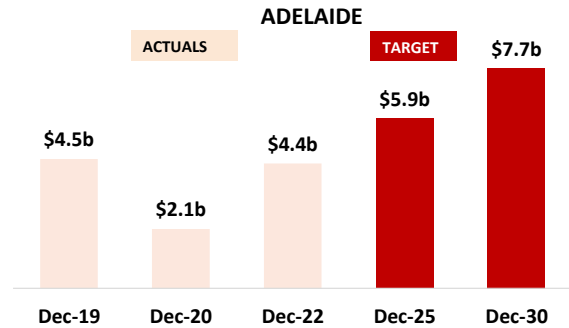




OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2022

- Currently Adelaide contributes \$4.4 billion to the year end December 2022 South Australian expenditure of \$8.3 billion.
- Adelaide has achieved 73 per cent of their 2025 target of \$5.9 billion and 57 per cent of their 2030 target of \$7.7 billion.

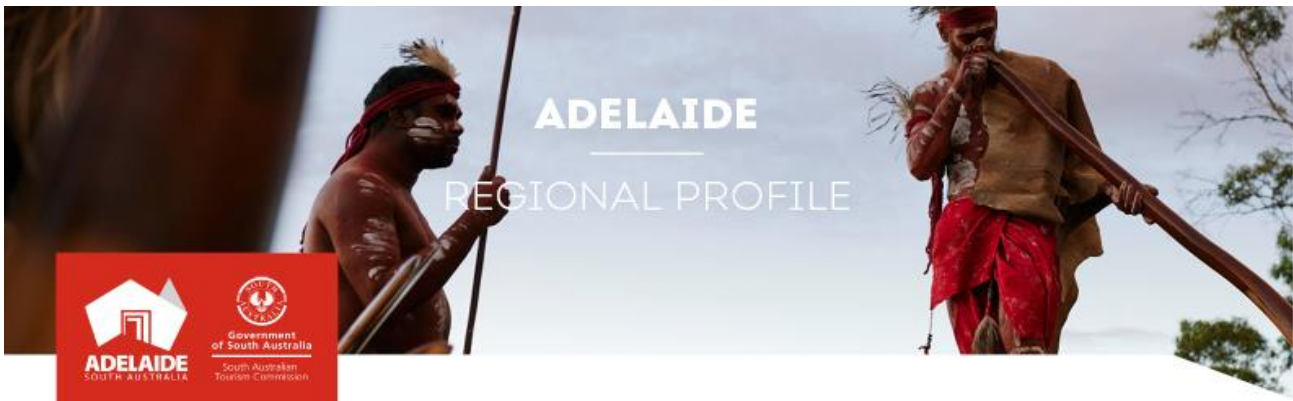


ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2022

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	1,055,000	1,870,000	2,925,000	159,000	3,084,000
%	36%	64%	95%	5%	100%
<i>Share of SA</i>	13%	43%	24%	57%	24%
<hr/>					
<i>% Across Regional SA</i>	64%	34%	98%	2%	100%
<hr/>					
Nights	2,716,000	7,320,000	10,035,000	4,691,000	14,727,000
%	27%	73%	68%	32%	100%
<i>Share of SA</i>	11%	41%	24%	74%	31%
<hr/>					
<i>% Across Regional SA</i>	50%	37%	87%	13%	100%
<hr/>					
Average Length of Stay	2.6	3.9	3.4	29.5	4.8
ALOS Regional SA	2.9	4.2	3.4	22.7	3.8
<hr/>					
Total Expenditure					\$4,400,000,000
Overnight Expenditure	\$1,122,000,000	\$2,087,000,000	\$3,209,000,000	\$435,000,000	\$3,644,000,000
Day Trip Expenditure					\$715,000,000
<hr/>					
Domestic Day Trips					4,495,000

- Adelaide saw 2.9 million domestic overnight visitors for the year end December 2022.
- 36 per cent of overnight visitors were from intrastate and 64 per cent from interstate.
- The 1.1 million intrastate overnight visitors stayed 2.7 million nights with an average length of stay of 2.6 nights.
- There were 1.9 million interstate overnight visitors who stayed 7.3 million nights with an average length of stay of 3.9 nights
- The region saw 159,000 international visitors with an average length of stay of 29.5 nights and spend of \$435 million.
- 4.5 million day trips were taken to Adelaide for the year with spend of \$715 million.

ALOS = Average Length of Stay



PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	912,000	1,045,000	756,000	401,000	3,084,000
%	30%	34%	25%	13%	100%
<i>Share of SA</i>	15%	31%	29%	55%	24%
<hr/>					
<i>% Across all regions</i>	48%	27%	20%	6%	100%

Nights	3,329,000	6,135,000	2,233,000	3,030,000	14,727,000
%	23%	42%	15%	21%	100%
<i>Share of SA</i>	16%	46%	25%	69%	31%
<hr/>					
<i>% Across all regions</i>	44%	28%	19%	9%	100%

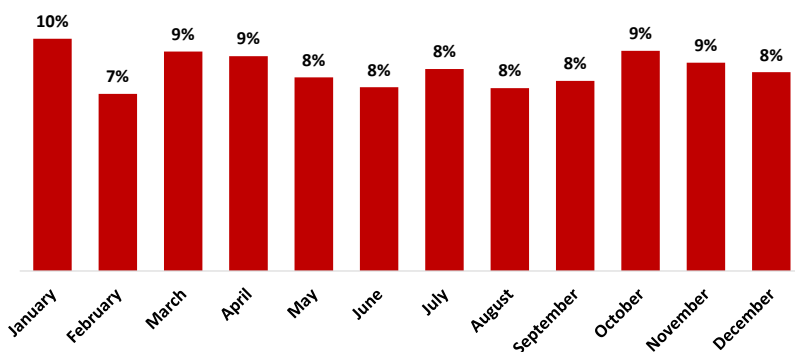
Average Length of Stay	3.7	5.9	3.0	7.6	4.8
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Expenditure					
Annual Expenditure	\$1,149,000,000	\$762,000,000	\$748,000,000	\$985,000,000	\$3,644,000,000
Expenditure 2019	\$951,000,000	\$733,000,000	\$847,000,000	\$1,338,000,000	\$3,868,000,000
Av spend per night	\$345	\$124	\$335	\$325	\$247
Av spend per night SA	\$242	\$120	\$219	\$317	\$209
Share of SA	37%	61%	60%	79%	52%

- 63 per cent of overnight visitors to Adelaide are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$345 per night compared to VFR visitors who spend \$124 per night.
- Leisure overnight visitors spent \$1.9 billion for the year, making up 52 per cent of all overnight expenditure.

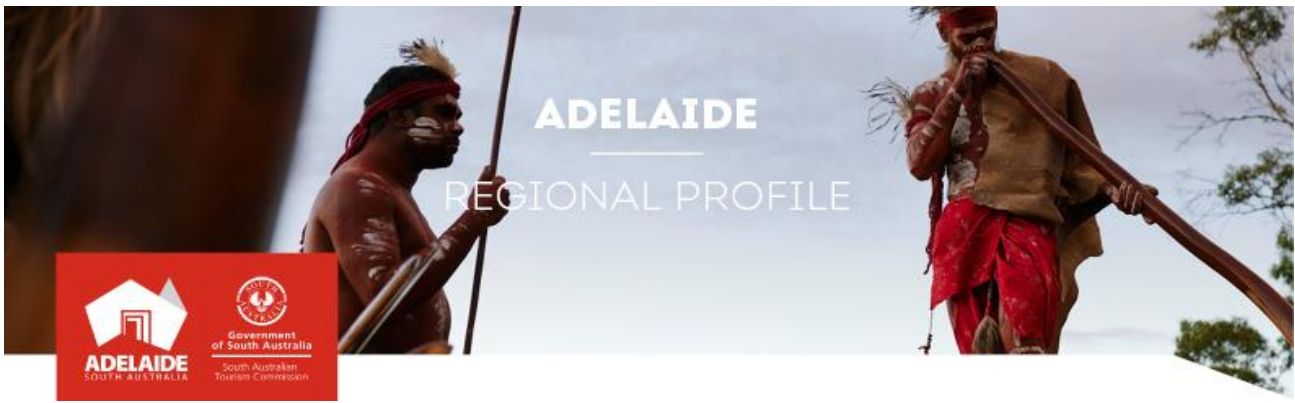
SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO ADELAIDE



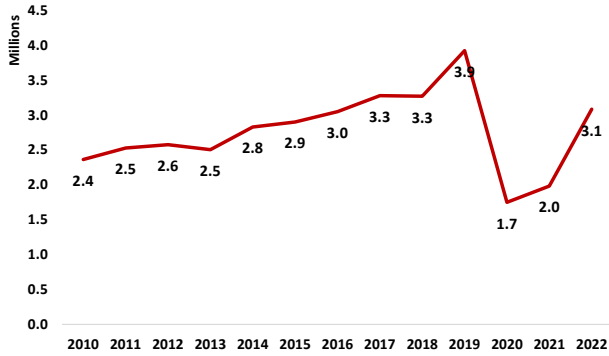
Source: NVS year end December 2022

- National Visitor Survey data shows us that January, March, April, October and November are the strongest months for visitation to Adelaide.
- January is busy with the school holidays.
- April and October are strong on the back of the school holidays.
- March is strong with Mad March and October and November are also strong with the conference season.

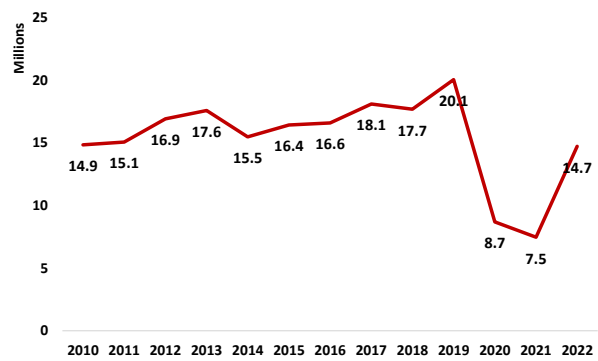


TOTAL OVERNIGHT VISITATION 2010 - 2022

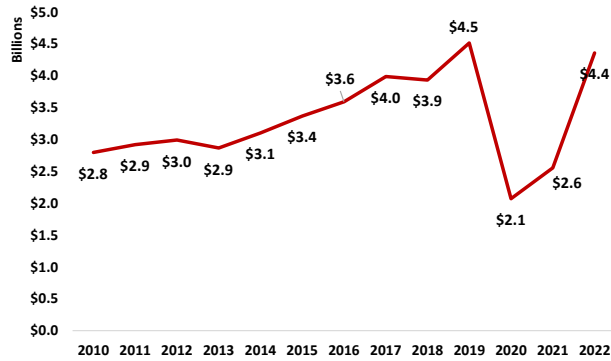
VISITORS ADELAIDE 2010 - 2022 - International and Domestic



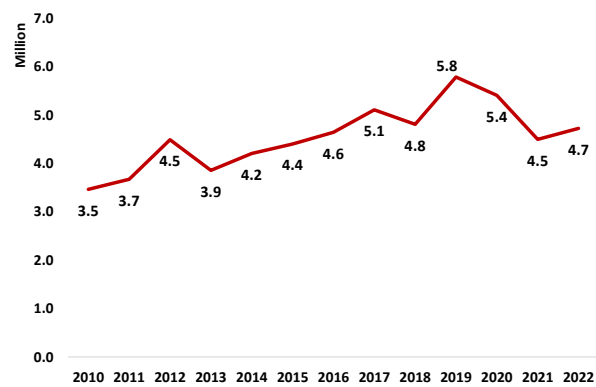
NIGHTS ADELAIDE 2010 - 2022 - International and Domestic



TOTAL EXPENDITURE ADELAIDE 2010 - 2022 - International and Domestic



DAY TRIPS ADELAIDE 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 TOURISM LISTINGS

Category	# Listings
EVENT	531
RESTAURANT	359
ATTRACTION	175
ACCOMM	161
TOUR	142
HIRE	23
TRANSPORT	16
GENSERVICE	8
DESTINFO	4
INFO	3
Grand Total	1422

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
AUSTRALIAN TOURISM DATA WAREHOUSE
LEADS
700,000
YEAR END DECEMBER 2022**



TOP 5

- EOS BY SKYCITY
- CROWNE PLAZA ADELAIDE
- INTERCONTINENTAL ADELAIDE
- SOFITEL ADELAIDE
- BIG4 WEST BEACH PARKS

TOP 5

- RESTAURANT BOTANIC
- SHOBOSHO
- PENFOLDS MAGILL ESTATE
- GAJA BY SASHI
- FINO VINO

TOP 5

- JOURNEY BEYOND RAIL EXPEDITIONS
- THE GHAN
- TEMPTATION SAILING
- ADELAIDE ZOO EXPERIENCES
- THE OVERLAND

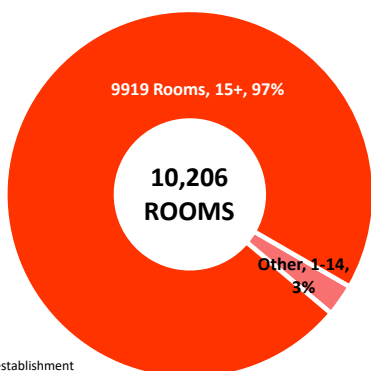
OTHER

- EVENTS - 38%
- ATTRACTIONS -18%

* Other refers to leads for events, destination information, attractions, general services, hire and transport

ROOMS IN ADELAIDE - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS IN ADELAIDE - SOURCE ATDW



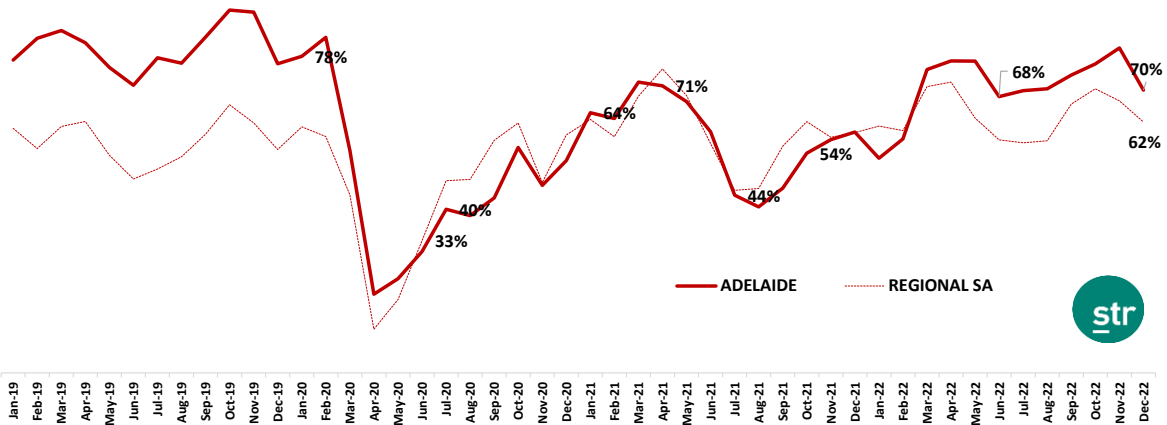
- Currently there are 161 establishments in Adelaide that accommodate guests.
- These 161 establishments account for 10,206 rooms across the region.
- 97 per cent of rooms fall into establishment with 15 or more rooms.
- 3 per cent of rooms fall into the 1-14 room establishments.

Rooms refers to rooms per establishment



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY ADELAIDE

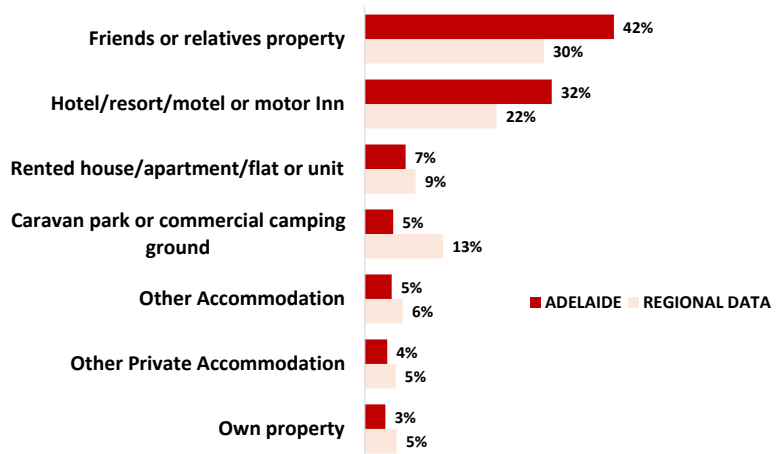


- Adelaide saw average occupancy of 80 per cent in 2019, this fell to 47 per cent in 2020, rose to 58 per cent in 2021 and again grew in 2022 to 71 per cent.
- Adelaide occupancy in 2022 was down 9 percentage points on 2019, however it needs to be remembered that room stock has grown by 8 per cent, with an extra 700 new rooms across the Adelaide region.

VISITOR USE OF ACCOMMODATION

- 42 per cent of domestic overnight visitor nights in Adelaide's are spent with Friends or Relatives compared to the SA regional average of 30 per cent.
- 32 per cent of visitors to Adelaide stayed in a Hotel, resort, motel or motor inn compared to regional SA where 22 per cent stayed in this accommodation.
- When compared to regional SA less visitors use caravan and camping for accommodation.

ACCOMMODATION USED IN ADELAIDE FOR DOMESTIC VISITORS



TRANSPORT

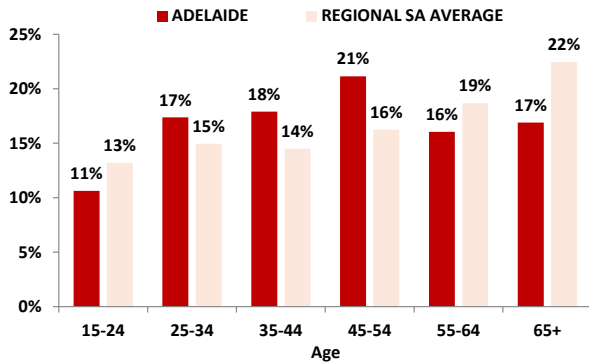


- The main method of transport used on trips to the Adelaide was a self drive vehicle.
- 50% of visitors used this type of transport.
- 45% of visitors arrived by aircraft.



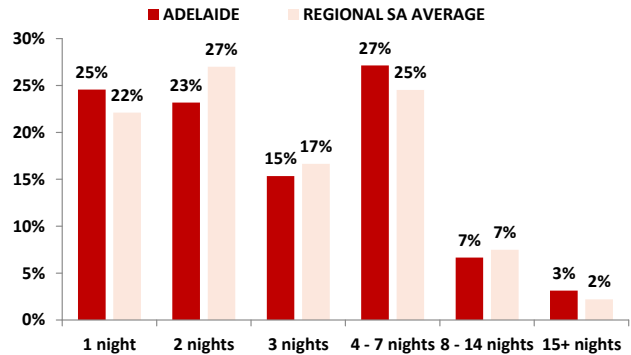
VISITOR PROFILE

AGE OF VISITORS TO ADELAIDE



- Overnight domestically there is a peak in the 45-54 age group at 21 per cent.
- 56 per cent of guest are in the 25-54 age group compared to regional SA with 35 per cent in this age group.

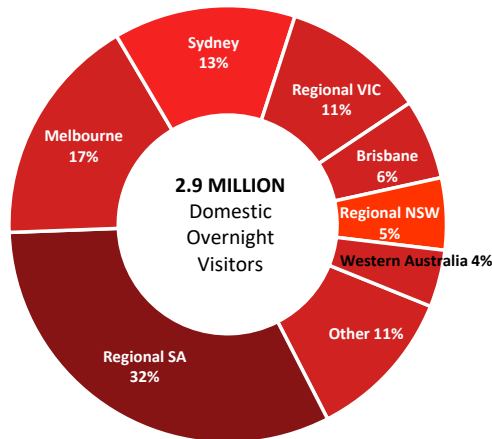
LENGTH OF VISIT TO ADELAIDE



- 48 per cent of domestic overnight visitors to Adelaide like to stay 1 to 2 nights.
- 27 per cent stay in Adelaide between 4 and 7 nights.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO ADELAIDE

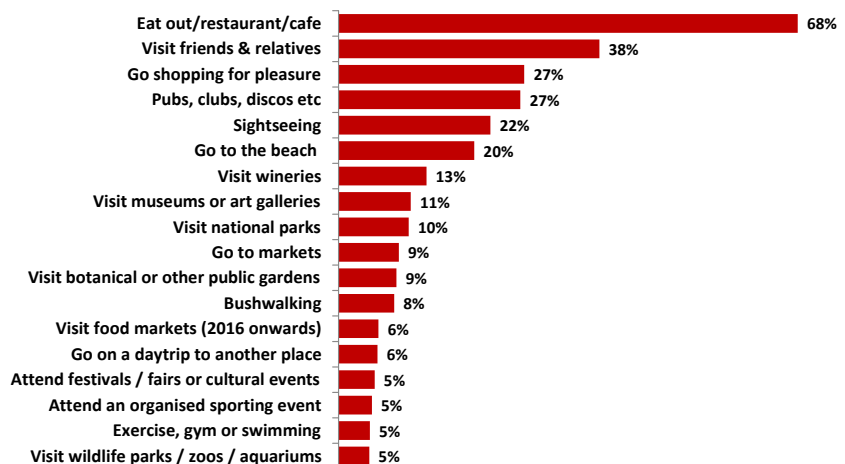


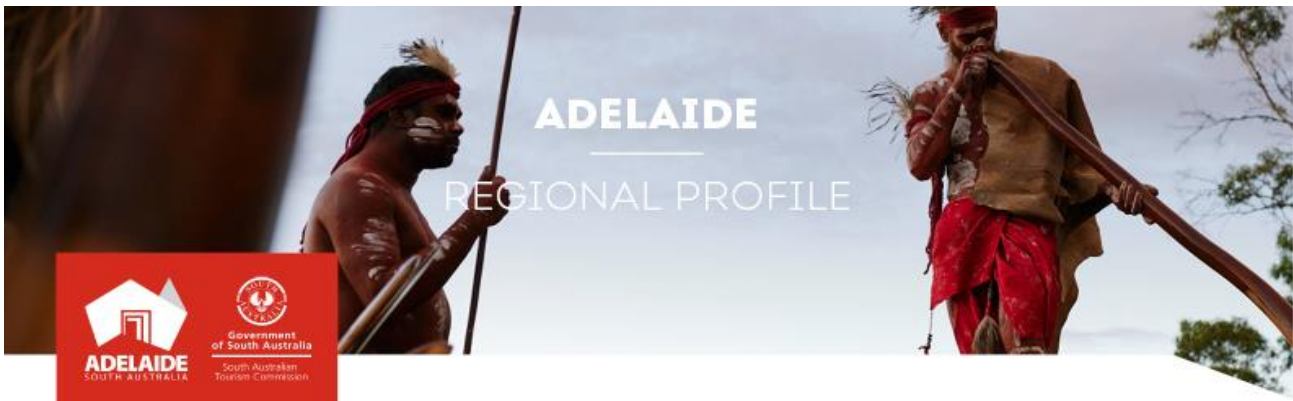
- Victoria at 28 per cent and New South Wales at 18 per cent are Adelaide's biggest interstate overnight domestic markets.
- Regional South Australia contributes 32 per cent of visitors to Adelaide.
- 6 per cent of visitors are from Brisbane and 4 per cent from Western Australia.

VISITOR ACTIVITIES

- The most popular activity when coming to Adelaide 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, going to the beach and seeing the sights.

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN ADELAIDE





REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2020-21, the tourism industry contributed an estimated \$2.4 billion to the Adelaide economy and directly employed approximately 16,000 people.

Employment

- 16,000 jobs for people employed directly by the tourism industry, 6,000 indirect jobs and a total employment impact of 22,000 people.

Gross Value Added (GVA)

- \$1.2 billion and \$705 million in direct and indirect tourism GVA, and \$1.9 billion in total tourism GVA.

Gross Regional Product (GRP)

- \$1.4 billion and \$885 million in direct and indirect tourism GRP and \$2.2 billion in total tourism GRP.

Tourism Consumption

2020-21

Tourism products - directly consumed

- Takeaway and restaurant meals 16%
- Shopping (including gifts and souvenirs) 14%
- Actual and imputed rent on dwellings 13%
- Fuel (petrol, diesel) 9%
- Travel agency and tour operator services 8%
- Accommodation services 7%
- Food products 6%
- Alcoholic beverages and other beverages 6%

Tourism Employment

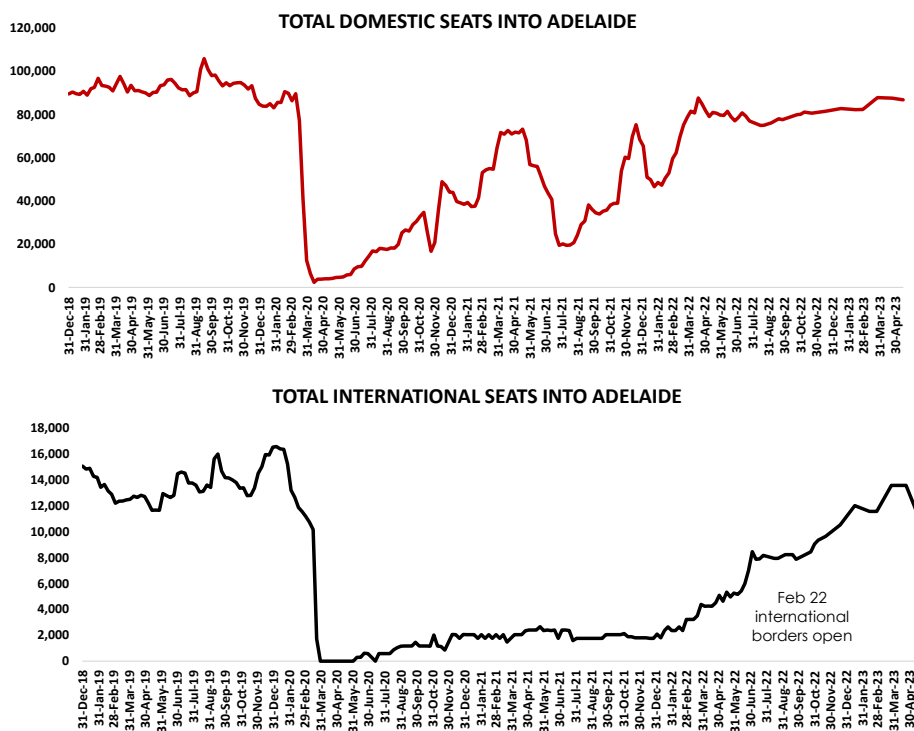
2020-21

Tourism Industries - 16,000 directly employed

- Retail trade 25%
- Cafes, restaurants and takeaway food services 22%
- Travel agency and tour operator services 12%
- Air, water and other transport 9%
- Accommodation 8%
- All other industries 7%
- Other sports and recreation services 5%
- Clubs, pubs, taverns and bars 5%

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

AIRLINE DATA



- Domestic seats have recovered well and are back to similar levels as to the pre-COVID 2019.

- The domestic market has seen strong recovery since early 2022.

- International seats have recovered well and are back to pre-COVID levels.

- Even though seats have recovered we are still waiting on Emirates, China Southern and Cathay Pacific to return whilst also exploring new airlines from the US and Japan.

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. Unless 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 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