Are we there yet?

The current and future value of tourism to
South Australia

Discovery series

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About the NRMA

Better road and transport infrastructure has been a core focus of the NRMA since 1920 when our founders lobbied for improvements to the condition of Parramatta Road in Sydney. Independent advocacy was the foundation activity of the organisation and remains critical to who we are as we approach our first centenary.

From humble beginnings, the NRMA has grown to one of the largest tourism and travel companies in Australia, representing over 2.6 million Australians. As our business has grown and diversified, so too has our national footprint and customer base, providing motoring, mobility and tourism services to 4.9 million customers across the country.

Today, the NRMA works with policy makers and industry leaders to advocate for increased investment in transport solutions to make mobility safer and easier, provide access to affordable travel options and experiences, and ensure communities remain connected to business and employment opportunities.
The NRMA is passionate about facilitating tourism and travel across Australia, recognising the vital role travel plays in how Australians connect and recharge, and discover the country.

By working together with all levels of government to deliver integrated tourism and travel options we can give the community a real choice about how they get around and explore the country. The NRMA believes that integrated transport networks, high-quality public transport and improved visitor facilities are essential to solve the challenge of growing congestion and provide for the future growth of our communities.

Discovery series

The NRMA is passionate about travel. We aim to inspire people to connect, explore and discover this great country through quality tourism and transport services.

As the backbone of many regional communities and an employer of over half a million Australians, we need to ensure the tourism industry continues to grow. The NRMA will champion investment in transport and visitor infrastructure, partnerships to profile our regions and technology to link visitors with the most iconic and best kept secrets this country has to offer.

Introduction

South Australia has built a vibrant visitor economy. From the vineyards of the Barossa, to the rugged beauty of Kangaroo Island, to the sandy shores and cliff faces of Fleurieu Peninsula, SA has a lot to offer visitors and locals alike. Coupled with a growing major events calendar, SA has developed a diverse tourism offering that encourages visitors to stay longer and explore what the state has to offer.

The NRMA is committed to the South Australian tourism industry and the communities it supports. The NRMA's SA *Are We There Yet?* paper highlights the importance of tourism to SA and its regions, trends in visitation and expenditure, and the value of drive tourism and caravan and camping to many of the state's iconic regional destinations.

SA welcomed 19.8 million visitors in 2016-17, who spent $6.2 billion in local communities. The state has experienced steady growth in both international and domestic visitor markets since 2011-12, with total visitation growing on average 3 per cent per annum.

In the five year period to 2016-17, international visitation grew faster than domestic overnight visitation, growing on average at 7 per cent each year to 435,000 visitors. International visitor expenditure also grew more than four times faster than domestic overnight expenditure at 13 per cent per annum to $1.1 billion. Domestic overnight expenditure however, still represents the lion share of spend in the state at $3.8 billion.

Encouraging visitors to discover our regions and stay longer is a core focus of the NRMA. Visitation to regional SA represents 62 per cent of total visitation to the state, with 42 per cent of visitor expenditure occurring in regional areas. Domestic visitation is the largest contributor to spend in the regions, contributing $2.5 billion or 95 per cent of total spend outside Adelaide.

It's important to note that 17.2 million visitors to the state took a self-drive trip, representing 87 per cent of total visitation. Of all self-drive trips, 99 per cent are undertaken by domestic visitors. Further, caravan and camping generated $356 million in visitor expenditure in 2016-17, of which 83 per cent occurs in regional SA.

SA's tourism regions have performed strongly over the five years to 2016-17. The Adelaide Hills experienced the largest average annual increase in domestic overnight visitors of 12 per cent to 188,000 visitors, while Kangaroo Island saw the largest average annual increase in international visitation at 12 per cent to 43,000 visitors.

The Fleurieu Peninsula received the largest total regional spend outside Adelaide at $435 million, while the Barossa and Clare Valley experienced the largest average annual growth in total visitor spend at nine per cent to $202 million and $127 million respectively.

The Eyre Peninsula has experienced the largest average annual increase in self-drive visitors of 7 per cent 756,000 visitors, while both the Flinders Ranges and Clare Valley experienced the largest average annual increases in expenditure by self-drive visitors outside of Adelaide and Adelaide Hills of 12 per cent and 11 per cent respectively.

The NRMA believes with the right level of investment, planning and industry partnerships, visitor nights could increase to 46 million by 2026-27, with overnight visitor expenditure growing to $6.9 billion. Overnight expenditure could also grow to $2.3 billion in regional SA.

With the industry approaching the cusp of the 2020 Tourism Industry potential target, now is the time to review our performance and plan for the future.

South Australia tourism regions

Tourism summary

Headlines figures

36,000
people employed in the sector

12.3
million visitors to regional SA — 62 per cent of total visitation

International visitor expenditure totalled
$1.1 billion
in 2016-17 - an average annual growth rate of 13 per cent

$6.2
billion in total visitor expenditure

83%
per cent of total visitor expenditure is generated by domestic visitors — overnight + daytrips

Domestic overnight expenditure totalled
$3.8 billion,
representing 61 per cent of total spend

42%
of expenditure occurs in regional SA - $2.6 billion

Industry potential

Visitor nights could grow to
45.8
million by 2026-27 — 19.8 million in regional SA

$2.3
billion in overnight visitor expenditure could be spent directly in regional SA

Direct overnight
visitor expenditure
could increase to $6.9 billion in 2026-27

Self-drive visitor nights could increase to
25.9
million by 2026-27

Caravan and camping

719,000
caravan and camping visitors in 2016-17

95%
of total caravan and camping visitors are domestic visitors — 684,000

Visitors who stayed in a caravan or camping ground spent
$356 million in 2016-17

In the regions

Limestone Coast - Largest number of international visitors outside Adelaide - 46,000

Limestone Coast — largest number of international visitor nights outside Adelaide at **356,000 nights.**

Kangaroo Island - largest international visitor spend of all regional destinations - **$24 million**

Kangaroo Island — largest annual increase in international visitation at **12%**

The Flinders Ranges and Outback received the largest domestic overnight regional expenditure of

$301 million

a 2 per cent average annual increase.

Fleurieu Peninsula

largest total regional spend outside Adelaide of $435 million, a 5 per cent average annual increase.

Barossa and Clare Valley — largest annual increase in total visitor spend at 9 cent to $202 million and **$127 million**

Adelaide Hills experienced the largest average annual change in domestic overnight visitors of 12 per cent to 188,000 visitors.

Caravan and camping

83 per cent of expenditure by caravan and camping visitors occurs in regional SA

The Limestone Coast and the Flinders Ranges and Outback remain the most popular caravan and camping destinations with 138 million and 173 million visitors respectively

Self-drive

17.2 million visitors took a self-drive trip in 2016-17

99% of self-drive trips were by domestic visitors.

International self-drive trips grown on average 8 per cent each year. Compared to 4 per cent for domestic overnight visitors.

Expenditure by self-drive visitors totalled **$3.6 billion in 2016-17**

58 per cent of expenditure by self-drive visitors occurs in regional SA

Self-drive visitors spent **12 million nights** in regional SA

Eyre Peninsula has experienced the largest average annual change in self-drive visitors of 7 per cent to 756,000 visitors.

Adelaide Hills saw the largest average annual increase in expenditure by self-drive visitors of 16 per to **$138 million**

Murraylands and Fleurieu Peninsula saw the largest average annual growth in regional international self-drive visitors of 12 per cent.

Economic contribution of tourism

Stopover region	Financial year	Total tourism visitation: Visitors (000) Int'l	Dom. overnight	Dom. daytrips	Total	Total tourism nights: Nights (000) Int'l	Dom. overnight	Total
Adelaide	2011/12	296	2,127	4,011	6,433	7,522	6,911	14,433
	2016/17	389	2,677	4,770	7,836	8,972	8,302	17,274
	Av. Annual change	6%	5%	4%	4%	4%	4%	4%
Adelaide Hills	2011/12	5	116	918	1,039	102	333	435
	2016/17	8	188	1,130	1,326	149	592	741
	Av. Annual change	12%	12%	5%	6%	9%	16%	14%
Barossa	2011/12	9	177	688	873	103	420	524
	2016/17	12	225	851	1,088	130	616	745
	Av. Annual change	7%	5%	5%	5%	5%	9%	8%
Clare Valley	2011/12	5*	166	336	507	14*	316	330
	2016/17	3*	190	351	545	36*	414	451
	Av. Annual change	-6%	3%	1%	2%	31%	6%	7%
Eyre Peninsula	2011/12	14	323	361	698	265	1,659	1,924
	2016/17	21	410	414	845	167	1,744	1,911
	Av. Annual change	11%	5%	3%	4%	-7%	1%	0%
Fleurieu Peninsula	2011/12	16	644	2,270	2,930	132	1,928	2,061
	2016/17	24	720	2,517	3,260	206	2,027	2,233
	Av. Annual change	10%	2%	2%	2%	11%	1%	2%
Limestone Coast	2011/12	43	505	634	1,182	293	1,504	1,797
	2016/17	46	546	699	1,290	356	1,638	1,994
	Av. Annual change	1%	2%	2%	2%	4%	2%	2%
Murraylands	2011/12	7	256	830	1,093	68	651	719
	2016/17	10	249	779	1,038	96	643	738
	Av. Annual change	8%	-1%	-1%	-1%	8%	0%	1%
Riverland	2011/12	7	251	474	733	288	814	1,103
	2016/17	7	359	433	800	231	972	1,203
	Av. Annual change	0%	9%	-2%	2%	-4%	4%	2%
Yorke Peninsula	2011/12	4*	436	656	1,097	42*	1,464	1,506
	2016/17	7*	496	600	1,102	189*	1,566	1,755
	Av. Annual change	12%	3%	-2%	0%	70%	1%	3%
Flinders Ranges and Outback	2011/12	38	552	480	1,070	290	2,367	2,657
	2016/17	41	644	619	1,304	263	2,564	2,828
	Av. Annual change	1%	3%	6%	4%	-2%	2%	1%
Kangaroo Island	2011/12	27	93	46*	165	103	300	403
	2016/17	43	99	24*	167	139	380	519
	Av. Annual change	12%	1%	-9%	0%	7%	5%	6%
Regional SA	2011/12	122	3,210	7,694	11,026	1,701	11,756	13,457
	2016/17	154	3,743	8,418	12,315	1,962	13,156	15,118
	Av. Annual change	5%	3%	2%	2%	3%	2%	2%
SA	**2011/12**	**328**	**5,081**	**11,705**	**17,114**	**9,223**	**18,667**	**27,890**
	2016/17	**435**	**6,143**	**13,188**	**19,766**	**10,934**	**21,458**	**32,393**
	Av. Annual change	**7%**	**4%**	**3%**	**3%**	**4%**	**3%**	**3%**

Source: Tourism Research Australia

Total tourism expenditure						
		Regional expenditure ($M)				Employment
Stopover region	**Financial year**	**Int'l**	**Dom. overnight**	**Dom. daytrips**	**Total**	**Total**
Adelaide	2011/12	562	1,895	466	2,923	20,300
	2016/17	927	2,168	542	3,637	
	Av. Annual change	13%	3%	3%	5%	
Adelaide Hills	2011/12	6	47	59	113	1,200
	2016/17	7	69	84	160	
	Av. Annual change	3%	9%	8%	8%	
Barossa	2011/12	6	73	61	141	900
	2016/17	14	99	89	202	
	Av. Annual change	27%	7%	9%	9%	
Clare Valley	2011/12	np*	58	28	88	500
	2016/17	np*	55	69	127	
	Av. Annual change	np	-1%	29%	9%	
Eyre Peninsula	2011/12	3	214	59	276	1,800
	2016/17	13	232	45	291	
	Av. Annual change	67%	2%	-5%	1%	
Fleurieu Peninsula	2011/12	5	206	143	354	3,100
	2016/17	13	247	175	435	
	Av. Annual change	32%	4%	4%	5%	
Limestone Coast	2011/12	13	189	69	271	1,900
	2016/17	18	231	108	357	
	Av. Annual change	8%	4%	11%	6%	
Murraylands	2011/12	2	53	56	111	1,000
	2016/17	6	59	71	136	
	Av. Annual change	40%	2%	5%	5%	
Riverland	2011/12	2	102	38	142	1,100
	2016/17	7	123	41	170	
	Av. Annual change	50%	4%	2%	4%	
Yorke Peninsula	2011/12	np*	130	44	176	1,300
	2016/17	np*	132	43	188	
	Av. Annual change	np	0%	0%	1%	
Flinders Ranges and Outback	2011/12	17	279	58	354	2,100
	2016/17	17	301	95	414	
	Av. Annual change	0%	2%	13%	3%	
Kangaroo Island	2011/12	26	66	np*	96	800
	2016/17	24	96	np*	125	
	Av. Annual change	-2%	9%	np	6%	
Regional SA	2011/12	85	1,417	619	2,122	15,700
	2016/17	134	1,644	825	2,605	
	Av. Annual change	12%	3%	7%	5%	
SA	**2011/12**	**647**	**3,312**	**1,085**	**5,045**	**36,000**
	2016/17	**1,061**	**3,812**	**1,367**	**6,242**	
	Av. Annual change	**13%**	**3%**	**5%**	**5%**	

*one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.

Self-drive tourism

		Drive tourism				Total tourism nights		
		Visitors (000)				Nights (000)		
Stopover region	Financial year	Int'l	Dom. overnight	Dom. daytrips	Total	Int'l	Dom. overnight	Total
Adelaide	2011/12	111	1,092	3,752	4,955	2,824	3,017	5,840
	2016/17	156	1,389	4,326	5,871	3,690	3,723	7,413
	Av. Annual change	8%	5%	3%	4%	6%	5%	5%
Adelaide Hills	2011/12	4*	75	866	944	88*	190	279
	2016/17	6*	144	1,099	1,249	110*	450	560
	Av. Annual change	13%	18%	5%	6%	5%	27%	20%
Barossa	2011/12	6	158	657	821	59	386	445
	2016/17	8	190	806	1,004	49	478	527
	Av. Annual change	6%	4%	5%	4%	-3%	5%	4%
Clare Valley	2011/12	4*	143	322	468	9*	272	281
	2016/17	2*	164	339	505	18*	358	376
	Av. Annual change	-9%	3%	1%	2%	20%	6%	7%
Eyre Peninsula	2011/12	9	228	327	564	55	1,014	1,069
	2016/17	12	340	404	756	75	1,280	1,355
	Av. Annual change	6%	10%	5%	7%	7%	5%	5%
Fleurieu Peninsula	2011/12	13	617	2,206	2,836	104	1,764	1,868
	2016/17	21	663	2,415	3,099	168	1,814	1,983
	Av. Annual change	12%	2%	2%	2%	12%	1%	1%
Limestone Coast	2011/12	35	453	632	1,120	123	1,392	1,515
	2016/17	38	521	656	1,215	210	1,582	1,792
	Av. Annual change	2%	3%	1%	2%	14%	3%	4%
Murraylands	2011/12	5	232	820	1,056	44	540	584
	2016/17	8	233	777	1,018	59	588	648
	Av. Annual change	12%	0%	-1%	-1%	7%	2%	2%
Riverland	2011/12	5	237	474	716	166	730	896
	2016/17	5*	328	433	766	61*	911	972
	Av. Annual change	1%	8%	-2%	1%	-13%	5%	2%
Yorke Peninsula	2011/12	4*	431	639	1,074	25*	1,451	1,476
	2016/17	6*	481	590	1,078	83*	1,478	1,561
	Av. Annual change	10%	2%	-2%	0%	48%	0%	1%
Flinders Ranges and Outback	2011/12	23	408	477	908	100	1,597	1,697
	2016/17	28	516	615	1,159	161	1,779	1,941
	Av. Annual change	5%	5%	6%	6%	12%	2%	3%
Kangaroo Island	2011/12	11	54*	36*	101	39	160*	199
	2016/17	14	55*	23*	92	61	194*	255
	Av. Annual change	5%	0%	-7%	-2%	11%	4%	6%
Regional SA	2011/12	79	2,800	7,455	10,334	813	9,496	10,309
	2016/17	98	3,340	8,158	11,596	1,056	10,914	11,969
	Av. Annual change	5%	4%	2%	2%	6%	3%	3%
SA	**2011/12**	**145**	**3,740**	**11,208**	**15,093**	**3,637**	**12,513**	**16,150**
	2016/17	**201**	**4,550**	**12,484**	**17,235**	**4,746**	**14,637**	**19,383**
	Av. Annual change	**8%**	**4%**	**2%**	**3%**	**6%**	**3%**	**4%**

Source: Tourism Research Australia

Drive tourism expenditure

Stopover region	Financial year	Regional expenditure ($M) Int'l	Dom. overnight	Dom. daytrips	Total
Adelaide	2011/12	174	502	399	1,075
	2016/17	337	719	461	1,517
	Av. Annual change	19%	9%	3%	8%
Adelaide Hills	2011/12	np*	15	57	77
	2016/17	np*	49	83	138
	Av. Annual change	np	45%	9%	16%
Barossa	2011/12	4	53	61	118
	2016/17	10	75	85	169
	Av. Annual change	30%	8%	8%	9%
Clare Valley	2011/12	np*	49	26	78
	2016/17	np*	51	68	120
	Av. Annual change	np	1%	32%	11%
Eyre Peninsula	2011/12	1	112	49	161
	2016/17	6	141	39	187
	Av. Annual change	100%	5%	-4%	3%
Fleurieu Peninsula	2011/12	3	184	141	328
	2016/17	11	213	169	393
	Av. Annual change	53%	3%	4%	4%
Limestone Coast	2011/12	9	155	67	231
	2016/17	10	197	96	302
	Av. Annual change	2%	5%	9%	6%
Murraylands	2011/12	1	42	56	99
	2016/17	2	38	71	111
	Av. Annual change	20%	-2%	5%	2%
Riverland	2011/12	1	91	38	130
	2016/17	np*	109	41	151
	Av. Annual change	np	4%	2%	3%
Yorke Peninsula	2011/12	np*	127	43	171
	2016/17	np*	124	43	170
	Av. Annual change	np	0%	0%	0%
Flinders Ranges and Outback	2011/12	7	142	58	208
	2016/17	15	226	95	336
	Av. Annual change	23%	12%	13%	12%
Kangaroo Island	2011/12	np	np*	np*	np
	2016/17	np	np*	np*	np
	Av. Annual change	np	np	np	np
Regional SA	2011/12	43	1,009	600	1,653
	2016/17	76	1,260	794	2,127
	Av. Annual change	15%	5%	6%	6%
SA	**2011/12**	**217**	**1,511**	**999**	**2,728**
	2016/17	**413**	**1,979**	**1,255**	**3,644**
	Av. Annual change	**18%**	**6%**	**5%**	**7%**

*one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.

Caravan and camping

Caravan and camping visitation					Total tourism nights		
		Visitors (000)			Nights (000)		
Stopover region	**Financial year**	**Int'l**	**Dom. overnight**	**Total**	**Int'l**	**Dom. overnight**	**Total**
Adelaide	2011/12	12	84	96	50	304	354
	2016/17	16	93	109	77	470	547
	Av. Annual change	6%	2%	3%	11%	11%	11%
Adelaide Hills	2011/12	0*	2*	3	1*	2*	3
	2016/17	1*	19*	20	6*	114*	119
	Av. Annual change	24%	144%	124%	198%	981%	838%
Barossa	2011/12	1*	22*	23	2*	55*	58
	2016/17	1*	38*	40	5*	109*	114
	Av. Annual change	7%	14%	14%	20%	20%	20%
Clare Valley	2011/12	1*	20*	21	1*	45*	46
	2016/17	0*	22*	23	0*	34*	34
	Av. Annual change	-14%	2%	2%	-8%	-5%	-5%
Eyre Peninsula	2011/12	5*	73	78	13*	339	352
	2016/17	6*	73	79	24*	378	403
	Av. Annual change	7%	0%	0%	16%	2%	3%
Fleurieu Peninsula	2011/12	4*	79	83	11*	271	282
	2016/17	3*	78	81	7*	224	231
	Av. Annual change	-5%	0%	0%	-8%	-3%	-4%
Limestone Coast	2011/12	7	110	117	11	424	435
	2016/17	7	130	138	11	467	478
	Av. Annual change	3%	4%	4%	-1%	2%	2%
Murraylands	2011/12	2*	47*	49	6*	107*	113
	2016/17	3*	36*	38	7*	63*	71
	Av. Annual change	13%	-5%	-4%	6%	-8%	-7%
Riverland	2011/12	2*	59	61	22*	234	256
	2016/17	2*	98	100	12*	280	292
	Av. Annual change	5%	13%	13%	-9%	4%	3%
Yorke Peninsula	2011/12	1*	89	89	2*	401	403
	2016/17	2*	69	71	3*	296	300
	Av. Annual change	28%	-4%	-4%	13%	-5%	-5%
Flinders Ranges and Outback	2011/12	12	143	155	33	432	465
	2016/17	14	159	173	46	517	564
	Av. Annual change	2%	2%	2%	8%	4%	4%
Kangaroo Island	2011/12	3*	15*	19	9*	58*	67
	2016/17	3*	3*	6	12*	27*	39
	Av. Annual change	-1%	-16%	-13%	6%	-11%	-8%
Regional SA	2011/12	22	584	606	112	2,368	2,480
	2016/17	28	609	637	134	2,511	2,644
	Av. Annual change	5%	1%	1%	4%	1%	1%
SA	**2011/12**	**27**	**643**	**670**	**162**	**2,672**	**2,834**
	2016/17	**35**	**684**	**719**	**211**	**2,980**	**3,191**
	Av. Annual change	**6%**	**1%**	**1%**	**6%**	**2%**	**3%**

Source: Tourism Research Australia

Caravan and camping expenditure				
		Regional expenditure ($M)		
Stopover region	**Financial year**	**Int'l**	**Dom. overnight**	**Total**
Adelaide	2011/12	5	77	82
	2016/17	6	55	61
	Av. Annual change	4%	-6%	-5%
Adelaide Hills	2011/12	0*	0*	0
	2016/17	0*	10*	10
	Av. Annual change	np	np	np
Barossa	2011/12	0*	11*	11
	2016/17	1*	17*	18
	Av. Annual change	np	11%	13%
Clare Valley	2011/12	0*	6*	6
	2016/17	0*	4*	4
	Av. Annual change	np	-7%	-7%
Eyre Peninsula	2011/12	0*	39	39
	2016/17	2*	40	42
	Av. Annual change	np	1%	2%
Fleurieu Peninsula	2011/12	1*	25	26
	2016/17	1*	27	28
	Av. Annual change	0%	2%	2%
Limestone Coast	2011/12	1	48	49
	2016/17	1	54	55
	Av. Annual change	0%	3%	2%
Murraylands	2011/12	0*	9*	9
	2016/17	0*	5*	5
	Av. Annual change	np	-9%	-9%
Riverland	2011/12	0*	20	20
	2016/17	0*	40	40
	Av. Annual change	np	20%	20%
Yorke Peninsula	2011/12	0*	31	31
	2016/17	0*	20	20
	Av. Annual change	np	-7%	-7%
Flinders Ranges and Outback	2011/12	2	54	56
	2016/17	3	64	67
	Av. Annual change	10%	4%	4%
Kangaroo Island	2011/12	2*	9*	11
	2016/17	3*	3*	6
	Av. Annual change	10%	-13%	-9%
Regional SA	2011/12	7	252	259
	2016/17	11	283	294
	Av. Annual change	11%	2%	3%
SA	**2011/12**	**12**	**329**	**341**
	2016/17	**18**	**338**	**356**
	Av. Annual change	**10%**	**1%**	**1%**

*one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.

2026-27 projections

Visitor nights and self-drive visitation

South Australia	All tourism nights (000)				
	Adelaide		Regional South Australia		
	International	Domestic Overnight	International	Domestic Overnight	Total
2017-18	9,583	8,638	2,080	13,559	33,860
2018-19	10,165	8,859	2,199	13,939	35,162
2019-20	10,798	9,052	2,311	14,276	36,437
2020-21	11,424	9,241	2,431	14,608	37,704
2021-22	12,065	9,428	2,547	14,934	38,974
2022-23	12,725	9,613	2,667	15,255	40,260
2023-24	13,420	9,799	2,792	15,578	41,589
2024-25	14,144	9,986	2,922	15,902	42,954
2025-26	14,908	10,174	3,057	16,227	44,367
2026-27	15,721	10,363	3,199	16,554	45,836

South Australia	Self drive tourism nights (000)				
	Adelaide		Regional South Australia		
	International	Domestic Overnight	International	Domestic Overnight	Total
2017-18	3,737	3,801	1,061	11,119	19,717
2018-19	3,964	3,898	1,122	11,430	20,414
2019-20	4,211	3,983	1,179	11,706	21,079
2020-21	4,455	4,066	1,240	11,978	21,740
2021-22	4,705	4,149	1,299	12,246	22,399
2022-23	4,963	4,230	1,360	12,509	23,062
2023-24	5,234	4,311	1,424	12,774	23,743
2024-25	5,516	4,394	1,490	13,040	24,440
2025-26	5,814	4,476	1,559	13,306	25,156
2026-27	6,131	4,560	1,632	13,574	25,896

2026-27 projections

Expenditure – capital city and regional South Australia

South Australia	Overnight visitor expenditure ($m)		
	Adelaide	Regional South Australia	Total
	Total	Total	Total
2017-18	3,188	1,854	5,042
2018-19	3,328	1,913	5,242
2019-20	3,473	1,966	5,439
2020-21	3,616	2,020	5,635
2021-22	3,760	2,072	5,833
2022-23	3,908	2,125	6,033
2023-24	4,062	2,178	6,240
2024-25	4,222	2,232	6,453
2025-26	4,388	2,286	6,674
2026-27	4,563	2,342	6,905

Data notes:

Source

- Tourism Research Australia (TRA)

Employment

- Estimates for each tourism region have been sourced from TRA's 2016-17 Regional Tourism Satellite Accounts.

Visitor Estimates

- Components may not add to totals as visitors may visit more than one tourism region on a trip.

Expenditure Estimates

- Expenditure excludes all motor vehicle, capital and major equipment purchases and for international visitors any pre-purchased international airfares and 70 per cent of pre-purchased packages assumed to be spent outside Australia.
- For self-drive, expenditure for each tourism region refers to total expenditure in that region by visitors who arrived by self-drive vehicle.
- For caravan and camping, expenditure for each tourism region refers to total expenditure in that region by visitors who stayed in a commercial caravan park or camping ground during their visit.

Tourism Region Estimates

- Tourism regions estimates for nearly all metrics are based on the region boundaries which applied in 2017. The caravan and camping expenditure estimates are based on 2018 region boundaries. The differences between 2017 and 2018 region boundaries are negligible.
- Where a tourism region is asterisked (*) one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.
- The Gold Coast tourism region is included in Regional Queensland estimates.

Inclusions and Exclusions

- Regional, State and National totals include relevant estimates from tourism regions where data has been confidentialised and not published (i.e. np cells).
- Regional, State and National totals exclude stopovers by visitors to unspecified, offshore and/or transit locations.

Projections

- Visitor overnight forecasts derived from TRA data
- Self-drive visits and visitor nights have been calculated using a five-year average of the percentage self-drive represents of all tourism
- Expenditure forecasts have been calculated using visitor nights as a pro rata proxy
- Care should be used when using forecasted numbers. Domestic and international geopolitical and economic events outside the scope of this report can impact both domestic and international visitor numbers, travel patterns and expenditure.

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