

AEDA Insights

Visitor Economy Report

Q1 2025 (January – March)



Summary of Findings

- The first quarter of the year delivered positive results for the city's visitor economy. Ahead of the city's peak festival season, this year's events calendar kicked off with major sporting highlights, including the Tour Down Under, Adelaide International, and BBL cricket matches. The 2025 Australian Football League (AFL) started at the end of the quarter.
- When compared to the first quarter of last year, the key visitor indicators of airport flight volumes, hotel revenue, short-term rental bookings and interstate expenditure had all increased. Business event and visitor information services figures were slightly lower than the same period last year.
- International passenger volumes increased to a greater extent than interstate. This pattern will likely continue as Jetstar has increased flights to Denpasar, Bali, from seven flights weekly to 11. Fiji Airways will increase from two to three flights weekly, commencing April 2025. AirAsia will commence four flights weekly from June 2025. United Airlines will commence three weekly flights from December 2025. China Southern operated its last flight for this season on 1 March 2025, and will recommence in early December 2025.
- The City of Adelaide set a record in Q1 2025 for the highest number of hotel room bookings in the first quarter of any year. More than 525,000 rooms were booked, with each month exceeding the levels of the years preceding. Major events drove high visitation levels, with LIV Golf and WOMADelaide helping break records for monthly revenue, the Average Daily Rate (ADR) and Revenue Per Available Room (RevPAR).
- Short-term Rental Accommodation (STRA) saw year-on-year increases in booked listings at both Greater Adelaide and Adelaide suburb levels.
- The number of STRA listings booked in Adelaide reached record levels for the quarter, even though total visitor nights and ADR fell compared to last year.
- Interstate expenditure remained at a similar level to Q1 2024, with small nominal growth. Spending from the larger visitor states, New South Wales and Victoria fell, whilst expenditure from Queensland and Western Australia increased.
- The largest visitor proportion was those visiting for multiple days and passerby/short-trip visitors. This was followed by day trip visitors and regular/routine visitors.
- Visitor Information Centre (VIC) visitation fell slightly, although the monthly trend remained consistent with previous years. The quality of the service remains very high, with surveyed visitors praising volunteers as extremely helpful. Attractions and transport remained the top two reasons people visited the VIC. Approximately half the VIC visitors were from interstate (56%), whilst a third were from overseas (36%) and the remaining intrastate visitors (8%).
- The first quarter is usually a quieter period for business events. While Q1 delegate numbers were lower than last year, they were higher than 2023. Business event figures for the complete year are extremely positive, with very strong figures forecasted for the remainder of the year.
- Forward hotel occupancy forecasts for the remainder of 2025 are ahead of last year's, with forward occupancy higher than 2024 for six out of the eight months remaining. This shows positive interest in the City of Adelaide as a destination.

Key Visitor Economy Metrics – Q1 2025

Flight Passengers
(Adelaide Airport)



2.2m

+1% on Q1 2024
-6% on Q4 2024

Hotel Revenue
(City of Adelaide)



\$108.8M

+3% on Q1 2024
-6% on Q4 2024

Short Term Rental Bookings
(Greater Adelaide Airbnb/Vbro)



13.1k

+6% on Q1 2024
+5% on Q4 2024

Interstate Expenditure
(City of Adelaide)



\$126.7m

+1% on Q1 2024
-12% on Q4 2024

Business Events
(Estimated economic impact)



\$52.8m

-9% on Q1 2024
-45% on Q4 2024

Visitor Info. Centre Visits
(Pirie Street, Adelaide)



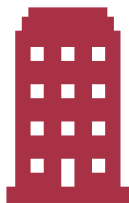
8.9k

-2% on Q1 2024
+18% on Q4 2024

Terminology



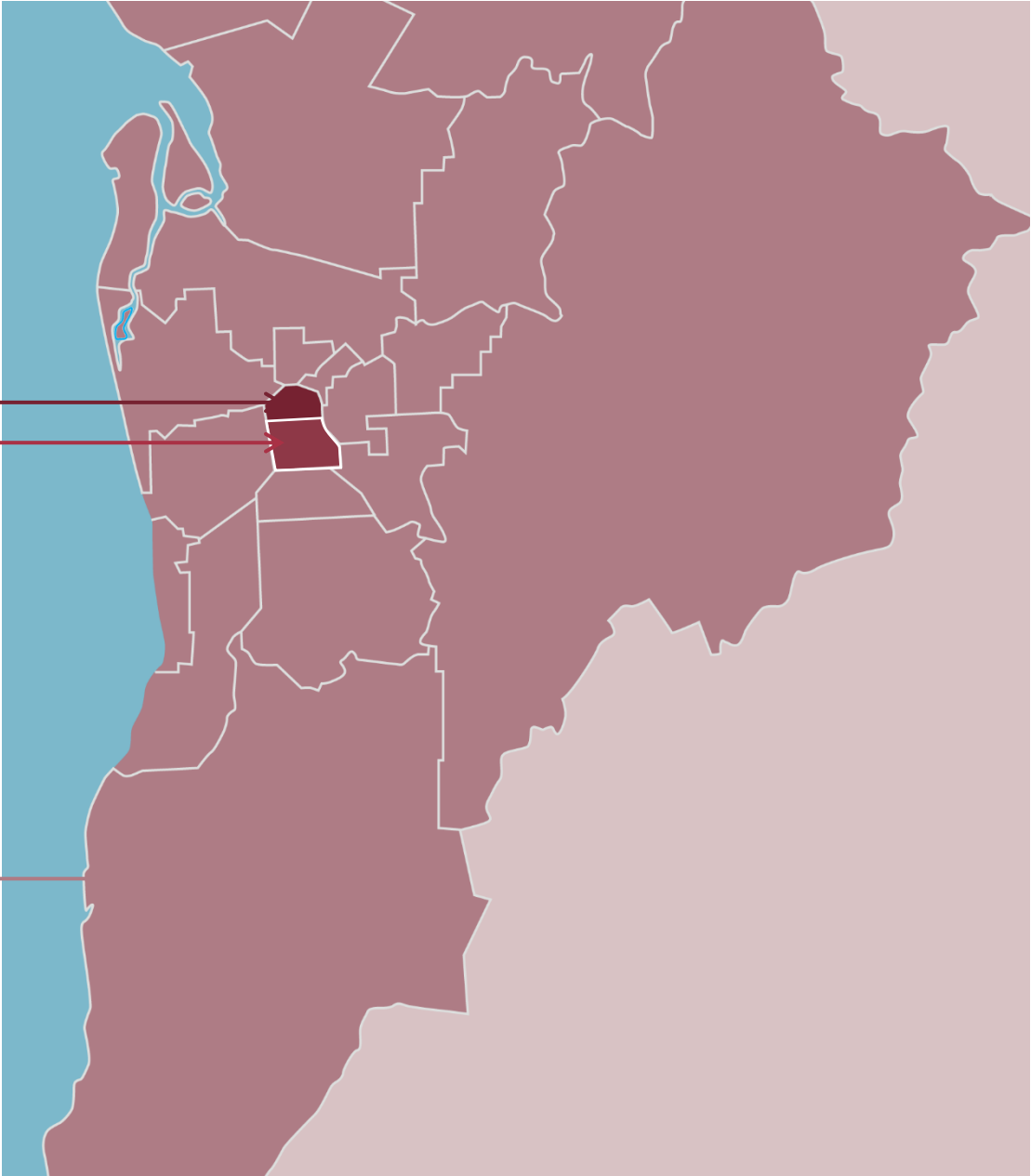
City of Adelaide
(Adelaide & North Adelaide)



Adelaide
(suburb postcode 5000)



Greater Adelaide
(Metro suburbs inc. Aldinga, Mt Barker, Gawler)

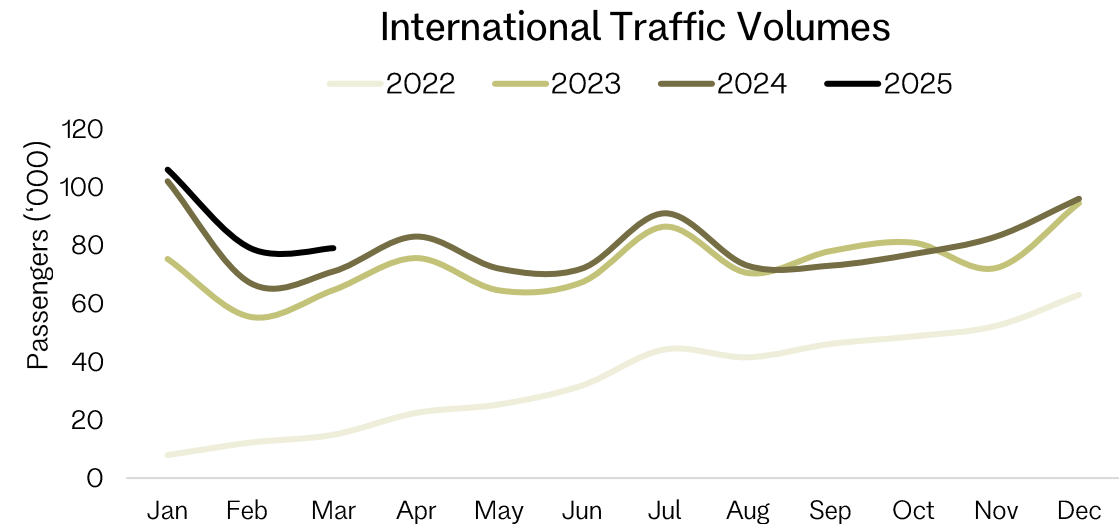
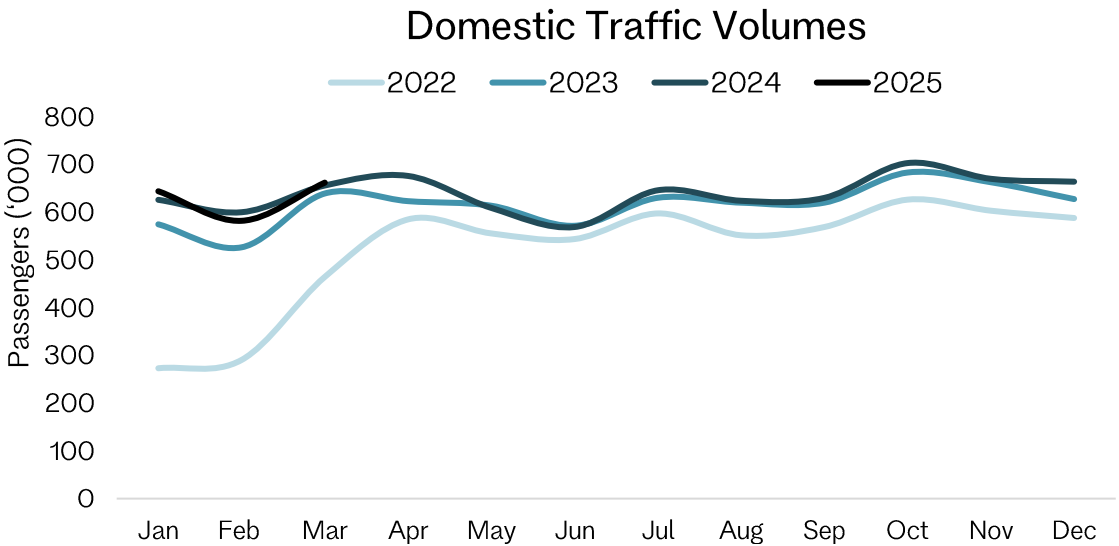


Traffic Volumes – Adelaide Airport

Airport traffic continues to grow YoY

Domestic Traffic Volumes Q1	
1.9M	+0.3% on Q1 2024 -7.3% on Q4 2024
International Traffic Volumes Q1	
264k	+10.0% on Q1 2024 +3.1% on Q4 2024

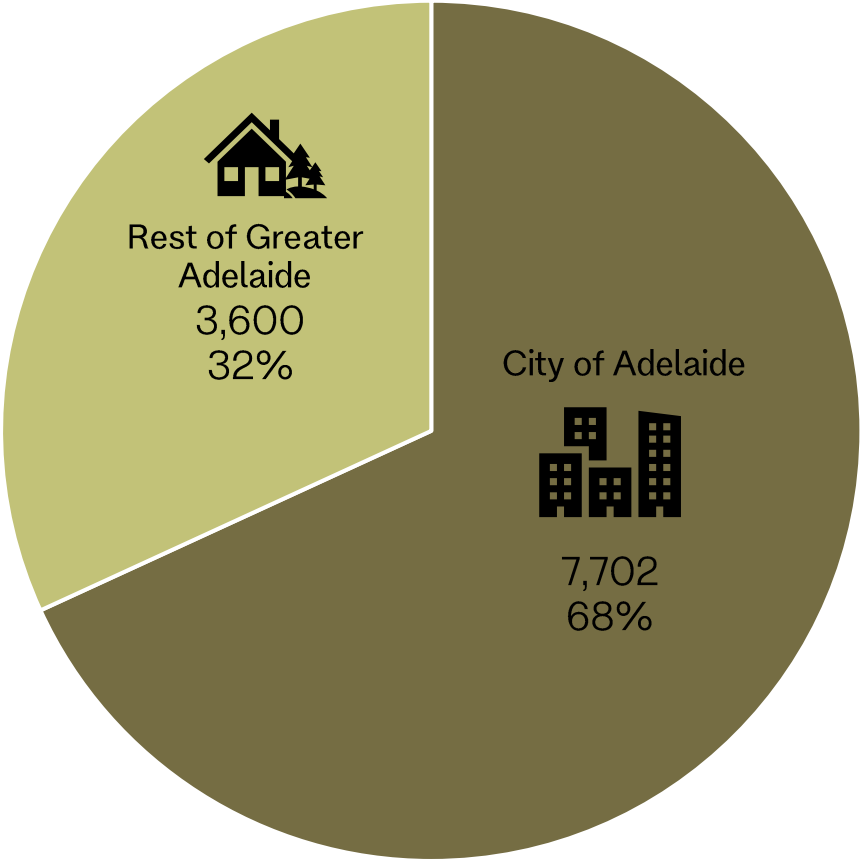
- International passenger volumes have continued to increase year-on-year, however, domestic traffic has stabilised.
- Domestic travel remains the major service from Adelaide Airport, although international passenger numbers now account for 12% of the passenger share.



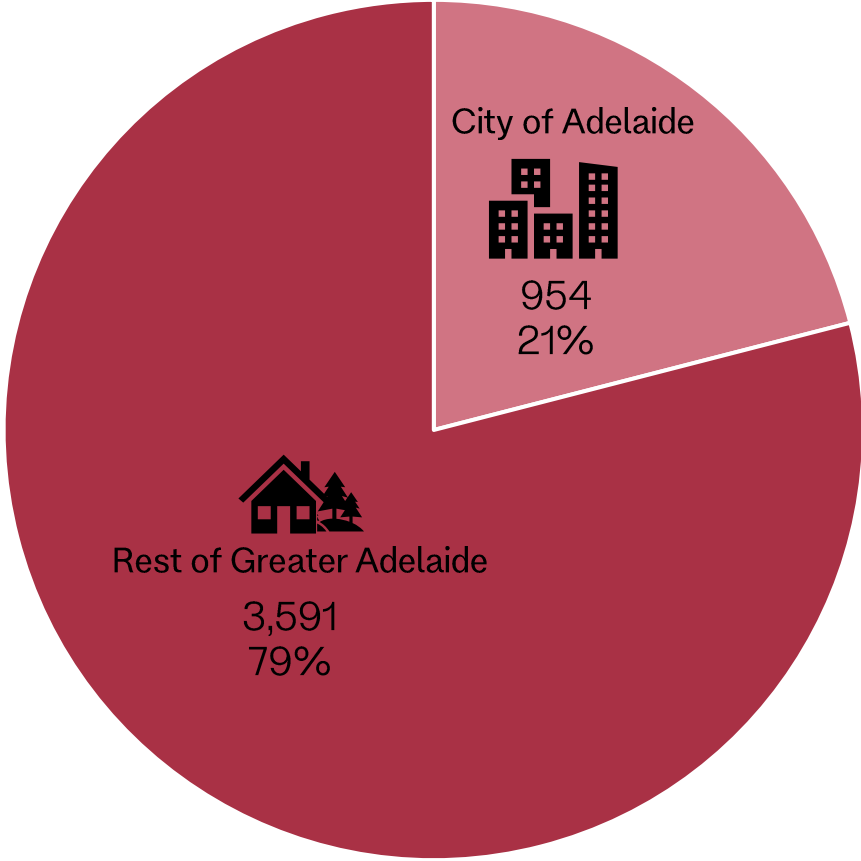
Accommodation – Market Share

Hotels are concentrated in the City of Adelaide whilst short-term rentals are more prevalent in the suburbs

Hotel Accommodation
(Share of rooms by area – as of March 2025)



Short Term Rental Accommodation
(Share of listings by area – as of March 2025)



Source: STR and AirDNA (Airbnb & Vrbo)

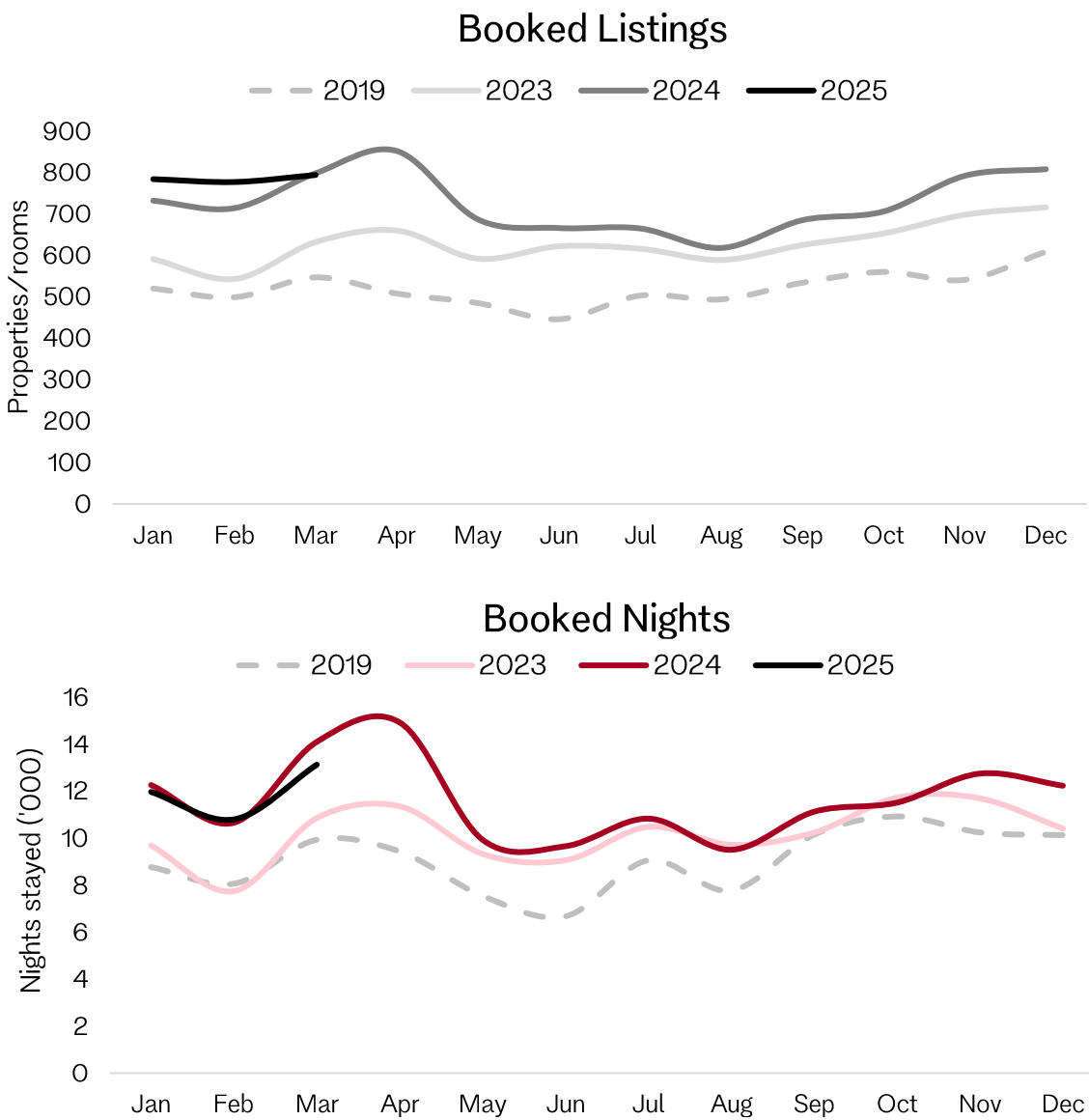
Short Term Rental Accommodation – Adelaide



STRA continues to grow in popularity

Booked Listings Q1	
2.4k	+4.9% on Q1 2024 +2.1% on Q4 2024
Booked Nights Q1	
35.9k	-3.0% on Q1 2024 -1.6% on Q4 2024

- The number of listings booked in Adelaide reached record levels for the quarter, even though the total nights stayed fell against last year.
- Q1 ADR was \$177, down from \$185 in Q4 2024 and \$184 in Q1 2024, likely due to more competition.
- Q1 occupancy sat at 64%, the same level as Q4 2024.
- The average length of stay is consistent during the year, with slightly longer stays in January (average of four nights) and July (4.1). Levels remained strong in February (3.8) and March (3.9).
- The majority of stays are in one or two-bedroom premises (86%).
- Airbnb accounts for 62% of listings, Vrbo 6% and places on both 32%.



Hotel Accommodation – City of Adelaide

Hotel bookings reached record levels

Rooms booked Q1

525.7k

+8.1% on Q1 2024

-0.3% on Q4 2024

Revenue Q1

\$108.8M

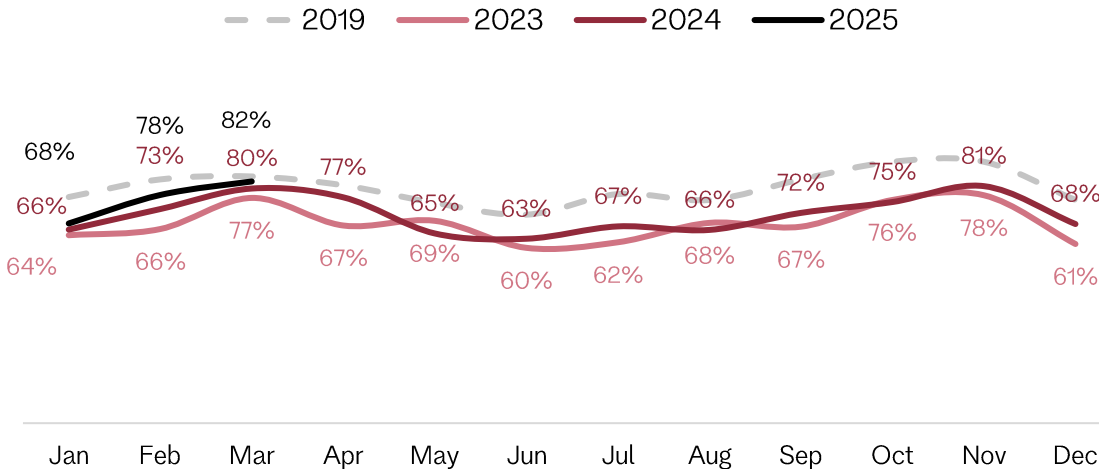
+2.9% on Q1 2024

-5.6% on Q4 2024

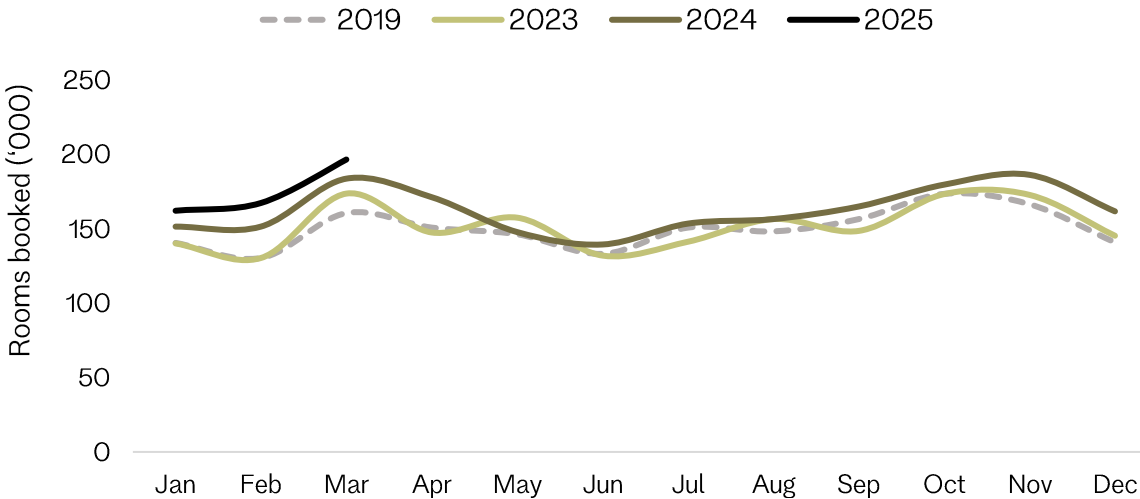
- Q1 set a record for rooms booked in a first quarter, with each month exceeding record levels. As bookings have increased, so has occupancy, although occupancy remains below 2019 levels (noting supply increases).
- Monthly revenue for March exceeded records by generating \$35.9M, and nightly revenue records were set in both February (\$2.4M on the 15th for the LIV Golf Saturday) and in March (\$2.3M on the 8th WOMAD Saturday).
- RevPAR also exceeded records in both February (\$310 on the 15th) and in March (\$300 on the 8th).
- The ADR for the quarter fell to \$204 (from \$213 in Q1 2024 and \$214 in Q4 2024), although February increased on average by \$2 from the previous year. ADR records were also set in both February (\$331 on the 15th) and in March (\$318 on the 8th).

Source: STR

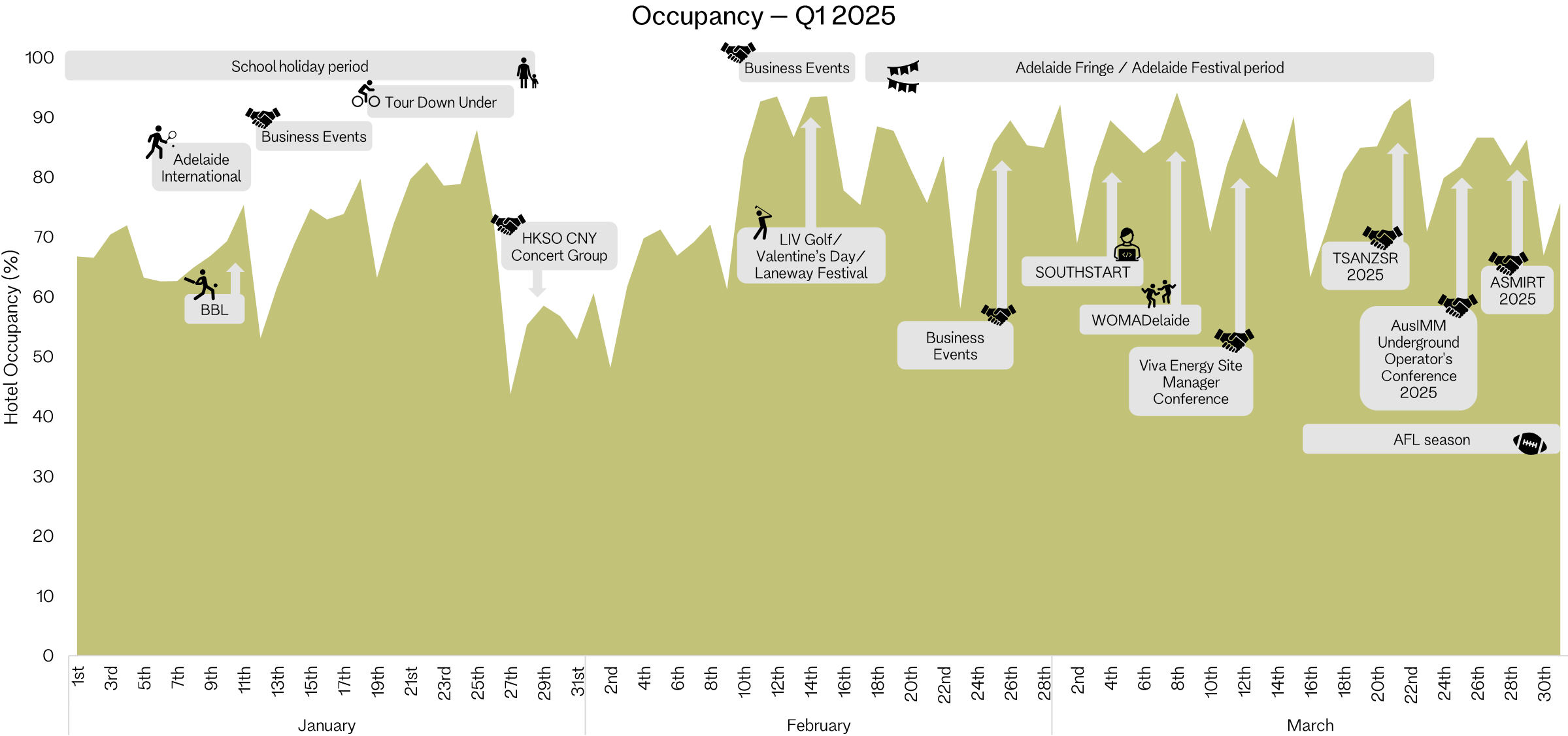
Occupancy Rates



Rooms Booked



Hotel Accommodation – City of Adelaide



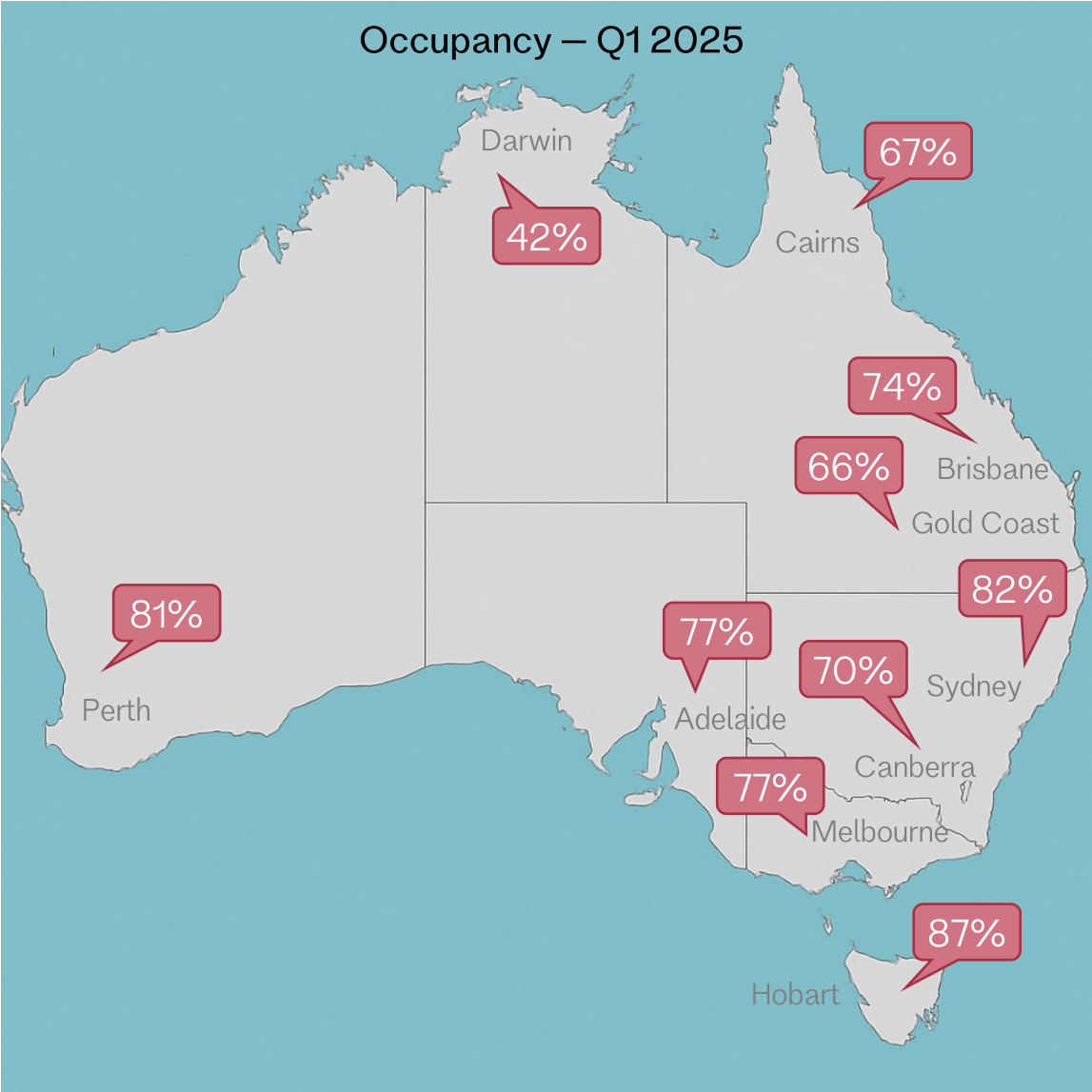
Source: STR

Hotel Accommodation – National

Occupancy improved across the board

Greater Adelaide Occupancy Q1	
76.5%	+1.0 pt on Q1 2024
Major cities Australia Occupancy Q1	
72.6%	+0.9 pt on Q1 2024

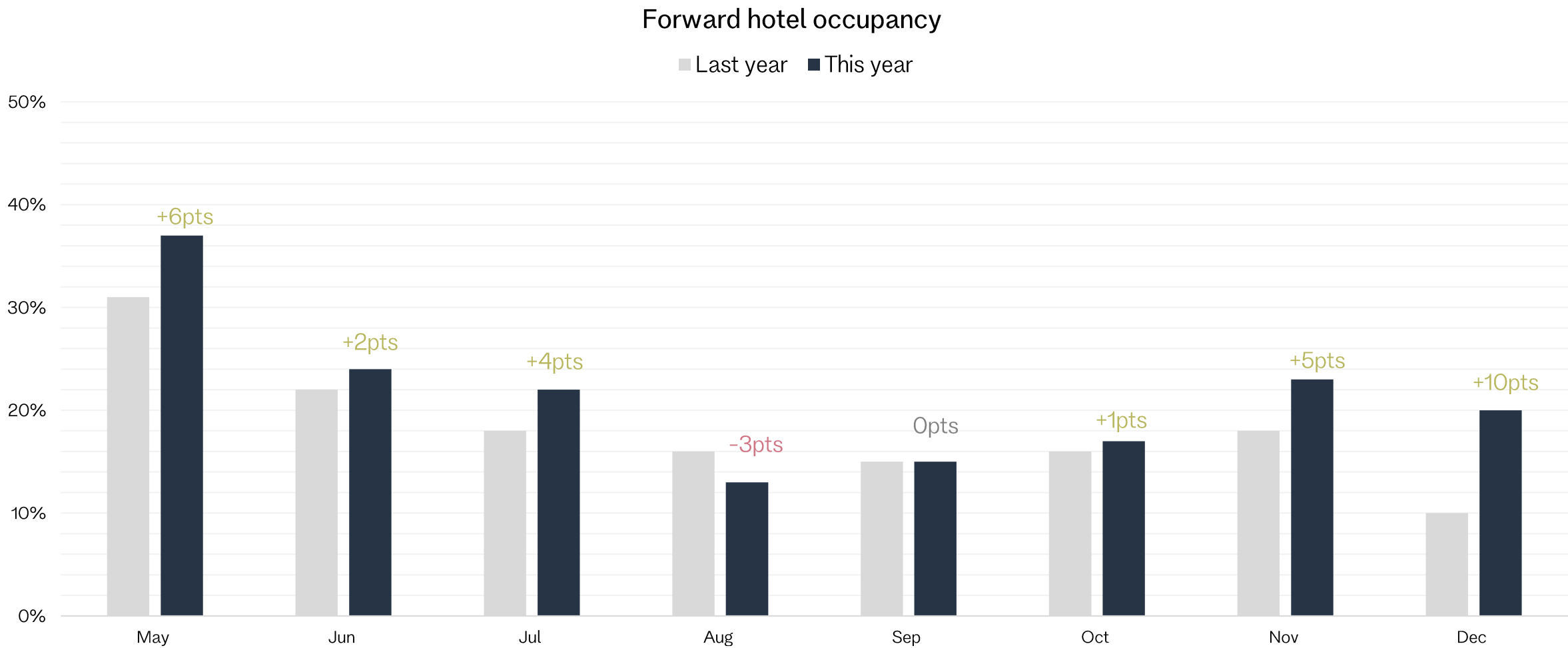
- Greater Adelaide’s occupancy was higher than the average for the other major cities in Australia during Q1 2025. Adelaide’s occupancy in January (70%) matched the national average, but it outperformed in February (77% vs 74%) and March (82% vs 73%)
- The ADR for Greater Adelaide was \$208 (lower than the national average of \$251) and was observed to have an inverse relationship with the national average during the quarter. In Greater Adelaide, the ADR fell in January to \$195 whilst it rose nationally to \$264. The ADR then rose in Greater Adelaide to over \$210 in February and March, whilst it fell below \$250 nationally.
- RevPAR for Greater Adelaide was \$159 during Q1 2025, down from \$162 in Q1 2024, compared to \$182 nationally (rising from \$180 in Q1 2024).



Hotel Accommodation – City of Adelaide

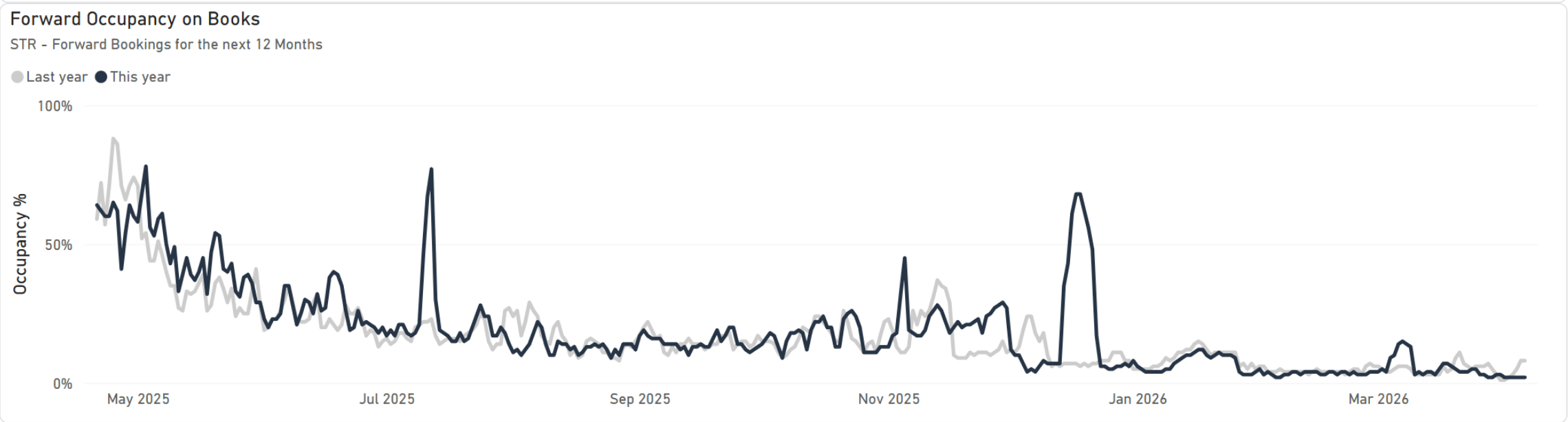
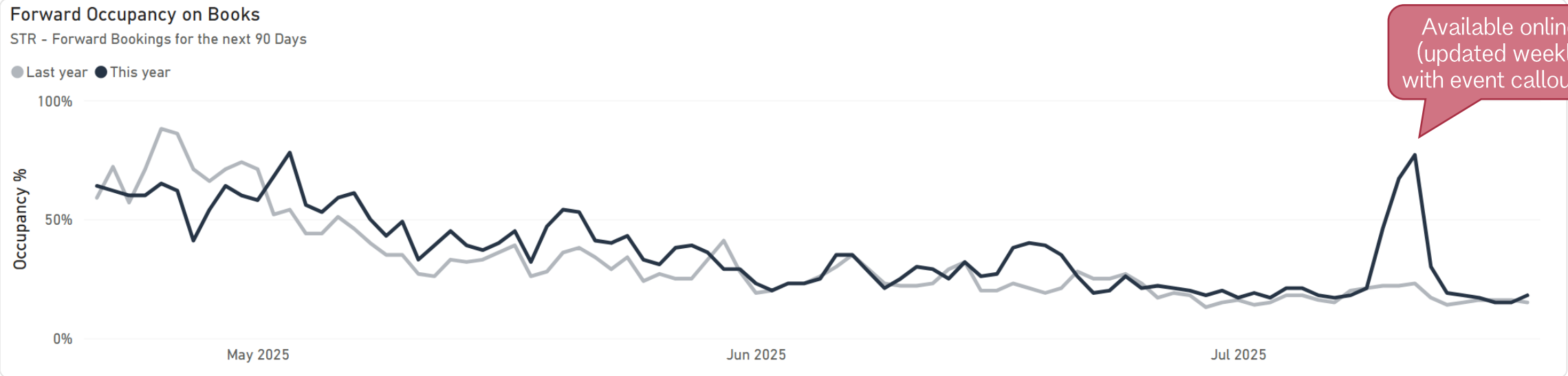


Travellers appear more confident to book further ahead, with higher forward occupancy when compared to last year



Source: STR (as of 7 April 2025)

Hotel Accommodation – City of Adelaide

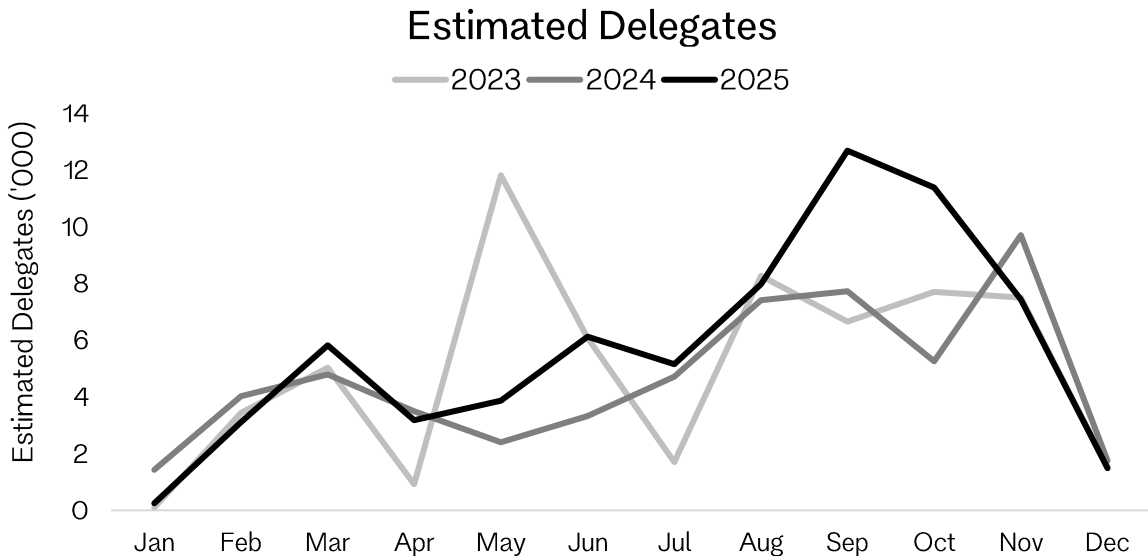
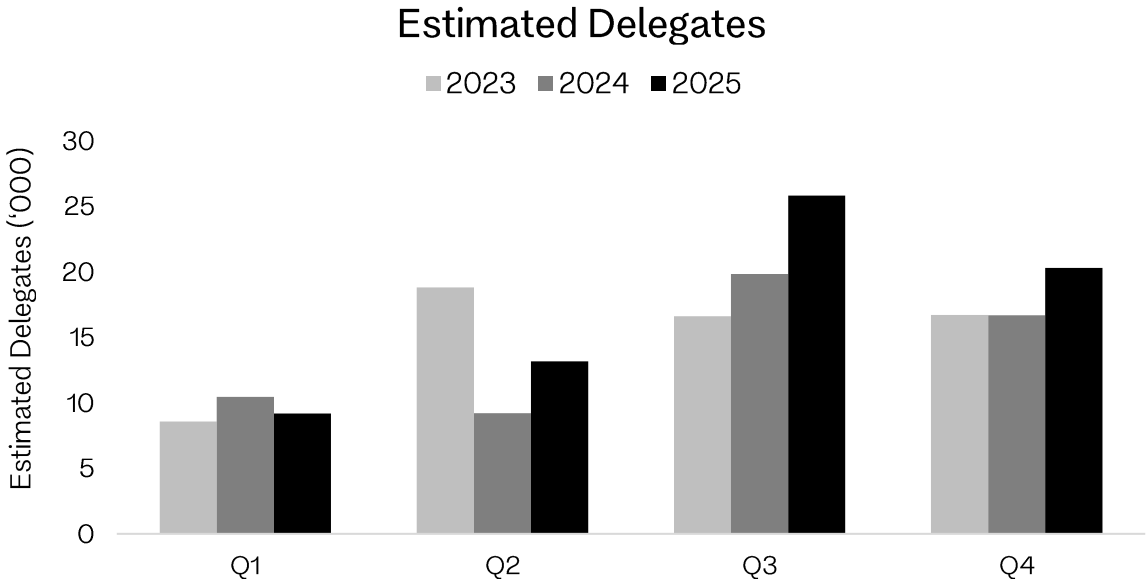


Business Events – Greater Adelaide

Record delegates numbers are expected this year

Delegates Q1	
9.2k	-12.3% on Q1 2024 -45.0% on Q4 2024
Bed nights Q1	
28.9k	-36.0% on Q1 2024 -44.5% on Q4 2024

- Approximately 68.5k delegates are forecast to attend 140 business events throughout the year (with further events likely secured during the year).
- The impact of the business events translates into 229k bed nights and an estimated \$421M in economic impact (to date).
- Even though Q1 2025 delegate numbers and bed nights are lower than Q1 2024 and the previous quarter, figures for the remainder of the year are forecast to increase on last year.
- September will likely be the peak month for business event delegates and consequently bed nights.

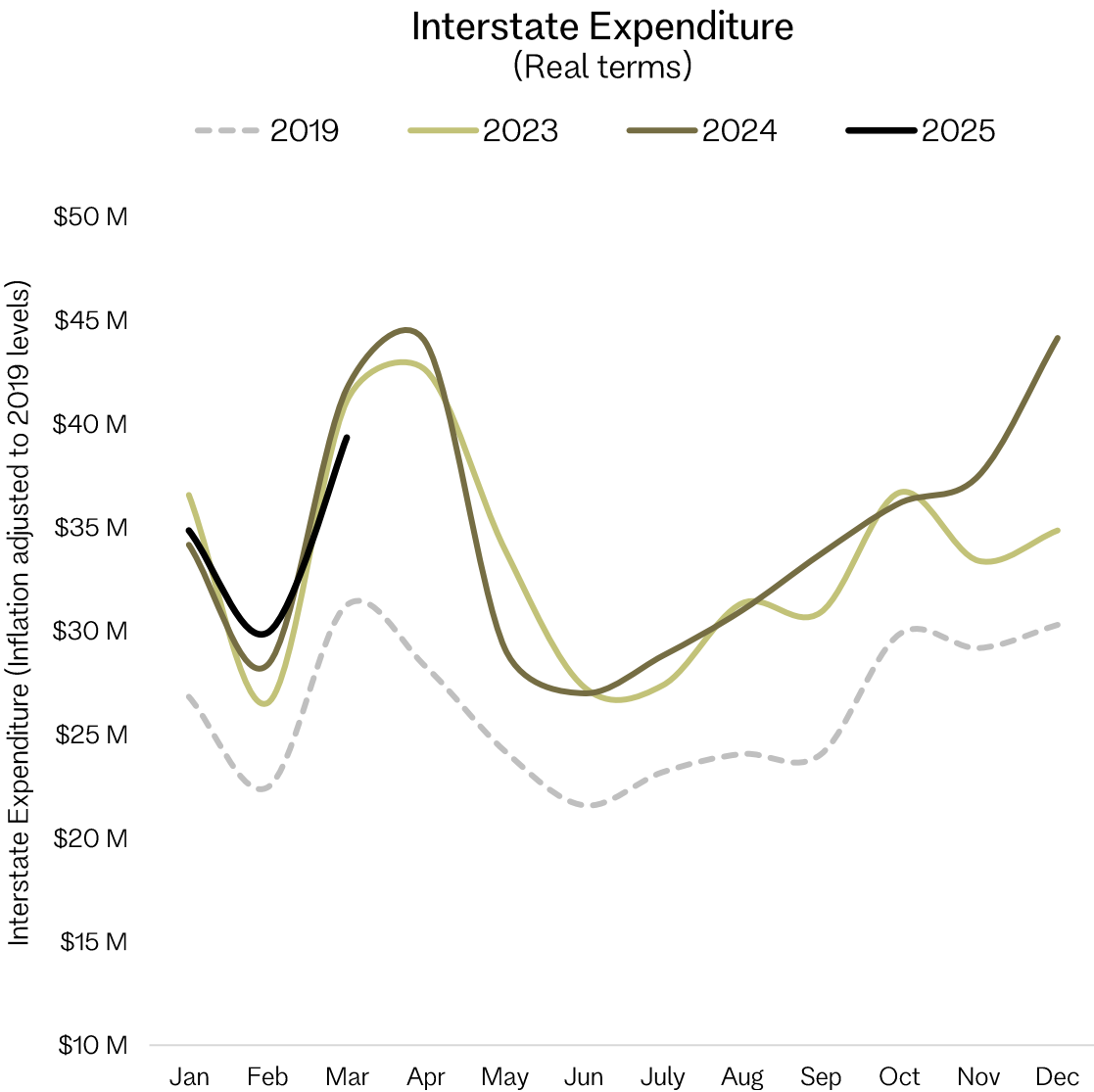


Interstate Expenditure – City of Adelaide

Expenditure has not grown in real terms

Nominal expenditure Q1	+1.3% on Q1 2024 -11.8% on Q4 2024
\$126.7m	
Expenditure in real terms (adjusted for inflation)	-0.1% on Q1 2024 -11.6% on Q4 2024

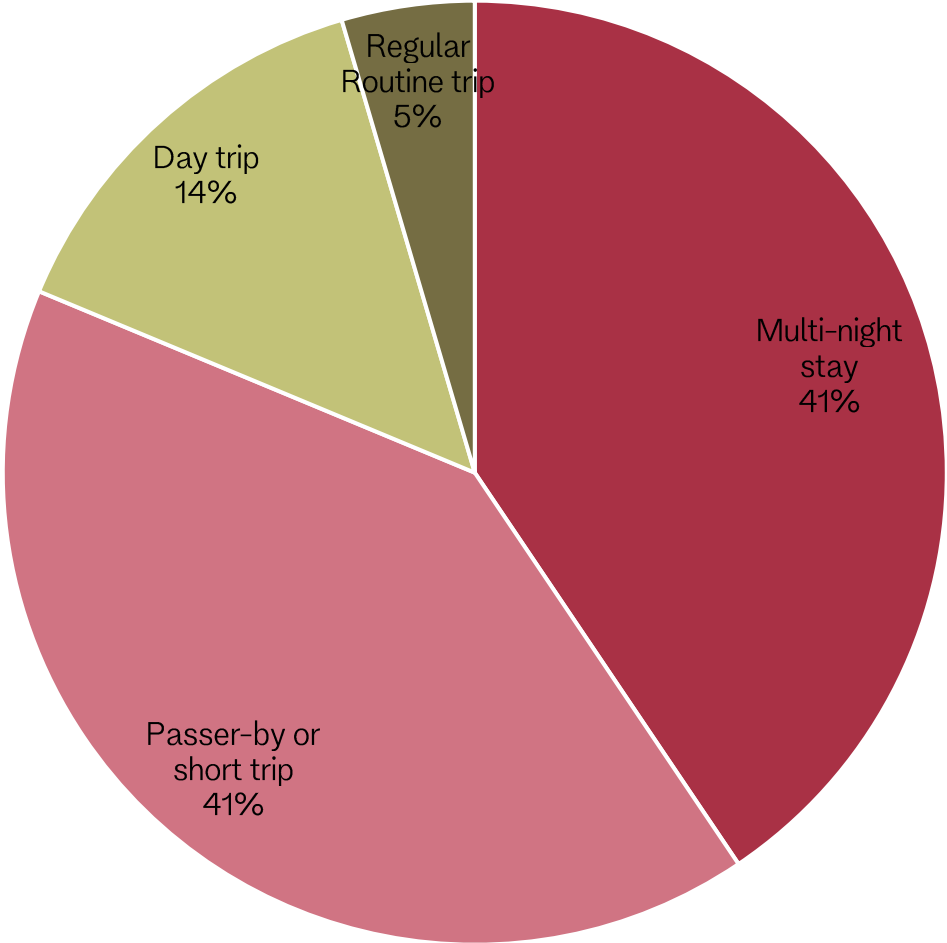
- Interstate expenditure remained at a similar level to Q1 2024.
- Spending from the larger visitor states, New South Wales and Victoria, fell. Meanwhile, expenditure from Queensland and Western Australia increased (in annual terms).
- The largest proportion of visitors were those visiting for multi-days and passerby/short-trip visitors (customers making transactions less than 4 hours apart when transiting through the City of Adelaide).
- This was followed by day trip visitors and regular/routine visitors (customers making at least five trips to the City of Adelaide with transactions across at least 20 days over at least three trips in a 90-day period).



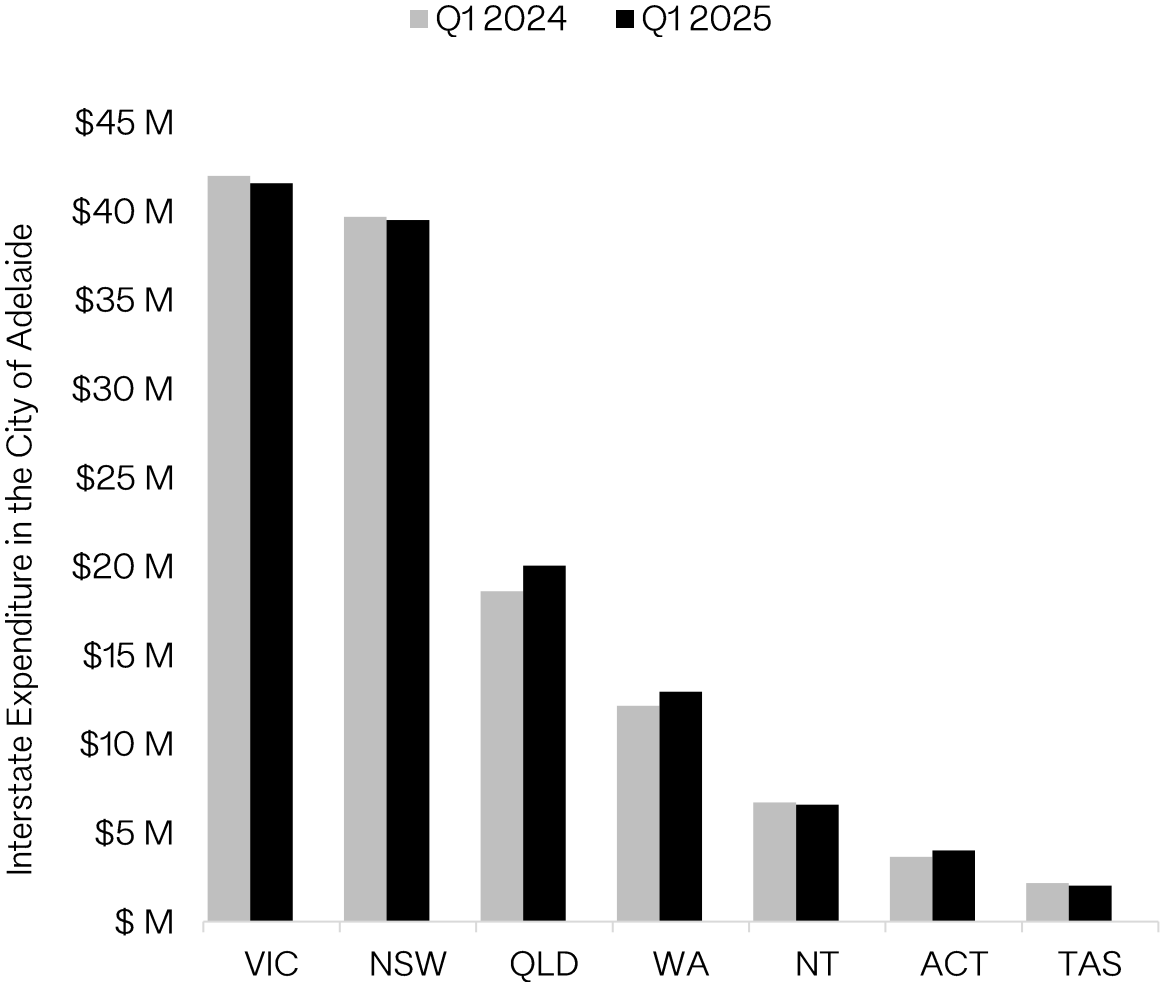
Tourism Expenditure – City of Adelaide



Visitor Type by Expenditure
(Q1 2025)



Nominal Expenditure by State of Origin



Visitor Information Centre (VIC) – Pirie Street, Adelaide

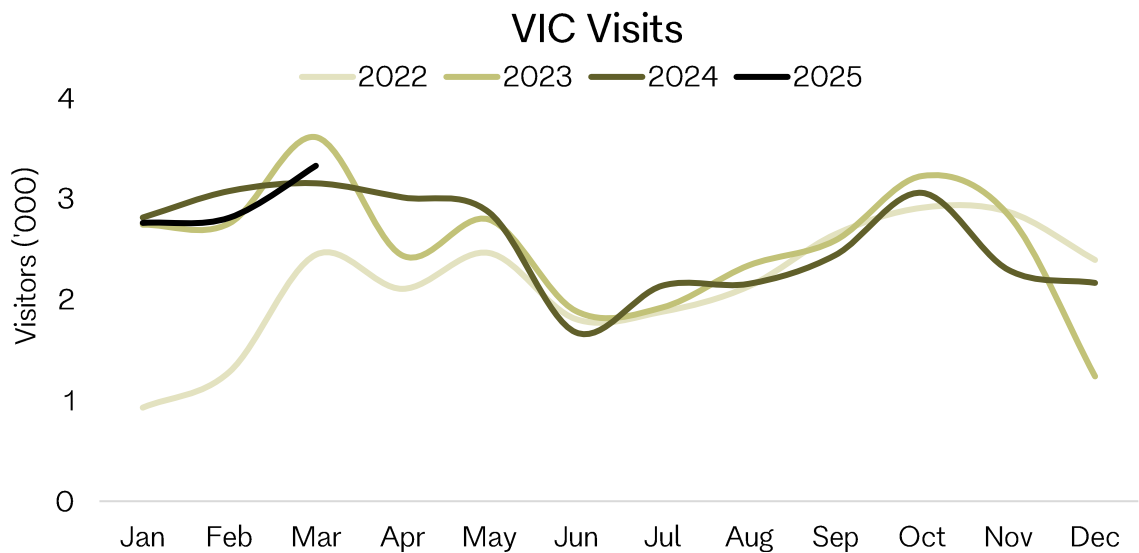
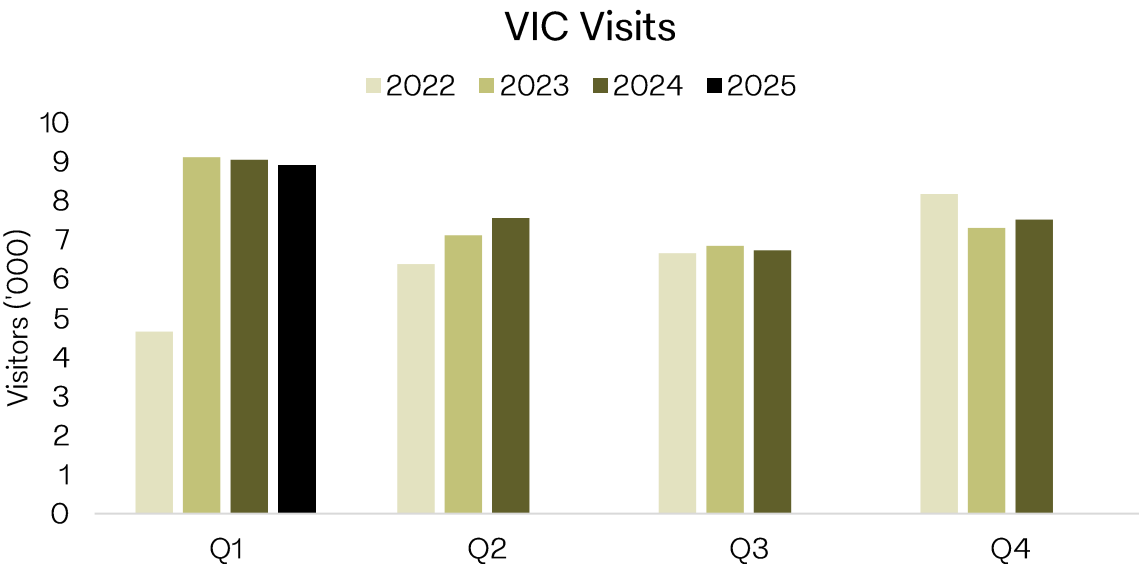


VIC visitors have been pleased with services

Visits Q1	
8.9k	-1.6% on Q1 2024 +18.4% on Q4 2024
Net Promoter Score Q1	
79	-5 pts on Q4 2024

- Overall visitation to the VIC fell for the quarter, as the monthly trend remained consistent with previous years.
- In Q1 2025, surveyed VIC visitors rated their experience 4.9/5 stars and 90% praised volunteers as extremely helpful, felt services were personalised, and indicated strong likelihood to recommend the VIC.
- Attractions and transport were the top two reasons people visited the VIC.
- Approximately half the VIC visitors were from interstate (56%), whilst a third were from overseas (36%) and the remaining intrastate visitors (8%).
- VIC visitors tend to stay overnight in the city for longer periods of time. Data showed 43% spent five or more nights, 49% 3-4 nights, 4% staying for 1-2 nights, while 4% day trip visitors.

Source: Visitor Information Centre (AEDA)



Need More Data?

If you have a specific data or research request, please scan the QR Code and complete the form at the bottom of the AEDA Data & Insights web page:



aedasa.com.au



Disclaimers

All effort is made for representations to be true and accurate at the time of dispatch, although historical figures may change, and information contained in this document should be treated sensitively and not used wholly for investment decisions.

Str data uses a sample of up to approximately 50 accommodation providers for monthly data and between 30-33 providers for forward bookings.

Visitor Information Centre exit surveys were conducted with 100 visitors over the past two quarters.

Spendmapp aggregates data from EFTPOS transactions then extrapolates this to provide an accurate picture of expenditure activity for the region. There is a complex process of ensuring outlier transactions do not skew the data and to also maintain the privacy of merchants and cardholders by masking data at low level merchant and transaction volumes. Note that both dollar values and the number of transactions are transformed to account for non-card transactions, although online spending is not weighted for cash transactions. To calculate the real growth rates, CPI statistics were sourced from the [ABS website](#).

Acknowledgement of Country

The City of Adelaide acknowledges that we are located on the traditional Country of the Kaurna people of the Adelaide Plains and pays respect to Elders past, present and emerging.

We recognise and respect their cultural heritage, beliefs and relationship with the land. We also extend that respect to visitors of other Aboriginal Language Groups and other First Nations.

Thank you



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