

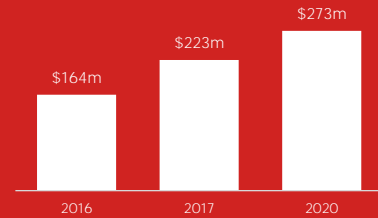
BAROSSA

Regional Profile December 2014-2016



OVERVIEW

- Currently the Barossa contributes \$164 million to the December 2016 South Australian expenditure of \$5.8 billion.
- The Barossa has achieved 60 per cent of their 2020 target of \$273 million.



Annual Visitor Summary December 2014 - December 2016

ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Visits	121,000	70,000	192,000	12,000	204,000
%	63%	36%	94%	6%	100%
Nights	221,000	208,000	429,000	154,000	583,000
%	52%	48%	74%	26%	100%
Average Length of Stay	1.8	3.0	2.2	12.8	2.9

Day Trips

Average Annual Day Trips to Barossa 739,000

PURPOSE

	Holiday	VFR	Business	Other	Total
Visits	98,000	68,000	30,000	8,000	204,000
%	48%	33%	15%	4%	100%
Nights	268,000	167,000	72,000	76,000	583,000
%	46%	29%	12%	13%	100%
Average Length of Stay	2.7	2.5	2.4	9.5	2.9

Expenditure
Average Annual Expenditure \$ 164,000,000

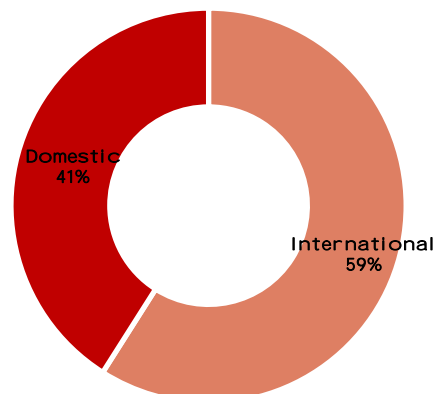
- 94 per cent of the Barossa Visitors are Domestic Visitors and 6 per cent are International Visitors.
- Domestically, 63 per cent are from within the state compared to 36 per cent from Interstate.
- 83 per cent of visitors to the Barossa are Leisure Visitors (Holiday + VFR).

BAROSSA TOURISM LISTINGS

Category	Barossa
Event	525
Accommodation	123
Food and Drink	109
Attraction	51
Tour	19
Destination Information	8
Hire	3
Transport	2
Information Services	2
Grand Total	842

*Note: some listings have multiple categories of accommodation
Source: Australian Tourism Data Warehouse*

BAROSSA MEDIA COVERAGE



Source: Item Count - SATC Internal - 2016

BAROSSA

Regional Profile December 2014-2016

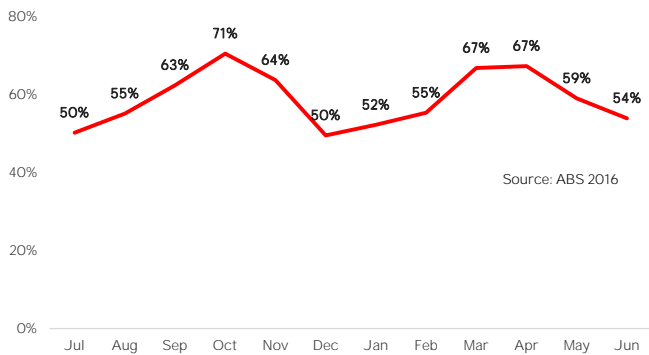


ACCOMMODATION SUPPLY

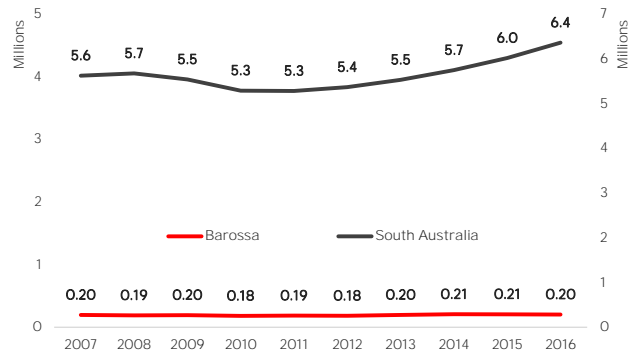
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	9
Rooms	365
Occupancy	59%
Takings	\$ 14,000,000

- Average occupancy for the year is 59 per cent over 9 establishment and 365 rooms.
- The peak months are October with occupancy of 71 and March and April with Occupancy of 67 per cent.
- Low point of the year is during the winter months with occupancy on average dropping to 53 per cent. December is also low at 50 per cent.

Monthly Occupancy Rates Year end June 2016 - Barossa

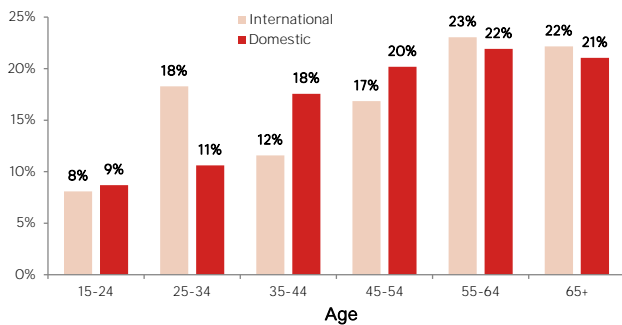


Total Overnight Visitation to Barossa & South Australia

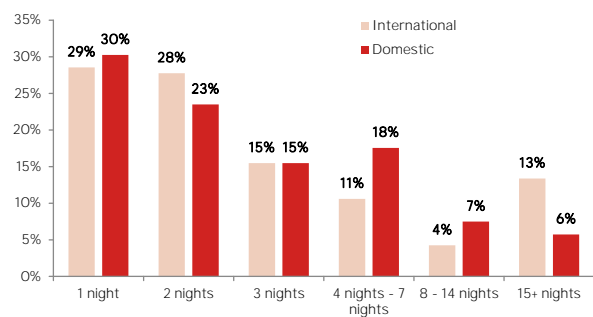


VISITOR PROFILE

Age of Visitors to Barossa



Length of Visit to Barossa



- International Visitors peak in the 55-64 age group at 23 per cent.
- Domestically the over 55 age group make up 43 per cent of the market.

- 57 per cent of International Visitors prefer to stay 1 or 2 night in the Barossa.
- 23 per cent of Domestic Visitors prefer to stay 2 nights, compared to 30 per cent staying 1 night.

BAROSSA

Regional Profile December 2014-2016



DOMESTIC VISITOR PROFILE

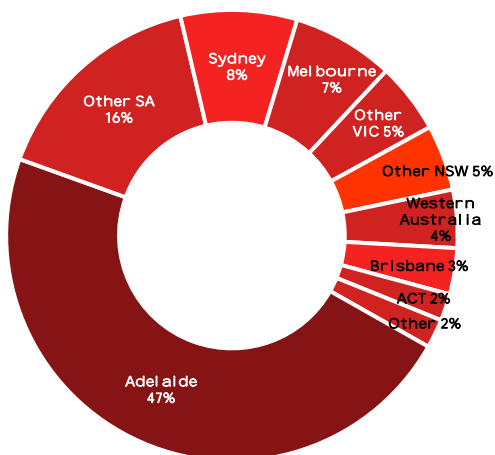
Purpose	Holiday	VFR	Other	Total
Visits	88,000	66,000	36,000	191,000
%	46%	35%	19%	100%
Nights	194,000	150,000	84,000	429,000
%	45%	35%	20%	100%
ALOS	2.2	2.3	2.3	2.2

INTERNATIONAL VISITOR PROFILE

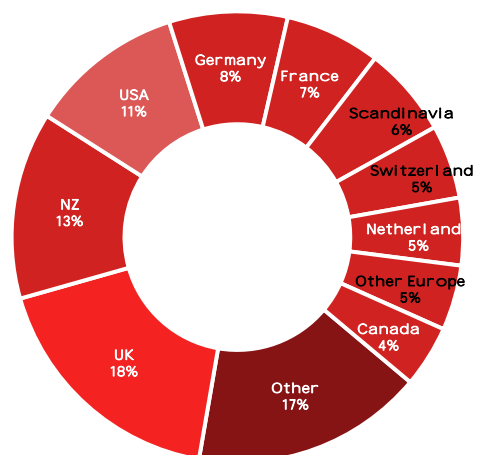
Purpose	Holiday	VFR	Other	Total
Visits	10,000	1,000	1,000	12,000
%	83%	8%	8%	100%
Nights	73,000	17,000	64,000	154,000
%	47%	11%	42%	100%
ALOS	7.3	17.0	64.0	12.8

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Barossa



Origin of International Visitors to Barossa



- New South Wales 13 per cent and Victoria 12 per cent are the Barossa's biggest interstate Markets.
- Regional South Australia contributes 16 per cent of visitors to the Barossa.
- Adelaide visitors contribute 47 per cent of the visitors to the Barossa.
- Internationally Europeans contribute 55 per cent of the visits to the Barossa with the United Kingdom contributing 18 per cent.
- 13 per cent of visitors to the Barossa are from New Zealand.

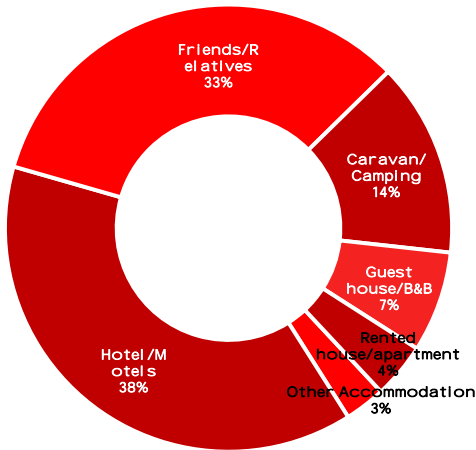
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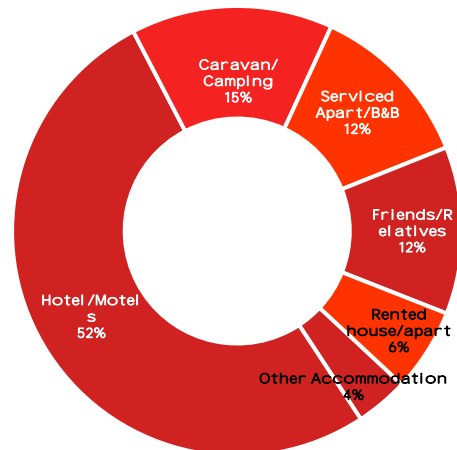


VISITOR USE OF ACCOMMODATION

Accommodation used in Barossa for Domestic Visitors



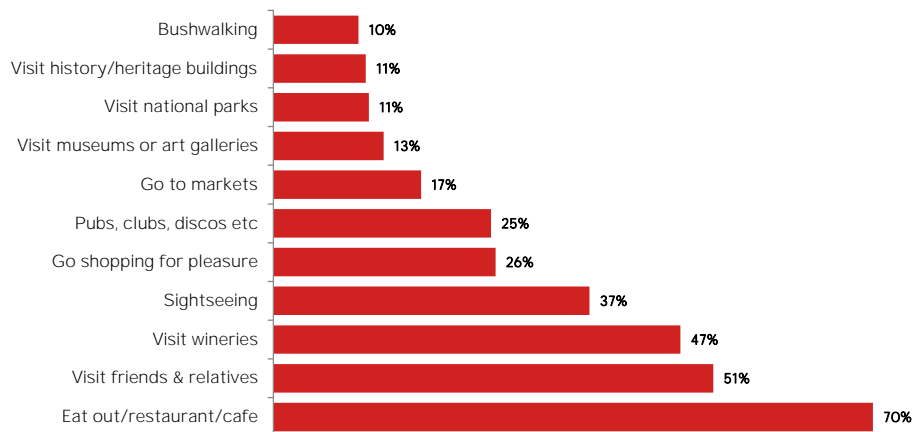
Accommodation used in Barossa for International Visitors



- 71 per cent of Domestic Visitor nights in the Barossa are spent either with Friends or Relatives or in Hotels and similar accommodation.
- International similar to Domestic with 64 per cent of visitors staying with Friends or Relatives or in Hotels and similar accommodation.
- 18 per cent of International visitors also like to stay in a Serviced Apart/B&B or a rented house/apartment.
- Caravan and camping contribute 14 per cent of Domestic nights and 15 per cent of International nights.

VISITOR ACTIVITIES

Domestic Visitor Activities in Barossa



- The most popular activity when coming to the Barossa is to Eat out or Dine at a restaurant and/or cafe.
- Other popular activities include visiting friends and relatives, visiting wineries and markets.

BAROSSA

Regional Profile December 2014-2016



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

- In 2013-14, the tourism industry contributed an estimated \$216 million to the Barossa regional economy (12.8 per cent of gross regional product) and directly employed approximately 600 people (4.3 per cent of regional employment).

In 2013-14, the tourism activity in the Barossa generated:

- \$75 million and \$379 million in direct and indirect tourism output, and \$453 million in total tourism output;
- \$38 million and \$151 million in direct and indirect tourism GVA, and \$189 million in total tourism GVA;
- \$40 million and \$175 million in direct and indirect tourism GRP and \$216 million in total tourism GRP; and
- 600 jobs for people employed directly by the tourism industry, 1,500 indirect jobs and a total employment impact of 2,200 people.

REGIONAL INSIGHTS

- Highly appealing but wine not enough for some.

Interstate

- Wine resonates with interstate visitors.
- Activities found attractive, e.g. festival / bike ride / hot air balloon.
- A lack of uniqueness is a limiting factor, with wine considered insufficient as the experience can be replicated closer to home.
- Perception of the destination as 'high end' for some.

Intrastate

- A well known destination and lots more hidden secrets among those who know e.g. farmers markets, rose garden, Angaston.
- Activities such as hot air balloon also appeal and have the potential to trigger a visit.
- A little far for a quick trip from Adelaide for some.

International

- Highly appealing winery region.
- Visiting Jacobs Creek is the top experience.
- Vintage festival and Whispering Wall also very popular.
- Visiting Cellar doors and creating your own wine showed relatively low appeal.

Appeal data is from the consumer surveying conducted for the SATC by BDA Marketing Planning. Sample of 800 interstate travellers and 400 interstate travellers, followed by eight focus groups in Adelaide, Sydney and Melbourne. Comments relating to International appeal are sourced from the Consumer Demand Project run by Tourism Australia in 9 priority markets, with a sample of 500 per market.

Prepared by the South Australian Tourism Commission, December 2016

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 Annual Average results for the 3 years from December 2014 to December 2016

Consumer Demand Product Testing - BDA Marketing

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

ABS: Survey of Tourism Accommodation. Hotels, Motels, Guest houses and Serviced Apartments with 15 or more rooms. Cat. No. 8635455001