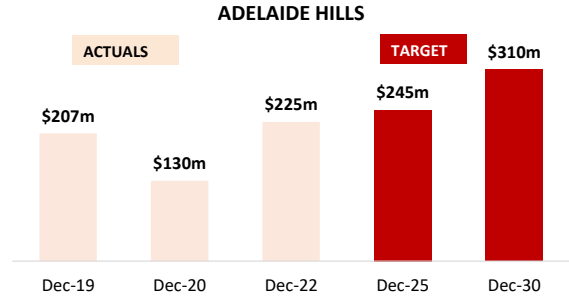




OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2022

- Currently, the Adelaide Hills contributes \$225 million to the year end December 2022 South Australian expenditure of \$8.3 billion.
- The Adelaide Hills has achieved 92 per cent of their 2025 target of \$245 million and 73 per cent of their 2030 target of \$310 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2022

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	84,000	67,000	151,000	4,000	155,000
%	56%	44%	97%	3%	100%
<i>Share of Regional SA</i>	2%	7%	3%	8%	3%
<hr/>					
% Across Regional SA	76%	22%	99%	1%	100%
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>					
Nights	182,000	275,000	456,000	53,000	509,000
%	40%	60%	90%	10%	100%
<i>Share of Regional SA</i>	2%	5%	3%	6%	3%
<hr/>					
% Across Regional SA	63%	32%	95%	5%	100%
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>					
Average Length of Stay	2.2	4.1	3.0	13.3	3.3
ALOS Regional SA	3.0	5.1	3.5	16.1	3.7
<hr/>					
Total Expenditure					\$225,000,000
Overnight Expenditure	\$56,000,000	\$57,000,000	\$112,000,000	\$5,000,000	\$117,000,000
Day Trip Expenditure					\$108,000,000
<hr/>					
Domestic Day Trips					1,210,000

- The Adelaide Hills saw 151,000 domestic overnight visitors for the year end December 2022.
- 56 per cent of overnight visitors were from intrastate and 44 per cent from interstate.
- The 84,000 intrastate overnight visitors stayed 182,000 nights with an average length of stay of 2.2 nights.
- There were 67,000 interstate overnight visitors who stayed 275,000 nights with an average length of stay of 4.1 nights
- The region saw 4,000 international visitors with an average length of stay of 13.3 nights and spend of \$5 million.
- 1.2 million day trips were taken to the Adelaide Hills for the year with spend of \$108 million.

ALOS = Average Length of Stay

ADELAIDE HILLS REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	77,000	72,000	5,000	4,000	155,000
%	50%	46%	3%	3%	100%
<i>Share of Regional SA</i>	3%	6%	1%	3%	3%
<i>% Across all regions</i>	53%	25%	19%	3%	100%

Nights	222,000	274,000	9,000	4,000	509,000
%	44%	54%	2%	1%	100%
<i>Share of Regional SA</i>	2%	8%	0%	1%	3%
<i>% Across all regions</i>	54%	21%	20%	4%	100%

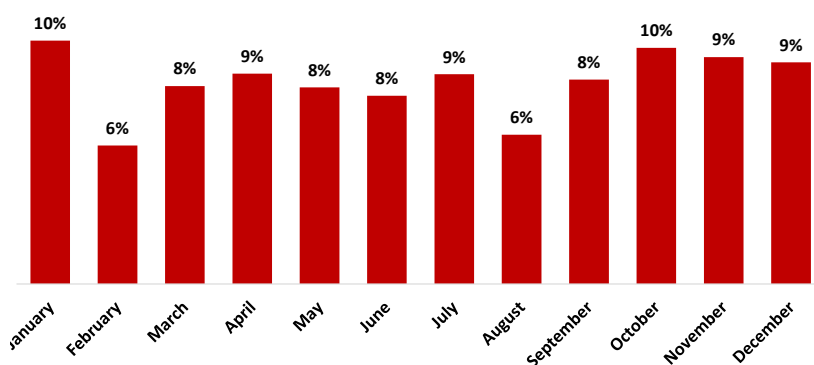
Average Length of Stay	2.9	3.8	1.8	1.0	3.3
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Expenditure					
Annual Expenditure	\$61,000,000	\$34,000,000	\$3,000,000	\$20,000,000	\$117,000,000
Expenditure 2019	\$38,000,000	\$46,000,000	\$3,000,000	\$12,000,000	\$98,000,000
Av spend per night	\$275	\$124	\$333	\$5,000	\$230
Av spend per night Reg SA	\$204	\$112	\$142	\$279	\$175
Share of Regional SA	3%	4%	0.4%	2%	3%

- 94 per cent of overnight visitors to the Adelaide Hills are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$275 per night compared to VFR visitors who spend \$124 per night.
- Leisure overnight visitors spent \$95 million for the year, making up 81 per cent of all overnight expenditure.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO ADELAIDE HILLS



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

Source: NVS year end December 2022

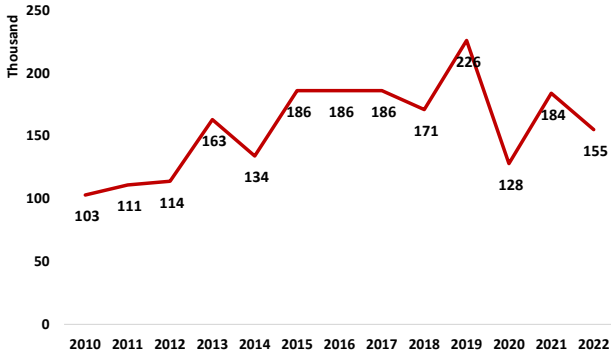


ADELAIDE HILLS REGIONAL PROFILE

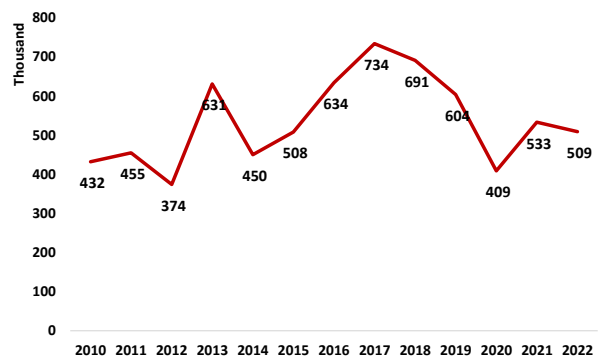


TOTAL OVERNIGHT VISITATION 2010 - 2022

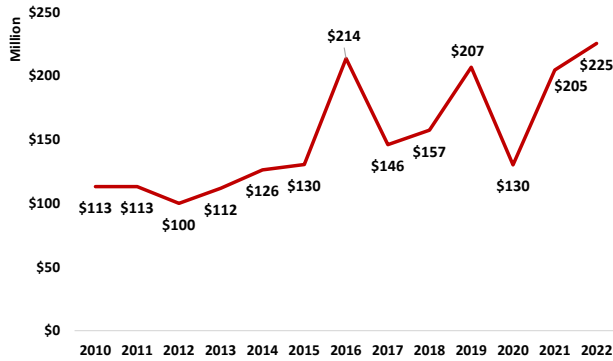
VISITORS ADELAIDE HILLS 2010 - 2022
International and Domestic



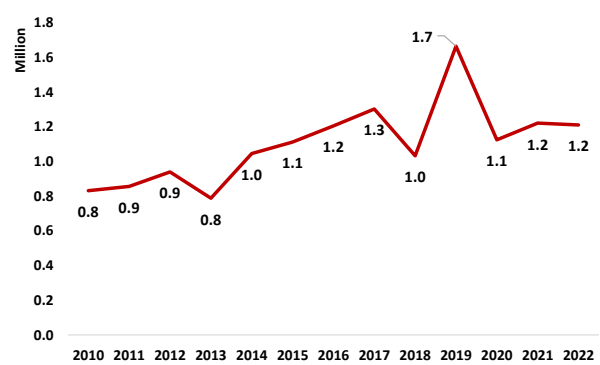
NIGHTS ADELAIDE HILLS 2010 - 2022
International and Domestic



TOTAL EXPENDITURE ADELAIDE HILLS 2010 - 2022 -
International and Domestic



DAY TRIPS ADELAIDE HILLS 2010 - 2022
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-22	Change on Dec-19	Dec-22	Change on Dec-19
Adelaide	3,084,000	-21%	\$4,400,000,000	-3%
Adelaide Hills	155,000	-31%	\$225,000,000	9%
Barossa	319,000	1%	\$326,000,000	45%
Clare Valley	196,000	-4%	\$152,000,000	29%
Eyre Peninsula	500,000	-14%	\$503,000,000	-8%
Fleurieu Peninsula	783,000	-13%	\$665,000,000	19%
Flinders Ranges and Outback	835,000	-10%	\$576,000,000	12%
Kangaroo Island	171,000	-18%	\$187,000,000	-2%
Limestone Coast	622,000	-20%	\$441,000,000	5%
Murray River, Lakes and Coorong	381,000	-16%	\$201,000,000	-28%
Riverland	412,000	-4%	\$240,000,000	23%
Yorke Peninsula	602,000	1%	\$354,000,000	47%
Regional SA	4,568,000	-12%	\$3,980,000,000	12%
South Australia	7,291,000	-15%	\$8,340,000,000	3%



ADELAIDE HILLS TOURISM LISTINGS

Category	# Listings
ACCOMM	82
RESTAURANT	80
ATTRACTION	57
EVENT	47
TOUR	26
DESTINFO	9
HIRE	5
GENSERVICE	2
TRANSPORT	2
INFO	1
Grand Total	311

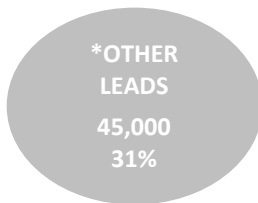
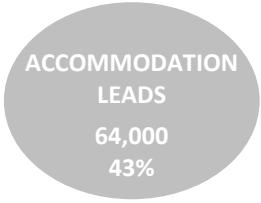
The **Australian Tourism Data Warehouse (ATDW)** is Australia’s national platform for digital tourism information. Eligible tourism businesses can create a listing for their accommodation, tour, food and drink establishment, event and more, free of charge. These listings appear on websites such as southaustralia.com

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)

Note: some listings have multiple categories of accommodation
Source: Australian Tourism Data Warehouse
Categories above defined at - <https://tourism.sa.gov.au/support/atdw>

**ADELAIDE HILLS
AUSTRALIAN TOURISM DATA WAREHOUSE
LEADS
147,000
YEAR END DECEMBER 2022**



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

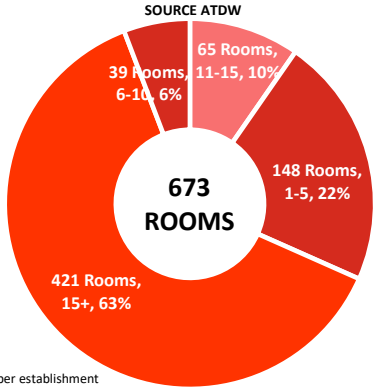
TOP 4

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

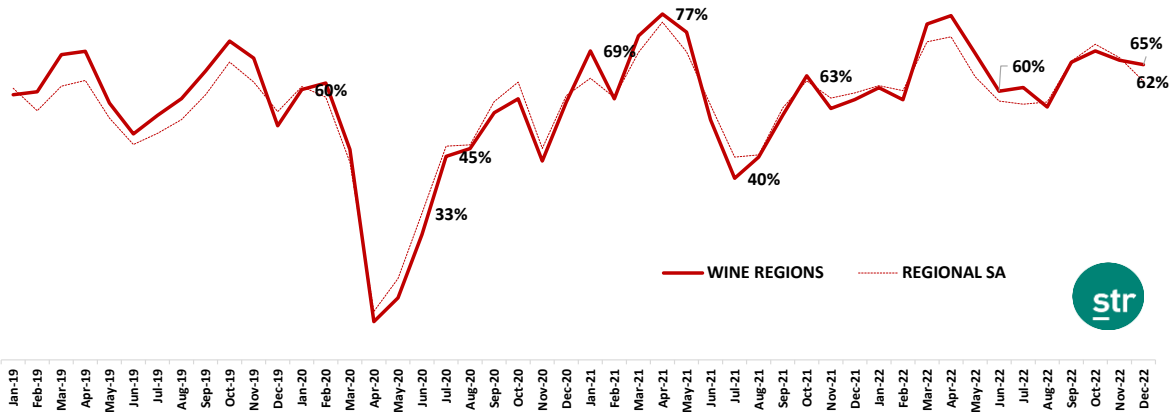


- Currently there are 82 establishments in the Adelaide Hills that accommodate guests.
- These 82 establishments account for 673 rooms across the region.
- 63 per cent of rooms fall into establishment with 15 or more rooms.
- 22 per cent of rooms fall into the 1-5 room establishments.

Rooms refers to rooms per establishment



ACCOMMODATION STR
ACCOMMODATION OCCUPANCY WINE REGIONS

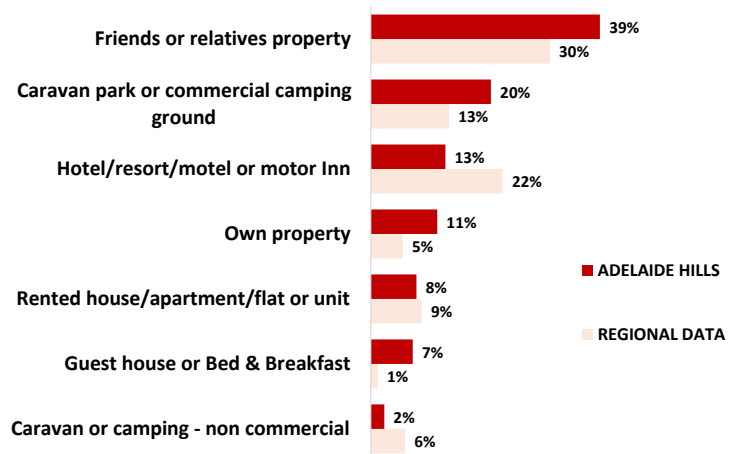


- The wine regions include accommodation data for the Adelaide Hills, the Clare Valley and the Barossa. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Wine Regions was 61%, this fell to 44% in 2020, rose to 60% in 2021 and grew again in 2022 to 65%.

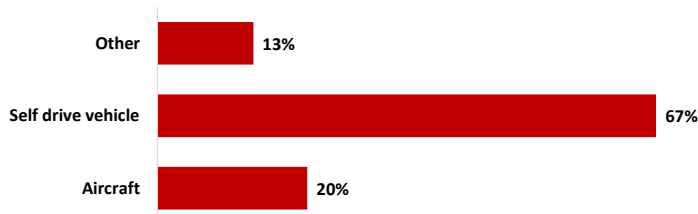
VISITOR USE OF ACCOMMODATION

- 39 per cent of domestic overnight visitor nights in the Adelaide Hills are spent with Friends or Relatives compared to the SA regional average of 30 per cent.
- 20 per cent stayed in a Caravan Park or Commercial camping ground. This compares to the regional average of 13 per cent.
- 13 per cent of nights were spent in Hotels, resorts and motor inn's, below the regional SA average of 22 per cent.

ACCOMMODATION USED IN ADELAIDE HILLS FOR DOMESTIC VISITORS



TRANSPORT

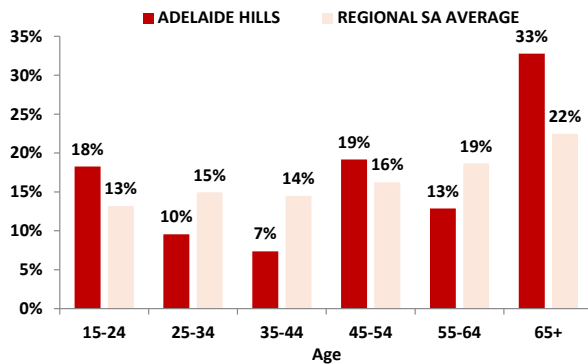


- The main method of transport used on trips to the Adelaide Hills was a self drive vehicle.
- 67% of visitors used this type of transport.
- 13% of people used another form of transport, this included planes, helicopters, buses etc.



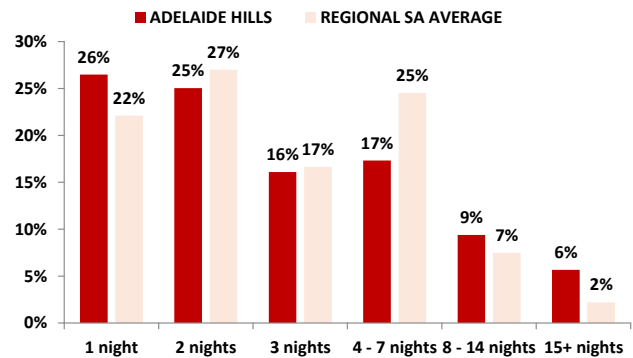
VISITOR PROFILE

AGE OF VISITORS TO ADELAIDE HILLS



- Overnight domestically there is a peak in the 65+ age group at 33 per cent.
- This is well above the average of 22 per cent for the 65+ age group for regional SA.
- 25-44 age group well below the regional average.

LENGTH OF VISIT TO ADELAIDE HILLS



- 51 per cent of domestic overnight visitors like to stay 1 to 2 nights.
- The 15 per cent who stay longer than 8 nights are predominantly staying with friends and relatives or working in the region.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO ADELAIDE HILLS

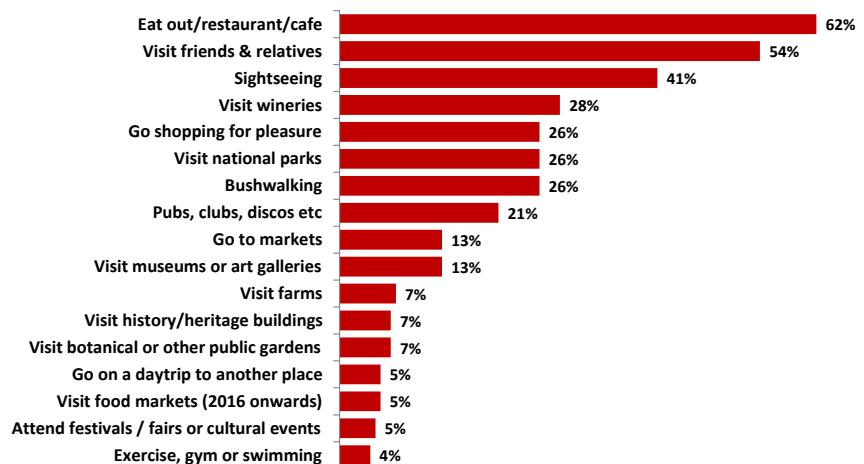


- Victoria at 19 per cent and New South Wales at 14 per cent are the Adelaide Hills biggest interstate overnight domestic markets.
- Regional South Australia contributes 30 per cent of visitors to the Adelaide Hills.
- 25 per cent of visitors come from Adelaide.

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 2020-21, the tourism industry contributed an estimated \$227 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, 500 indirect jobs and a total employment impact of 1,900 people.

Gross Value Added (GVA)

- \$65 million and \$56 million in direct and indirect tourism GVA, and \$121 million in total tourism GVA.

Gross Regional Product (GRP)

- \$70 million and \$71 million in direct and indirect tourism GRP and \$141 million in total tourism GRP.

Tourism Consumption

2020–21

Tourism products - directly consumed

- Shopping (including gifts and souvenirs) 22%
- Takeaway and restaurant meals 20%
- Fuel (petrol, diesel) 12%
- Alcoholic beverages and other beverages 6%
- Travel agency and tour operator services 6%
- Food products 6%
- Actual and imputed rent on dwellings 4%
- Accommodation services 4%

Tourism Employment

2020–21

Tourism Industries - 1,400 directly employed

- Cafes, restaurants and takeaway food services 38%
- Retail trade 27%
- Clubs, pubs, taverns and bars 7%
- All other industries 6%
- Accommodation 6%
- Travel agency and tour operator services 6%
- Cultural services 4%
- Other sports and recreation services 2%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2021

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...	<ul style="list-style-type: none"> – 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 2022

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. Un less otherwise stated, all data refers to the year end December 2022.

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 Intra-state 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