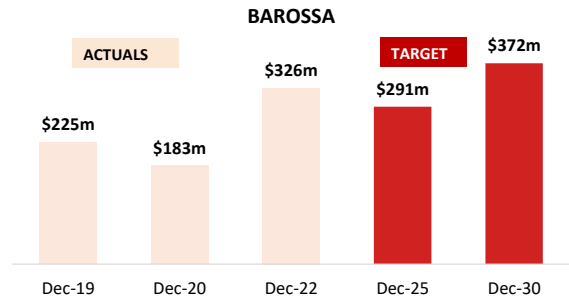




OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2022

- Currently the Barossa contributes \$326 million to the year end December 2022 South Australian expenditure of \$8.3 billion.
- The Barossa has achieved 100 per cent of their 2025 target of \$291 million and 88 per cent of their 2030 target of \$372 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2022

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	210,000	105,000	316,000	3,000	319,000
%	66%	33%	99%	1%	100%
<i>Share of Regional SA</i>	6%	10%	7%	6%	7%
<hr/>					
% Across Regional SA	76%	22%	99%	1%	100%
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>					
Nights	478,000	343,000	821,000	39,000	860,000
%	58%	42%	95%	5%	100%
<i>Share of Regional SA</i>	5%	6%	5%	5%	5%
<hr/>					
% Across Regional SA	63%	32%	95%	5%	100%
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>					
Average Length of Stay	2.3	3.3	2.6	13.0	2.7
ALOS Regional SA	3.0	5.1	3.5	16.1	3.7
<hr/>					
Total Expenditure					\$326,000,000
Overnight Expenditure	\$95,000,000	\$92,000,000	\$187,000,000	\$8,000,000	\$195,000,000
Day Trip Expenditure					\$131,000,000
<hr/>					
Domestic Day Trips					925,000

- The Barossa saw 316,000 domestic overnight visitors for the year end December 2022.
- 66 per cent of overnight visitors were from intrastate and 33 per cent from interstate.
- The 210,000 intrastate overnight visitors stayed 478,000 nights with an average length of stay of 2.3 nights.
- There were 105,000 interstate overnight visitors who stayed 343,000 nights with an average length of stay of 3.3 nights
- The region saw 3,000 international visitors with an average length of stay of 13.0 nights and spend of \$8 million.
- 925,000 day trips were taken to the Barossa for the year with spend of \$131 million.

ALOS = Average Length of Stay

BAROSSA

REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	159,000	117,000	39,000	4,000	319,000
%	50%	37%	12%	1%	100%
<i>Share of Regional SA</i>	7%	10%	4%	3%	7%
<i>% Across all regions</i>	53%	25%	19%	3%	100%

Nights	432,000	302,000	117,000	9,000	860,000
%	50%	35%	14%	1%	100%
<i>Share of Regional SA</i>	5%	8%	3%	1%	5%
<i>% Across all regions</i>	54%	21%	20%	4%	100%

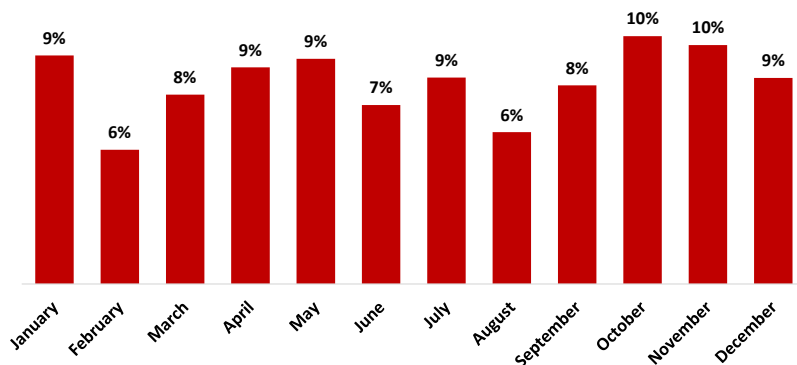
Average Length of Stay	2.7	2.6	3.0	2.3	2.7
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Expenditure					
Annual Expenditure	\$141,000,000	\$36,000,000	\$13,000,000	\$4,000,000	\$195,000,000
Expenditure 2019	\$95,000,000	\$26,000,000	\$20,000,000	\$5,000,000	\$145,000,000
Av spend per night	\$326	\$119	\$111	\$444	\$227
Av spend per night Reg SA	\$204	\$112	\$142	\$279	\$175
Share of Regional SA	3%	4%	0%	2%	3%

- 86 per cent of overnight visitors to the Barossa are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$326 per night compared to VFR visitors who spend \$119 per night.
- Leisure overnight visitors spent \$177 million for the year, making up 91 per cent of all overnight expenditure.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO BAROSSA

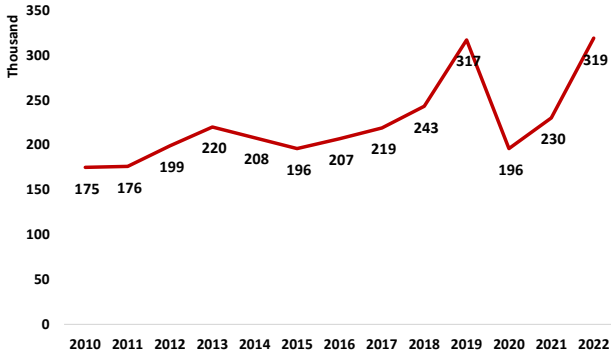


- National Visitor Survey data shows us that October and November are the strongest months for visitation in the Barossa.
- October is busy with the school holidays and the long weekend.
- January, April and July are strong on the back of the school holidays.
- May was strong with the 'Great State Voucher' incentive.

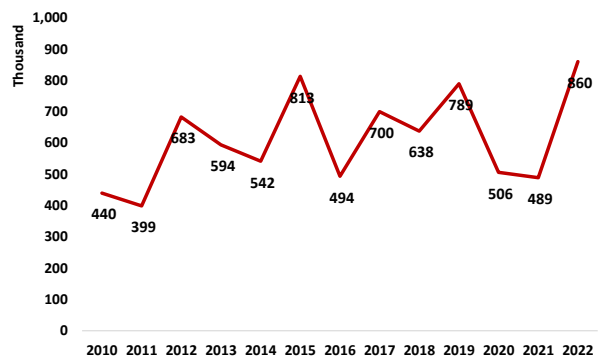


TOTAL OVERNIGHT VISITATION 2010 - 2022

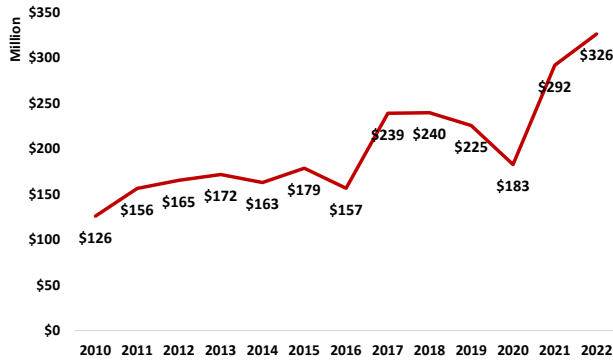
VISITORS BAROSSA 2010 - 2022
International and Domestic



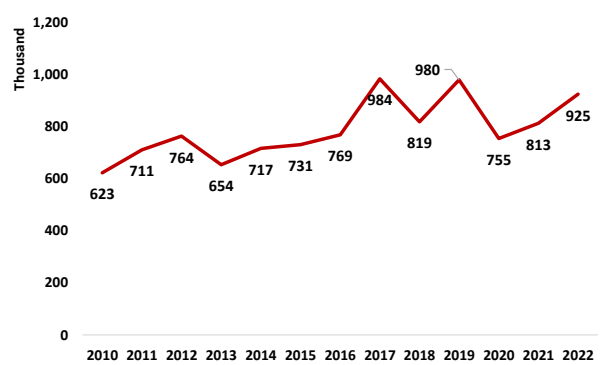
NIGHTS BAROSSA 2010 - 2022
International and Domestic



TOTAL EXPENDITURE BAROSSA 2010 - 2022 -
International and Domestic



DAY TRIPS BAROSSA 2010 - 2022
Domestic



Note: Fluctuations can occur in visitation data due to small sample sizes. Prior regional profiles used data averaged over three years to smooth these fluctuations.

Regions	Visits		Expenditure	
	Dec-22	Change on Dec-19	Dec-22	Change on Dec-19
Adelaide	3,084,000	-21%	\$4,400,000,000	-3%
Adelaide Hills	155,000	-31%	\$225,000,000	9%
Barossa	319,000	1%	\$326,000,000	45%
Clare Valley	196,000	-4%	\$152,000,000	29%
Eyre Peninsula	500,000	-14%	\$503,000,000	-8%
Fleurieu Peninsula	783,000	-13%	\$665,000,000	19%
Flinders Ranges and Outback	835,000	-10%	\$576,000,000	12%
Kangaroo Island	171,000	-18%	\$187,000,000	-2%
Limestone Coast	622,000	-20%	\$441,000,000	5%
Murray River, Lakes and Coorong	381,000	-16%	\$201,000,000	-28%
Riverland	412,000	-4%	\$240,000,000	23%
Yorke Peninsula	602,000	1%	\$354,000,000	47%
Regional SA	4,568,000	-12%	\$3,980,000,000	12%
South Australia	7,291,000	-15%	\$8,340,000,000	3%



BAROSSA TOURISM LISTINGS

Category	# Listings
RESTAURANT	181
ACCOMM	126
ATTRACTION	96
EVENT	79
TOUR	68
GENSERVICE	27
HIRE	6
TRANSPORT	3
INFO	3
JOURNEY	1
Grand Total	590

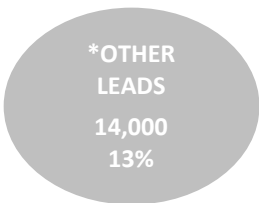
Note: some listings have multiple categories of accommodation
Source: Australian Tourism Data Warehouse
Categories above defined at - <https://tourism.sa.gov.au/support/atdw>

The **Australian Tourism Data Warehouse (ATDW)** is Australia’s national platform for digital tourism information. Eligible tourism businesses can create a listing for their accommodation, tour, food and drink establishment, event and more, free of charge. These listings appear on websites such as southaustralia.com

An **ATDW lead** is generated when a user performs one of the following actions when viewing an ATDW product page on southaustralia.com:

- Website click through (via visit website button or website URL)
- Book now button click
- Claim deal button click
- Clicking on contact email address to start writing email
- Clicking on a phone number to start a phone call (mobile only)

**BAROSSA
AUSTRALIAN TOURISM DATA WAREHOUSE
LEADS
108,000
YEAR END DECEMBER 2022**



TOP 5

- BIG4 BAROSSA TOURIST PARK
- DISCOVERY PARKS BAROSSA VALLEY
- KINGSFORD THE BAROSSA
- ROGASCH COTTAGE
- THE LOUISE

TOP 5

- HARVEST KITCHEN
- FINO SEPPELTSFIELD
- MAGGIE BEER'S FARMSHOP
- SEPPELTSFIELD ROAD DISTILLERS
- ARTISANS OF BAROSSA

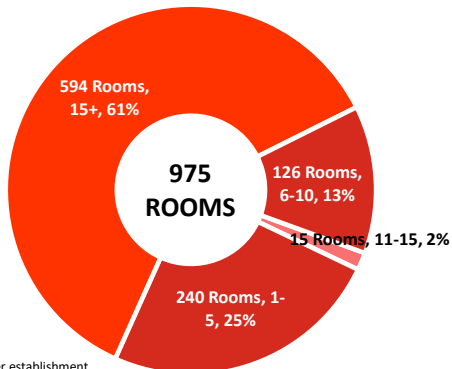
TOP 5

- BAROSSA BALLOON ADVENTURES
- BAROSSA HELICOPTERS EXPERIENCES
- BAROSSA VALLEY BALLOONING
- BAROSSA BOUTIQUE WINE TOURS
- THE FARM EATERY COOKING SCHOOL

* Other refers to leads for events, destination information, attractions, general services, hire and transport

ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS IN THE BAROSSA
SOURCE ATDW



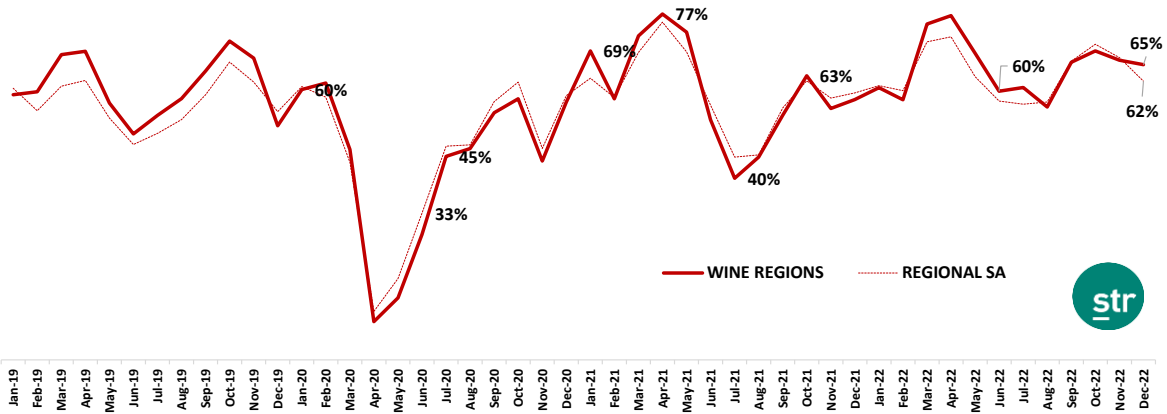
Rooms refers to rooms per establishment

- Currently there are 126 establishments in the Barossa that accommodate guests.
- These 126 establishments account for 975 rooms across the region.
- 61 per cent of rooms fall into establishment with 15 or more rooms.
- 24 per cent of rooms fall into the 1-5 room establishments.



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY WINE REGIONS

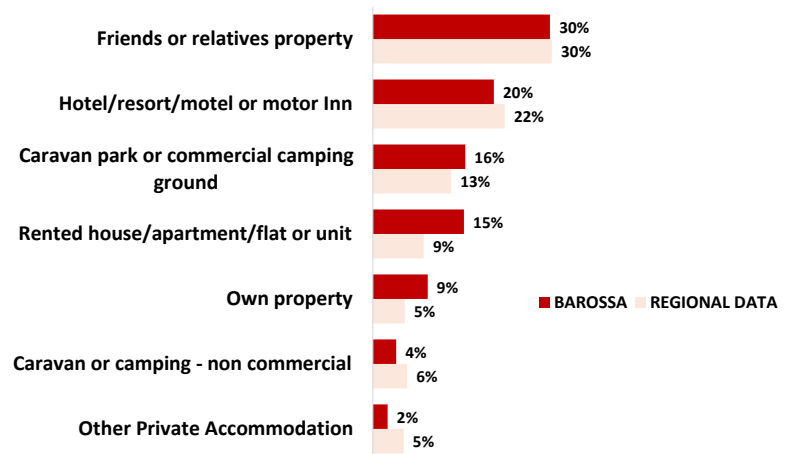


- The wine regions include accommodation data for the Adelaide Hills, the Clare Valley and the Barossa. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Wine Regions was 61%, this fell to 44% in 2020, rose to 60% in 2021 and grew again in 2022 to 65%.

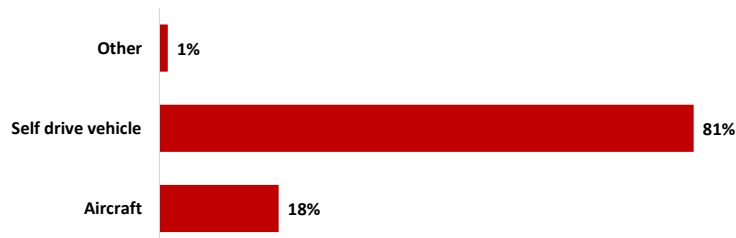
VISITOR USE OF ACCOMMODATION

ACCOMMODATION USED IN BAROSSA FOR DOMESTIC VISITORS

- 30 per cent of domestic overnight visitor nights in the Barossa are spent with Friends or Relatives compared to the SA regional average of 30 per cent.
- 20 per cent stayed in a Hotel/resort/motel or motor inn. This compares to the regional average of 22 per cent.
- The region over indexed for Rented house, apartments and flats.



TRANSPORT

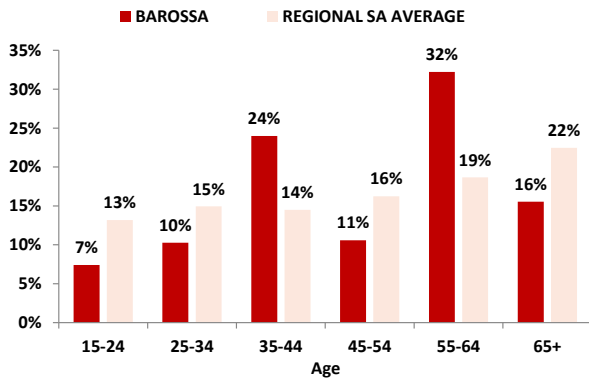


- The main method of transport used on trips to the Barossa was a self drive vehicle.
- 81% of visitors used this type of transport.
- 19% of people used another form of transport, this included planes, helicopters, buses etc.



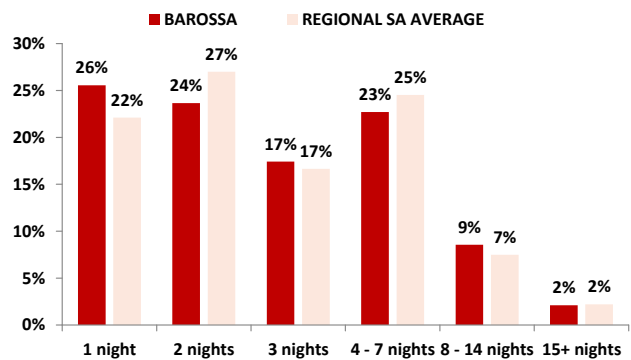
VISITOR PROFILE

AGE OF VISITORS TO BAROSSA



- Overnight domestically there is a peak in the 35-44 and the 55-64 age group of 24 per cent and 32 per cent.
- The 55-64 age group is well above the average of 19 per cent for regional SA.
- 25-34 age group well below the regional average.

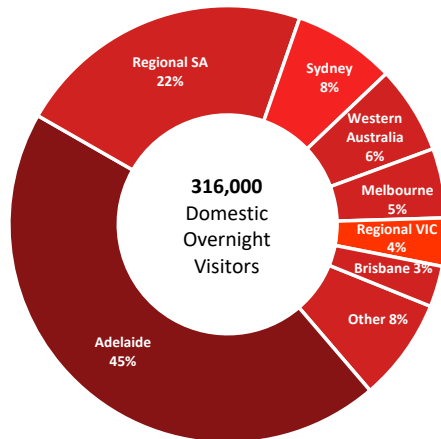
LENGTH OF VISIT TO BAROSSA



- 50 per cent of domestic overnight visitors like to stay 1 to 2 nights.
- The 11 per cent who stay longer than 8 nights are predominantly staying with friends and relatives or working in the region.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO BAROSSA

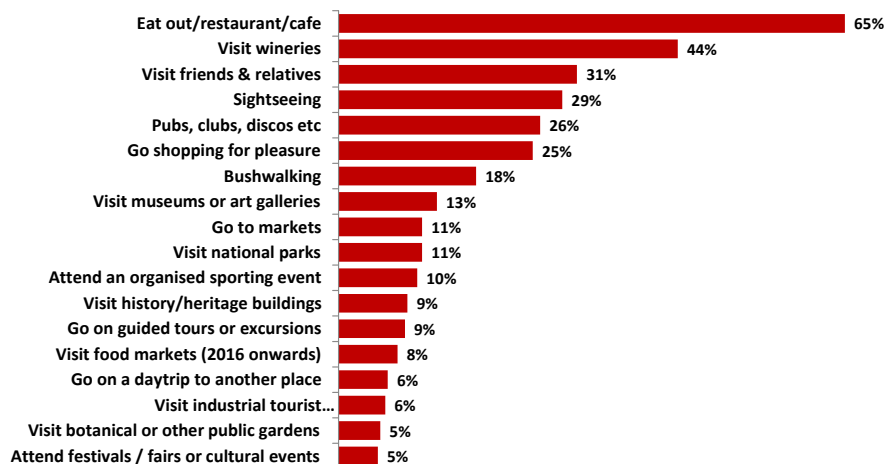


- Victoria at 9 per cent and New South Wales at 10 per cent are the Barossa's biggest interstate overnight domestic markets.
- Regional South Australia contributes 22 per cent of visitors to the Barossa.
- 45 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

- The most popular activity when coming to the Barossa is to eat out at a restaurant or cafe.
- Other popular activities include visiting a friend or relative, visiting wineries, bushwalking, visiting national parks, going to markets and seeing the sights.

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN BAROSSA





REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2020-21, the tourism industry contributed an estimated \$278 million to the Barossa regional economy and directly employed approximately 1,080 people.

Employment

- 1,080 jobs for people employed directly by the tourism industry, 570 indirect jobs and a total employment impact of 1,650 people.

Gross Value Added (GVA)

- \$64 million and \$62 million in direct and indirect tourism GVA, and \$126 million in total tourism GVA.

Gross Regional Product (GRP)

- \$71 million and \$78 million in direct and indirect tourism GRP and \$148 million in total tourism GRP.

Tourism Consumption

2020-21
Tourism products - directly consumed
• Takeaway and restaurant meals 20%
• Shopping (including gifts and souvenirs) 18%
• Fuel (petrol, diesel) 11%
• Travel agency and tour operator services 10%
• Accommodation services 7%
• Food products 7%
• Alcoholic beverages and other beverages 7%
• Long distance passenger transportation 6%

Tourism Employment

2020-21
Tourism Industries - 1,080 directly employed
• Retail trade 28%
• Cafes, restaurants and takeaway food services 22%
• Accommodation 14%
• Travel agency and tour operator services 11%
• All other industries 6%
• Other sports and recreation services 4%
• Clubs, pubs, taverns and bars 4%
• Road transport and transport equipment rental 4%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2021

REGIONAL PERCEPTIONS REPORTING

- The Barossa Valley is arguably South Australia's best known region, driven predominantly by its strong wine associations.
- A significant challenge for the Barossa is that awareness rarely extends beyond food and wine experiences meaning the region is perceived as being for drinkers only, and not seen as a family friendly destination.
- People also see the Barossa as a place for a short stay or long weekend only, again linked to the perception that its just wine, and wine alone couldn't fill a holiday.

To drive increased visitation and expenditure, we recommend the Barossa:

Position the Barossa Valley as being more than wine	The perception of the Barossa Valley being a wine only region, means that the appeal among non wine drinkers, non drinkers, and families in general decreases dramatically. Building awareness of the non wine related activities travellers are able to do in the Barossa will help increase the appeal of the region to more people, promoting more visitors from new audiences that have previously perceived the region as being not for them.
Promote longer stays in the Barossa	By positioning the Barossa as more than wine, people will start to see the potential for a longer stay or holiday in the region. Currently, perceptions of the Barossa as a wine only region limit the amount of time people feel they could spend in the region. The potential for more diversity in experience should translate to longer stays.
Promote tourism in the less desirable seasons (particularly summer)	With so much happening in South Australia at the start of the year and in March, there are a great deal of opportunities to drive visitation to the Barossa Valley in the summer months of the year through activating existing events in the region. Managing concerns around how the heat is managed in the summer months, and how people can be kept warm in the winter will go a long way in reassuring potential travellers at this time of year.
Region appeals to...	<ul style="list-style-type: none"> — Relaxation seekers — Those seeking an 'adults only' experience — Lovers of food and wine

Prepared by the South Australian Tourism Commission, December 2022

Sources Unless otherwise stated, all data in this report is from the International Visitor and National Visitor Surveys (IVS and NVS) conducted by Tourism Research Australia. These Sources are based on sample surveys and as with all sample surveys, are subject to sampling errors. Caution is required in interpreting some estimates, in particular, regional estimates can be affected by small sample sizes and can be subject to a high level of sampling error. Regional data should accordingly be used with a high level of caution and treated as being for indicative purposes only. Data refers to visitors 15 years and over. Unless otherwise stated, all data refers to the year end December 2022.

Regional Perceptions Testing - June 2022 - 3-day, online bulletin board (OBB) Approx. 40 mins of content per person, per day. Participants were recruited as follows: - 22 intrastate participants (70% metro, 30% regional), - 20 interstate participants (Melbourne, Regional VIC and Sydney)

A mix of age (18-44 and 45-69) and gender was achieved across participants. Participants were willing travellers, non-rejectors of travelling to/within SA, and did not live in the region they were recruited to explore (for intrastate).

Notes and Abbreviations Totals may not add to 100% due to rounding. VFR: Visiting Friends and Relatives. np: Not Published due to small sample size. ALOS: Average Length of Stay