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OVERVIEW

- ❖ The number of overnight domestic visitors that visit wineries during their visit in South Australia is at its highest level (424,000 winery visitors in 2003/04) since data collection commenced in 1998.
- ❖ In 2003/04 nearly 5 million international and domestic visitors went to a winery in Australia while on an overnight trip of one or more nights or on a day trip excursion.
- ❖ In South Australia nearly 1 million international and domestic visitors went to a winery during a day trip or overnight visit in SA.
- ❖ 20% of all visits in Australia that include visits to wineries, visit a winery in South Australia, which is much higher than both our total market share of tourism or our total population share^a.

	Winery Visitors 2003/04		SA as % total Winery Visits in Australia
	Australia	South Australia	
Intrastate (2003/04) – Overnight Visitors	1,534,000	182,000	12%
Interstate (2003/04) – Overnight Visitors	815,000	242,000	30%
International (2003/04)*	579,000	103,000	18%
Day Trips Domestic** (2003/04)	2,063,000	466,000	23%
TOTAL	4,991,000	993,000	20%

Source TRA National Visitor Survey, 2003/04 and International Visitor Survey, 2003/04

* International figure for Australia is based on a question about what activities (e.g. visit wineries) visitors participated in on their trip in Australia. The international figure for South Australia is based on a question about what attractions (e.g. wineries) visitors went to as a day trip activity while in SA. Wording for attractions visited in SA changed in 2003 and accordingly results are not comparable for figures published for years prior to 2003. International figures for SA adjusted for short interviews.

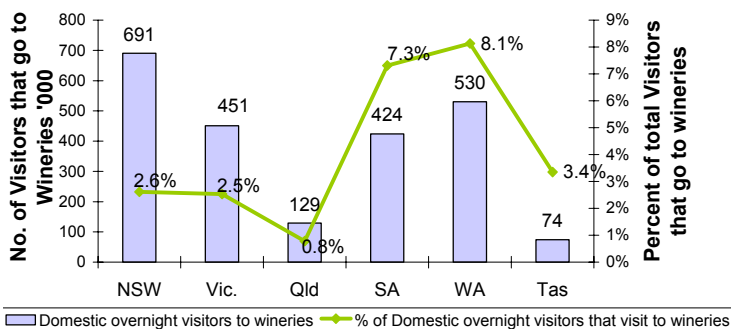
** For the purpose of the NVS, a day trip is defined as a round trip of at least 50 km and at least 4 hours away from home but not including an overnight stay away from home. Thus this figure does not include local day visits of a shorter duration that include winery visits.

DOMESTIC VISITORS

- ❖ From the National Visitor Survey (NVS) around 7.3% or 424,000 of all domestic overnight visitors¹ to South Australia in 2003/04 visited a winery during their stay.
- ❖ This compares with around 2.3 million or 3.2% of all domestic overnight visitors in Australia going to wineries during their visit.
- ❖ A higher proportion of domestic overnight visitors in SA visit wineries than in any other state except WA.
- ❖ South Australia attracts 18% of all domestic overnight visitors that visit a winery – well above our market share of 7.8% of all overnight domestic visitors.

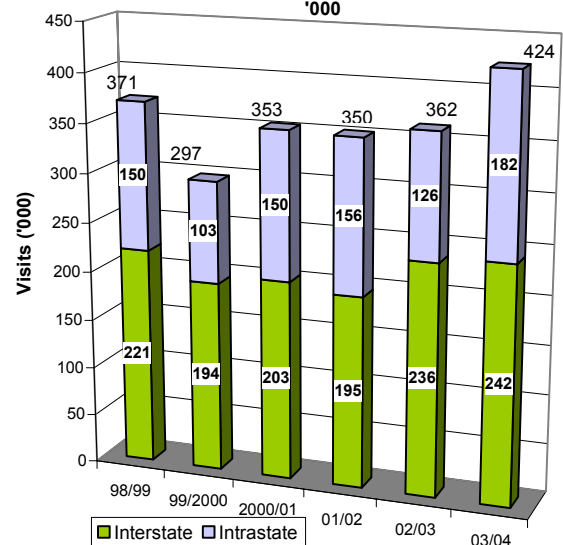
- ❖ The number of domestic overnight visitors² that go to wineries in SA increased over the past 2 years.
- ❖ Both interstate and intrastate overnight visitor numbers to wineries in SA are at the highest levels recorded during the time series.

Domestic Overnight Visitors to Wineries, 2003/04
Number and Percent of Total Visitors



Source TRA NVS 2003/04

Overnight Domestic Visitors to Wineries in SA, '000



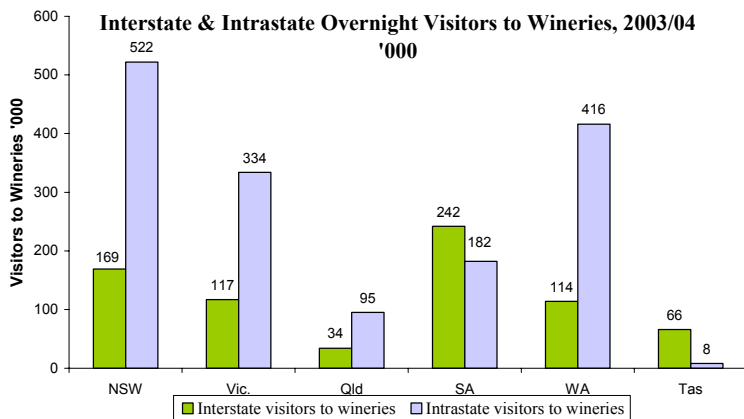
Source : TRA NVS

^a SA's share of domestic and international overnight visits and domestic day trips in 2003/04 was 7.5% (based on total visits, not total visitor nights) and share of total population aged over 15 years was 7.8% at June 2004.

¹ Domestic visitors 15 years or over on an overnight trip involving one or more nights away from home for all purposes of travel

² The NVS, like all sample surveys, is subject to sampling variability. The smaller the subset of data considered, the less reliable the estimates due to the smaller sample of respondents that meet the relevant criteria. For this reason, estimates for domestic visits to wineries in SA should be considered indicative only and consideration of trends should be based on an understanding of the data's level of reliability

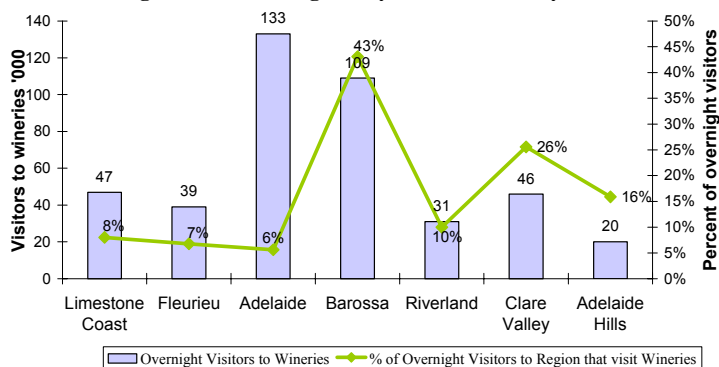
- ❖ In 2003/04 815,000, or 3%, of all interstate overnight visitors in Australia went to a winery. Of interstate visitors to South Australia, 242,000, or 12%, visit a winery. In total 30% of interstate domestic visitors in Australia that visit a winery, visit a winery in South Australia and SA attracts more interstate winery visitors than any other state.



Source TRA NVS 2003/04

- ❖ 182,000 or 5% of intrastate overnight visitors in SA in 2003/04 went to a winery compared to 3% of intrastate visitors in Australia. SA attracts a lower number of intrastate winery visitors than some states due to our lower population base and Adelaide's ready day trip proximity to many wine areas.
- ❖ When holiday/VFR purpose visits are considered separately, 216,000, or 17% of interstate holiday/VFR visitors to SA and 169,000 or 6% of intrastate holiday/VFR purpose visitors went to a winery during their visit to SA in 2003/04. This compares with 4% of interstate and 3% of intrastate holiday/VFR purpose visits in Australia including winery visits.
- ❖ Around 43%, or 109,000 of domestic visitors that stayed in the Barossa in 2003/04 visited a winery during their visit: 45% of these were interstate visitors. 26% of visitors staying in Clare Valley went to wineries, as did 16% of those staying in the Adelaide Hills, 10% of those to the Riverland, 8% of Limestone Coast visitors and 7% of overnight visitors to the Fleurieu Peninsula.

Overnight Visitors to Regions by Visited a Winery 2003/04



Visitors staying in a region may visit a winery in that region or as a day trip to a nearby region

- ❖ Around 31% or 133,000 of domestic overnight visits in SA that include winery visits are by visitors staying in the Adelaide region – the majority (95%)

of these are interstate visitors. This reflects Adelaide's significance as the State's major interstate visitor destination and the number of wineries readily accessible as day trips from Adelaide, as well as those within the region itself. Nearly 6% of all domestic visitors that stay in Adelaide and over 8% of interstate visitors to Adelaide visit a winery during their stay either within the Adelaide region or in other tourism regions such as Barossa, McLaren Vale and Clare.

- ❖ In addition to visits to wineries by overnight visitors, there were 466,000 visits to wineries in SA in 2003/04 by domestic day trip visitors³ - 57% of these day trips were to the Barossa, 20% to Fleurieu Peninsula and 10% to Clare Valley. 5% of all day trip visits in SA include winery visits, compared with just over 1% of all day trips in Australia. SA attracts a significant 23% of all day trips in Australia that include winery visits.

INTERNATIONAL VISITORS

- ❖ In 2003/04 around 579,000 international visitors to Australia visited a winery at some time during their stay in Australia. This represents around 12% of all international visits to Australia.
- ❖ In 2003/04 103,000⁴, or 33% of all international visitors to South Australia, visited a winery as a day trip while staying in South Australia
- ❖ In 2003/04 119,000, or 38% of international visitors⁴ to SA, visited the Barossa as a day trip that did not include an overnight stay in the region.
- ❖ In 2003⁵ the number of international visitors that go to SA wineries or winery areas compares with:
 - 189,000, or 32% of all internationals to Western Australia, visited Swan Valley and 156,000 (27% of internationals to WA) visited the Margaret River/southern forest area in 2003 as either day trips or overnight stays;
 - 138,000 or 11% of internationals to Victoria in 2003 visited Yarra Valley wineries as a day trip;
 - 6,000, or 3% of international visitors to ACT in 2003 visited ACT wineries as a day trip.
- ❖ Compared to international visitors to other states, a significantly higher proportion of internationals to SA visit a winery during their stay. This reflects a strong association of wineries with South Australia.

Further Information

Other research and statistics including copies of this fact sheet and SATC's 2003 cellar door survey are available at: <http://www.tourism.sa.gov.au/publications>

Other information on wine tourism in South Australia is available at <http://www.tourism.sa.gov.au/winetourism/default.asp>

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Sources: TRA International Visitor Survey, TRA National Visitor Survey

³ Day trips are defined as round trips of at least 50 km and at least 4 hours from home but not involving a night away from home.

⁴ Adjusted for short interviews

⁵ Results are for 2003 as the wording of this question changed for some states in 2004 making financial year results unavailable. Figures for SA in 2003 were 97,000 (32%) visit wineries and 120,000 (40%) visit Barossa as a day trip. Interstate and SA figures adjusted for short interviews.