AEDA Insights

Visitor Economy Report

Q1 2026 (January - March)

Adelaide Economic Development Agency

CITY OF ADELAIDE

Table of Contents

Visitor Economy Q1 2026

Summary of Findings

Overall

- Economic activity remained broadly positive across key visitor metrics through the quarter.
- Major events, including LIV Golf, Santos Tour Down Under, Adelaide Fringe, and WOMADelaide supported strong visitation, accommodation performance, and visitor spending.
- Late-quarter softening reflected the conclusion of the festival season and early impacts of higher fuel costs and international flight disruptions.

Accommodation

- Hotels outperformed the prior year across rooms booked and revenue, with Adelaide Fringe delivering a notable uplift in hotel revenue compared to the prior year's festival period.
- STRA continued to strengthen, with booked listings and stayed nights tracking at record levels.

Travel and Engagement

- Adelaide Airport international passenger volumes continued to grow strongly, with expanded airline services supporting forward capacity.
- Domestic volumes eased slightly due to temporary capacity reductions linked to fuel cost pressures.

Tourism Expenditure

- Interstate visitor expenditure remained stable, peaking in March driven by the major events calendar.
- International spending reached record quarterly levels, surpassing pre-COVID levels in real terms.

Visitor Trends

- Average expenditure per trip eased marginally, continuing the shift toward shorter, more price-conscious travel.
- Visitor Information Centre enquiries declined year on year, although international engagement increased, likely driven by the strong events calendar.

Key visitor economy metrics – Q1 2026

Flight Passengers
(Adelaide Airport)

2.3m

+5% on Q1 2025
-8% on Q4 2025

Hotel Revenue
(City of Adelaide)

$121.2m

+11% on Q1 2025
-11% on Q4 2025

Short Term Rental Occupancy
(Adelaide Airbnb/Vbro)

70%

+2 pts on Q1 2025
-3 pts on Q4 2025

Interstate Expenditure
(City of Adelaide)

$131.7m

+3% on Q1 2025
-13% on Q4 2025

Business Events
(Estimated economic impact)

$49.7m

-6% on Q1 2025
-56% on Q4 2025

Visitor Info. Centre Engagement
(Pirie Street, Adelaide)

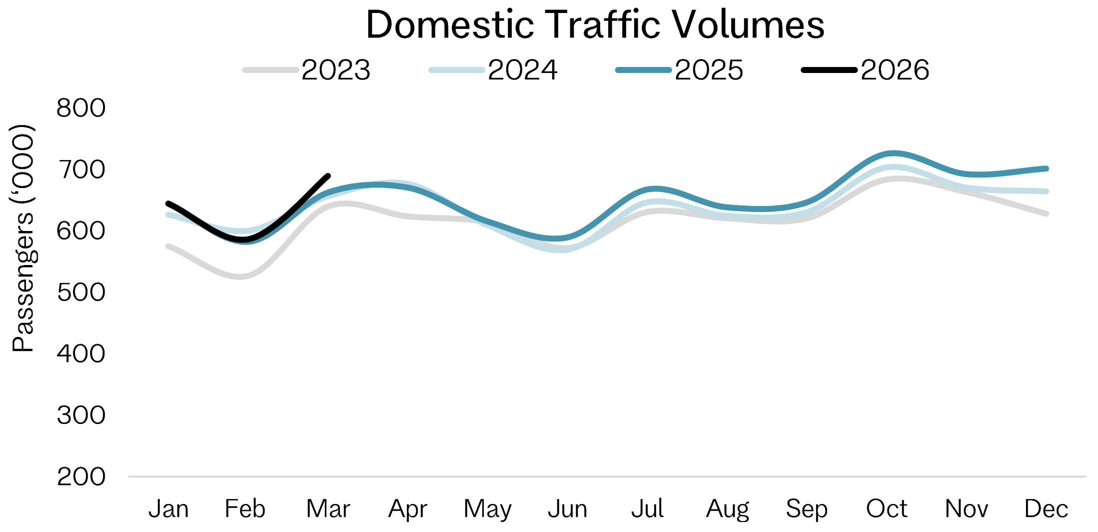
8.5k

-23% on Q1 2025
-23% on Q4 2025

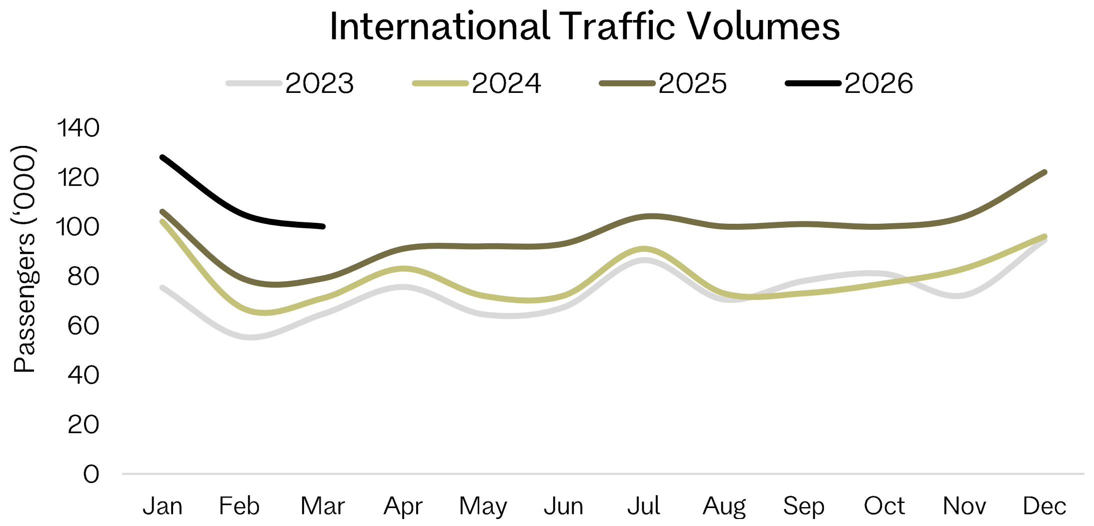
Traffic volumes – Adelaide Airport

International passenger volumes continued to soar

Domestic Traffic Volumes Q4 **1.9M**	+2% on Q1 2025 -9% on Q4 2025
International Traffic Volumes Q4 **337k**	+27% on Q1 2025 +2% on Q4 2025



- Passenger volumes remained strong in Q1 2026, with international travel continuing to drive overall growth. Momentum from late 2025 carried into the current quarter, supported by expanded airline services.
- International capacity continues to build, with China Southern moving to year-round services and new or increased flights from China Eastern and Indonesia AirAsia strengthening forward demand. Improved connectivity through Asian hubs and the planned return of daily Qatar services are supporting access to Europe.
- Domestic volumes eased slightly following temporary capacity reductions linked to higher fuel costs, including Qantas' 5% cut and the suspension of Mount Gambier services. As fuel pressures stabilise, domestic capacity is expected to gradually recover.



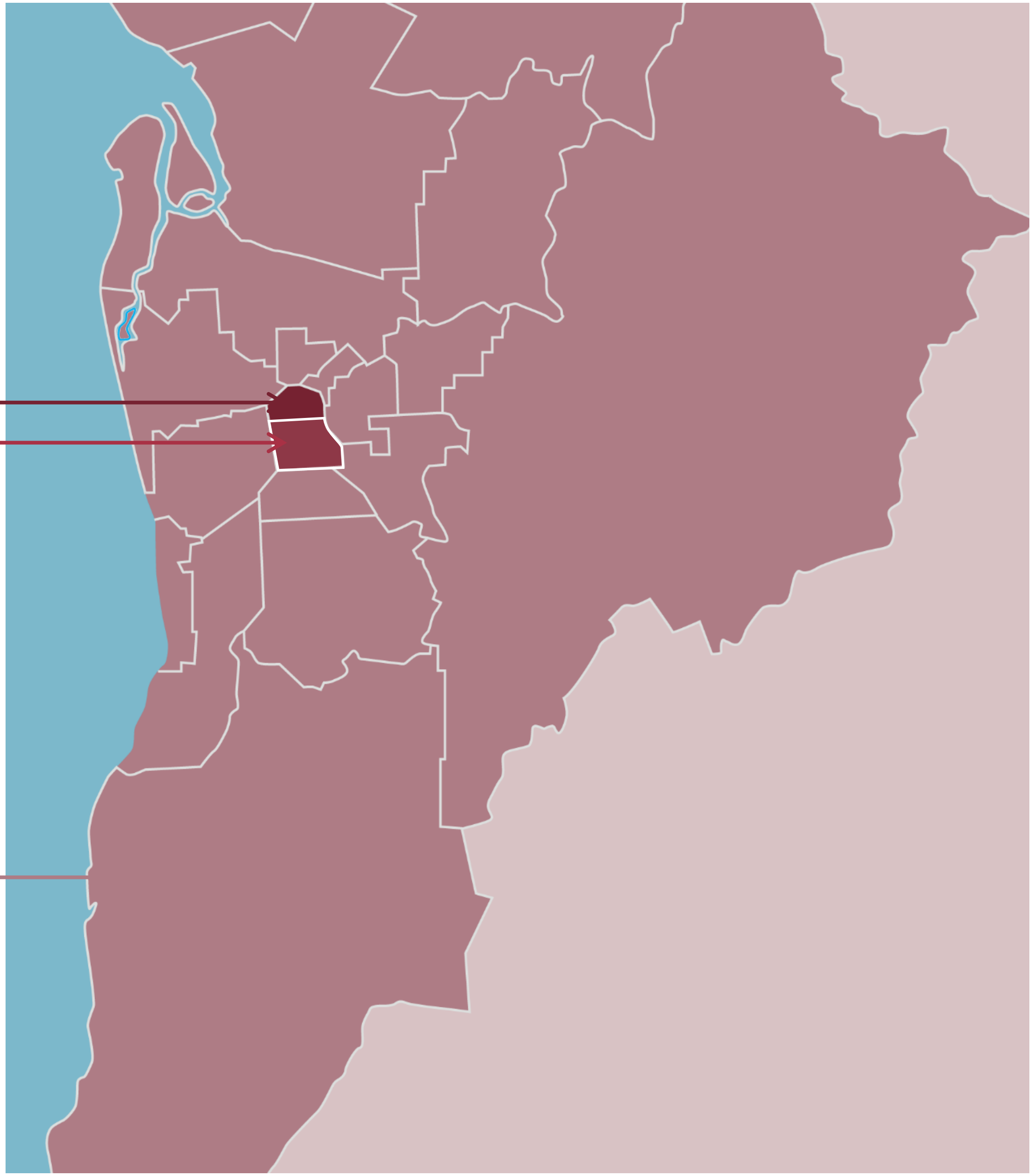
Source: Adelaide Airport

Area Classifications

City of Adelaide
(Adelaide & North Adelaide)

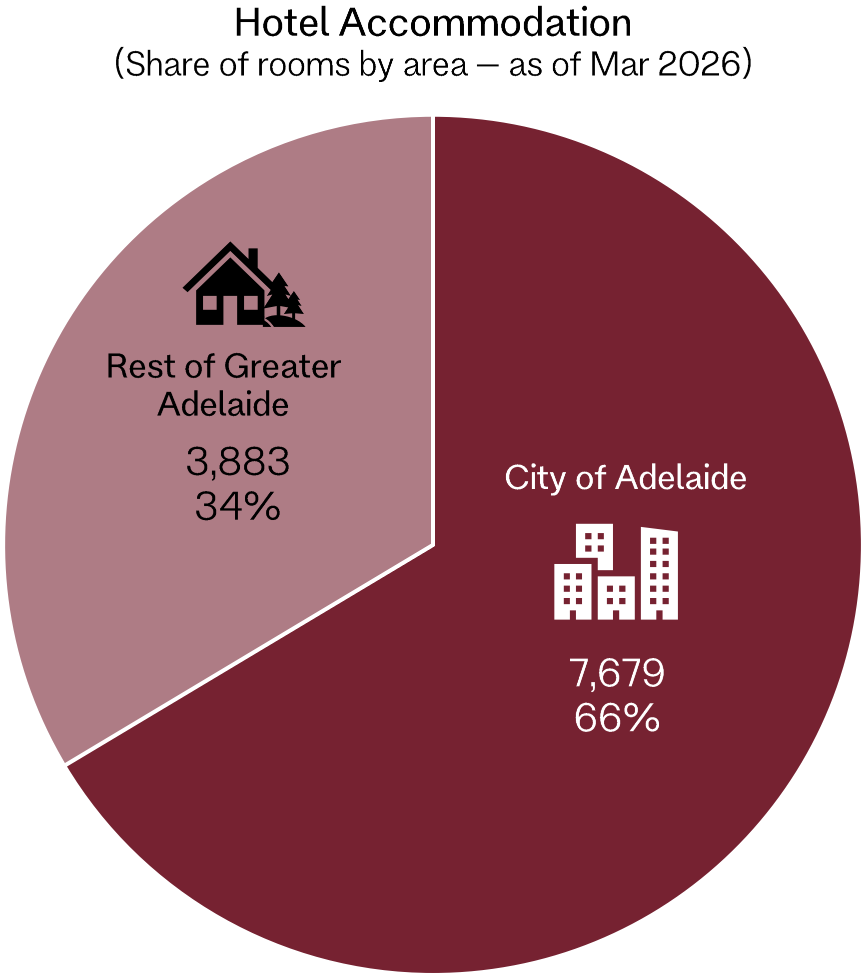
Adelaide
(suburb postcode 5000)

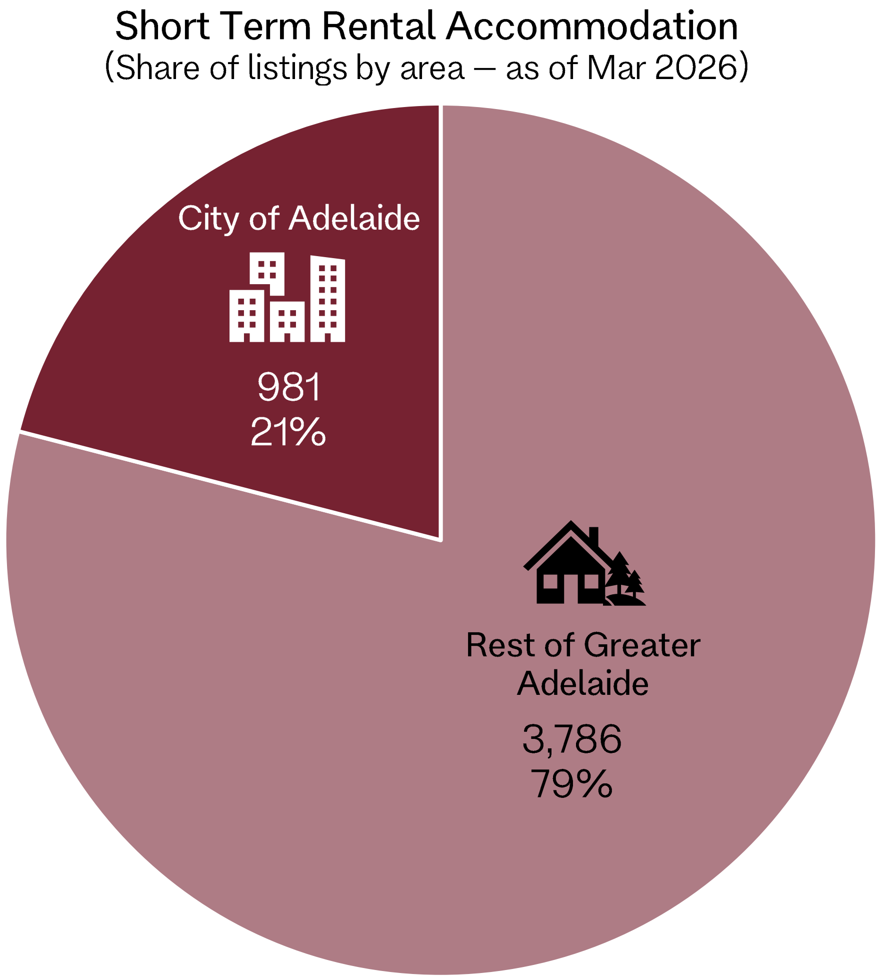
Greater Adelaide
(Metro suburbs inc. Aldinga, Mt Barker, Gawler)



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.





Source: STR and AirDNA (Airbnb & Vrbo)

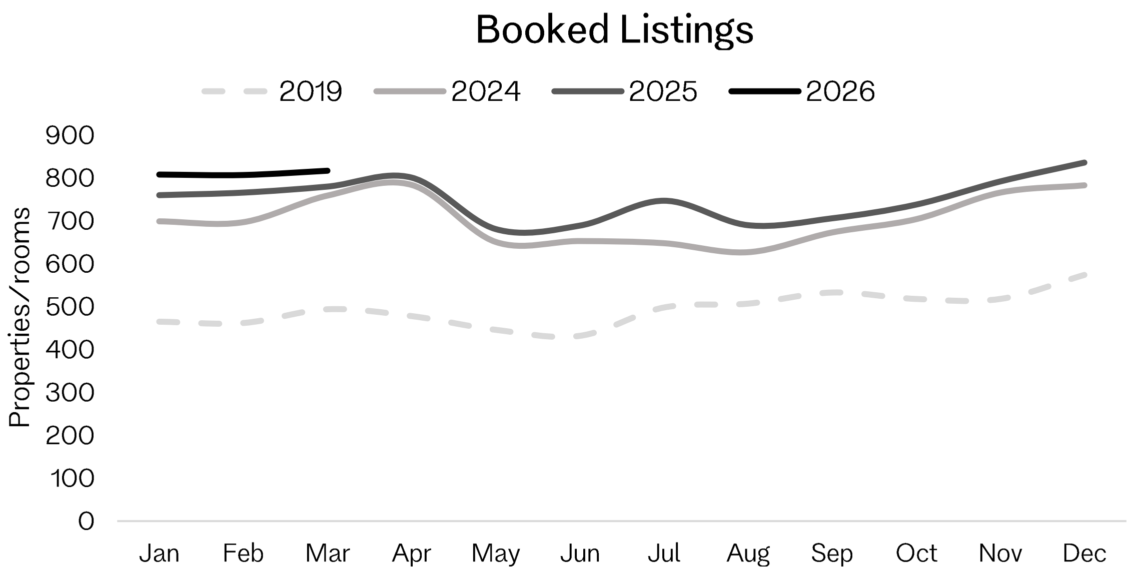
Short Term Rental Accommodation (STRA) – Adelaide

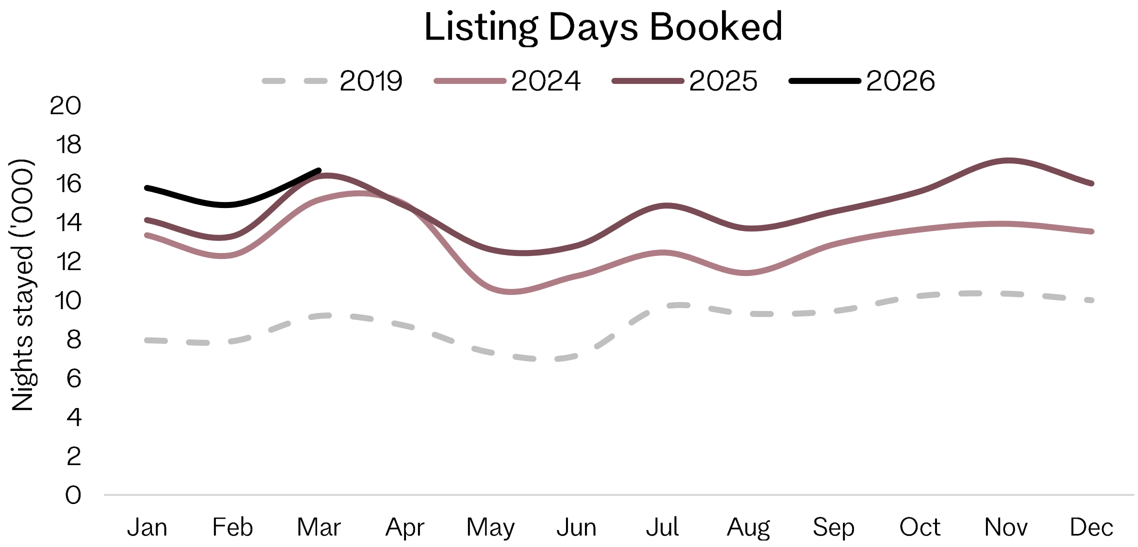
STRA continued to grow from previous quarters

Booked Listings Q1	
2.4k	+6% on Q1 2025 +3% on Q4 2025
Listing Days Booked Q1	
47.3k	+8% on Q1 2025 -3% on Q4 2025

- Adelaide continued its record high demand trend for both number of listings booked and total booked nights from the previous quarter, tracking well historical and pre-COVID levels.
- Average Daily Rate (ADR) softened slightly to $251, $14 lower than Q1 2025, likely reflecting increased supply and more competitive pricing outside peak periods. Despite this, pricing remained responsive to high demand periods, with ADR peaking at $321 during the Adelaide Cup Day long weekend, alongside other major events and was $311 during the Valentines day/LIV Golf weekend ($75 higher than 12-month average).
- Occupancy slightly softened from the peak previous quarter, averaging 70% in Q1 2026, 2 percentage points higher than Q1 2025, peaking at 72% in February. However, revenue, with average revenue per listing being $4.9k during Q1, was 3% lower on the same period last year.
- One and two-bedroom properties continued to dominate, accounting for 88% of bookings.

Source: AirDNA



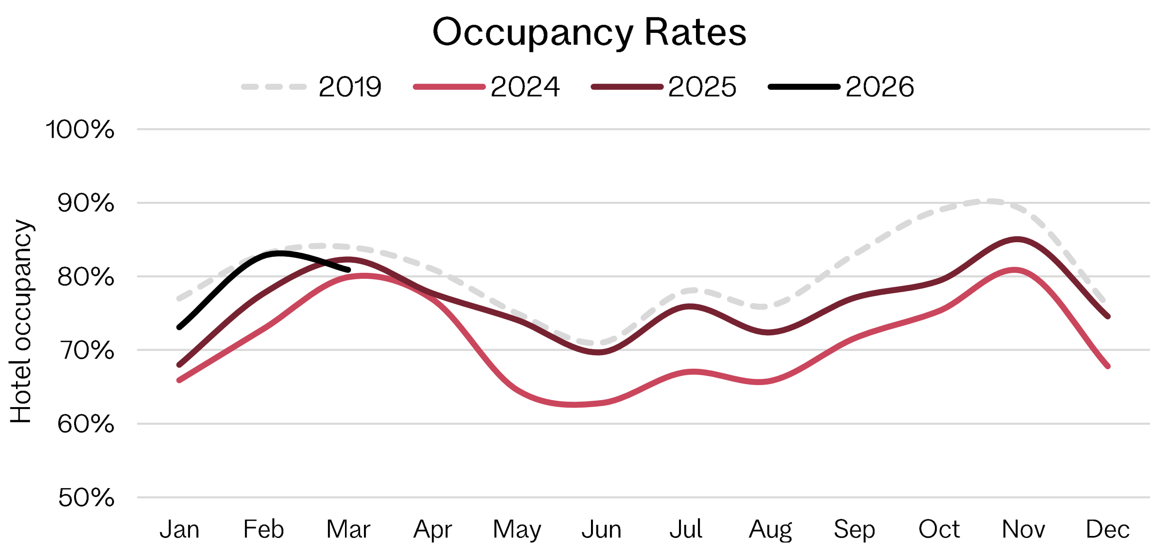


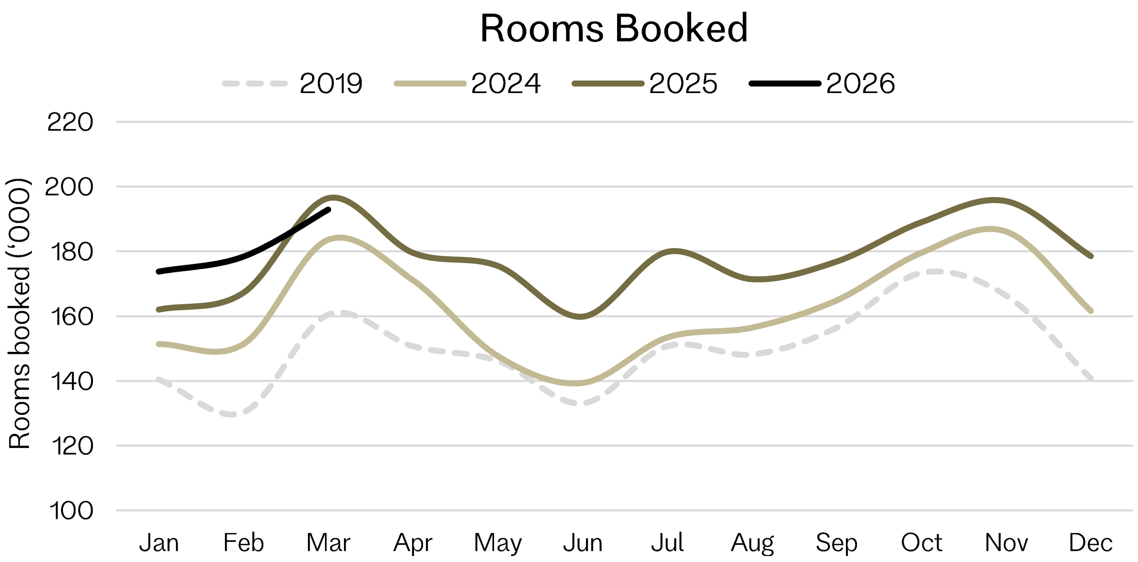
Hotel accommodation – City of Adelaide

Hotel revenue continued to grow

Rooms booked Q1 **545.0k**	+4% on Q1 2025 -3% on Q4 2025
Revenue Q1 **$121.2M**	+11% on Q1 2025 -11% on Q4 2025

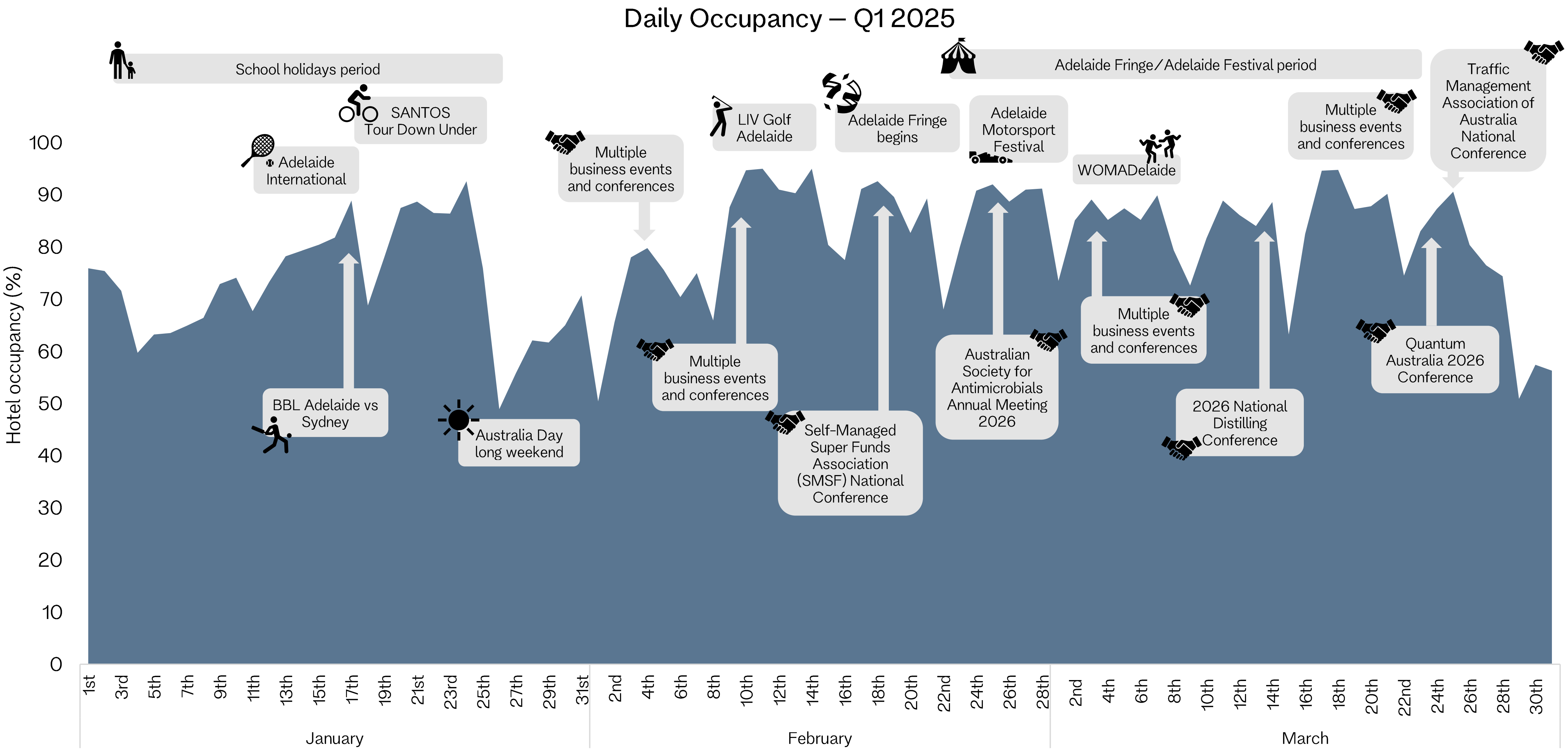
- Q1 continued the momentum from the previous two quarters, with average monthly occupancy around 3 pts higher than Q1 2025 and tracking very closely to pre-COVID levels, despite a 25% increase in room supply since December 2019. Both Adelaide International and Tour Down Under recorded stronger occupancy compared to their event periods last year.
- February was the strongest month in terms of occupancy, with 11 of 28 days recording occupancy above 90%, the highest concentration of peak nights observed in any February. Occupancy peaked at 95% on February 10 and 11, the two days prior to LIV Golf's Pro-Am, reflecting strong pre-event arrivals from corporate, interstate, and international visitors.
- Whilst March 2026 delivered 3,518 fewer room nights demanded compared to March 2025, hotels brought in an additional $1.6 million in revenue over the same period. Peak occupancy of 95% on March 17 and 18 was driven by a convergence of three major conferences generating 4,000 bed nights alongside ongoing Adelaide Fringe.
- Hotel performance was particularly strong during the major events. Rooms demanded reached 201,910 (+3%), occupancy averaged 85% (+3 pts) and revenue totalled $48.0M (+12%). Even as overall March demand softened, major events continued to support accommodation volume and value, reinforcing their role as key demand drivers.





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

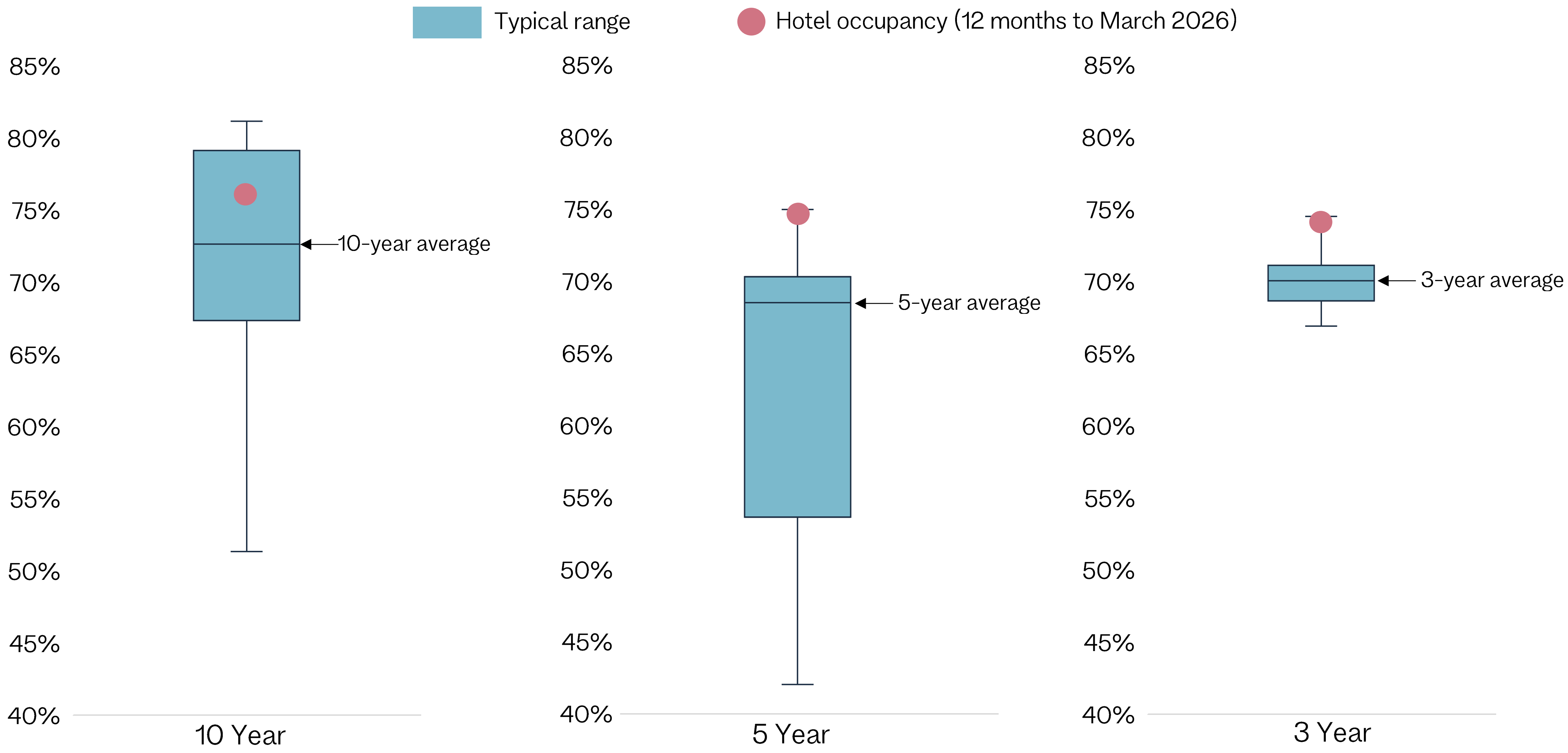
Hotel occupancy – City of Adelaide



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

Hotel occupancy – City of Adelaide

Hotel occupancy rates are currently outperforming both short and long-term averages.



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

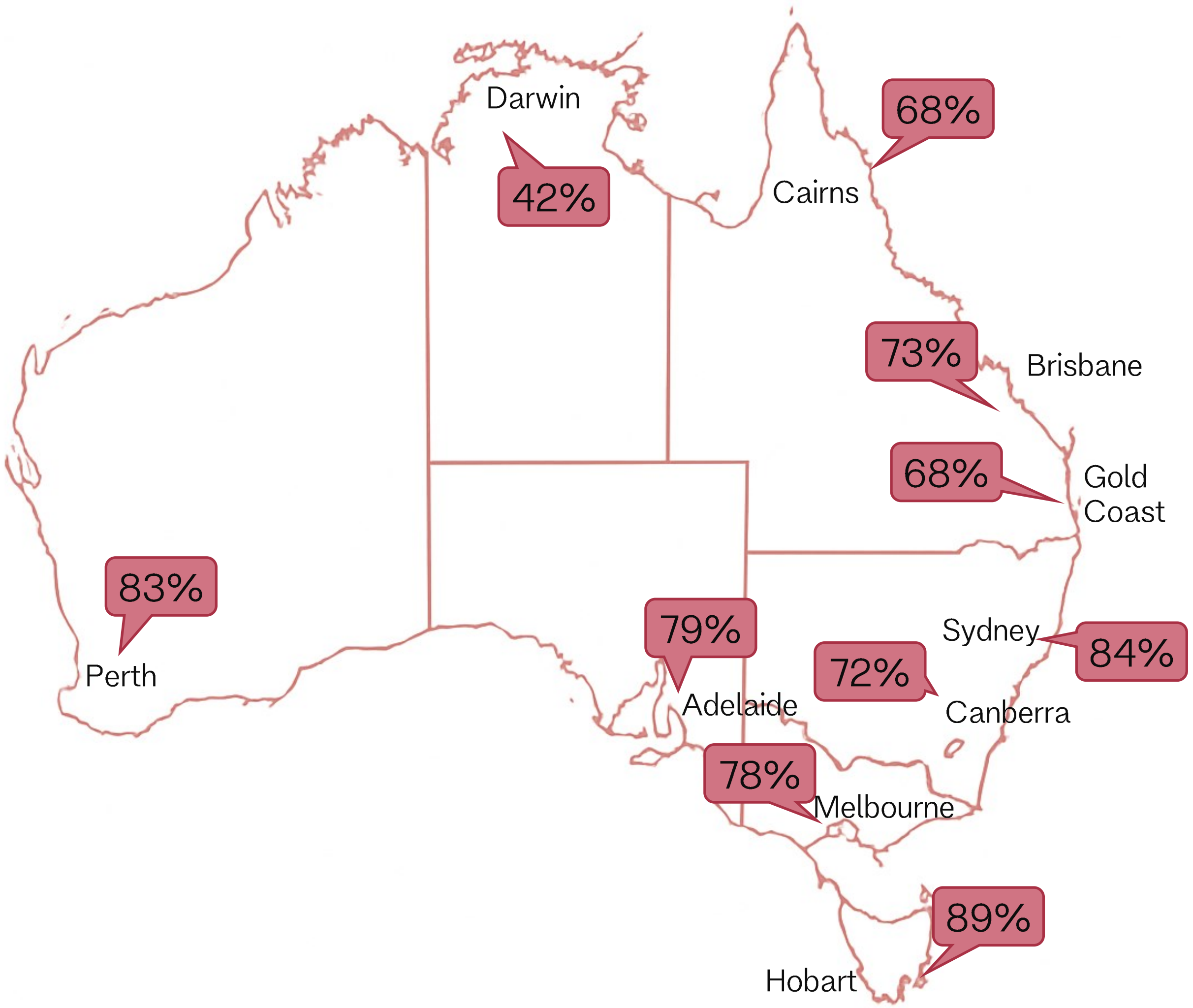
Hotel accommodation – National

Greater Adelaide reflected higher occupancy as well

Greater Adelaide Occupancy Q1 **79.2%**	+3 pts on Q1 2025
Major cities Australia Occupancy Q1 **73.6%**	+1 pt on Q1 2025

- Greater Adelaide's hotel occupancy averaged 3 pts higher than Q1 2025 and 6 pts above the national average and experienced the strongest year-on-year increase amongst other major capital cities.
- Hobart recorded the highest occupancy at 88%, whilst Darwin recorded the lowest and had the strongest decline compared to last year (-2 pts).
- Revenue Per Available Room (RevPAR) for Greater Adelaide averaged $222 in Q1 2026, increasing by $15 compared to the same quarter last year. National ADR remained higher at $265, increasing by $15 over the same period.
- Sydney had the highest ADR among all capital cities at $315 and also experienced the highest increase year-on-year by $25.

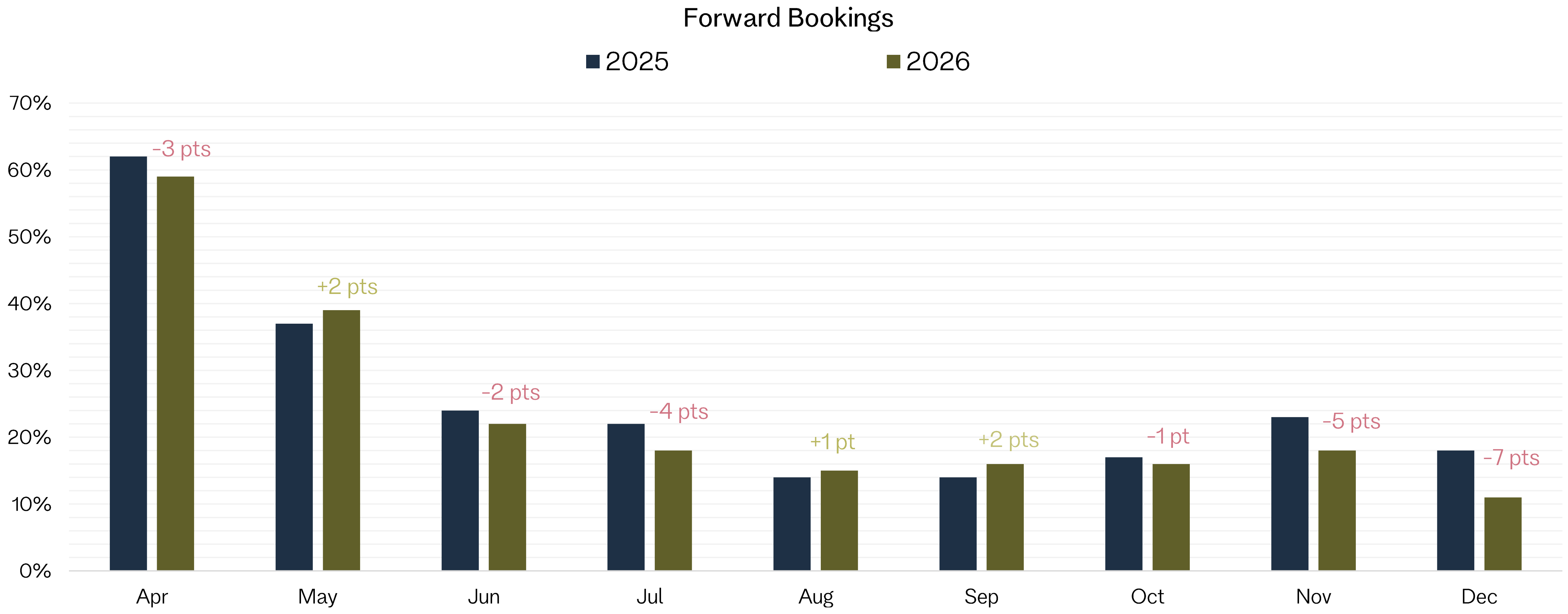
Occupancy – Q4 2025



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

Hotel forward bookings outlook – City of Adelaide

Forward bookings are more uneven compared to last year as mid season months are relatively steady, whilst November and December are pacing behind. Ongoing cost pressures are likely shortening booking windows and moderating forward demand.



Source: STR Global, Limited, a CoStar Group company 2025 (as of 6 April 2026)

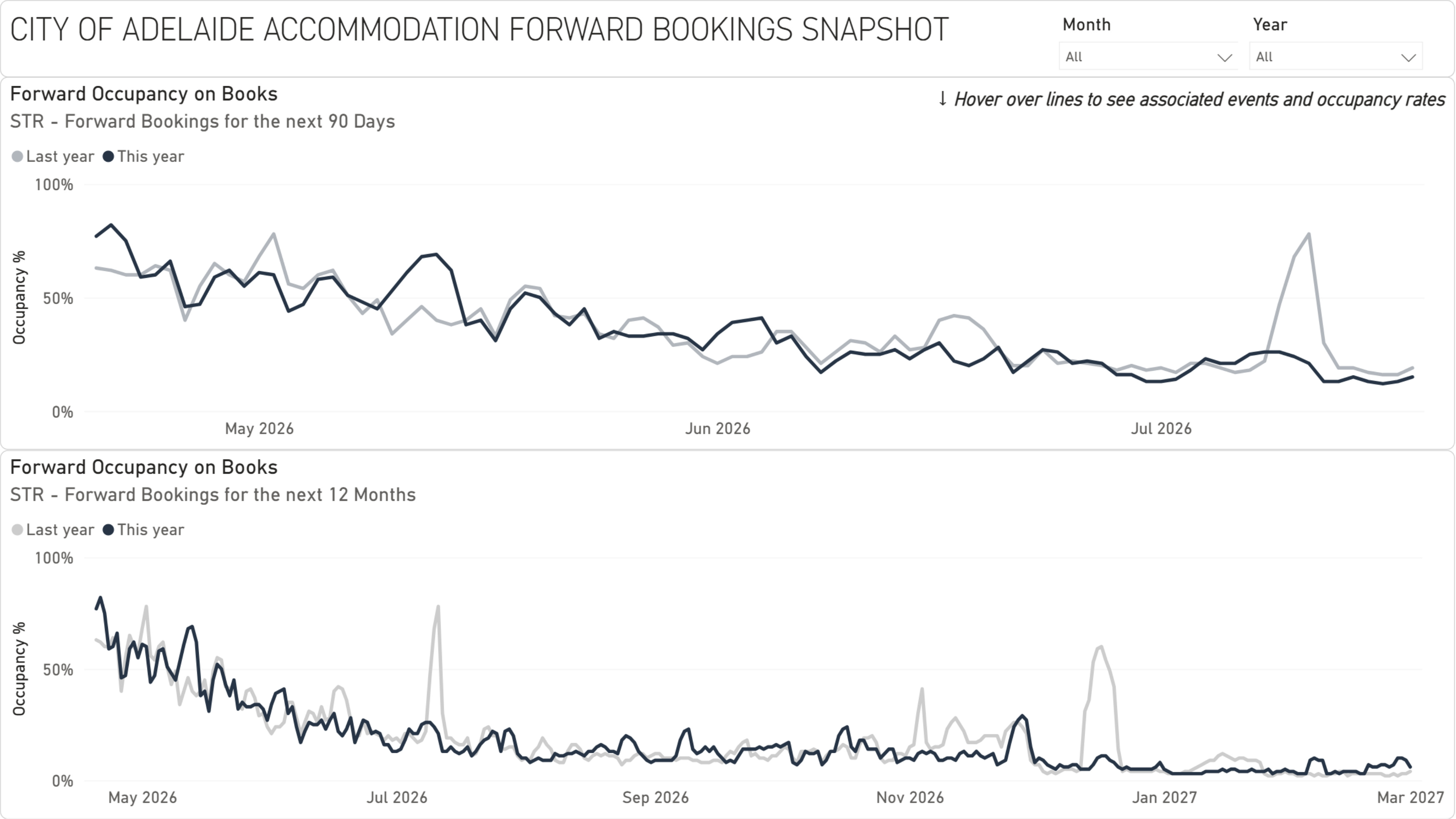
Hotel forward bookings – City of Adelaide

(Live occupancy forecasting)

Available online

(Updated weekly with event callouts)

Click here to access



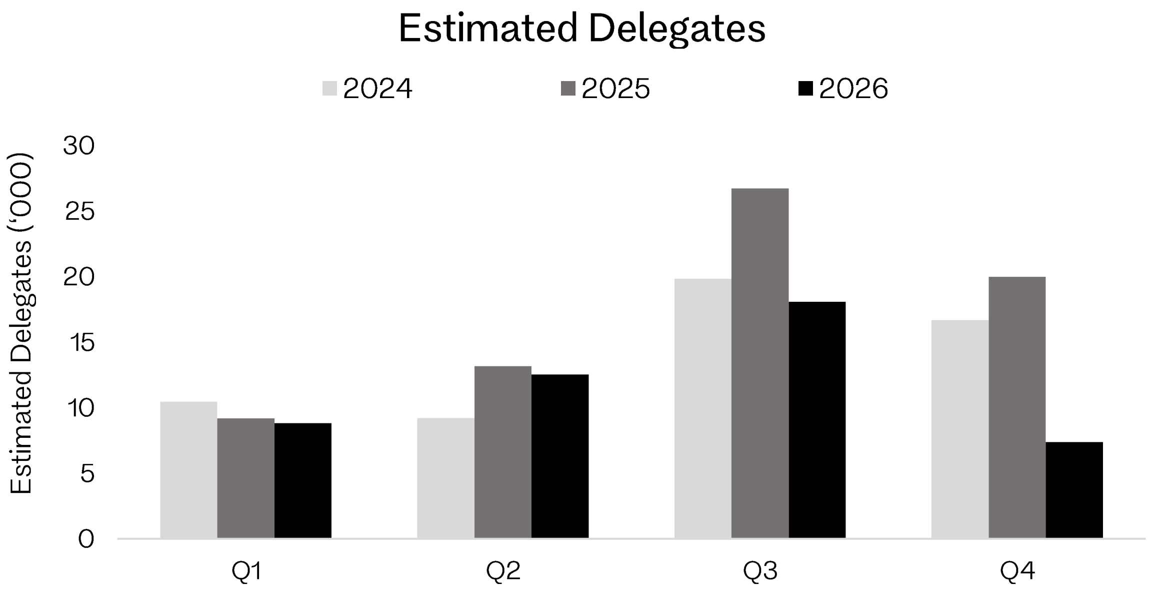
Source: STR Global, Limited, a CoStar Group company 2025

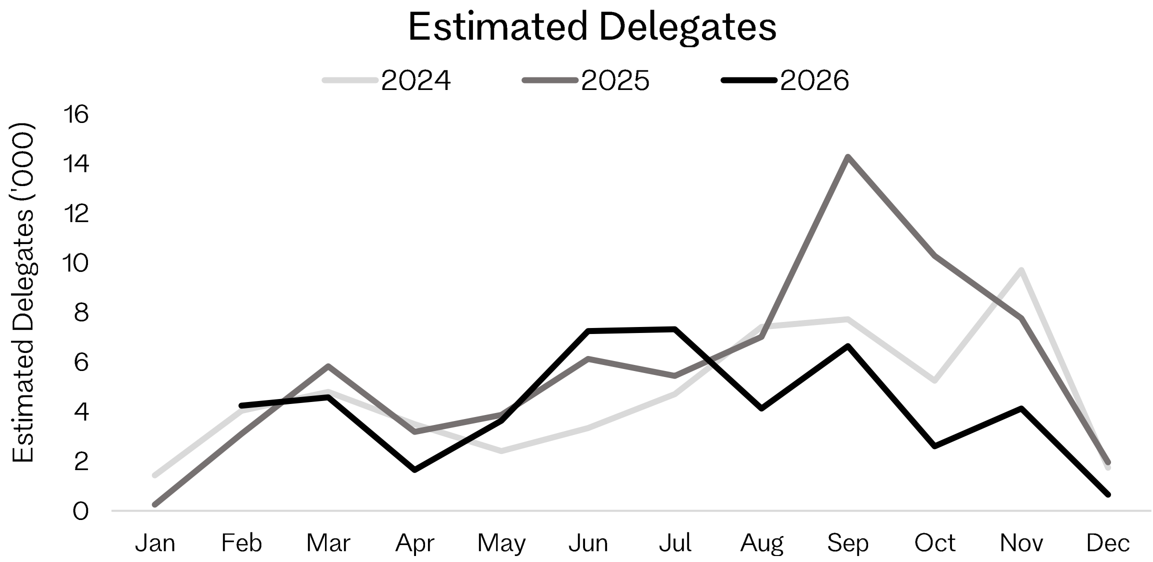
Business events – Greater Adelaide

Business event activity softened compared to last year

Delegates Q1 **8.8k**	-4% on Q1 2025 -56% on Q4 2025
Bed nights Q1 **27.6k**	-4% on Q1 2025 -57% on Q4 2025

- Business events activity in Greater Adelaide softened compared to Q1 2025 and the previous quarter, though Q1 is historically the quietest period for the business events calendar.
- Despite lower delegate volumes, the conferences generated a similar estimated economic impact to prior periods, reflecting higher-value events during the quarter.
- March was the highest business event activity period during the quarter, with an estimated 14.1k delegates and an estimated economic impact of $25.7 million.
- Approximately 47k delegates are forecast to attend 92 business events throughout calendar year 2026, translating into 155k bed nights and $283 million in estimated economic impact, with further events likely to be secured during the year.





Source: Business Events Adelaide

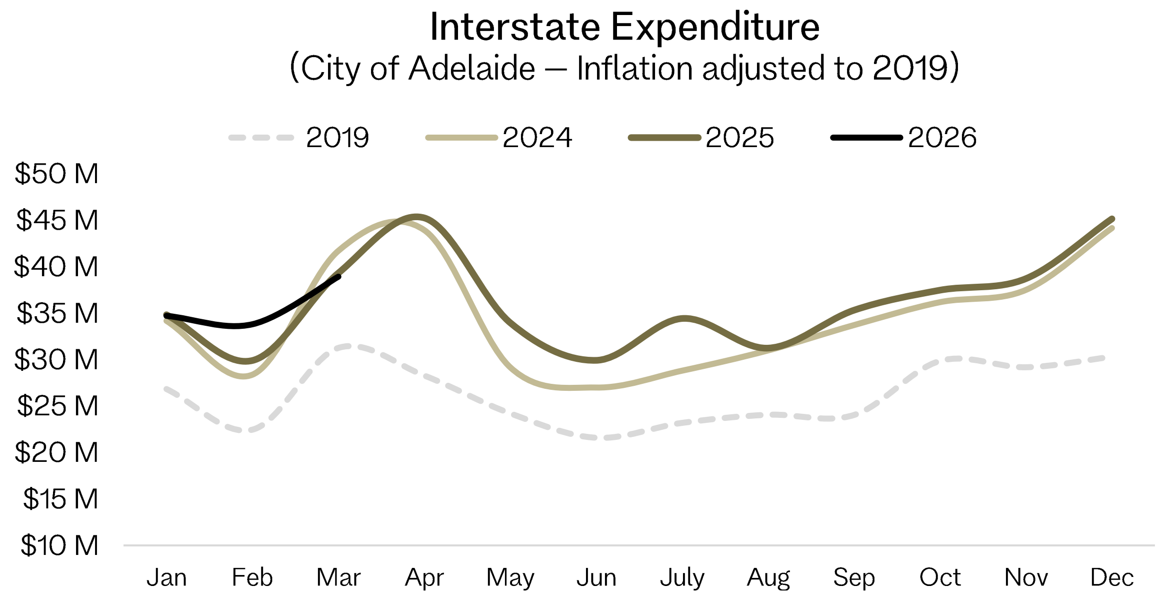
Interstate expenditure – City of Adelaide

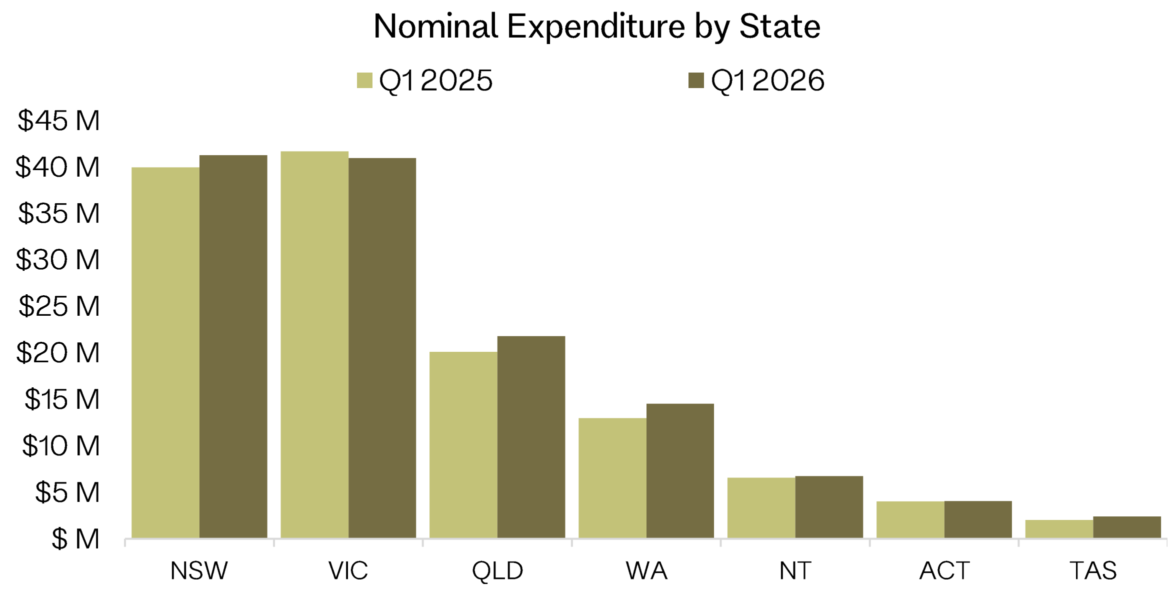
Interstate expenditure remained stable

Nominal expenditure Q1	
$131.7m	+3% on Q1 2025 -13% on Q4 2025
Expenditure in real terms (adjusted for inflation to Q1 2025)	0% on Q1 2025 -13% on Q4 2025

- Interstate expenditure remained broadly stable in Q1 2026, up 3% on Q1 2025 in nominal terms and flat in real terms, with the seasonal decline from Q4 and consistent with typical patterns.
- March was the peak month, with expenditure reaching $48 million, driven by multiple major events and festivities including Adelaide Fringe, Adelaide Festival, and WOMADelaide.
- Queensland recorded the highest year-on-year growth in interstate expenditure in terms of value (additional $1.7 million), whilst New South Wales remained the largest contributor to interstate spend, continuing its trend from the previous quarter.
- The largest visitor segments by spend were multi-day visitors and passer-by/short-trip visitors, with both directing around 40% of their total expenditure toward restaurants, cafes, pubs, and hospitality venues.

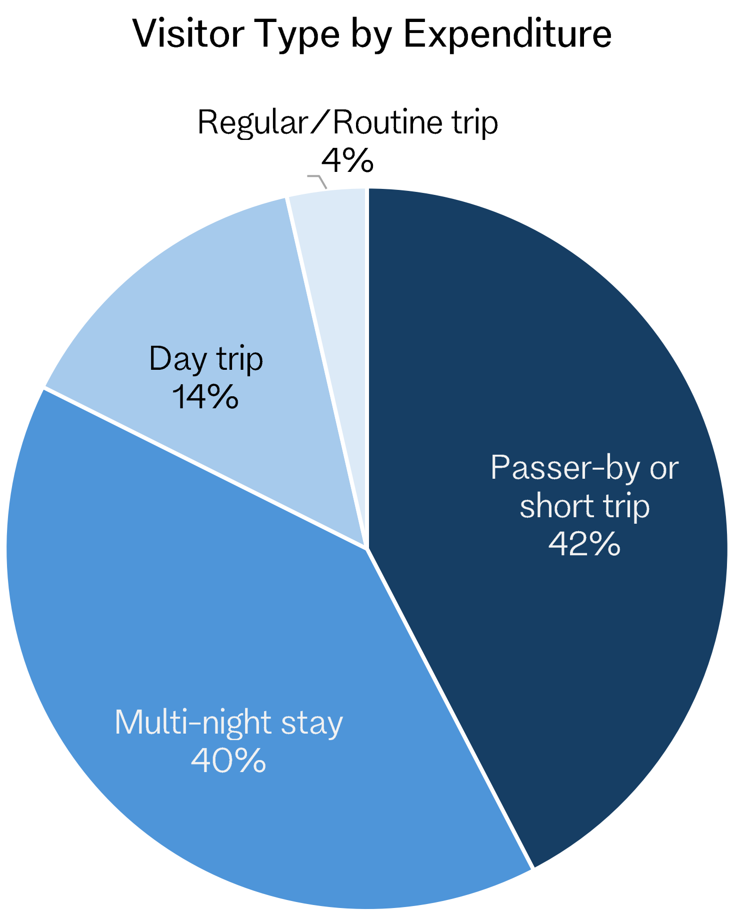
Source: Spendmapp by Geografia and banking data

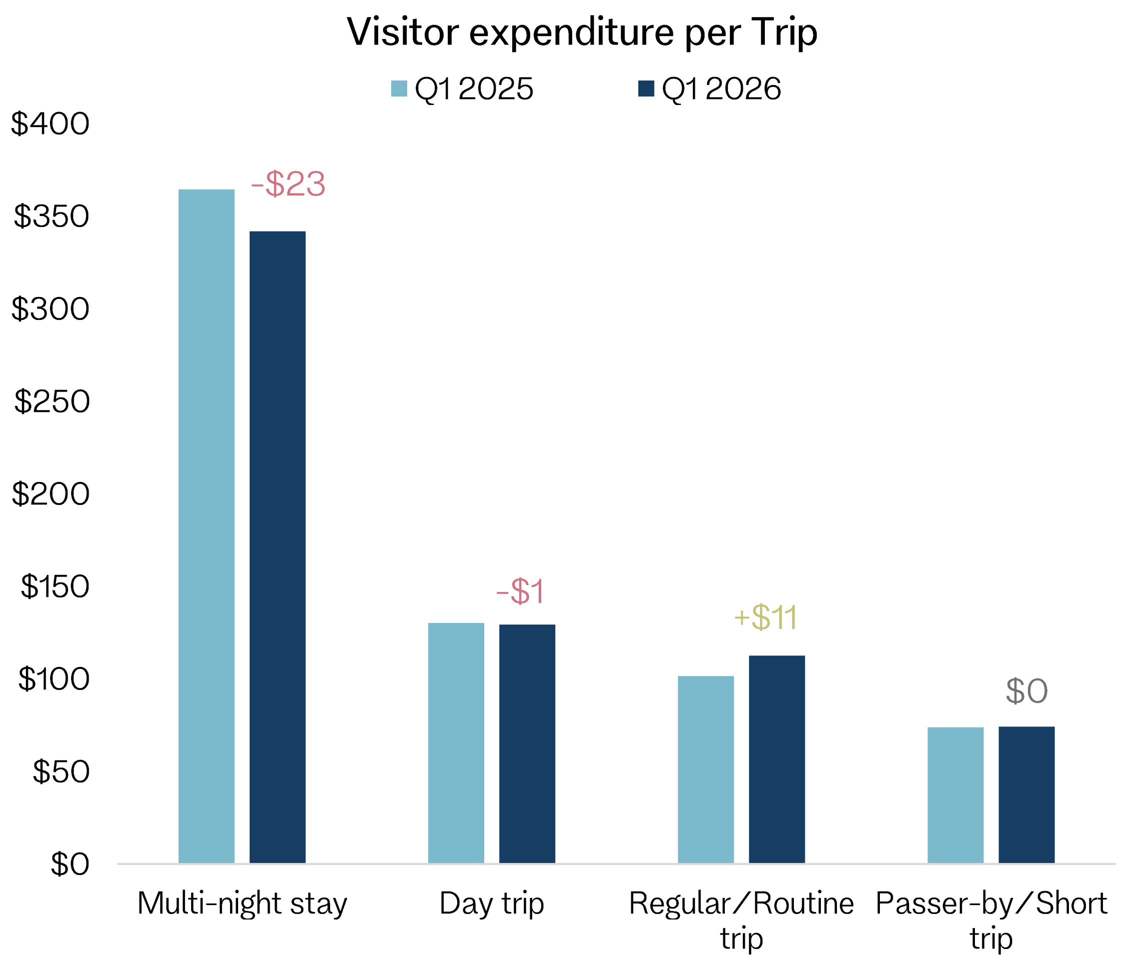




Visitor expenditure – City of Adelaide

Whilst overall visitation remained strong, average expenditure per trip across all visitor types declined marginally, indicating a continued rise in shorter, price-conscious interstate visitation.

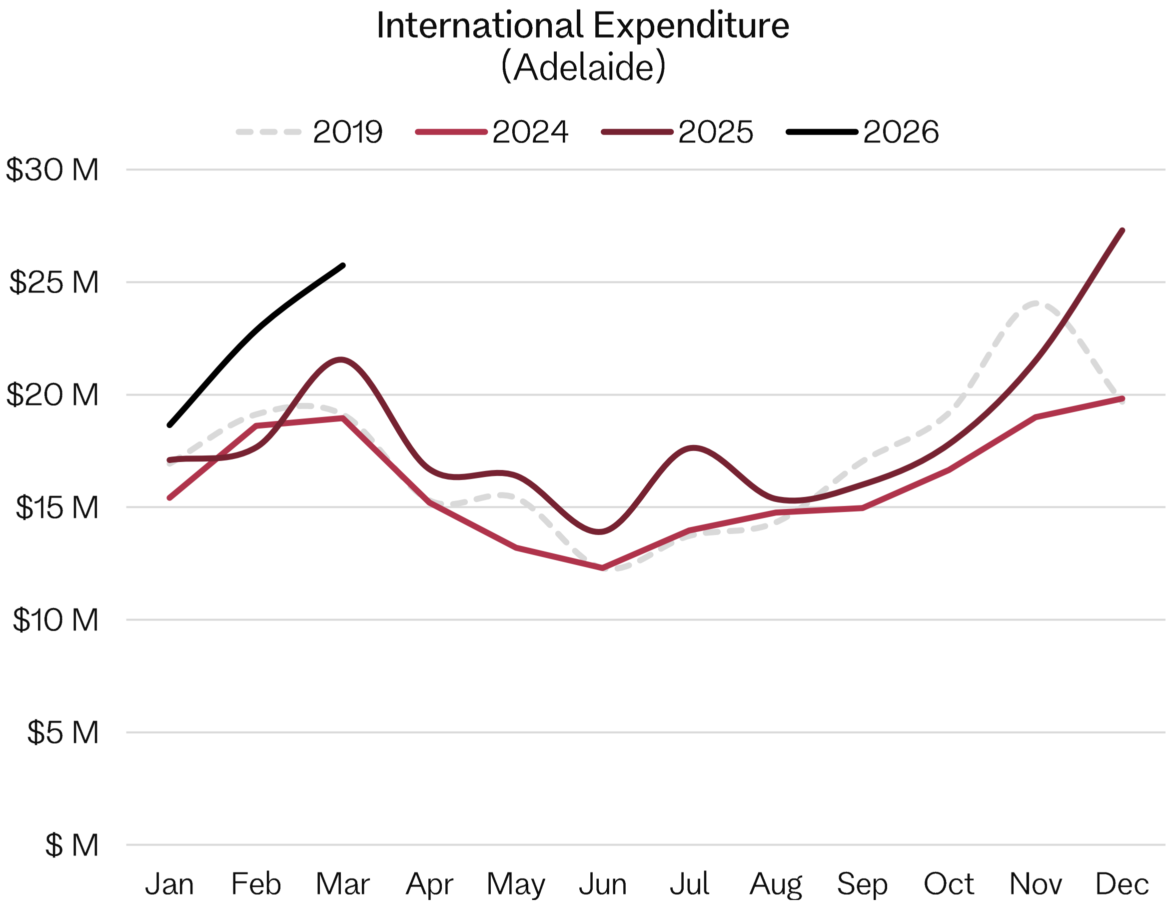


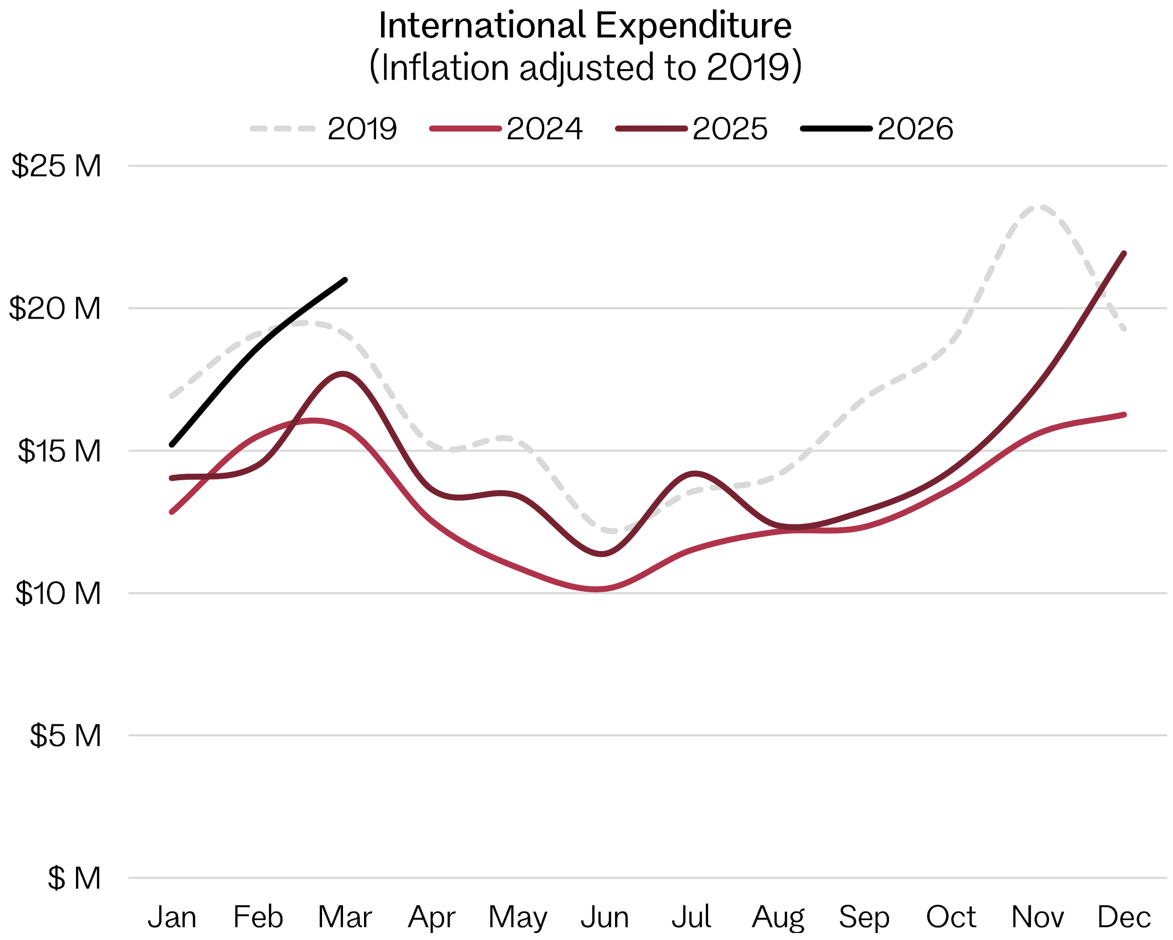


Source: Spendmapp by Geografia and banking data

International expenditure – Adelaide

International expenditure was 19% higher than Q1 2025 and reached record levels in March 2026, likely driven by high overseas visitation generated by a strong calendar of international major events during the quarter.





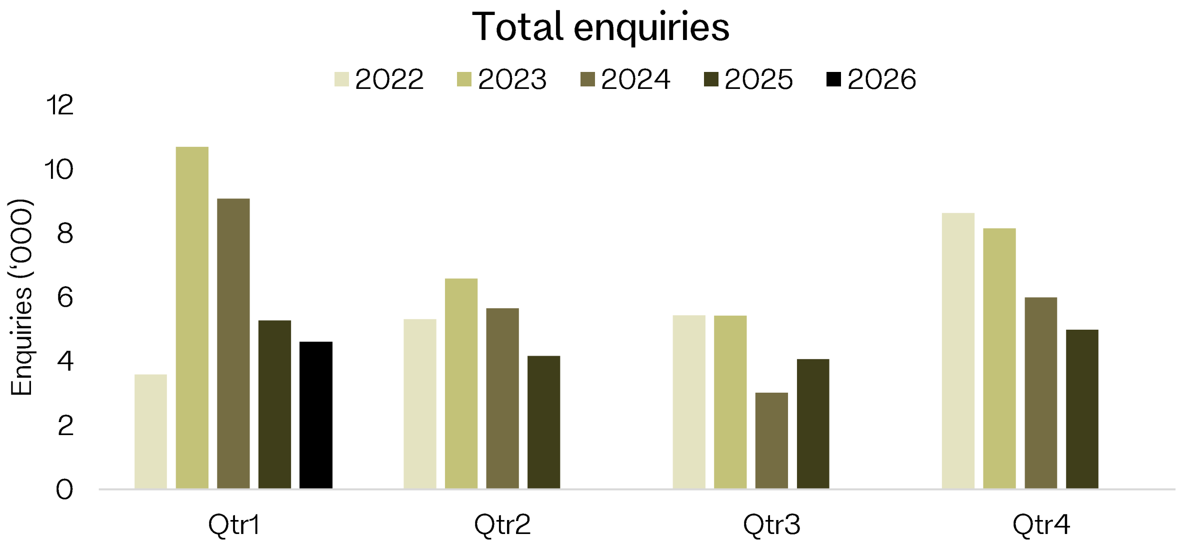
Source: Spendmapp by Geografia

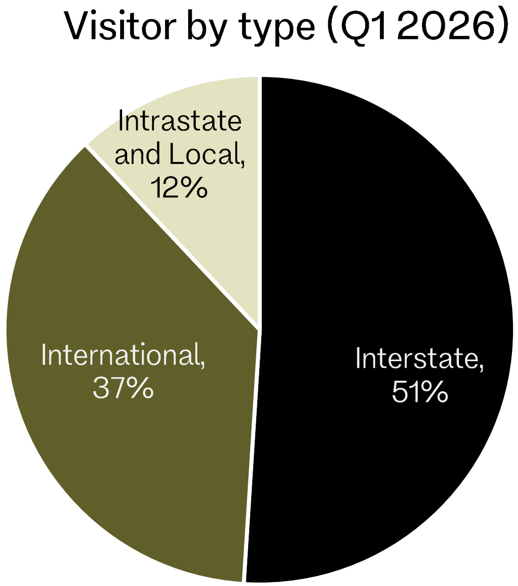
Visitor Information Services (VIS) – City of Adelaide

VIC continued to record high international visitation

Overall engagement Q1	
8.5k	-23% on Q1 2025 -23% on Q4 2025

- Visitor Information Centre (VIC) Engagement is measured by volunteers across multiple channels, including city guides, VIC interactions by staff, volunteers and mobile visitor information bike, along with visits through extrapolated door counts at the VIC.
- Whilst engagement was lower compared to previous year and quarter, visitors who stayed five or more nights peaked in March and recorded the highest level since January.
- Interstate visitors continued to represent the largest share of enquiries, followed by international visitors and intrastate/local visitors.
- Visitors from the United Kingdom (UK) remained the highest source of international enquiry, accounting for 34%, 6 pts higher than Q1 2025.
- VIC recorded a larger share of international enquiries, 5 pts higher than Q1 2024, likely supported by the quarter's strong international events calendar.





Source: Visitor Information Services (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:

Adelaide Economic Development Agency

aedasa.com.au