

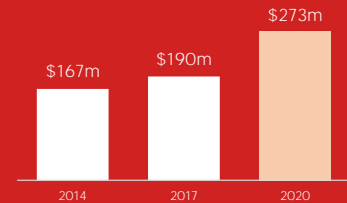
BAROSSA

Regional Profile



OVERVIEW

- Currently the Barossa contributes \$190 million to the December 2017 South Australian expenditure of \$6.6 billion.
- The Barossa has achieved 70 per cent of their 2020 target of \$273 million.



Annual Visitor Summary December 2015 - December 2017

ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	124,000	73,000	197,000	12,000	209,000
%	63%	37%	94%	6%	100%
Nights	233,000	222,000	455,000	187,000	642,000
%	51%	49%	71%	29%	100%
Average Length of Stay	2	3	2	16	3
Domestic Day Trips					828,000
International Day Trips*					84,000

PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	112,000	70,000	19,000	8,000	209,000
%	54%	33%	9%	4%	100%
Nights	319,000	187,000	41,000	95,000	642,000
%	50%	29%	6%	15%	100%
Average Length of Stay	3	3	2	12	3
Expenditure					
Average Annual Expenditure					190,000,000

- 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 37 per cent from Interstate.
- 87 per cent of visitors to the Barossa are Leisure visitors (Holiday + VFR).
- On average 828,000 day trips are taken to the Barossa each year, with an extra 84,000 international day trips.

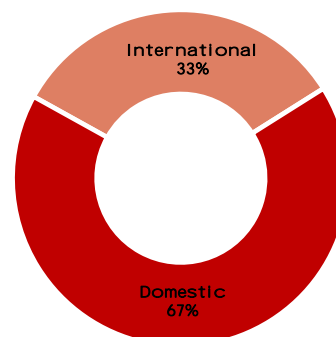
*International visitors counted as taking 'International Day Trips' are also counted at the location of their overnight stay. Therefore, while they are visible as 'feet on the ground' they cannot be added to the international visitor total for the region.

BAROSSA TOURISM LISTINGS

Category	Barossa
Accommodation	105
Attraction	43
Destination Information	6
Event	166
Food and Drink	128
Hire	4
Tour	27
Transport	4
Grand Total	483

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

BAROSSA MEDIA COVERAGE



Source: Item Count - SATC Internal - 2017

BAROSSA

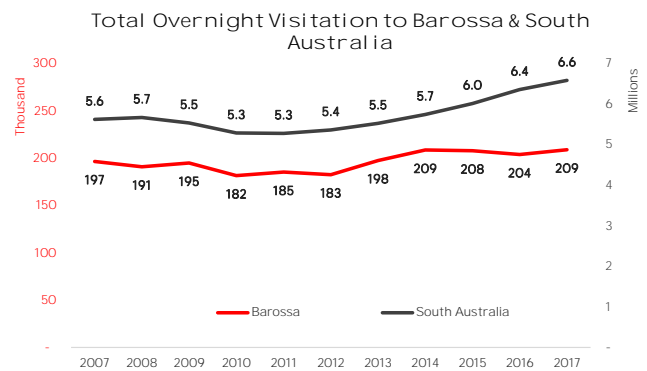
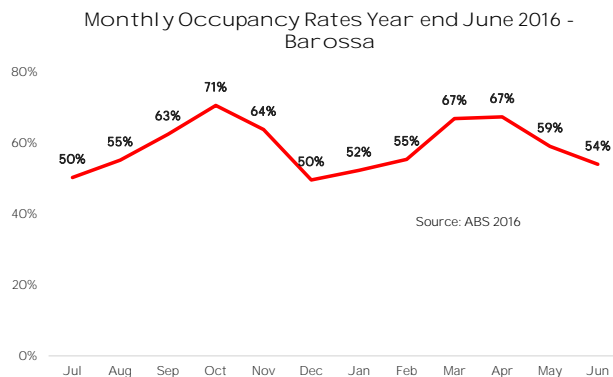
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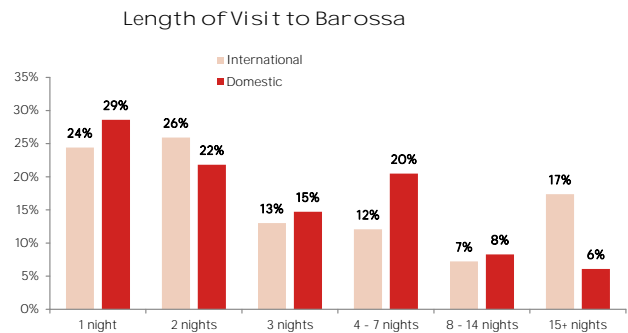
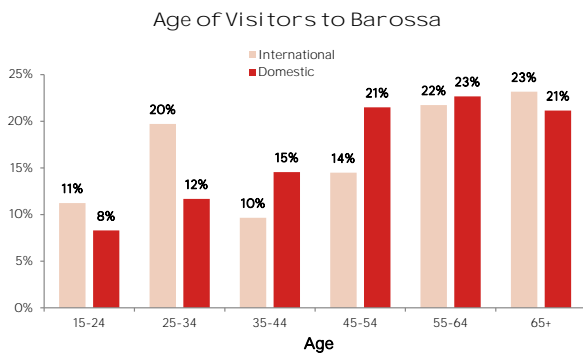
ACCOMMODATION SUPPLY

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 establishments and 365 rooms.
- The peak months are October with occupancy of 71 per cent 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.



VISITOR PROFILE



- International visitors peak in the 65+ age group at 23 per cent.
- Domestically the over 55 age group make up 44 per cent of the market.

- 50 per cent of International visitors prefer to stay 1 or 2 night in the Barossa.
- 22 per cent of Domestic visitors prefer to stay 2 nights, compared to 29 per cent staying 1 night.

BAROSSA

Regional Profile



DOMESTIC VISITOR PROFILE

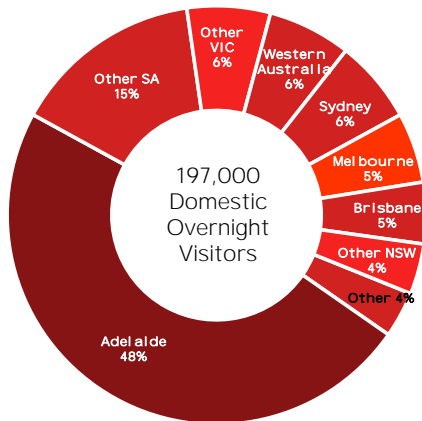
Purpose	Holiday	VFR	Other	Total
Visits	103,000	68,000	26,000	197,000
%	52%	35%	13%	100%
Nights	238,000	159,000	56,000	455,000
%	52%	35%	12%	100%
ALOS	2	2	2	2

INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	9,000	2,000	1,000	12,000
%	75%	17%	8%	100%
Nights	80,000	28,000	79,000	187,000
%	43%	15%	42%	100%
ALOS	9	14	79	16

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Barossa



Origin of International Visitors to Barossa



- New South Wales 10 per cent and Victoria 11 per cent are the Barossa's biggest interstate Markets.
- Regional South Australia contributes 15 per cent of visitors to the Barossa.
- Adelaide visitors contribute 48 per cent of the visitors to the Barossa.
- Internationally Europeans contribute 52 per cent of the visits to the Barossa with the United Kingdom contributing 20 per cent.
- 14 per cent of visitors to the Barossa are from New Zealand.

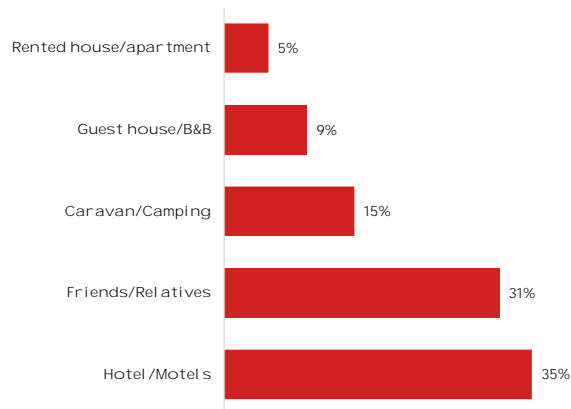
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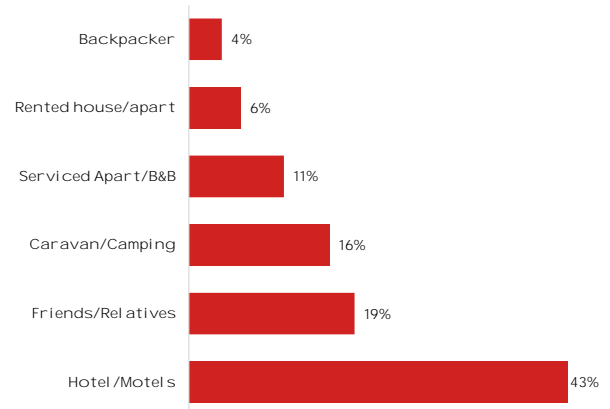


VISITOR USE OF ACCOMMODATION

Accommodation used in Barossa for Domestic Visitors



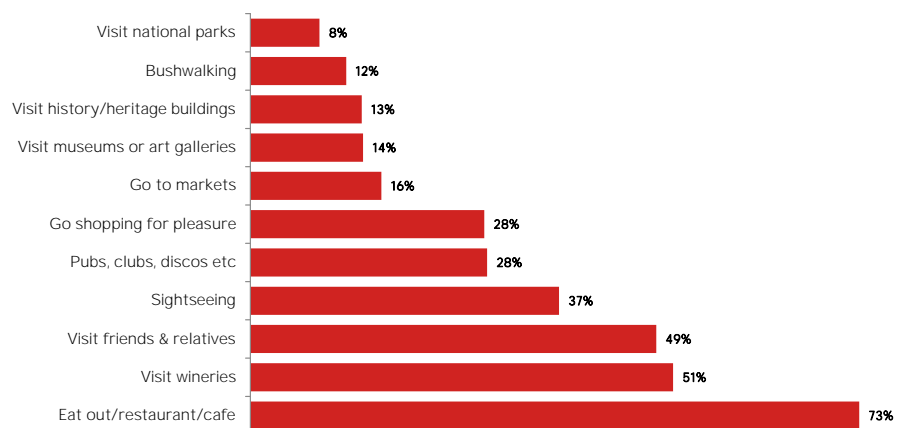
Accommodation used in Barossa for International Visitors



- 66 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 62 per cent of visitors staying with Friends or Relatives or in Hotels and similar accommodation.
- 17 per cent of International visitors also like to stay in a Serviced Apart/B&B or a rented house/apartment.
- Caravan and camping contribute 15 per cent of Domestic nights and 16 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



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2016-17, the tourism industry contributed an estimated \$135 million to the Barossa regional economy and directly employed approximately 900 people.

Employment

- 900 jobs for people employed directly by the tourism industry, 500 indirect jobs and a total employment impact of 1,300 people.

Tourism output

- \$117 million and \$151 million in direct and indirect tourism output, and \$268 million in total tourism output.

Gross Value Added (GVA)

- \$61 million and \$63 million in direct and indirect tourism GVA, and \$124 million in total tourism GVA.

Gross Regional Product (GRP)

- \$64 million and \$71 million in direct and indirect tourism GRP and \$135 million in total tourism GRP.

REGIONAL INSIGHTS

Interstate

- Wine resonates with interstate visitors.
- Activities found attractive, e.g. festival / bike ride / hot air balloon.
- 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.

International

- Highly appealing winery region.
- Visiting Jacobs Creek is the top experience.
- Vintage festival and Whispering Wall also very popular.

Regional Visitor Strategy Priorities

- The main priority for driving future growth to the Barossa is to increase overnight visitation from interstate and overseas markets. While the region receives four day-trip visitors for every overnight visitor, overnight visitors deliver over two thirds of total spend.
- Accommodation improvements and developments will be crucial to the region.
- The Barossa needs to leverage established global marketing platforms such as Ultimate Winery Experiences and Great Wine Capitals of the World for promoting the region.

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 11 priority markets, with a sample of 1,600 per market.

Prepared by the South Australian Tourism Commission, December 2017

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 2015 to December 2017.
Consumer Demand Product Testing Phase 1 - 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. 863455001
Consumer Demand Product Testing Phase 1 - BDA Marketing