

BAROSSA

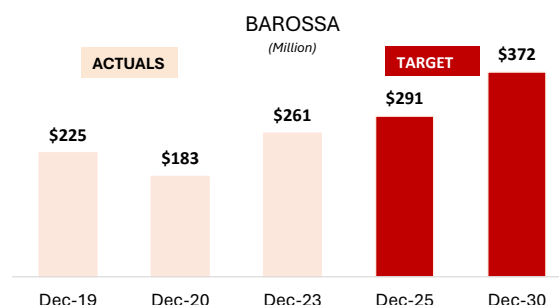
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2023

- Currently, the Barossa contributes \$261 million to the year end December 2023 South Australian expenditure of \$10.1 billion.
- The Barossa has achieved 90 per cent of their 2025 target of \$291 million and 70 per cent of their 2030 target of \$372 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2023

ORIGIN						
	Intrastate	Interstate	Total Domestic	International	Total	
Overnight Visits	223,000	111,000	334,000	9,000	343,000	
% of visits	65%	32%	97%	3%	100%	
<i>Share of Regional SA</i>	5%	4%	5%	2%	4%	
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% Across Regional SA	60%	35%	94%	6%	100%	
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>						
Nights	420,000	334,000	754,000	63,000	817,000	
% of nights	51%	41%	92%	8%	100%	
<i>Share of Regional SA</i>	3%	3%	3%	0%	2%	
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% Across Regional SA	33%	31%	65%	35%	100%	
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>						
Average Length of Stay	1.9	3.0	2.3	7.0	2.4	
ALOS Regional SA	2.8	4.6	3.5	32.0	5.1	
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Total Expenditure					\$261,000,000	
Overnight Expenditure	\$78,000,000	\$98,000,000	\$176,000,000	\$9,000,000	\$185,000,000	
Day Trip Expenditure					\$76,000,000	
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Domestic Day Trips					758,000	

- The Barossa saw 343,000 overnight visitors for the year end December 2023.
- 65 per cent of overnight visitors were from intrastate, 32 per cent from interstate and 3 per cent from overseas.
- The 223,000 intrastate overnight visitors stayed 420,000 nights with an average length of stay of 1.9 nights.
- There were 111,000 interstate overnight visitors who stayed 334,000 nights with an average length of stay of 3.0 nights.
- The region saw 9,000 international visitors with an average length of stay of 7 nights and spend of \$9 million.
- 758,000 day trips were taken to the Barossa for the year with spend of \$76 million.

ALOS = Average Length of Stay

BAROSSA

REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	189,000	135,000	19,000	-	343,000
% of visits	55%	39%	6%	0%	100%
Share of Regional SA	6%	5%	1%	0%	4%
% Across all regions	41%	33%	21%	6%	100%

Nights	491,000	241,000	63,000	22,000	817,000
% of nights	60%	29%	8%	3%	100%
Share of Regional SA	4%	2%	1%	0%	2%
% Across all regions	31%	39%	15%	14%	100%

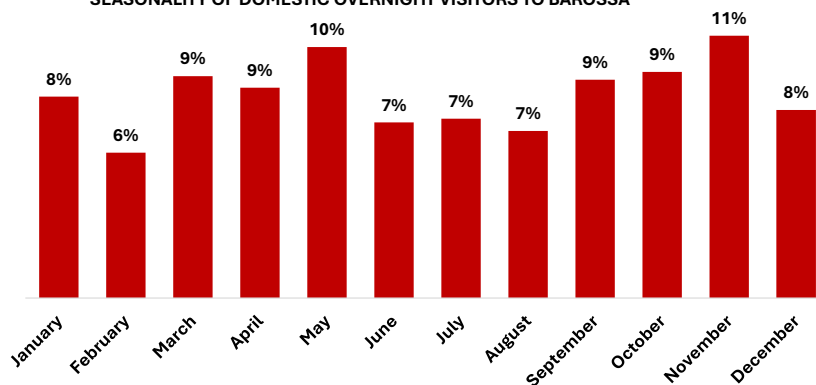
Average Length of Stay	2.6	1.8	3.3	-	2.4
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Expenditure					
Annual Expenditure	\$123,000,000	\$48,000,000	\$9,000,000	\$5,000,000	\$185,000,000
Expenditure 2019	\$95,000,000	\$26,000,000	\$20,000,000	\$5,000,000	\$145,000,000
Av spend per night	\$251	\$199	\$143	\$227	\$226
Av spend per night Reg SA	\$224	\$109	\$155	\$297	\$181
Share of Regional SA	3%	5%	1.3%	2%	3%

- 94 per cent of overnight visitors to the Barossa are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$251 per night compared to VFR visitors who spend \$199 per night.
- Leisure overnight visitors spent \$171 million for the year, making up 92 per cent of all overnight expenditure.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO BAROSSA



National Visitor Survey data shows us that May and November are the strong months for visitation in the Barossa.

October is busy with the school holidays and the long weekend.

Over the year April has been strong on the back of Easter, Anzac day and the school holidays.

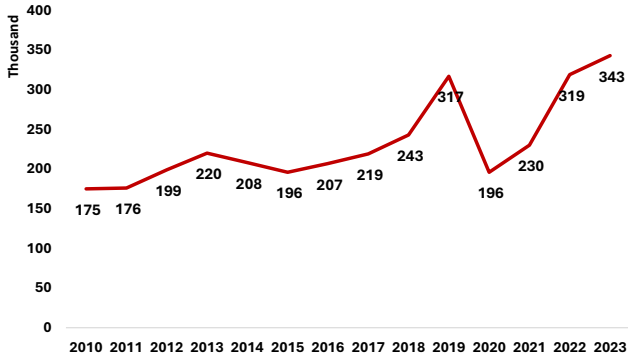
BAROSSA

REGIONAL PROFILE

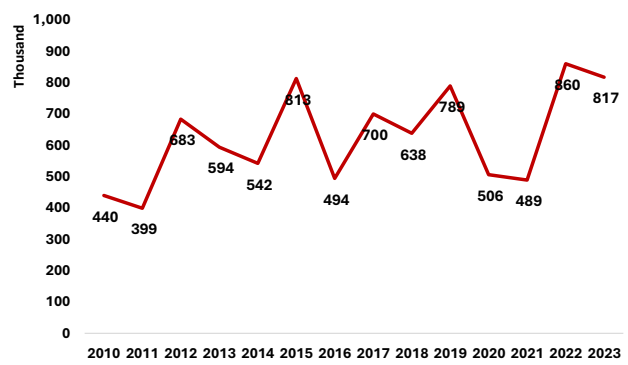


TOTAL OVERNIGHT VISITATION 2010 - 2022

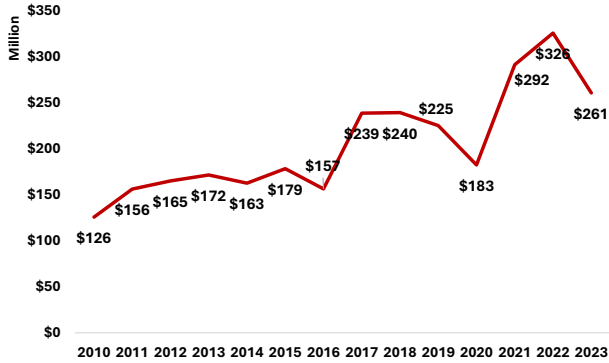
VISITORS BAROSSA 2010 - 2023 - International and Domestic



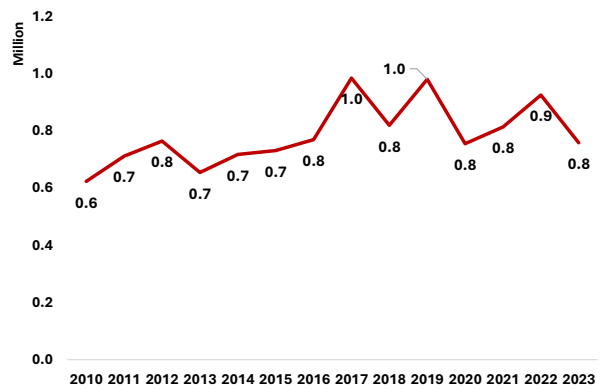
NIGHTS BAROSSA 2010 - 2023 - International and Domestic



TOTAL EXPENDITURE BAROSSA 2010 - 2023 - International and Domestic



DAY TRIPS BAROSSA 2010 - 2023 - 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-23	Change on Dec-19	Dec-23	Change on Dec-19
Adelaide	3,422,000	-13%	\$5,500,000,000	22%
Adelaide Hills	233,000	3%	\$293,000,000	42%
Barossa	343,000	8%	\$261,000,000	16%
Clare Valley	226,000	11%	\$191,000,000	62%
Eyre Peninsula	537,000	-8%	\$591,000,000	7%
Fleurieu Peninsula	868,000	-4%	\$837,000,000	50%
Flinders Ranges and Outback	761,000	-18%	\$610,000,000	19%
Kangaroo Island	205,000	-1%	\$280,000,000	47%
Limestone Coast	763,000	-2%	\$520,000,000	24%
Murray River, Lakes and Cooror	363,000	-20%	\$373,000,000	33%
Riverland	322,000	-25%	\$239,000,000	22%
Yorke Peninsula	530,000	-11%	\$384,000,000	60%
Regional SA	4,830,000	-7%	\$4,630,000,000	30%
South Australia	7,835,000	-9%	\$10,140,000,000	25%

BAROSSA

REGIONAL PROFILE



BAROSSA TOURISM LISTINGS

Category	# Listings
Food & Drink	185
Accommodation	132
Attraction	93
Event	83
Tour	69
General Services	28
Hire	6
Information Services	3
Transport	2
Destination Information	2
Journey	1
Grand Total	603

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
101,000
 YEAR END DECEMBER 2023



TOP 5

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

TOP 5

- HARVEST KITCHEN
- ARTISANS OF BAROSSA
- MAGGIE BEER'S FARMSHOP
- HENTLEY FARM CELLAR DOOR
- FINO SEPPELTSFIELD

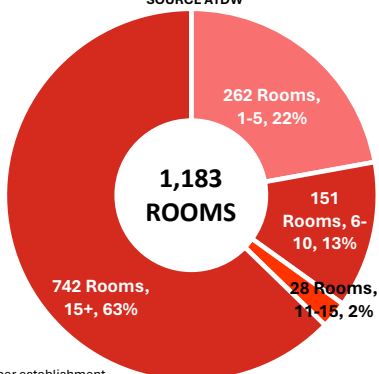
TOP 5

- BAROSSA BALLOON ADVENTURES
- BAROSSA HELICOPTERS EXPERIENCES
- BAROSSA VALLEY BALLOONING
- MAGGIE BEER'S FARMSHOP EXPERIENCES
- 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



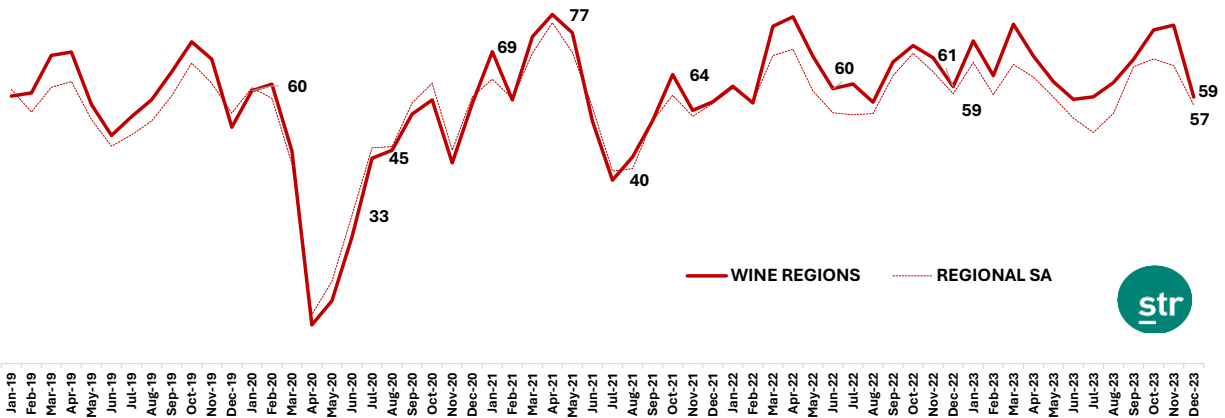
Rooms refers to rooms per establishment

- Currently there are 142 establishments in the Barossa that accommodate guests.
- These 142 establishments account for 1,183 rooms across the region.
- 63 per cent of rooms fall into establishment with 15 or more rooms.
- 22 per cent of rooms fall into the 1-5 room establishments.



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY WINE REGIONS

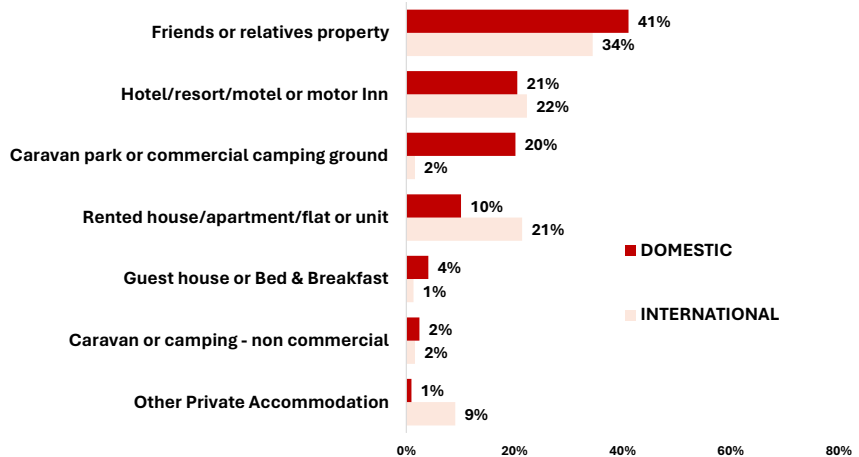


- The wine regions include accommodation data for the Adelaide Hills, the Clare Valley and the Barossa. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Wine Regions was 61%, this fell to 44% in 2020, rose to 65% in 2022 and grew again in 2023 to 66%.

VISITOR USE OF ACCOMMODATION

- 41 per cent of domestic overnight visitor nights in the Barossa are spent with Friends or Relatives compared to the international average of 34 per cent.
- 21 per cent of domestic visitors stayed in a Hotel/resort/motel or motor inn. This compares to the international average of 22 per cent.
- 20% of domestic visitors to the Barossa stay in a caravan park.
- 21% of international visitors stay in a rented house, apartment, flat or unit.

ACCOMMODATION USED IN BAROSSA FOR DOMESTIC AND INTERNATIONAL VISITORS



TRANSPORT



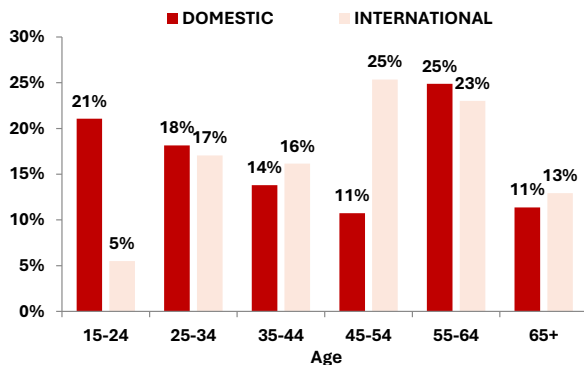
- The main method of transport used on trips to the Barossa was a self drive vehicle.
- 90% of visitors used this type of transport.
- 10% of people used an aircraft to visit the Barossa.

BAROSSA REGIONAL PROFILE



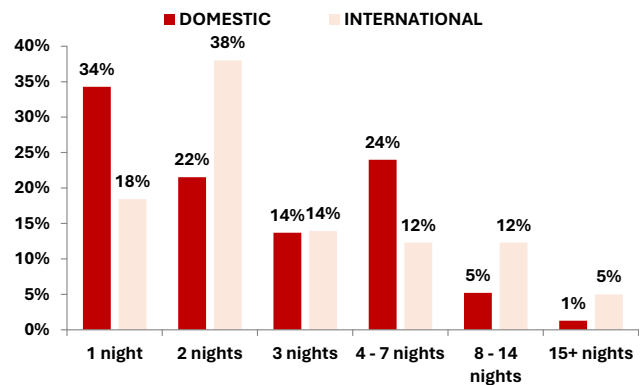
VISITOR PROFILE

AGE OF VISITORS TO BAROSSA



- In the domestic market the strongest age groups were the 15-24 and the 55-64 age groups.
- In the international market the 45-54 and the 55-64 age group were the strongest.

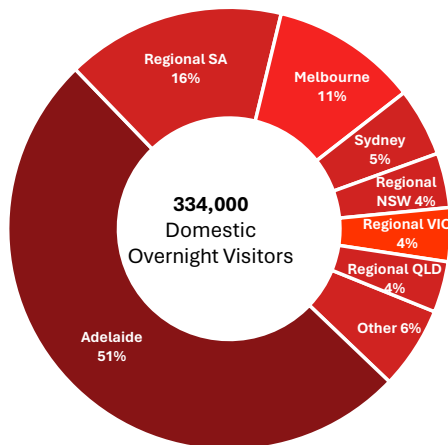
LENGTH OF VISIT TO BAROSSA



- 56 per cent of domestic overnight visitors like to stay 1 to 2 nights.
- The 24 per cent who stay longer 4-7 nights.
- 38 per cent of international visitors like to stay 2 nights.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO BAROSSA

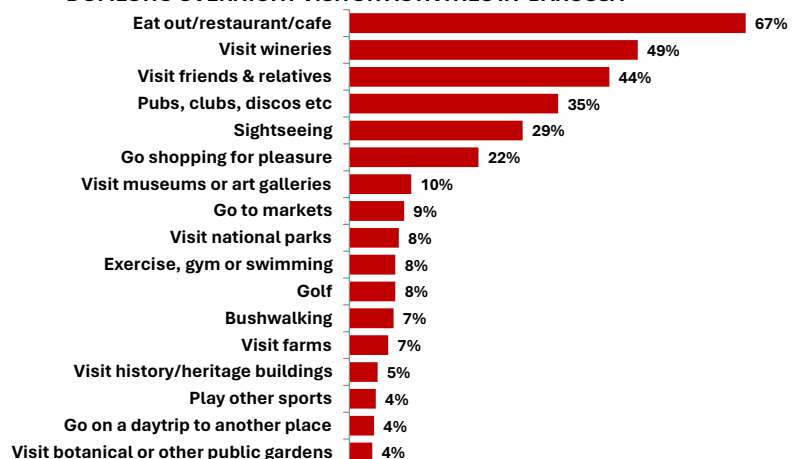


- Victoria at 15 per cent and New South Wales at 9 per cent are the Barossa's biggest interstate overnight domestic markets.
- Regional South Australia contributes 16 per cent of visitors to the Barossa.
- 51 per cent of visitors come from Adelaide.

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





BAROSSA

REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2021-22, the tourism industry contributed an estimated \$277 million to the Barossa regional economy and directly employed approximately 500 people.

Employment

- 500 jobs for people employed directly by the tourism industry, 700 indirect jobs and a total employment impact of 1,200 people.

Gross Value Added (GVA)

- \$47 million and \$120 million in direct and indirect tourism GVA, and \$167 million in total tourism GVA.

Gross Regional Product (GRP)

- \$48 million and \$155 million in direct and indirect tourism GRP and \$203 million in total tourism GRP.

Tourism Consumption

2021-22	
<i>Tourism products</i> - directly consumed	
• Shopping (including gifts and souvenirs)	10%
• Takeaway and restaurant meals	10%
• Fuel (petrol, diesel)	7%
• Long distance passenger transportation	4%
• Accommodation services	3%
• Food products	3%
• Alcoholic beverages and other beverages	3%

Tourism Employment

2021-22	
<i>Tourism Industries</i> - 500 directly employed	
• Cafes, restaurants and takeaway food service	32%
• Retail trade	25%
• Accommodation	17%
• Clubs, pubs, taverns and bars	6%
• Travel agency and tour operator services	5%
• All other industries	4%
• Other sports and recreation services	5%
• Air, water and other transport	4%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2022

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 2023

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 2023.

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 Intra-state participants (70% metro, 30% regional), - 20 Inter-state 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