

AEDA Insights

Visitor Economy Report

Q3 2025 (July - September)

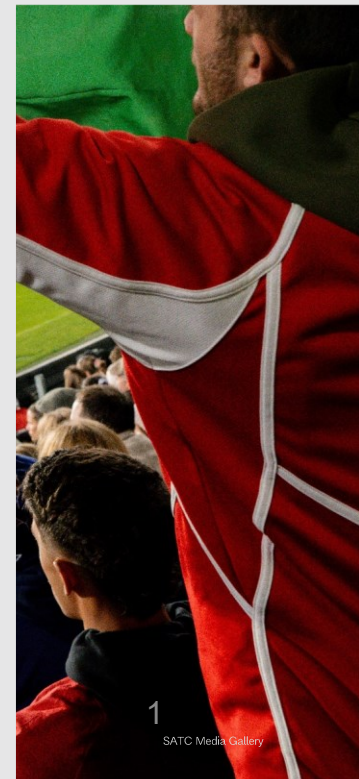
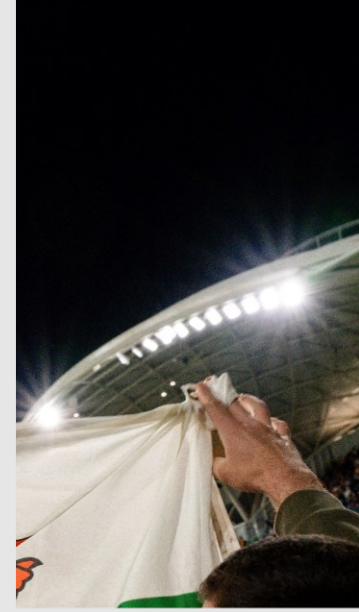


Table of Contents



Page 3 - [Visitor Economy Q3 2025 - Summary of Findings](#)

Page 4 - [Key Visitor Economy Metrics – Q3 2025](#)

Page 5 - [Traffic volumes - Adelaide Airport](#)

Page 6 - [Terminology](#)

Page 7 - [Accommodation – Market share](#)

Page 8 - [Short Term Rental Accommodation \(STRA\) – Adelaide](#)

Page 9 - [Hotel accommodation – Adelaide](#)

Page 10 - [Hotel occupancy \(daily\) – City of Adelaide](#)

Page 11 - [Hotel occupancy – City of Adelaide](#)

Page 12 - [Hotel accommodation – National](#)

Page 13 - [Hotel accommodation forward bookings – City of Adelaide](#)

Page 14 - [Hotel accommodation – City of Adelaide](#)

Page 15 - [Business events – Greater Adelaide](#)

Page 16 - [Interstate expenditure – City of Adelaide](#)

Page 17 - [Tourism expenditure – City of Adelaide](#)

Page 18 - [International expenditure – City of Adelaide](#)

Page 19 - [Visitor Information Services \(VIS\) – City of Adelaide](#)

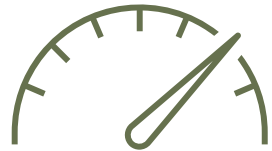
Page 20 - [Need more information](#)

Page 21 - [Disclaimers](#)

Page 22 - [Acknowledgement of Country](#)

Visitor Economy Q3 2025

Summary of Findings



Overall

- Economic activity strengthened across key visitor metrics.
- Coinciding major events such as Illuminate Adelaide and the British & Irish Lions rugby tour strengthened accommodation in July.
- Business events and the AFL games added uplift across the quarter, most notably in September.



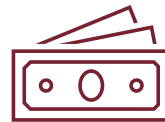
Accommodation

- Hotel performance improved on 2024 across occupancy, revenue, and revenue per available room whilst the average daily rates have fallen.
- Short term rental bookings and nights increased year-on-year, both in the City of Adelaide and Greater Adelaide regions.



Travel and Engagement

- Adelaide Airport traffic increased, with international travel experiencing significant growth.
- Business events hit record levels, in terms of bed nights and economic impact. September had the highest estimated number of delegates for any month in the past three years.



Tourism Expenditure

- Tourism spend increased across major interstate markets, rising in both nominal and real terms.
- International spend rose nominally, although remains below pre-COVID levels in real terms.



Visitor Trends

- Visits to the Visitor Information Centre fell but total enquiries grew, meaning greater numbers of tourists finding Visitor Information Services outside the Centre.
- International enquiries have increased whilst regional South Australian enquiries softened.

Key visitor economy metrics – Q3 2025

Flight Passengers
(Adelaide Airport)



2.3m

+6% on Q3 2024
+4% on Q2 2025

Hotel Revenue
(City of Adelaide)



\$101.7m

+15% on Q3 2024
-1% on Q2 2025

Short Term Rental Bookings
(Greater Adelaide Airbnb/Vbro)



12.1k

+7% on Q3 2024
-3% on Q2 2025

Interstate Expenditure
(City of Adelaide)



\$125.4m

+10% on Q3 2024
-6% on Q2 2025

Business Events
(Estimated economic impact)



\$176.4m

+59% on Q3 2024
+120% on Q2 2025

Visitor Info. Centre Visits
(Pirie Street, Adelaide)



5.5k

-19% on Q3 2024
-23% on Q2 2025



Traffic volumes – Adelaide Airport

International passenger volumes continued to rise

Domestic Traffic Volumes Q3

1.9M

+3% on Q3 2024

+4% on Q2 2025

International Traffic Volumes Q3

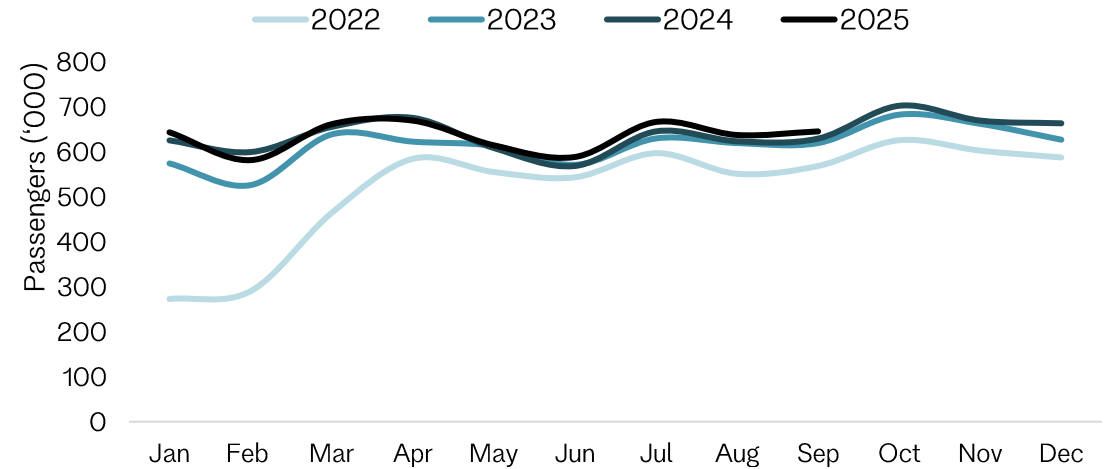
305k

+29% on Q3 2024

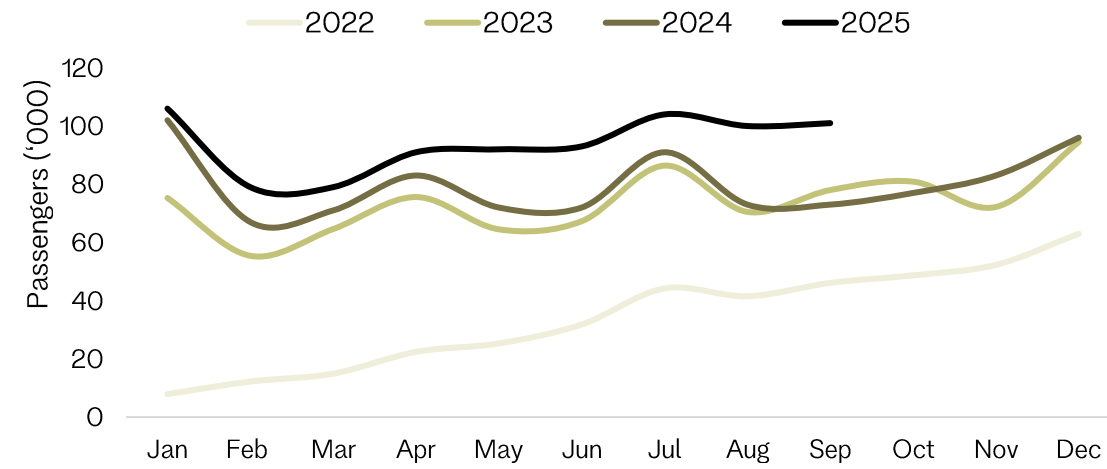
+11% on Q2 2025

- International passenger volumes reached record highs, accounting for 14% of total airport traffic, supported by expanded international flight schedules.
- Building on sustained growth since early 2024, international air traffic rose 29% compared to Q3 2024, underpinned by flights resuming from Guangzhou.
- Domestic traffic experienced slight growth from Q3 2024 and remains the predominant service from Adelaide Airport.
- Overall, traffic trends indicate a steady growth trajectory, with international travel serving as the primary driver of momentum.

Domestic Traffic Volumes



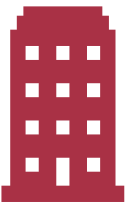
International Traffic Volumes



Terminology



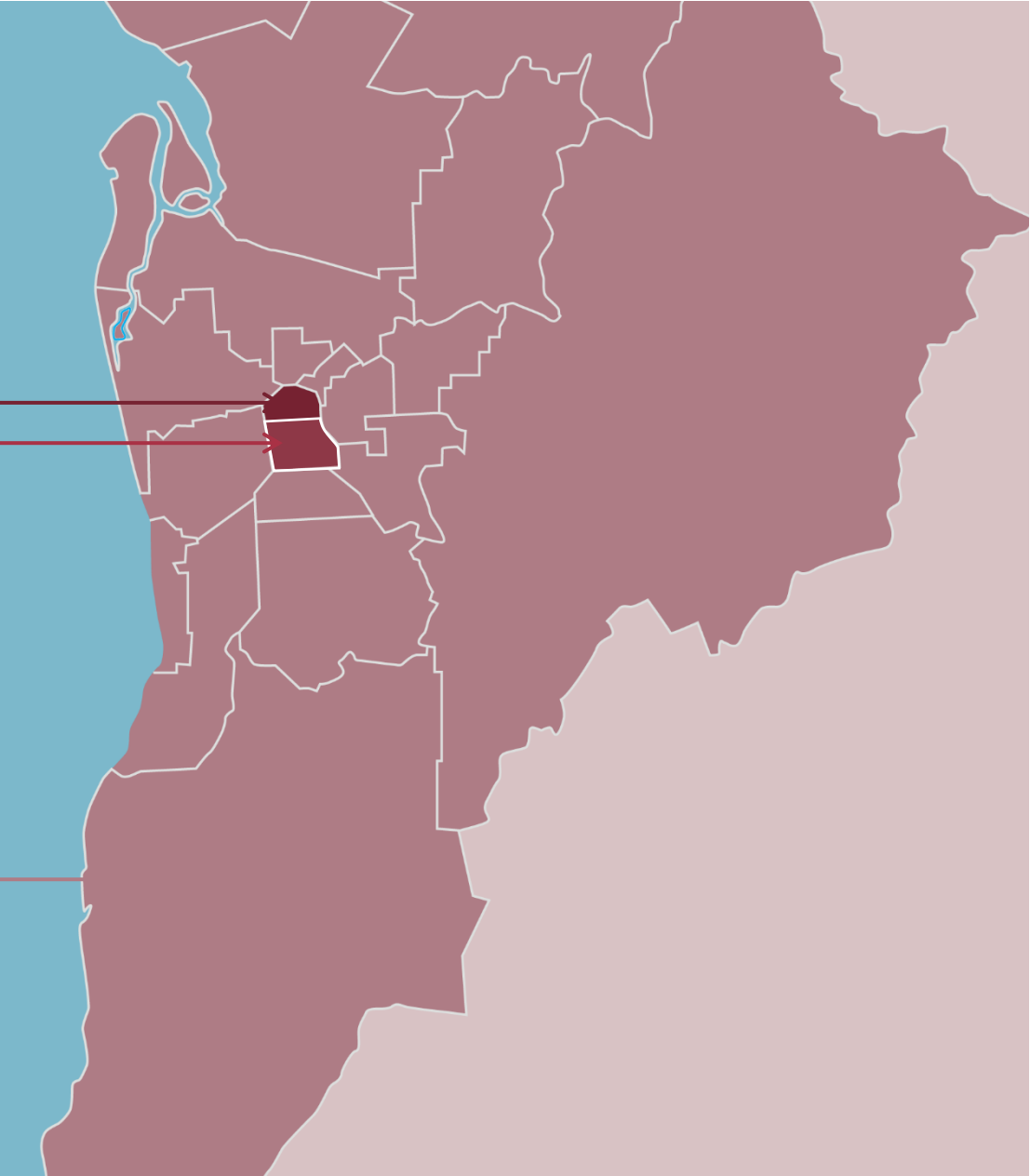
City of Adelaide
(Adelaide & North Adelaide)



Adelaide
(suburb postcode 5000)



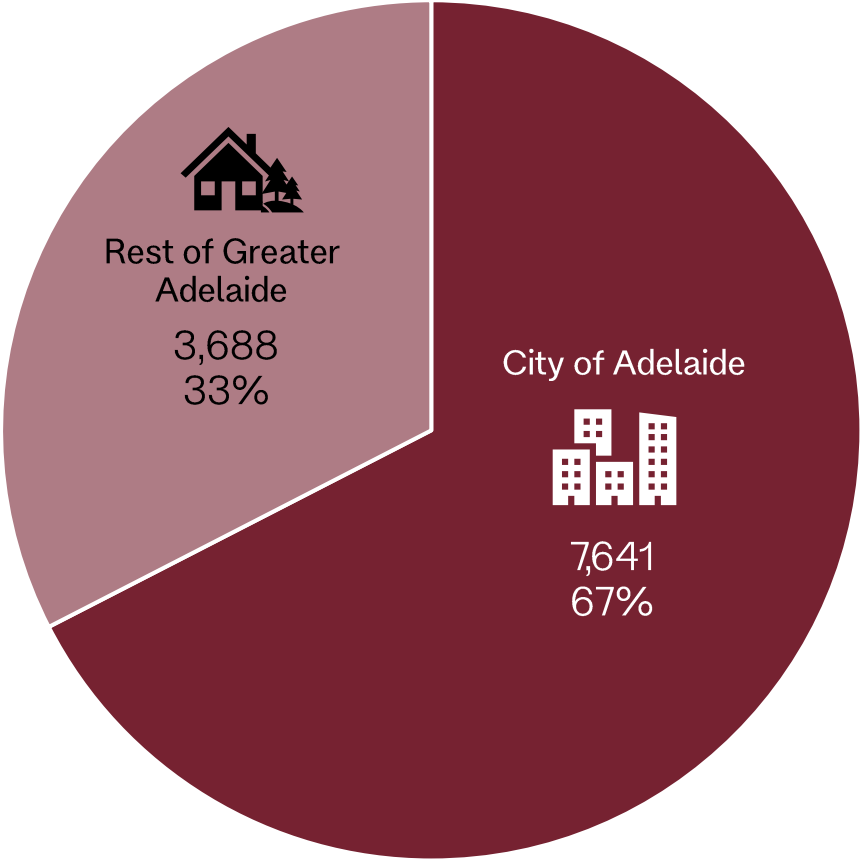
Greater Adelaide
(Metro suburbs inc. Aldinga, Mt Barker, Gawler)



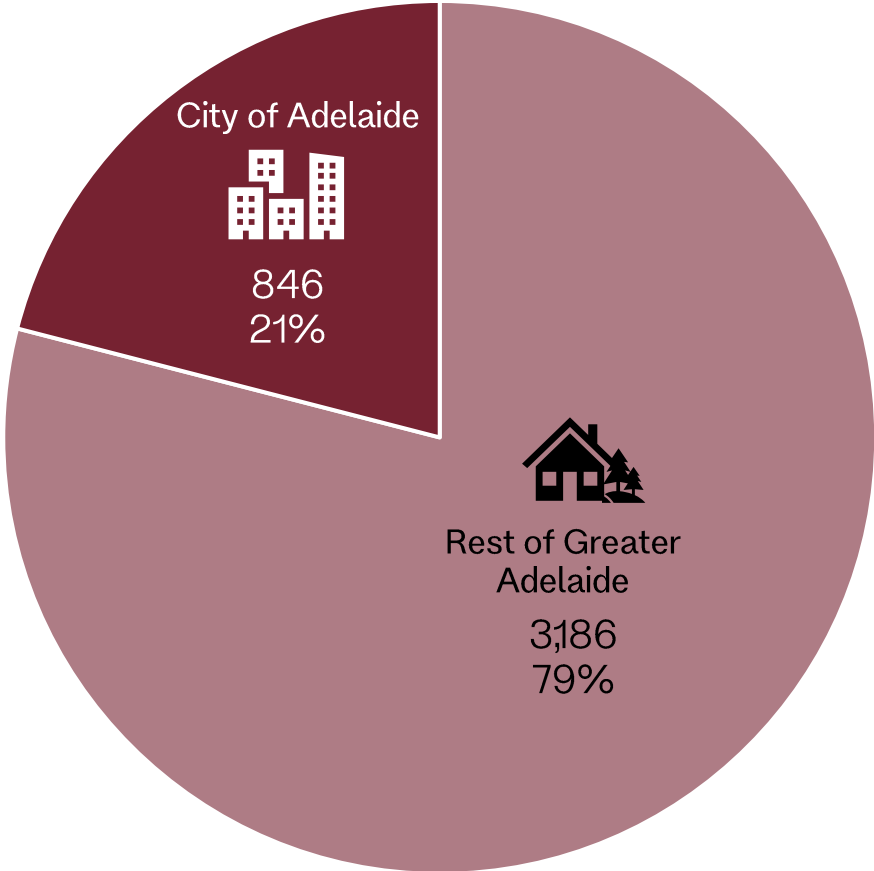
Accommodation – Market share

The City of Adelaide has a higher proportion of hotel rooms than Greater Adelaide, whilst short-term rental accommodation (STRA) is more prevalent in the suburbs.

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



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



Source: STR and AirDNA (Airbnb & Vrbo)



Short Term Rental Accommodation (STRA) – Adelaide

STRA listings and nights spiked in July

Booked Listings Q3

2.1k

+7% on Q3 2024

-3% on Q2 2025

Booked Nights Q3

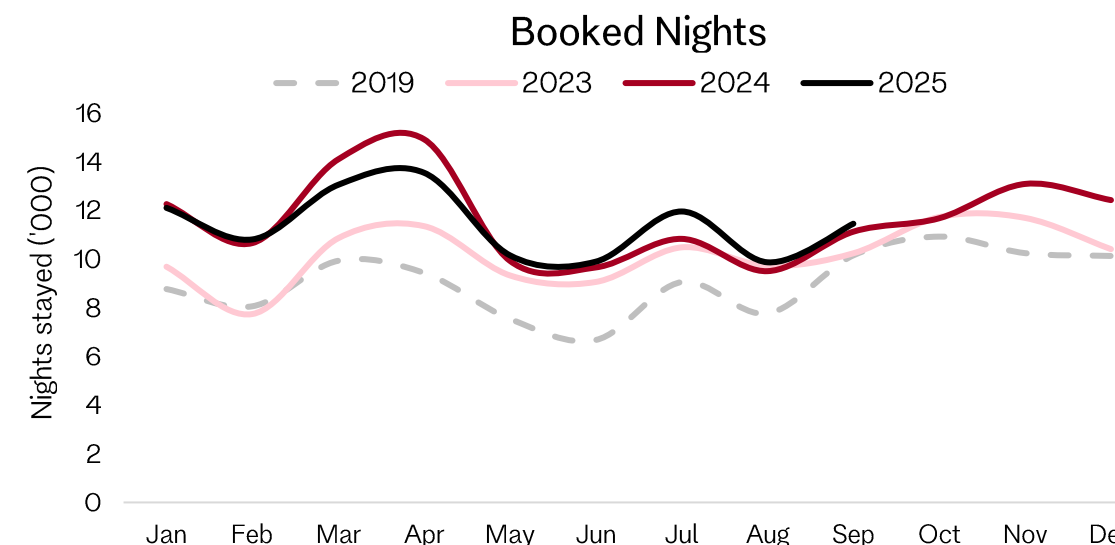
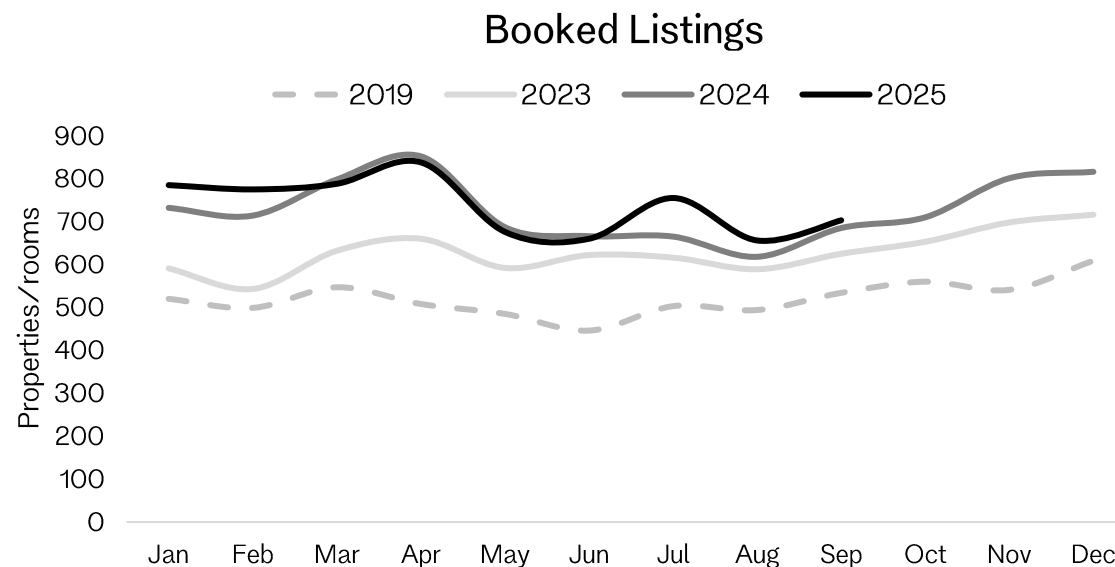
33.2k

+6% on Q3 2024

-3% on Q2 2025

- Adelaide saw an increase in both the number of listings booked and total booked nights compared to Q3 2024, though activity eased relative to the previous quarter.
- The average daily rate (ADR) was \$238, \$2 higher than Q3 2024, and at similar levels to the previous quarter. Bookings spiked around British and Irish Lions rugby tour.
- Overall occupancy averaged 66%, peaking at 70% in September, and a marginal 1 pt above Q3 2024. The average length of stay remained consistent at 5 days booked per listing, with both the previous quarter and Q3 2024.
- One and two-bedroom properties continued to dominate, accounting for 88% of bookings.

Source: AirDNA





Hotel accommodation – Adelaide

Hotel revenue continued to rise

Rooms booked Q3

528.1k

+11% on Q3 2024

+3% on Q2 2025

Revenue Q3

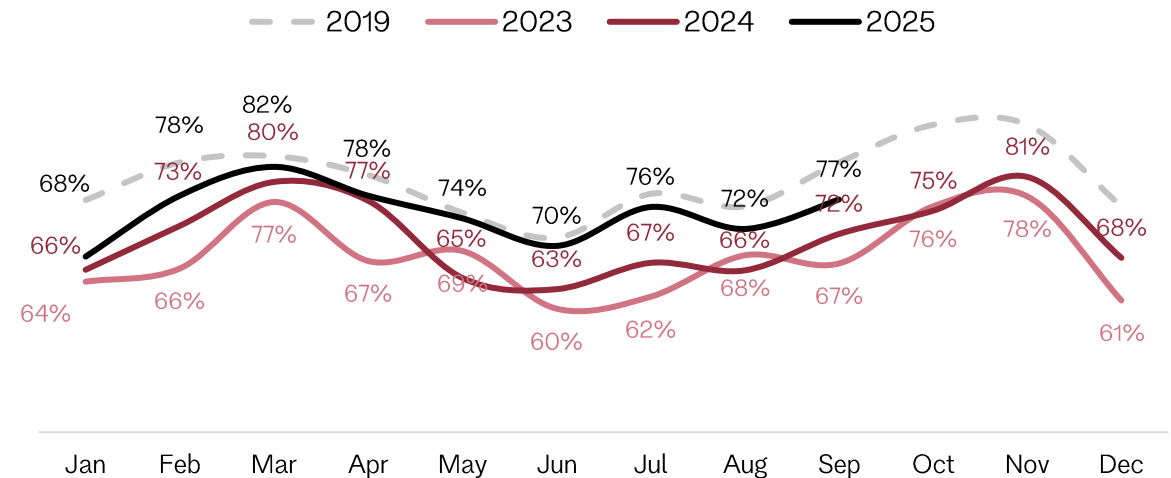
\$101.7M

+15% on Q3 2024

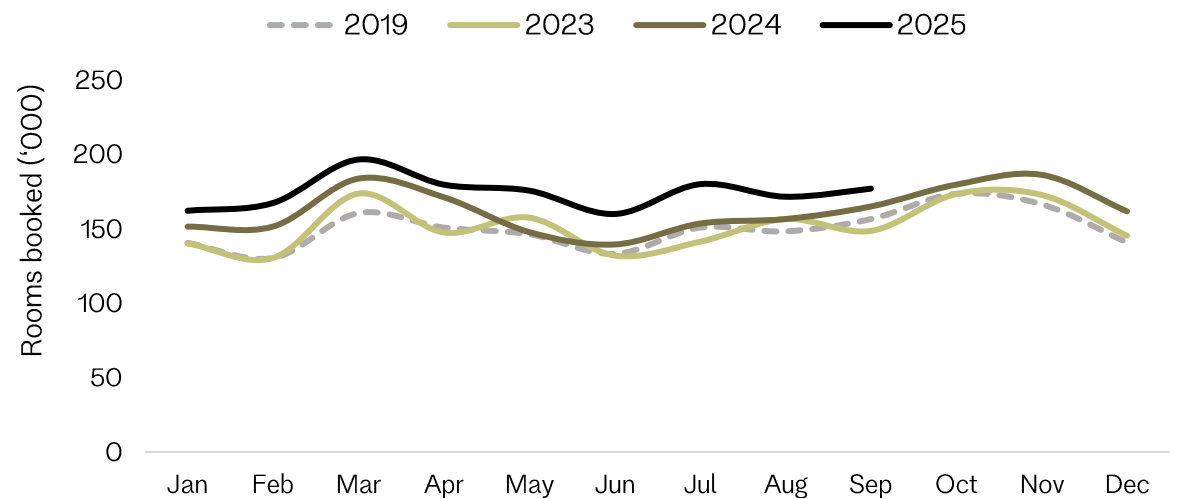
-1% on Q2 2025

- Q3 maintained momentum from Q2, with monthly occupancy rates 7 percentage points higher than Q3 2024, reaching 95% of pre-COVID levels despite a 28% increase in room supply since June 2019.
- September delivered the quarter's peak performance, recording an average daily rate (ADR) of \$196, \$6 higher than 2024, underpinned by strong business event visitation.
- \$22.4M in hotel revenue was generated during Illuminate 2025, an increase of 30% year-on-year, with RevPAR being 27% higher than the previous year's event (+\$32).
- The British and Irish Lions rugby tour provided a major uplift, driving weekend occupancy to 85% and a 102% year-on-year increase in RevPAR (+\$137).
- Hotel occupancy peaked at 95% on July 12 during the British and Irish Lions match and reached 94% again when the Adelaide Crows played Collingwood, demonstrating the continued economic impact of major sporting events.

Occupancy Rates



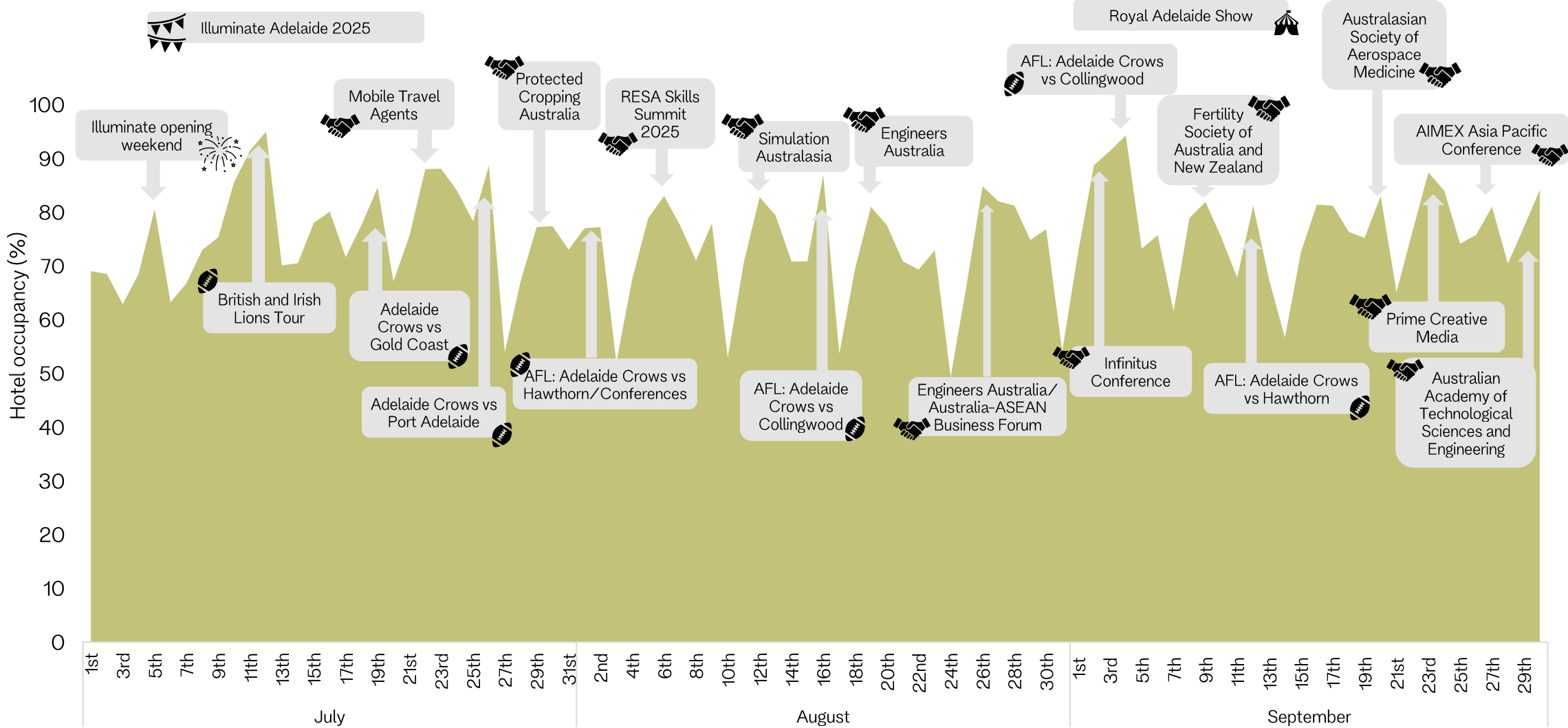
Rooms Booked



Hotel occupancy – City of Adelaide



Daily Occupancy - Q3 2025

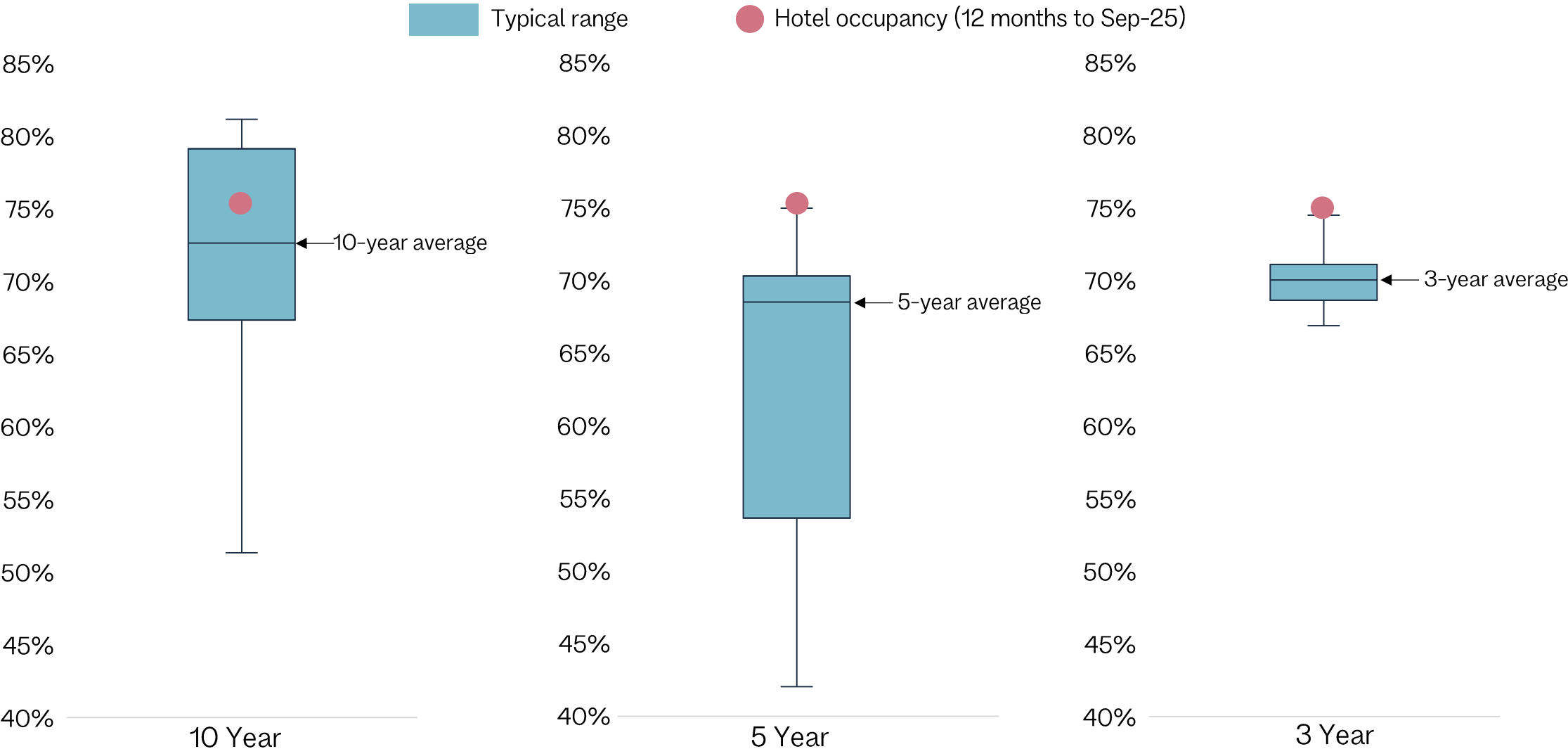


Source: STR Global, Limited, a CoStar Group company 2025

Hotel occupancy – City of Adelaide



Hotel occupancy rates have been at their highest level when compared with both the short-term and long-term average



Source: Source: STR Global, Limited, a CoStar Group company 2025



Hotel accommodation – National

Adelaide held strong against national ave.

Greater Adelaide Occupancy Q3

74.6%

+5 pts on Q3 2024

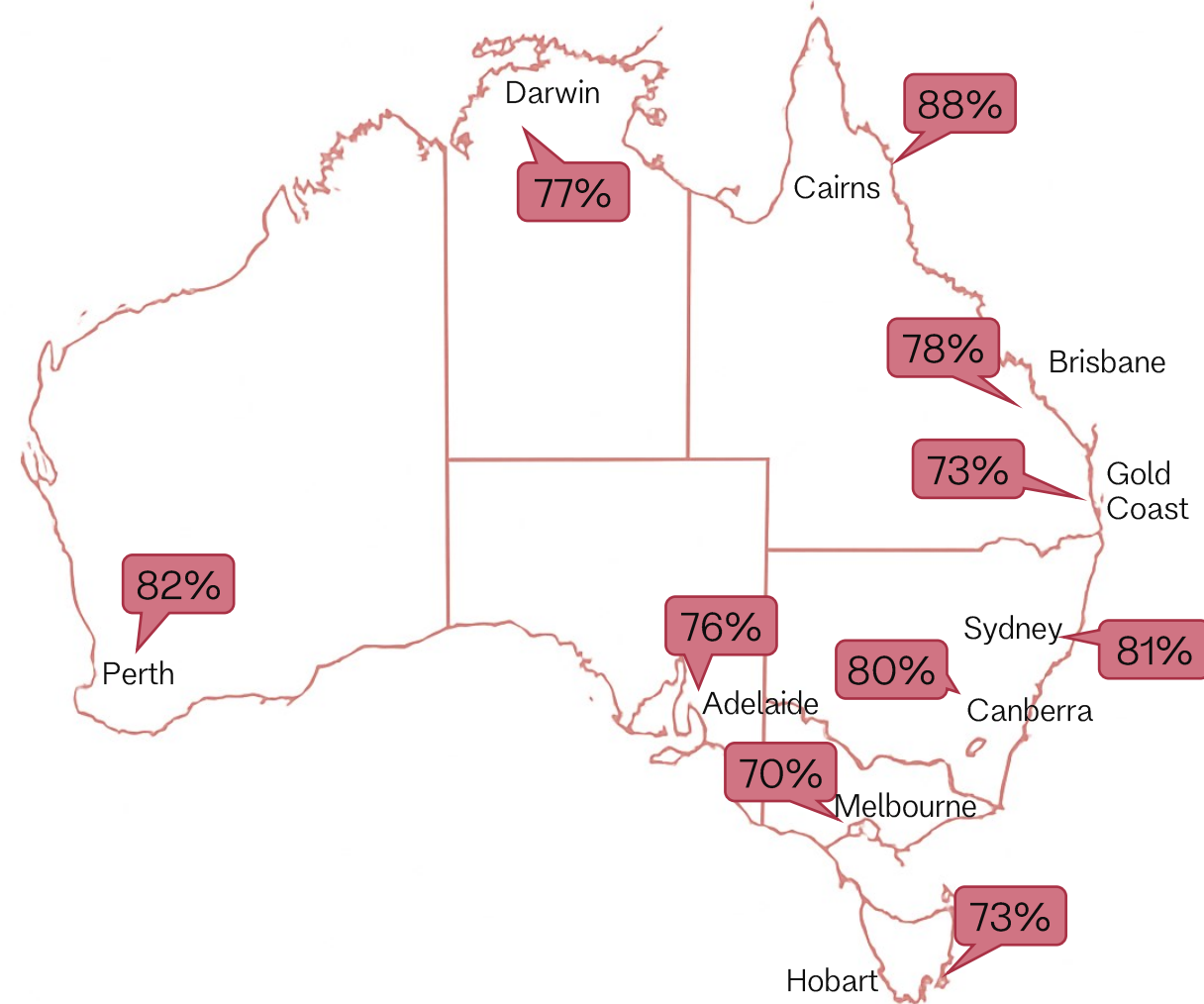
Major cities Australia Occupancy Q3

74.3%

-2 pts on Q3 2024

- Greater Adelaide experienced the highest increase in occupancy (+5 pts), when compared to other major cities in Australia.
- Greater Adelaide's hotel occupancy in Q3 was slightly higher than the national average by 1.8 pts. The Average Daily Rate (ADR) in Greater Adelaide rose by \$12 when compared to Q3 2024, aligning with the increase in national ADR.
- Among all recorded cities, Cairns recorded the highest occupancy (88%) during this quarter and Brisbane recorded the highest decline from Q3 2024 (2 pts).
- Revenue Per Available Room (RevPAR) for Greater Adelaide averaged \$142 in Q3 2025, increasing by \$15 compared to Q3 2024. Additionally, national RevPAR increased with the same magnitude.

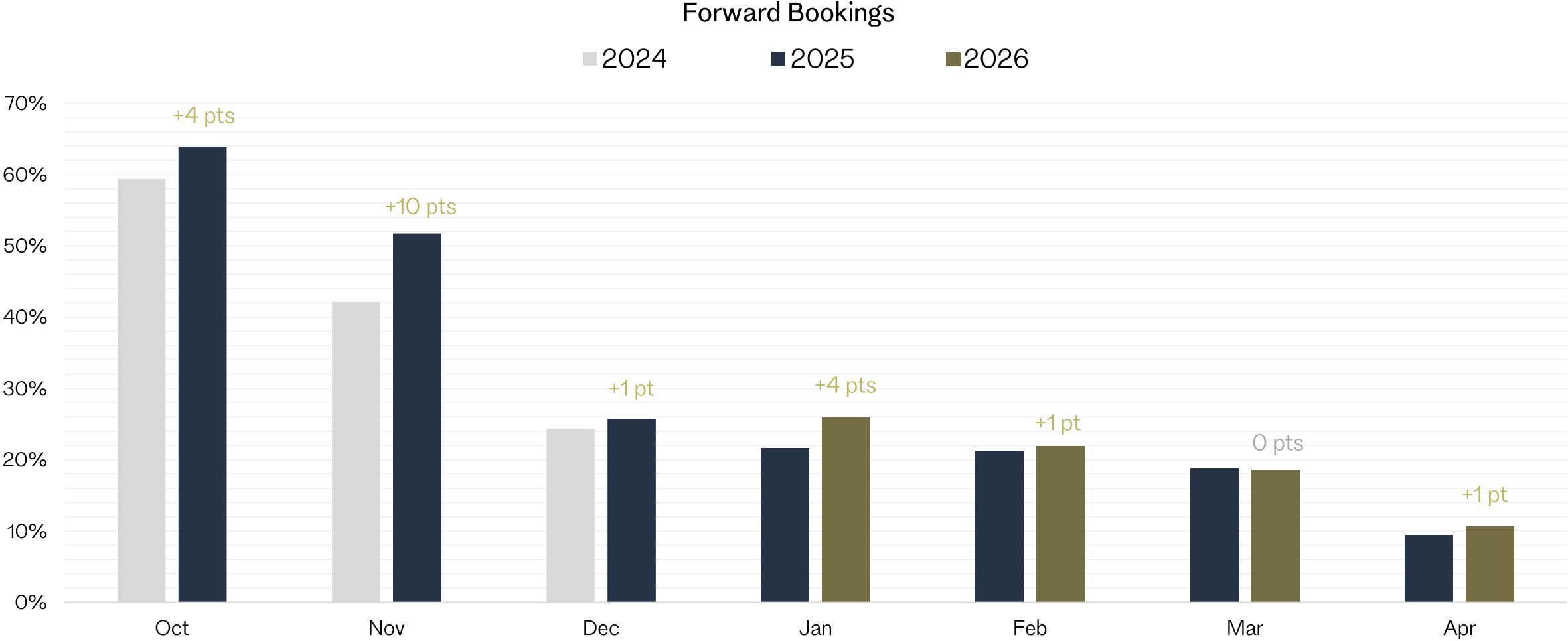
Occupancy – Q3 2025



Hotel accommodation forward bookings – City of Adelaide



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



Source: STR Global, Limited, a CoStar Group company 2025 (as of 8 October 2025)

Hotel accommodation – City of Adelaide



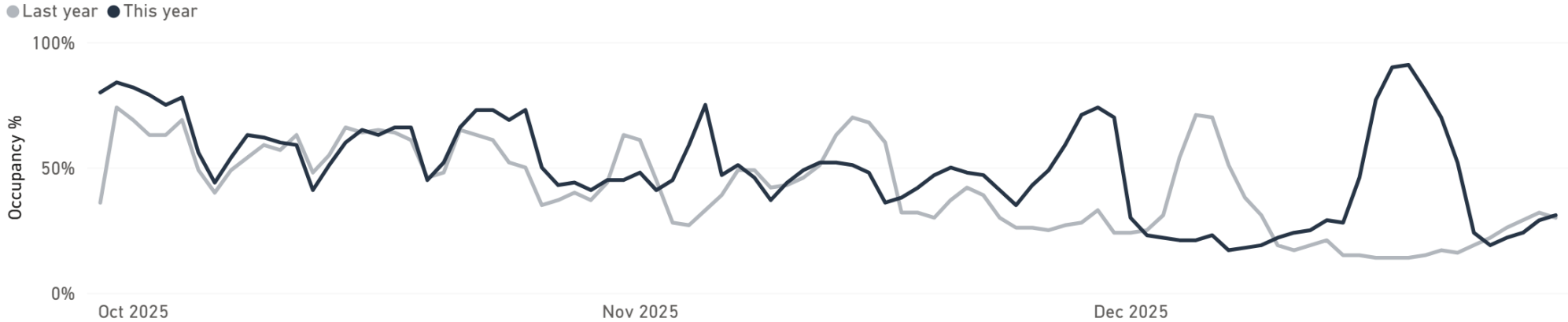
CITY OF ADELAIDE ACCOMMODATION FORWARD BOOKINGS SNAPSHOT

Month: Year:

Forward Occupancy on Books

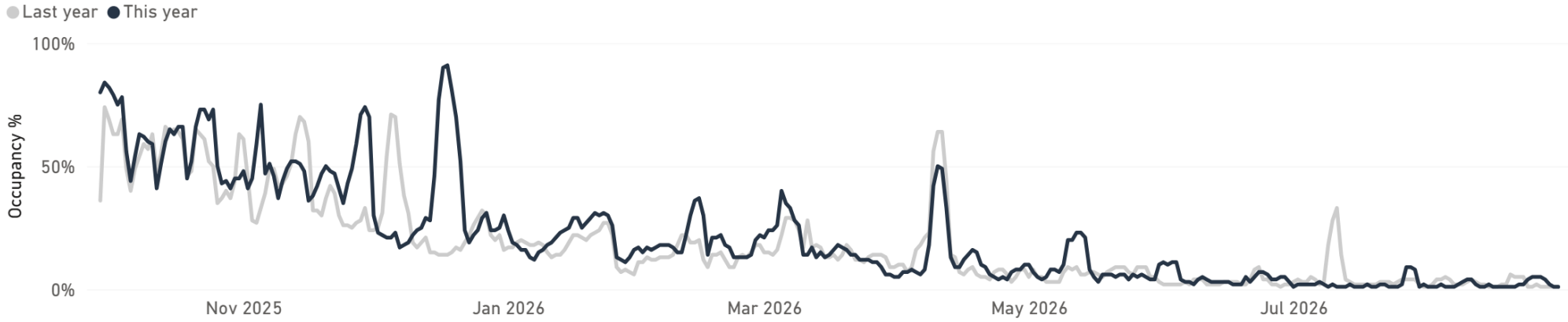
STR - Forward Bookings for the next 90 Days

↓ Hover over lines to see associated events and occupancy rates



Forward Occupancy on Books

STR - Forward Bookings for the next 12 Months



Available online

(Updated weekly with event callouts)

[Click here to access](#)

Source: STR Global, Limited, a CoStar Group company 2025

Business events – Greater Adelaide

Business event activity reached historic levels

Delegates Q3

26.7k

+19% on Q3 2024
+102% on Q2 2025

Bed nights Q3

91.1k

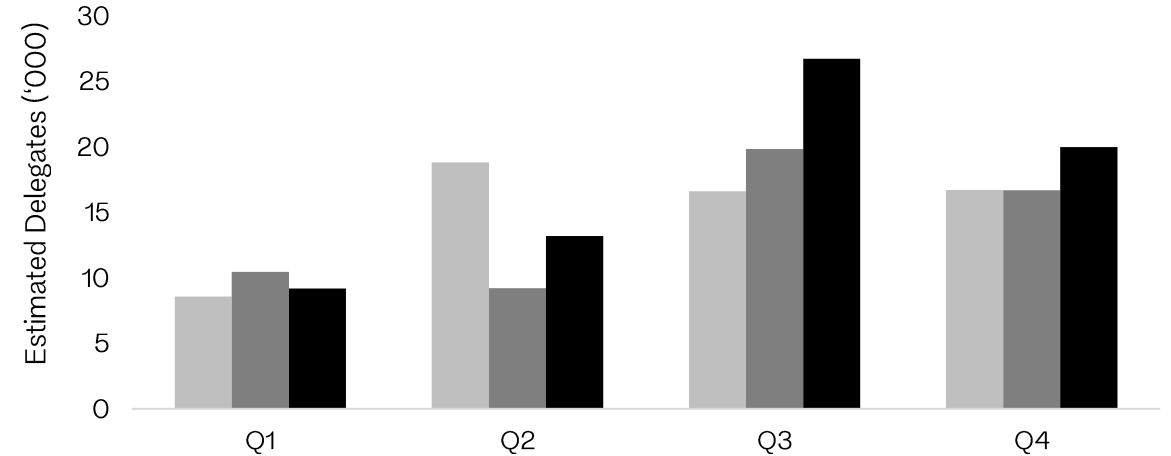
+51% on Q3 2024
+100% on Q2 2025

- Both business event delegate numbers and bed nights were significantly higher than the same quarter last year and Q2 2025.
- The combined estimated economic impact of business events for Q3 2025 was \$176.4M, 59% higher than Q2 2024 and an increase of 120% from the previous quarter.
- September was the highest recorded month for business event activity, peaking with an estimated 14,269 delegates, and an estimated economic impact of \$111.6M during the month.



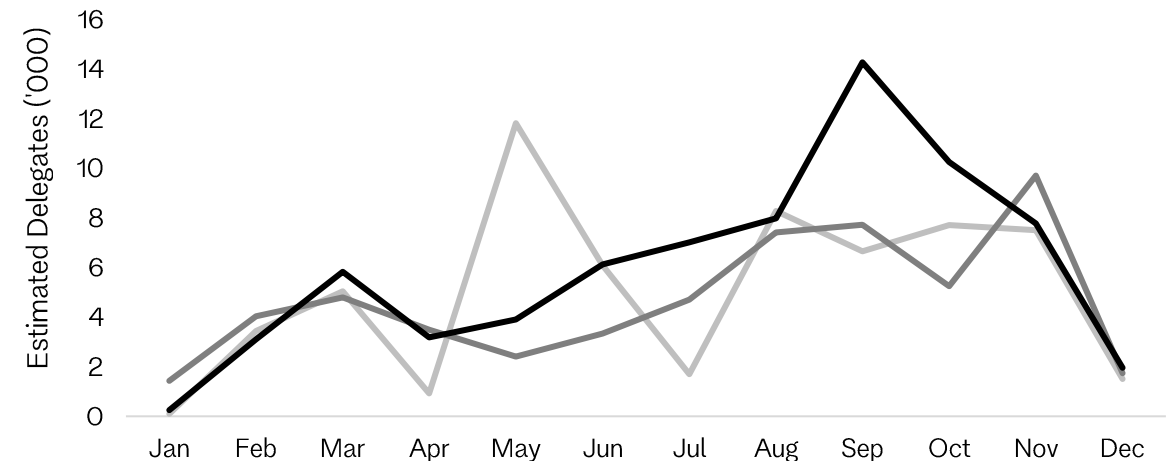
Estimated Delegates

■ 2023 ■ 2024 ■ 2025



Estimated Delegates

— 2023 — 2024 — 2025



Interstate expenditure – City of Adelaide

Interstate expenditure continues its growth

Nominal expenditure Q3

\$125.4m

+10% on Q3 2024

-6% on Q2 2025

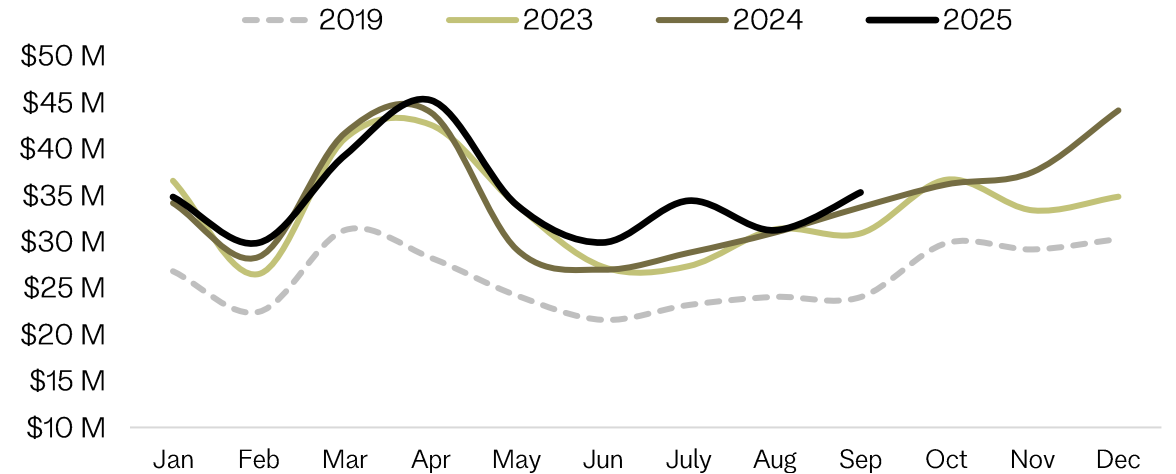
Expenditure in real terms
(adjusted for inflation)

+8% on Q3 2024

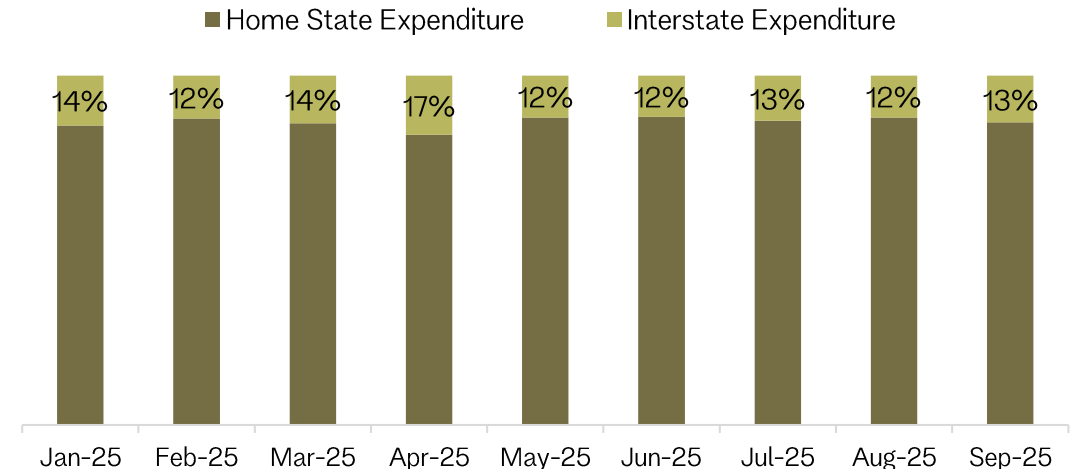
-7% on Q2 2025

- Interstate expenditure peaked in September this quarter.
- Queensland showed the highest growth in interstate expenditure (29% higher than last year). Victoria and New South Wales had the highest volume of expenditure and also increased when compared with Q3 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)



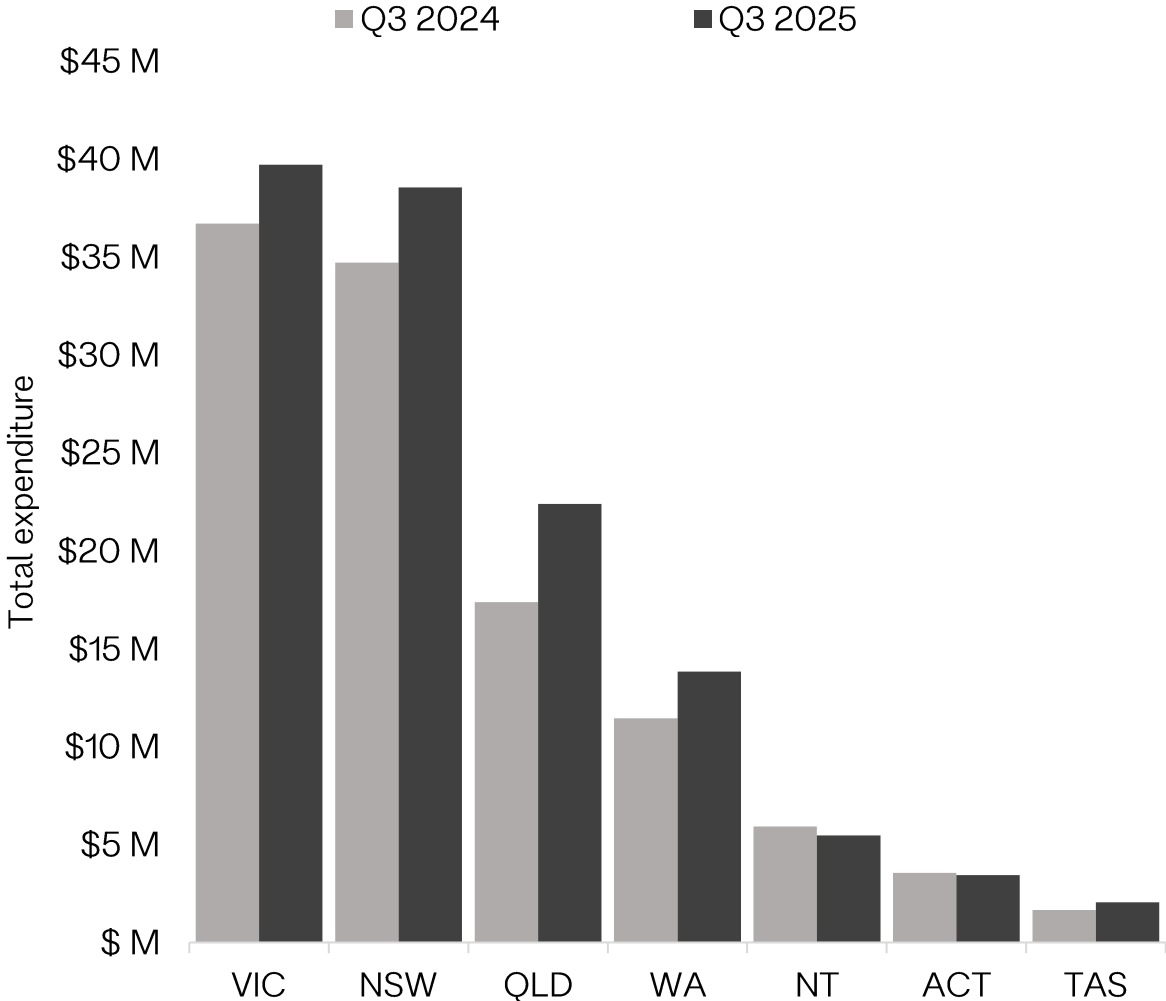
Proportion of Interstate Expenditure
(City of Adelaide, YTD 2025)



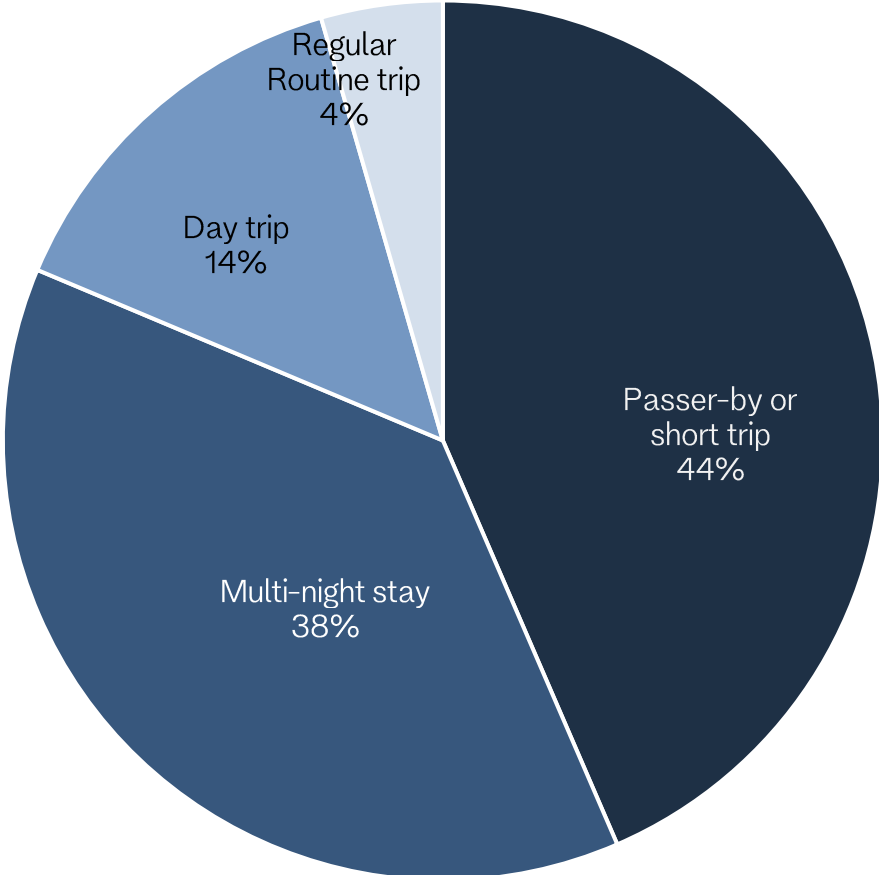
Tourism expenditure – City of Adelaide



Nominal Expenditure by State of Origin



Visitor Type by Expenditure (Q3 2025)

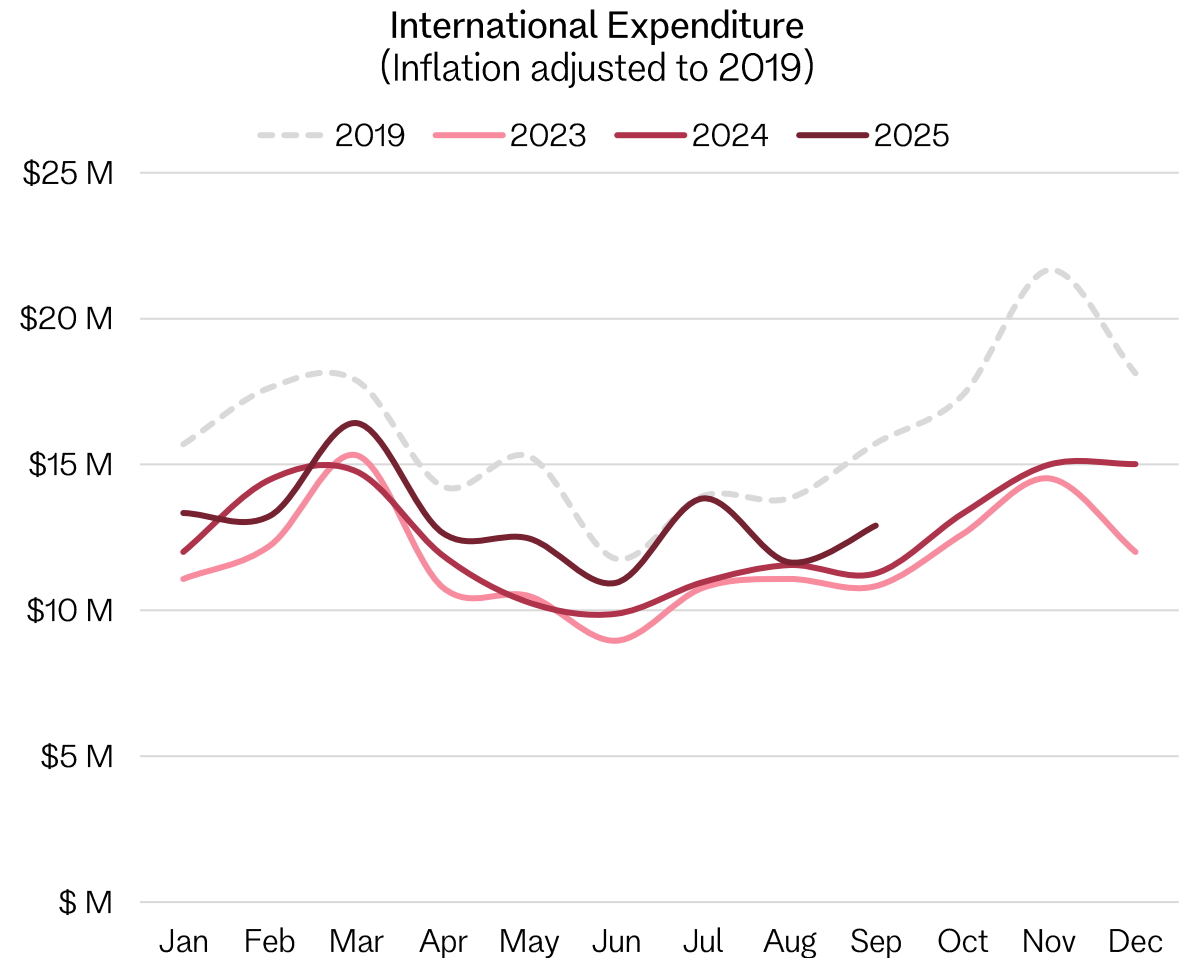
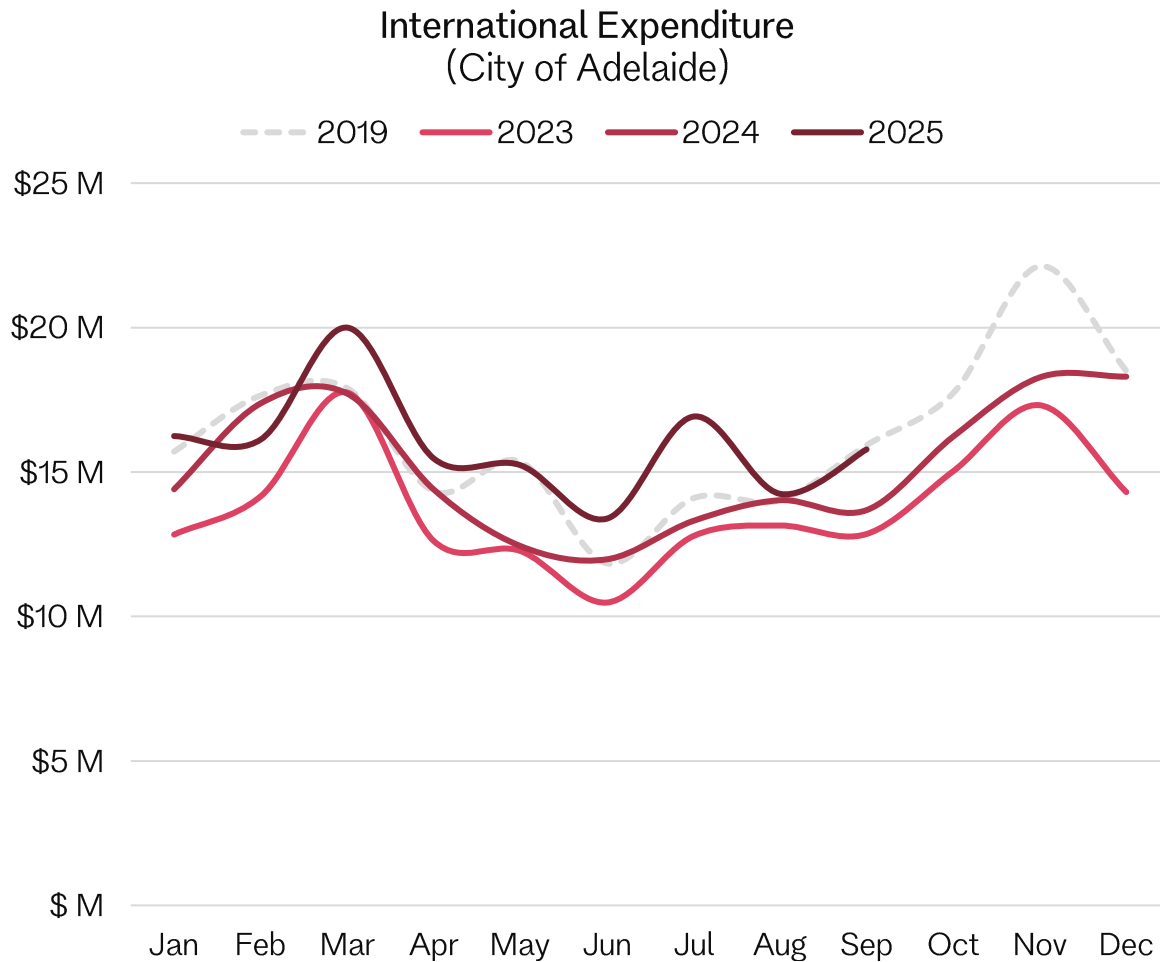


Source: Spendmapp by Geografia and banking data

International expenditure – City of Adelaide



International expenditure was 14% higher than Q3 2024, however, when adjusted for inflation, it remains below 2019 levels





Visitor Information Services (VIS) – City of Adelaide

VIS enquiries grew on Q3 last year

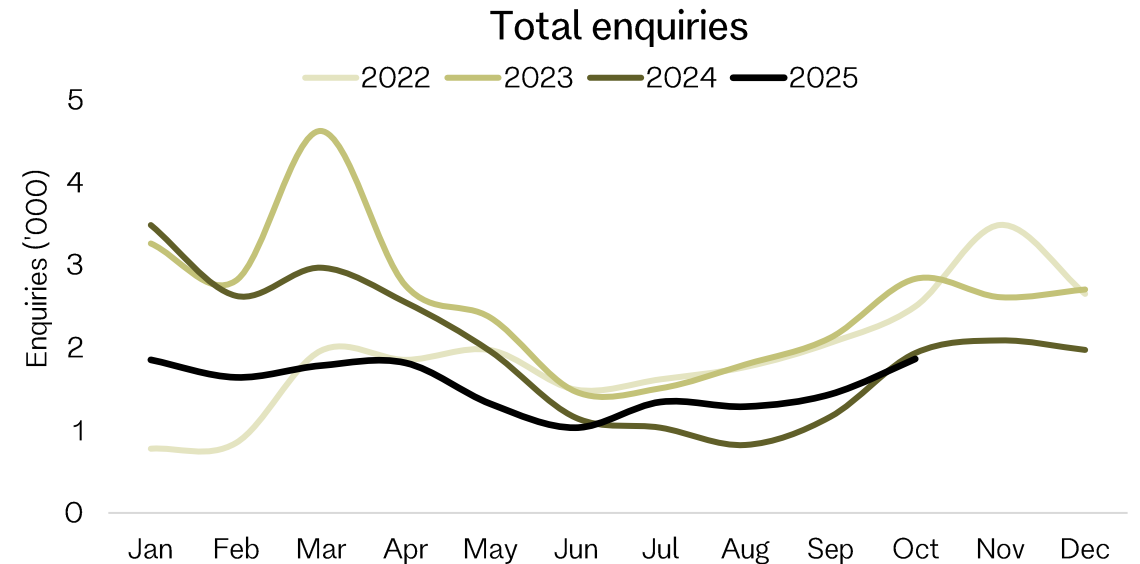
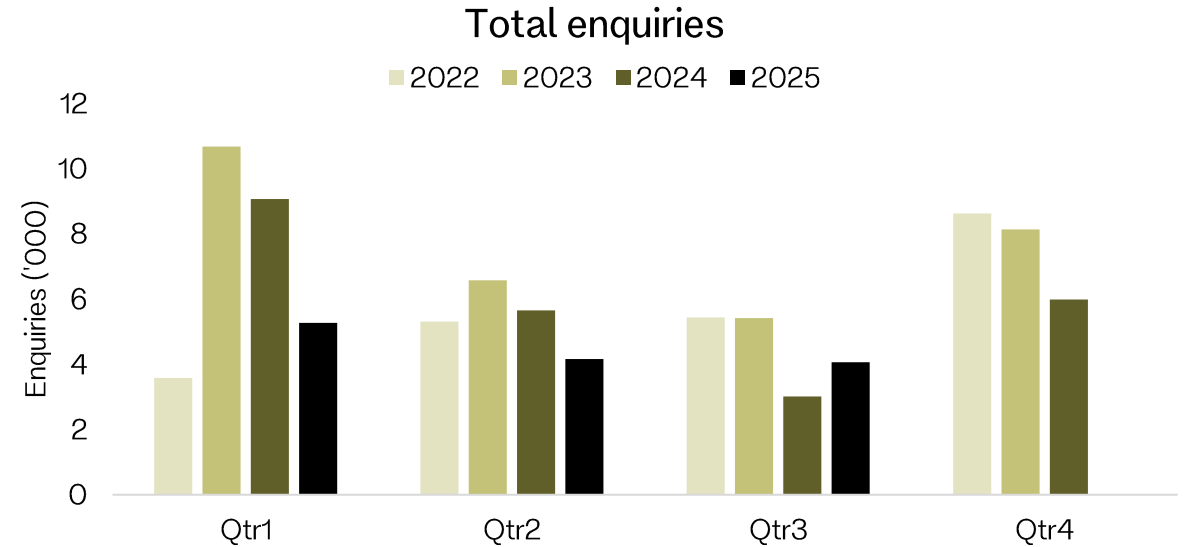
Total enquiries Q3

4.1k

+35% on Q3 2024

-2% on Q2 2025

- Enquiries are recorded by volunteers across multiple channels, including city guides, Visitor Information Centre (VIC) interactions, and mobile visitor bikes. Enquiries to VIS increased by 35% compared with Q3 2024, with September 2025 showing the strongest uplift.
- 2024 and 2025 enquiry levels remain below 2022 and 2023 levels, similar observations have been made with visits to the VIC.
- International visitor enquiries in Q3 2025 contributed to 22% of enquiries compared to 20% in Q3 2024, with the UK showing the largest growth (+12 pts).
- Adelaide-based visitors in Q3 2025 rose to 87% from 82% in Q3 2024 (+5 pts), whilst regional South Australia visitors decreased by the same margin.
- Overall visitation to the Visitor Information Centre declined compared to both Q3 2024 and the previous quarter.



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

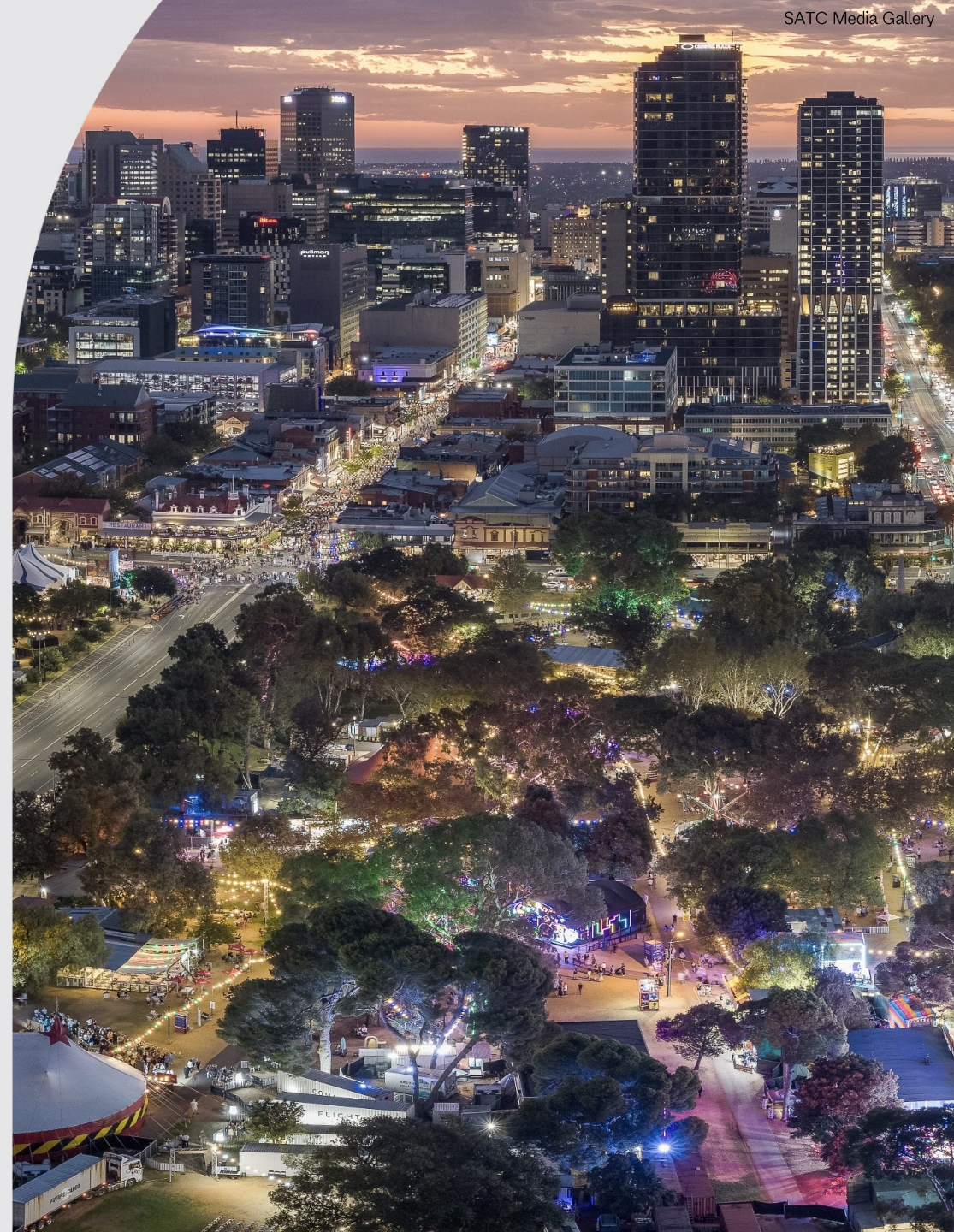


Disclaimers

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.

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](#).



Adelaide
Economic
Development
Agency

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