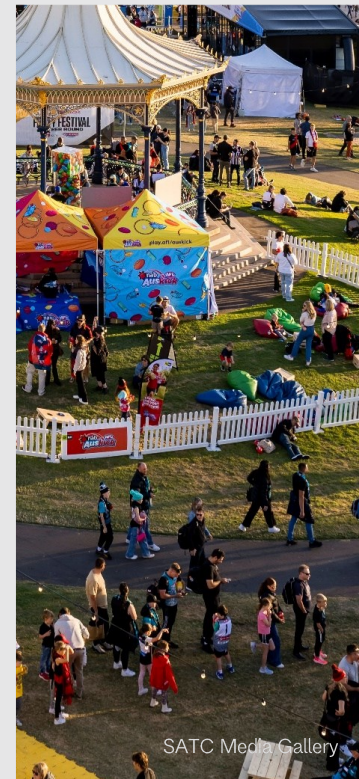


# AEDA Insights

## Visitor Economy Report

Q2 2025 (April - June)



# Summary of Findings

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- The City of Adelaide's visitor economy continued to perform strongly in Q2 2025, supported by a high volume of both cultural and business events, major events such as the AFL Gather Round, record interstate expenditure, and growing international connectivity.
- Passenger volumes at Adelaide Airport remained steady at 2.1 million, with international traffic increasing significantly compared to the same period last year. International passengers now represent 13% of total airport traffic, driven by expanded air routes and ongoing post-pandemic recovery. The addition of Indonesia AirAsia and upcoming services from United Airlines and Air New Zealand are set to further strengthen South Australia's international connectivity.
- Hotel performance remained elevated, as revenue reached \$103.1M in Q2, marking a 7% year-on-year increase. AFL Gather Round generated \$12M in hotel revenue, including a single-day record of \$3.5M. Despite a decline in the Average Daily Rate (ADR), hotels increased room yield, with Q2 Revenue Per Available Room (RevPAR) rising to \$148, \$5 higher than Q2 2024.
- Nationally, hotel occupancy fell when compared to the same quarter last year. Greater Adelaide's occupancy aligned with the major city average at 69%, although outperformed the national rate by 10 percentage points in April. Additionally, in April, Greater Adelaide recorded a strong RevPAR of \$191, significantly ahead of the national figure of \$156. RevPAR for Greater Adelaide averaged \$143 in Q2 2025, slightly down from \$147 in the same quarter of last year, whereas national RevPAR fell more sharply to \$150 from \$180.
- The short-term rental accommodation market in Adelaide's CBD experienced seasonal post peak-festival softening, with booked listings and total nights declining slightly on the previous quarter.
- Interstate expenditure reached a record \$55M in April, accounting for 17% of all domestic spending in the City of Adelaide. Year-on-year growth was led by Victoria (+17%) and Queensland (+15%). Visitor profiles were dominated by multi-day and passerby/short-trip visitors, followed by day-trippers and regular repeat visitors.
- Business events played a major role in Q2 2025, contributing an estimated \$80.4M in economic impact, increasing by 43% on Q2 2024. Both business event delegate numbers and bed nights were significantly higher than the same quarter last year and Q1 2025. September is expected to be the peak month for business event activity this year.
- Visitor Information Centre (VIC) visitation declined from Q1 but remained in line with longer-term seasonal trends. The VIC continued to serve mostly interstate travellers (63%), with strong satisfaction linked to service quality and transport and attraction information being the primary reasons for visiting. Most VIC users were longer-stay visitors.
- Forward hotel occupancy for the remainder of 2025 is tracking ahead of last year, with six of the next eight months showing higher booking rates. July and December are particularly strong, each 11 percentage points higher year-on-year, reflecting upcoming demand for hoteliers in the City of Adelaide.

# Key Visitor Economy Metrics – Q2 2025

Flight Passengers  
(Adelaide Airport)



2.1m

+3% on Q2 2024  
0% on Q1 2025

Hotel Revenue  
(City of Adelaide)



\$103.1M

+7% on Q2 2024  
-5% on Q1 2025

Short Term Rental Bookings  
(Greater Adelaide Airbnb/Vbro)



12.1k

+5% on Q2 2024  
-7% on Q1 2025

Interstate Expenditure  
(City of Adelaide)



\$133.5m

+10% on Q2 2024  
-5% on Q1 2025

Business Events  
(Estimated economic impact)



\$80.4m

+43% on Q2 2024  
+52% on Q1 2025

Visitor Info. Centre Visits  
(Pirie Street, Adelaide)



7.1k

-7% on Q2 2024  
-21% on Q1 2025



# Traffic Volumes – Adelaide Airport

## International passenger volumes soar

Domestic Traffic Volumes Q2

# 1.9M

+1% on Q2 2024

-1% on Q1 2025

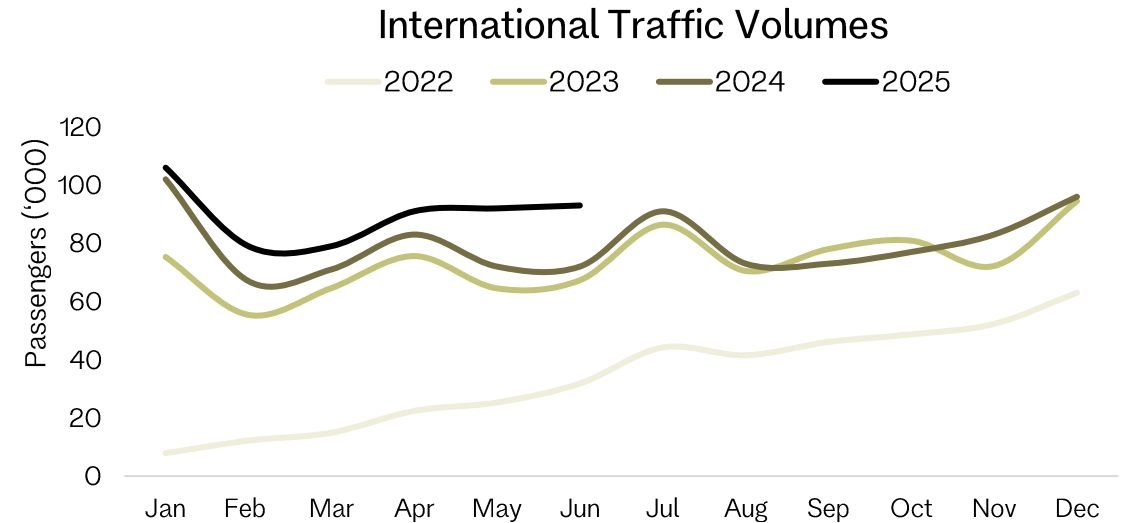
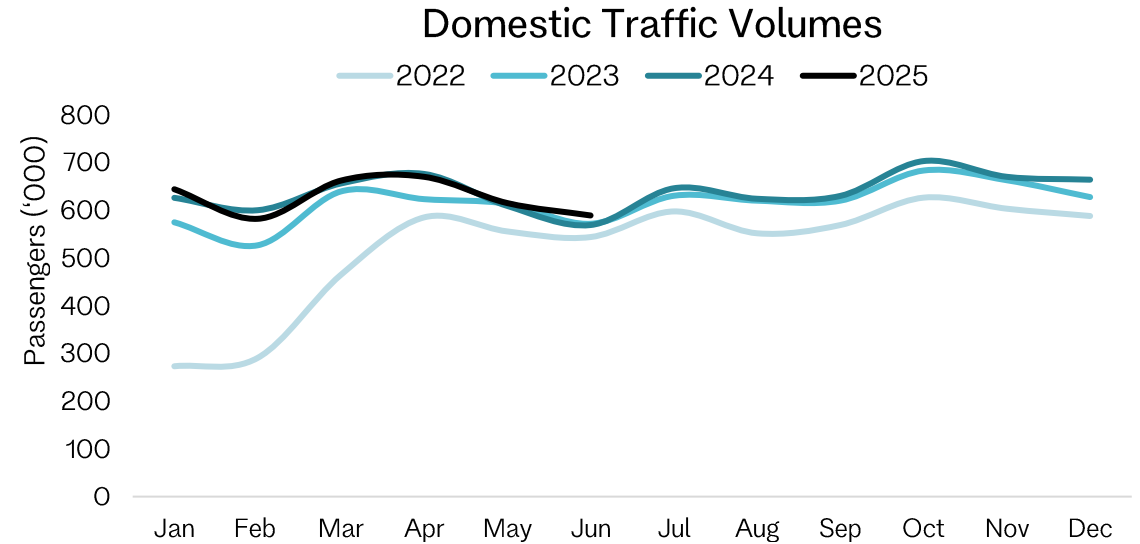
International Traffic Volumes Q2

# 276k

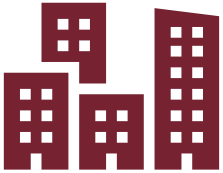
+22% on Q2 2024

+5% on Q1 2025

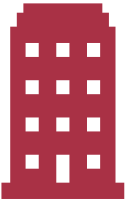
- International passenger volumes have continued to grow, now comprising 13% of total airport traffic, supported by expanded international route schedules and sustained post COVID recovery.
- Domestic travel has stabilised, although remains the major service from Adelaide Airport.
- Overall traffic trends suggest a steady growth trajectory, with international growth providing the primary source of momentum for the state.



# Terminology



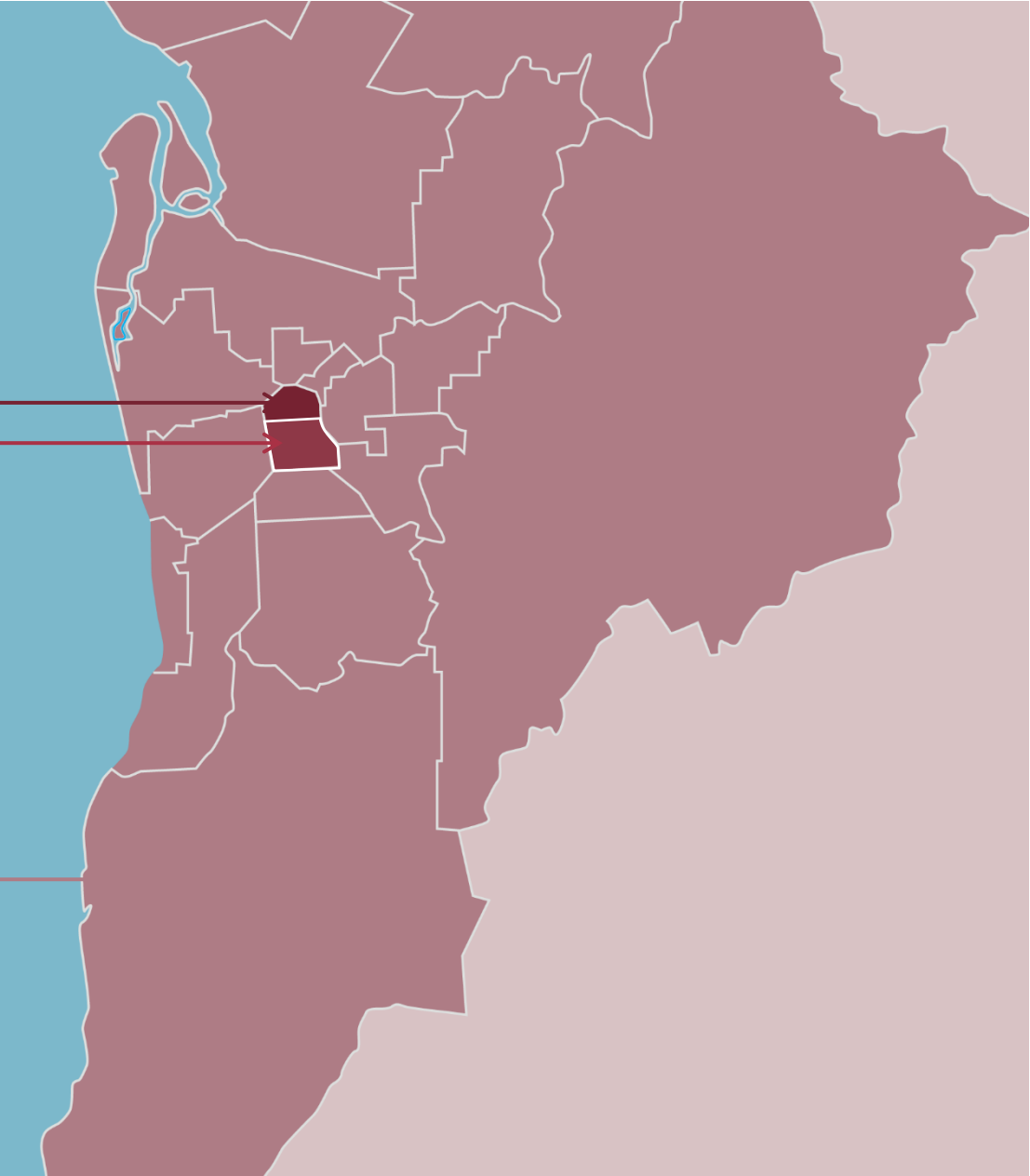
City of Adelaide  
(Adelaide & North Adelaide)



Adelaide  
(suburb postcode 5000)



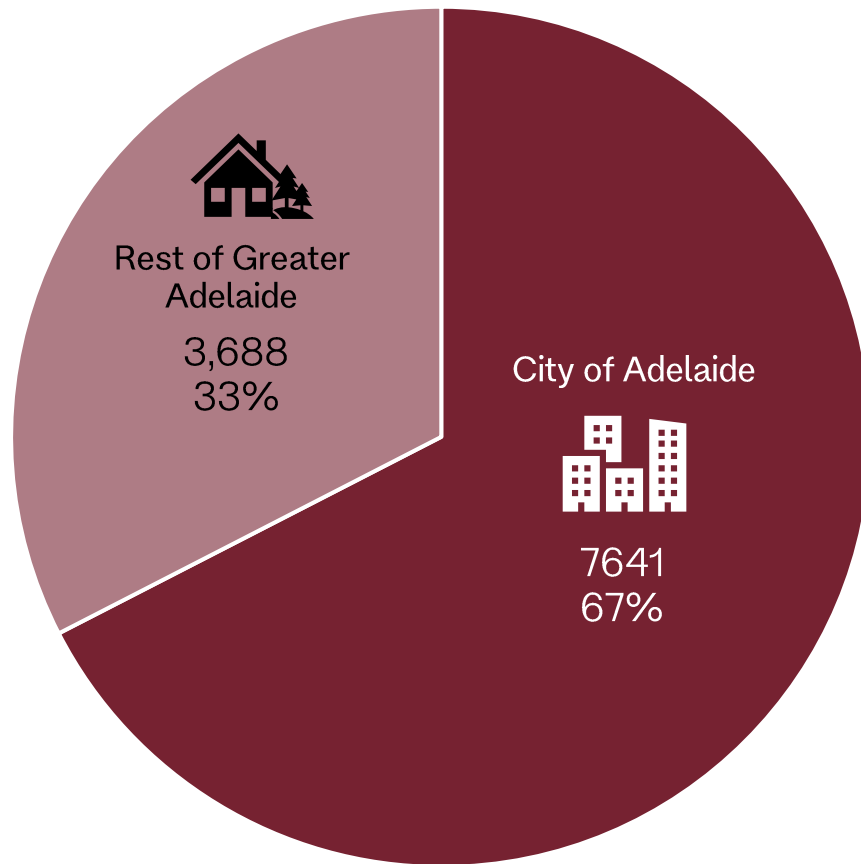
Greater Adelaide  
(Metro suburbs inc. Aldinga, Mt Barker, Gawler)



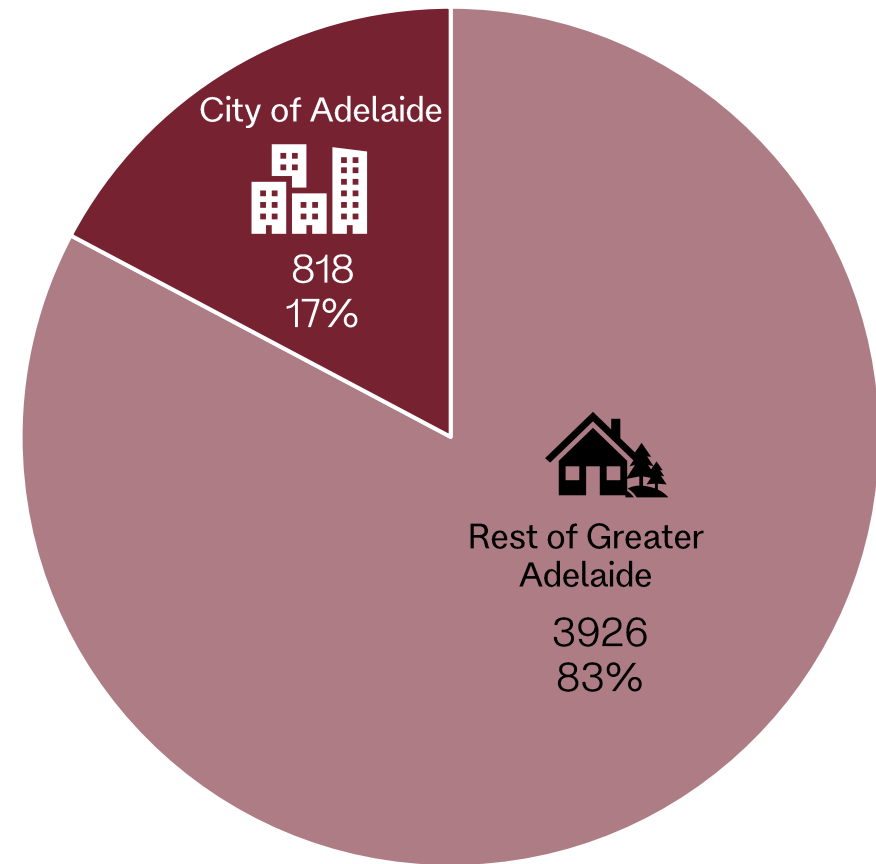
# Accommodation – Market Share

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 June 2025)



**Short Term Rental Accommodation**  
(Share of rooms by area – as of June 2025)





# Short Term Rental Accommodation – Adelaide

## STRA softened post peak festive season

Booked Listings Q2

**2.2k**

-1% on Q2 2024

-7% on Q1 2025

Booked Nights Q2

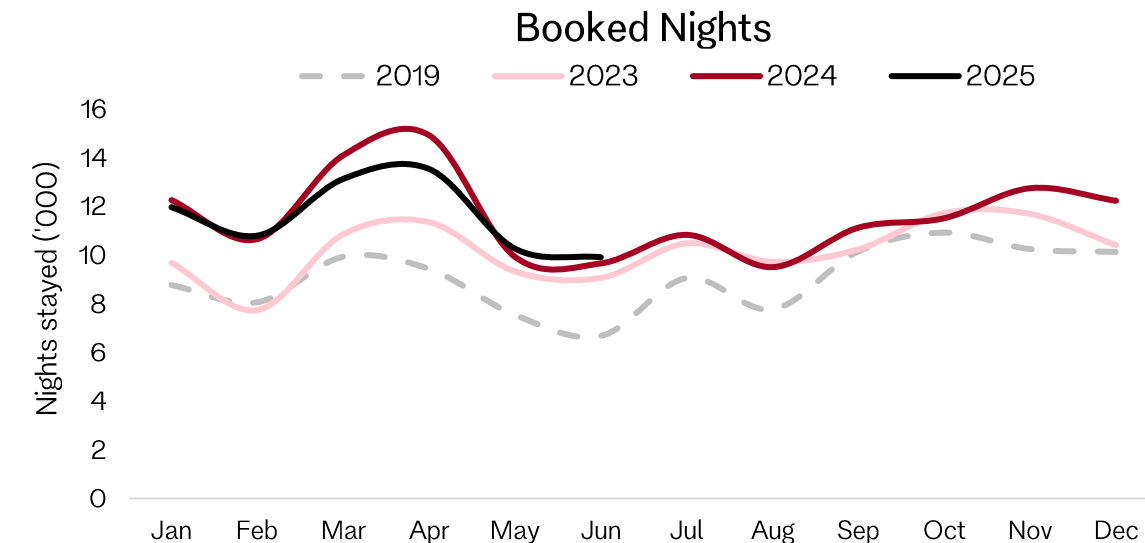
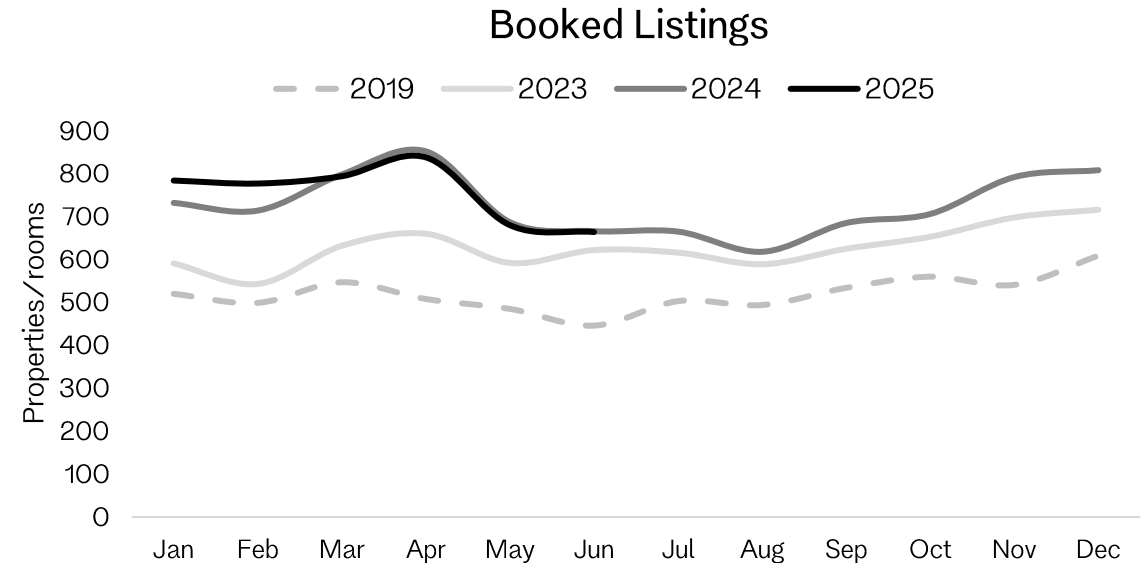
**33.7k**

-2% on Q2 2024

-6% on Q1 2025

- The number of listings booked and total booked nights in Adelaide declined slightly compared to both Q2 2024 and the previous quarter.
- The average daily rate (ADR) was \$253, \$5 higher than Q2 2024, although down from \$281 in Q1, reflecting softened demand post peak-festival season.
- Occupancy reached 61%, representing a 2-percentage point increase on Q2 2024, as supply may have softened in contrast to demand.
- The average length of stay remained consistent with both Q1 and Q2 2024.
- One and two-bedroom properties accounted for 87% of bookings.
- Airbnb hosted 61% of listings, Vrbo 5%, and 34% were listed on both platforms.

Source: AirDNA





# Hotel Accommodation – City of Adelaide

## Record revenue induced by AFL Gather Round

Rooms booked Q2

**514.9k**

+12% on Q2 2024

-2% on Q1 2025

Revenue Q2

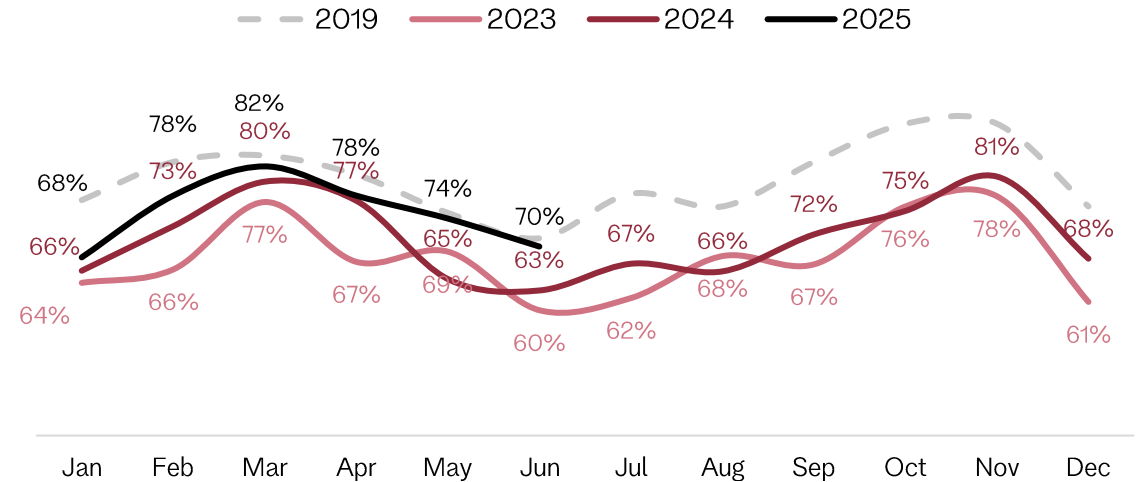
**\$103.1M**

+7% on Q2 2024

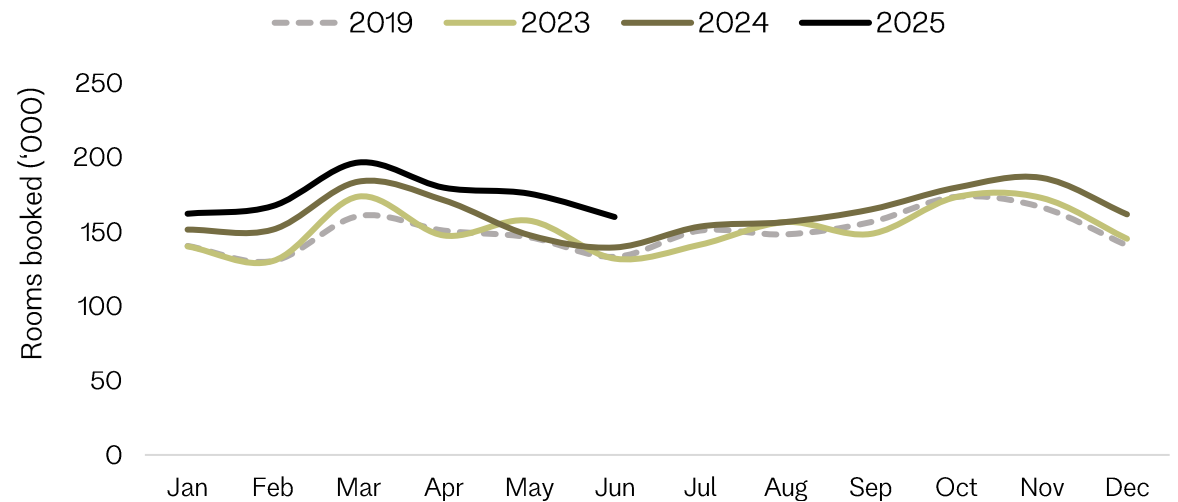
-5% on Q1 2025

- Q2 maintained momentum from Q1, with monthly occupancy rates 6 percentage points above Q2 2024, reaching 98% of pre-COVID levels in June, despite increased supply of 28% since June 2019.
- The daily average revenue for April was slightly above the peak month of March, contributing to a 7% increase in total hotel revenue from Q2 2024.
- AFL Gather Round 2025 generated \$12M in revenue, 25% higher than the 2024 event, with \$3.5M recorded on the opening Friday, a new single-day high. During AFL Gather Round 2025, RevPAR was \$65 higher than the previous year's event (+120%), underlining the impact of peak demand.
- Despite a lower ADR in Q2 (\$195 vs \$205 in Q2 2024), RevPAR rose to \$148 in Q2 (from \$143 in Q2 2024), supported by stronger occupancy. Hotels managed pricing effectively, offsetting rate declines with higher room yield.

### Occupancy Rates



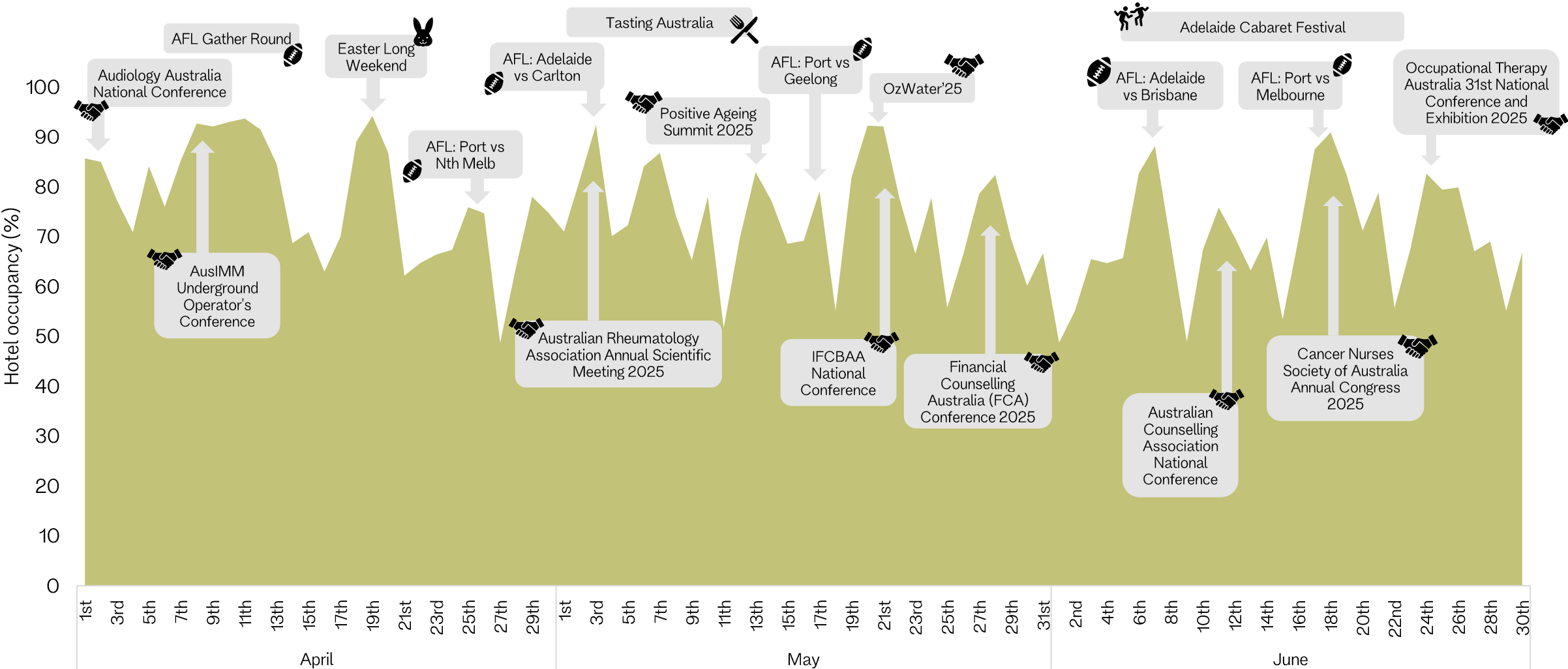
### Rooms Booked



# Hotel Accommodation – City of Adelaide



## Hotel Occupancy – Q2 2025



Source: STR



# Hotel Accommodation – National

## Adelaide held strong against national ave.

Greater Adelaide Occupancy Q2

**69.4%**

-2 pts on Q2 2024

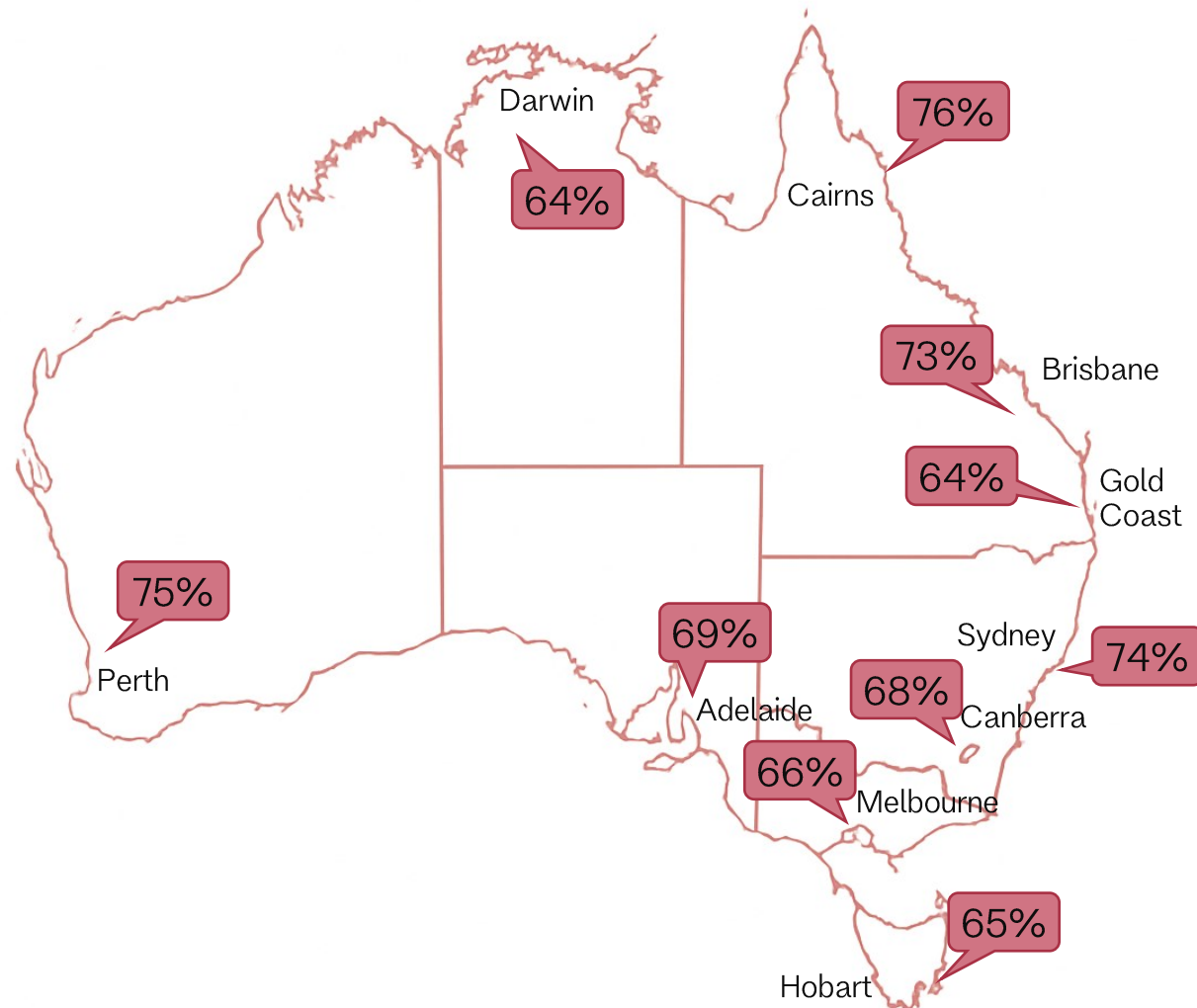
Major cities Australia Occupancy Q2

**69.4%**

-2 pts on Q2 2024

- Greater Adelaide's hotel occupancy in Q2 matched the national average at 69.4%, with a notable April peak of 78% (10 points above the Australian average) before easing in subsequent months.
- The Average Daily Rate (ADR) in Greater Adelaide rose by \$4 year-on-year, outperforming the national average in April. Across the full quarter, national ADR declined by \$6 compared to Q2 2024.
- Revenue Per Available Room (RevPAR) for Greater Adelaide averaged \$143 in Q2 2025, slightly down from \$147 in the same quarter last year. National RevPAR fell more sharply to \$150 from \$180. In April, Greater Adelaide recorded a strong RevPAR of \$191, significantly ahead of the national figure of \$156.

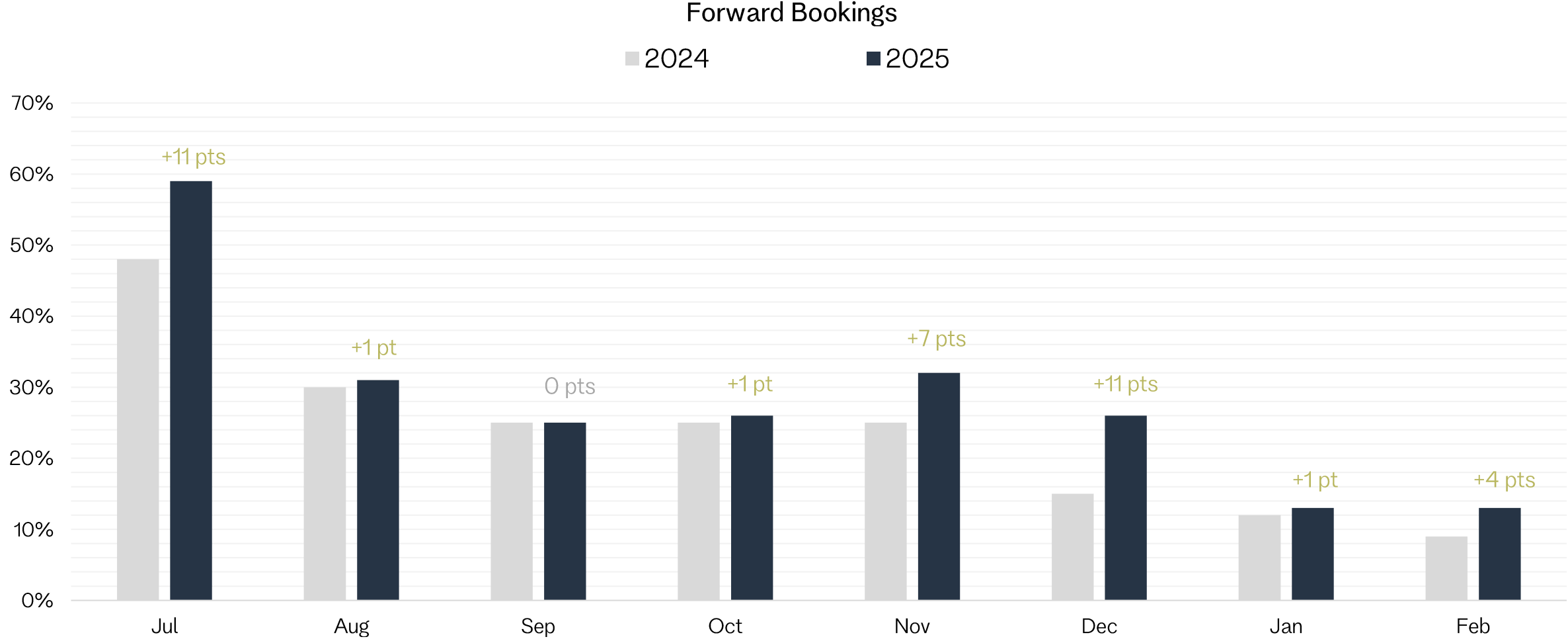
Occupancy – Q2 2025



# 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 July 2025)

# Hotel Accommodation – City of Adelaide



## CITY OF ADELAIDE ACCOMMODATION FORWARD BOOKINGS SNAPSHOT

Month

All

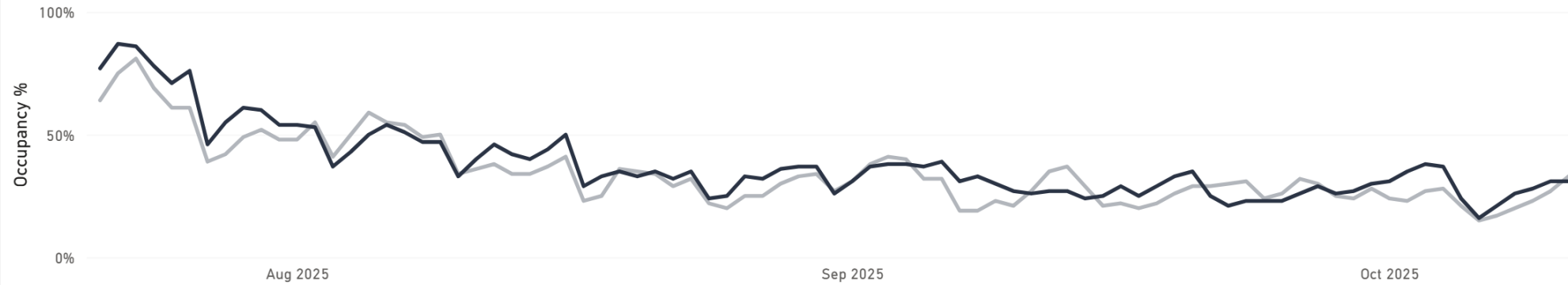
Year

All

### Forward Occupancy on Books

STR - Forward Bookings for the next 90 Days

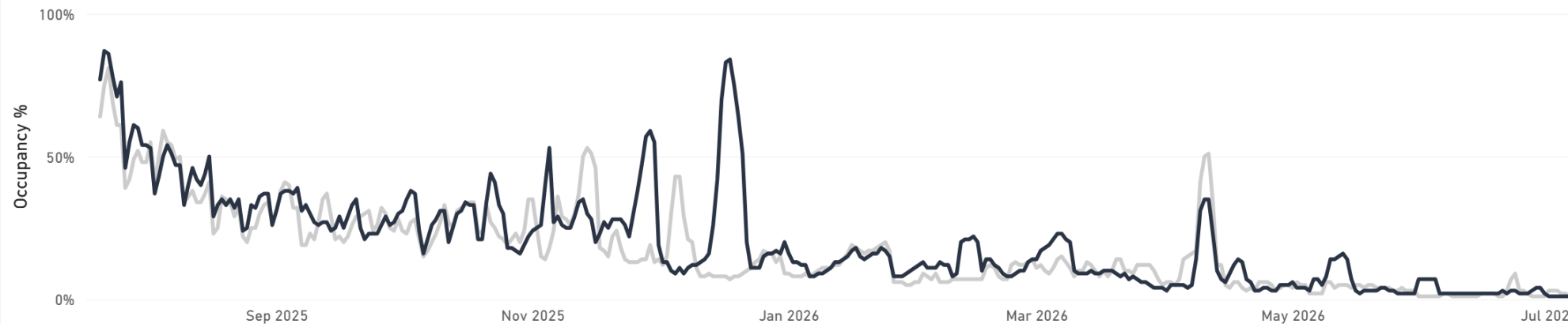
● Last year ● This year



### Forward Occupancy on Books

STR - Forward Bookings for the next 12 Months

● Last year ● This year



Available  
online

(Updated weekly  
with event  
callouts)

[Click here  
to access](#)



# Business Events – Greater Adelaide

## Quarter boosted by strong business event activity

Delegates Q2

**13.2k**

+43% on Q2 2024

+44% on Q1 2025

Bed nights Q2

**45.4k**

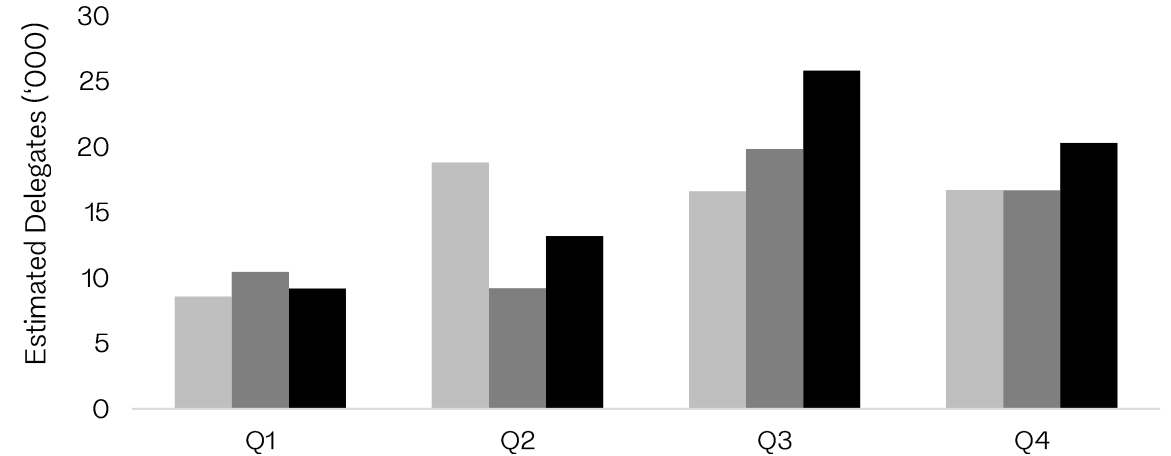
+11% on Q2 2024

+58% on Q1 2025

- Both business event delegate numbers and bed nights were significantly higher than the same quarter last year and Q1 2025.
- The combined estimated economic impact of business events for Q2 2025 was \$80.4M, 43% higher than Q2 2024 and an increase of 52% from the previous quarter.
- September will most likely be the peak month for business event delegates and consequently bed nights.
- Approximately 68.5k delegates are forecast to attend 140 business events throughout the year (with further events likely secured during the year).

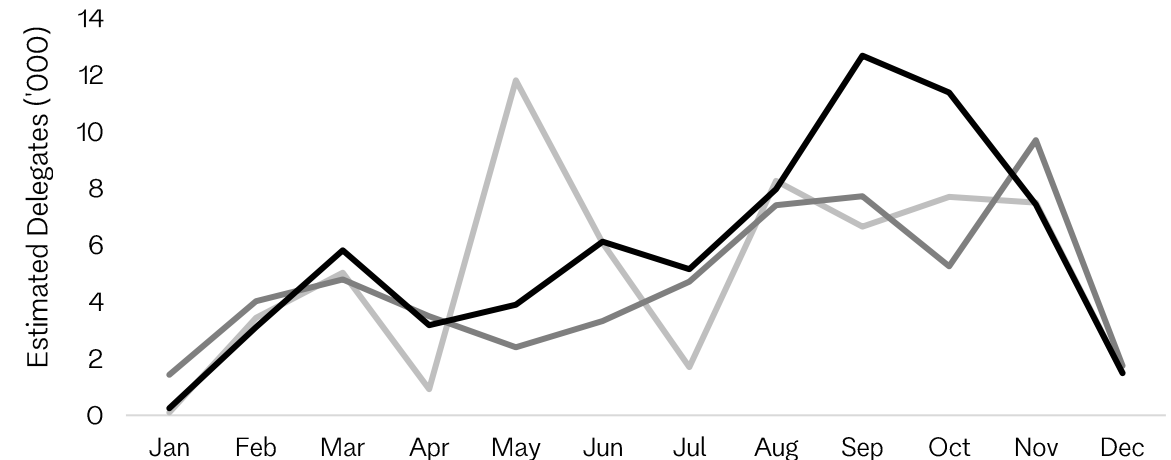
### Estimated Delegates

■ 2023 ■ 2024 ■ 2025



### Estimated Delegates

— 2023 — 2024 — 2025



# Interstate Expenditure – City of Adelaide

## Interstate expenditure reaches historic levels

Nominal expenditure Q2

**\$133.5m**

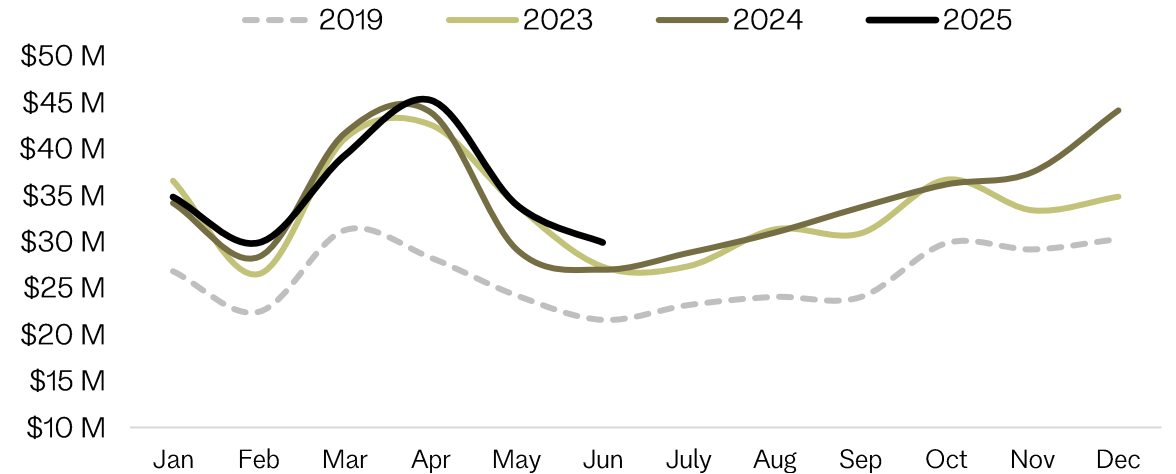
+10% on Q2 2024  
+5% on Q1 2025

Expenditure in real terms  
(adjusted for inflation)

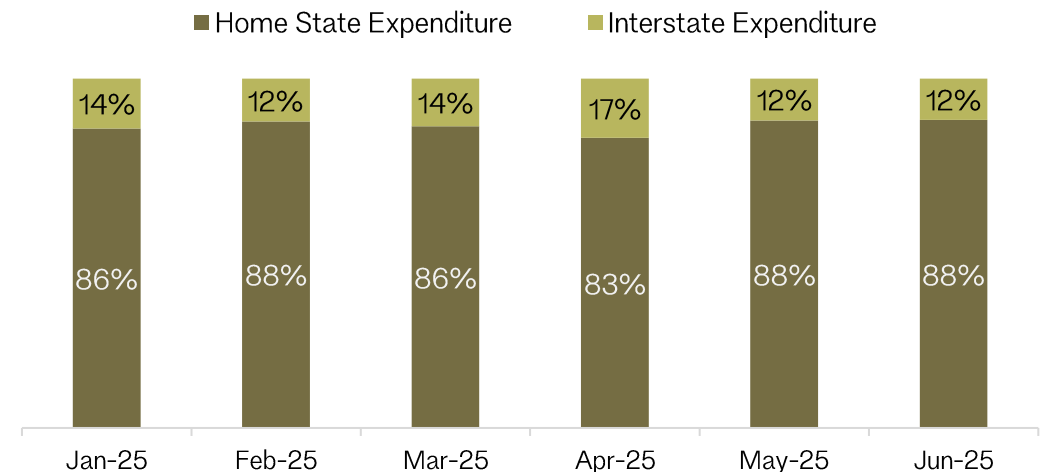
+9% on Q2 2024  
+5% on Q1 2025

- Interstate expenditure reached a record \$55M in April, accounting for 17% of all domestic expenditure in City of Adelaide and increasing 4% annually.
- Spending from all states increased annually, led by Victoria (+17%), followed by QLD (+15%) when compared to Q2 2024.
- The largest visitor segments were multi-day and passerby/short-trip visitors, those transiting through the city with transactions less than four hours apart.
- This was followed by day-trippers and regular/routine visitors, defined by frequent visits and transactions spread across at least 20 days over multiple trips within a 90-day period.

Interstate Expenditure  
(City of Adelaide - Real terms)



Proportion of Interstate Expenditure  
(City of Adelaide, H1 2025)

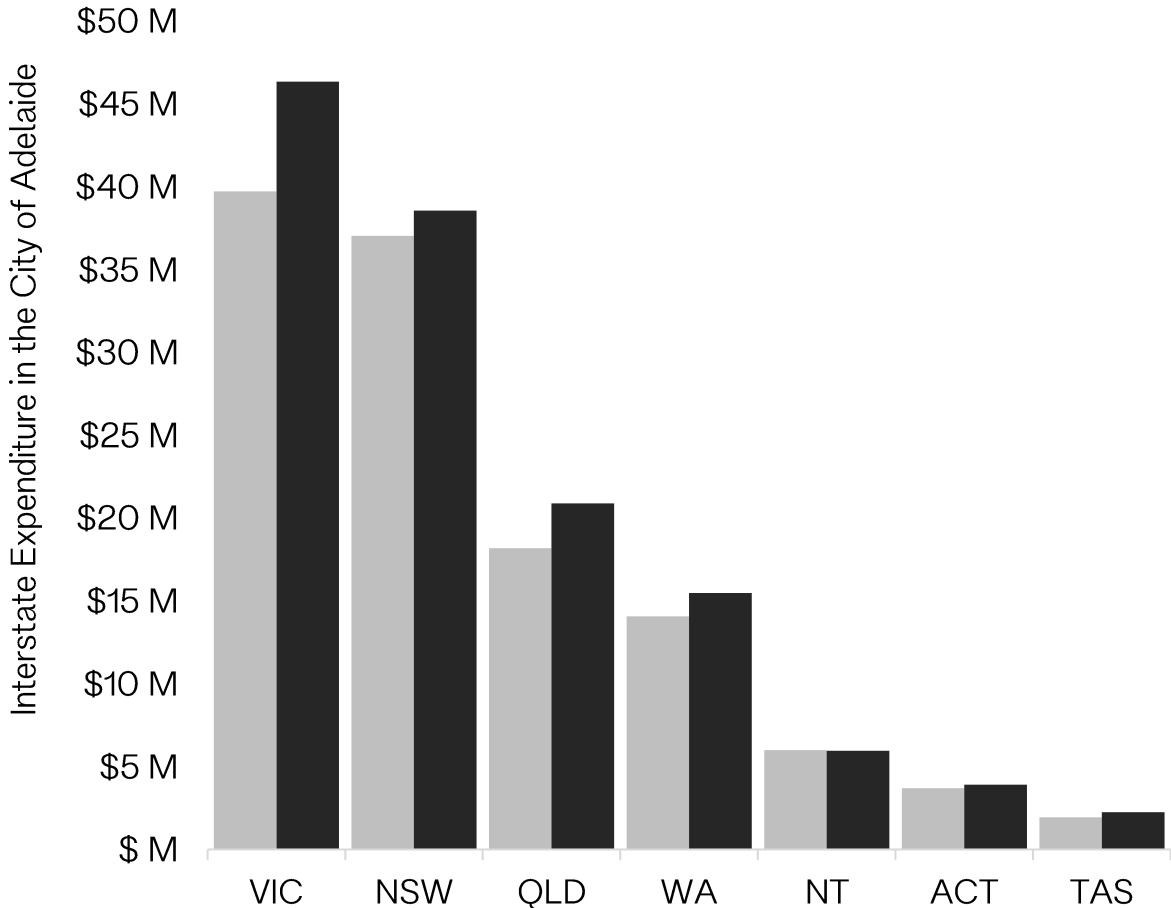


# Tourism Expenditure – City of Adelaide

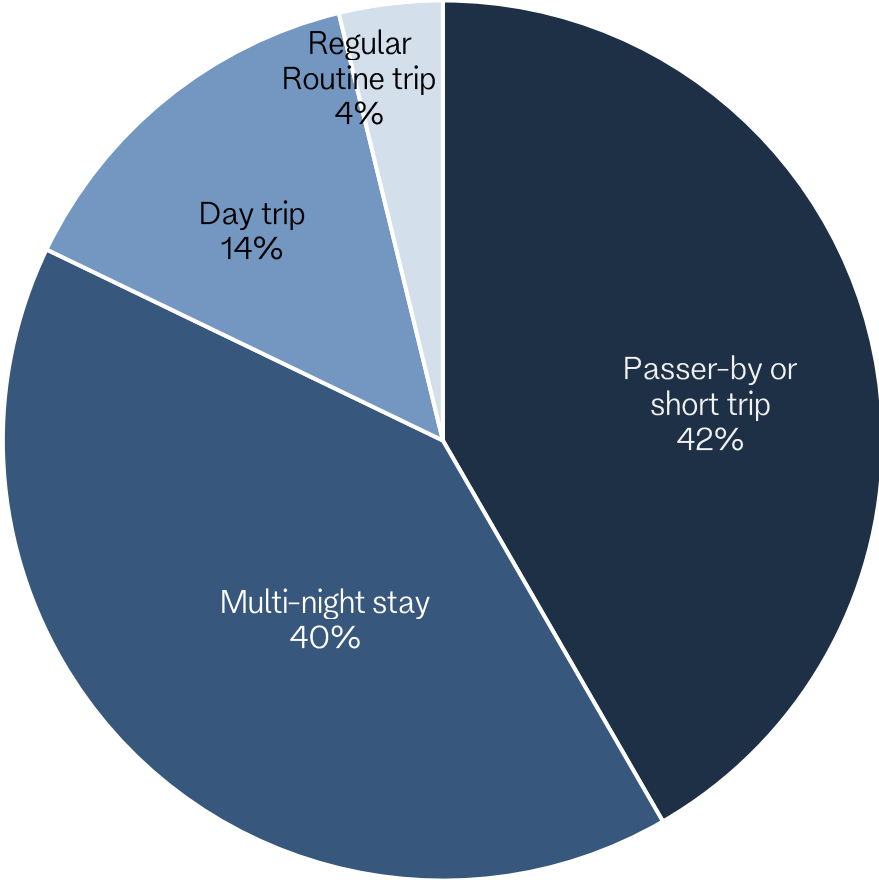


Nominal Expenditure by State of Origin

■ Q2 2024 ■ Q2 2025



Visitor Type by Expenditure (Q2 2025)



Source: Spendmapp by Geografia and banking data



# Visitor Information Centre (VIC) – Pirie Street, Adelaide

## VIC visitors have been pleased with services

Visits Q2

**7.1k**

-7% on Q2 2024

-21% on Q1 2025

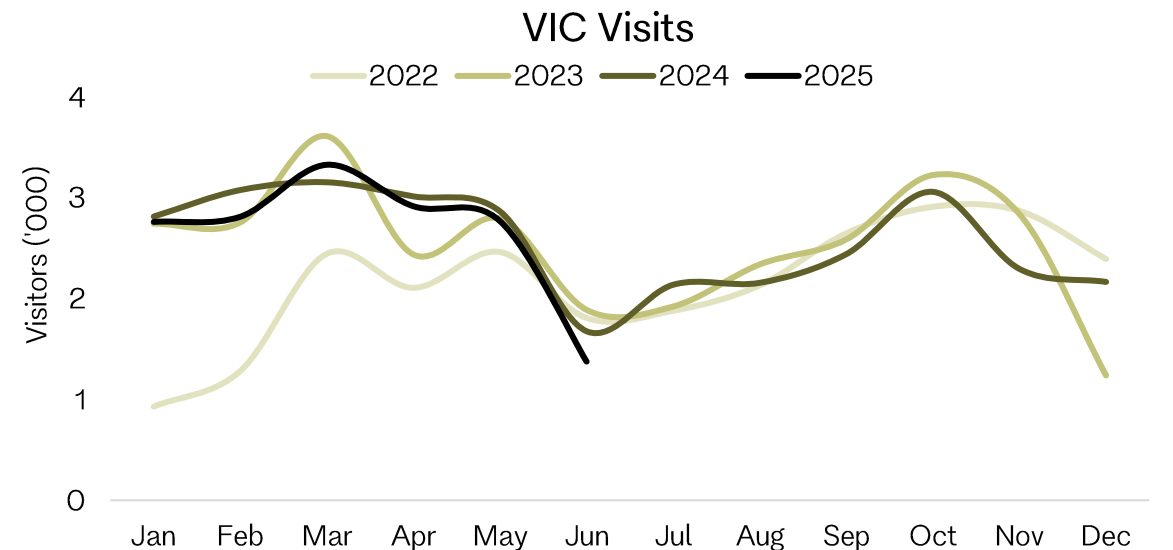
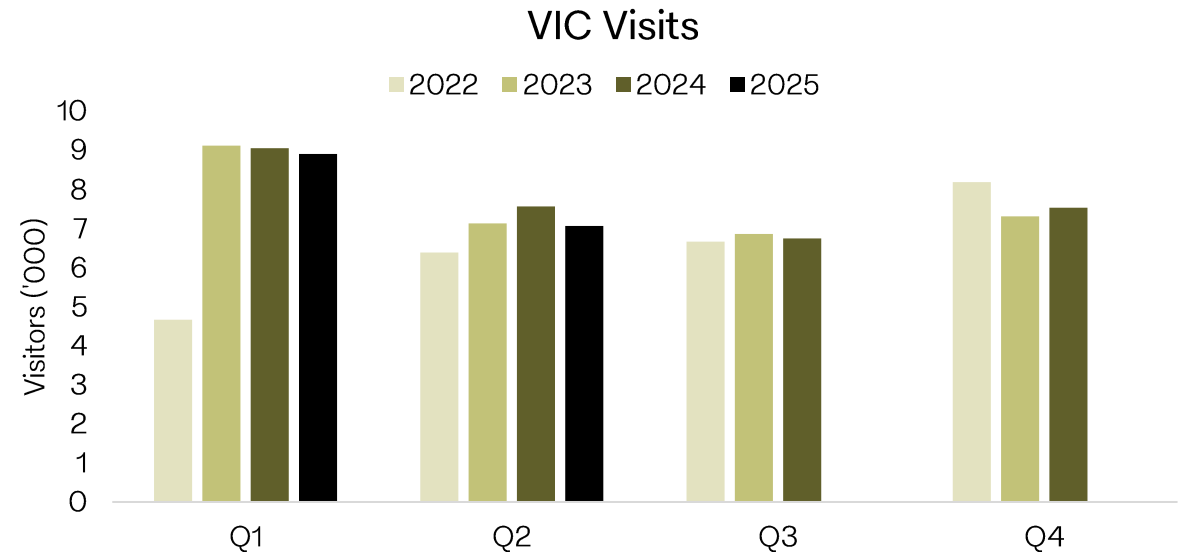
Interstate Visitors as Proportion Q2

**63%**

+1 pt on Q2 2024

+12 pts on Q1 2025

- Overall visitation to the VIC declined compared to both Q2 2024 and the previous quarter.
- Transport and attraction information remained the primary reasons for visiting the VIC.
- Interstate travellers made up the majority of visitors (63%), followed by international (20%) and intrastate (18%) visitors.
- Most VIC visitors (61%) stayed three or more nights, while 22% stayed 1–2 nights and 5% were day trippers.



# 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](https://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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