

BAROSSA

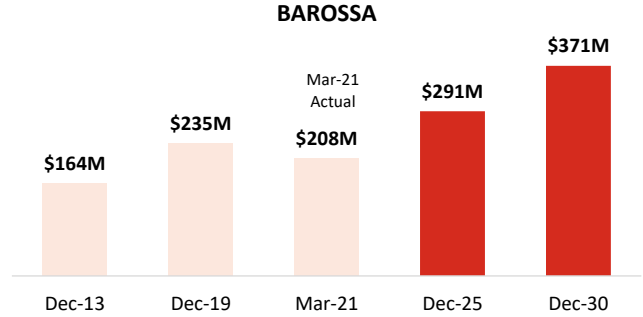
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END MARCH 2021 - FULL YEARS WORTH OF COVID AFFECTED DATA

- Currently the Barossa contributes \$208 million to the year end March 2021 South Australian expenditure of \$4.4 billion.
- The Barossa has achieved 71 per cent of their 2025 target of \$291 million and 56 per cent of their 2030 target of \$371 million.



ANNUAL VISITOR SUMMARY YEAR END MARCH 2021

ORIGIN						
	Intrastate	Interstate	Total Domestic	International	Total	
Overnight Visits	207,000	16,000	223,000	-	223,000	
%	93%	7%	100%	0%	100%	
% Across all regions	90%	10%	100%	0%	100%	
Share of Regional SA	5%	4%	5%	0%	5%	
Nights	479,000	58,000	538,000	0%	538,000	
%	89%	11%	100%	0%	100%	
% Across all regions	82%	18%	100%	0%	100%	
Share of Regional SA	4%	2%	4%	0%	4%	
ALOS	2.3	3.6	2.4	-	2.4	
ALOS Regional SA	3.2	6.0	3.5	-	3.5	
Total Expenditure					\$208,000,000	
Overnight Expenditure	\$113,000,000	\$19,000,000	\$132,000,000	\$0	\$132,000,000	
Day Trip Expenditure					\$76,000,000	
Domestic Day Trips					731,000	

- The Barossa saw 223,000 domestic overnight visitors for the year end March 2021.
- 93 per cent of overnight visitors were from intrastate and 7 per cent from interstate.
- The 207,000 intrastate overnight visitors stayed 479,000 nights with an average length of stay of 2.3 nights.
- There were 16,000 interstate overnight visitors who stayed 58,000 nights with an average length of stay of 3.6 nights
- There have been no international arrivals with borders closed.
- 731,000 day trips were taken to the Barossa for the year with spend of \$76 million.

ALOS = Average Length of Stay

BAROSSA

REGIONAL PROFILE

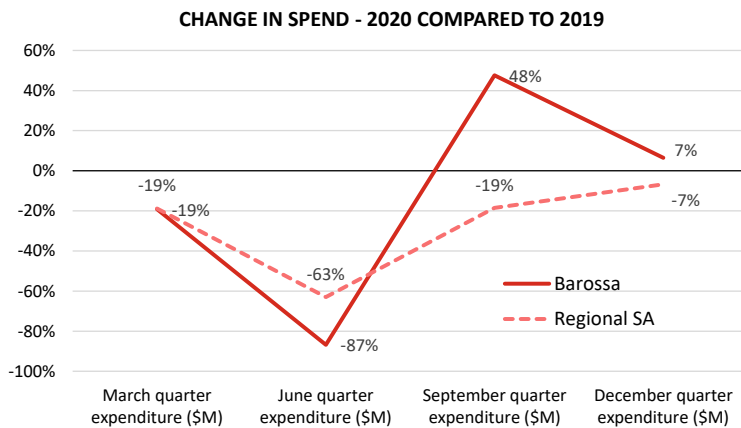


PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	138,000	49,000	16,000	20,000	223,000
%	62%	22%	7%	9%	100%
% Across all regions	56%	22%	18%	5%	100%
Share of Regional SA	5%	4%	5%	0%	5%
Nights	332,000	114,000	44,000	48,000	538,000
%	62%	21%	8%	9%	100%
% Across all regions	58%	18%	20%	3%	100%
Share of Regional SA	4%	4%	1%	10%	4%
Average Length of Stay	2.4	2.3	2.8	2.4	2.4
Expenditure					
Annual Expenditure	\$105,000,000	\$15,000,000	\$2,000,000	\$10,000,000	\$132,000,000
Av spend per night	\$316	\$132	\$45	\$208	\$245
Av spend per night Regional SA	\$213	\$126	\$132	\$511	\$191
Share of Regional SA	9%	9%	1%	5%	7%

- 84 per cent of overnight visitors to the Barossa are leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$316 per night compared to VFR visitors who spend \$132 per night.
- Leisure visitors spent \$120 million for the year, making up 91 per cent of all overnight expenditure.

SPEND 2020 VERSUS 2019



- March quarter 2020 prior to COVID-19 was down on the March quarter in 2019.
- The Barossa saw expenditure fall by 87 per cent for the June quarter in 2020 compared to June quarter in 2019.
- The September quarter saw excellent recovery, up 48 per cent on 2019.
- The December 2020 quarter was up 7 per cent compared to the December quarter in 2019.



BAROSSA

REGIONAL PROFILE



BAROSSA TOURISM LISTINGS

Category	# Listings
RESTAURANT	181
EVENT	154
ACCOMMODATION	134
ATTRACTION	86
TOUR	64
GENERAL SERVICE	24
DESTINATION INFORMATION	7
HIRE	6
TRANSPORT	6
INFORMATION	3
JOURNEY	1
Grand Total	666

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)

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

BAROSSA
AUSTRALIAN TOURISM DATA WAREHOUSE
LEADS
137,000
YEAR END MARCH 2021



TOP 5

- DISCOVERY PARKS BAROSSA VALLEY
- THE NOVOTEL BAROSSA VALLEY RESORT
- BAROSSA PAVILIONS
- THE LOUISE
- CAMBOURNE BOUTIQUE ACCOMMODATION

TOP 5

- BAROSSA VALLEY CHOCOLATE COMPANY
- MAGGIE BEERS FARM SHOP CAFE
- HENTLEY FARM CELLAR DOOR AND RESTAURANT
- THE FARM EATERY
- FINO SEPPELTSFIELD

TOP 5

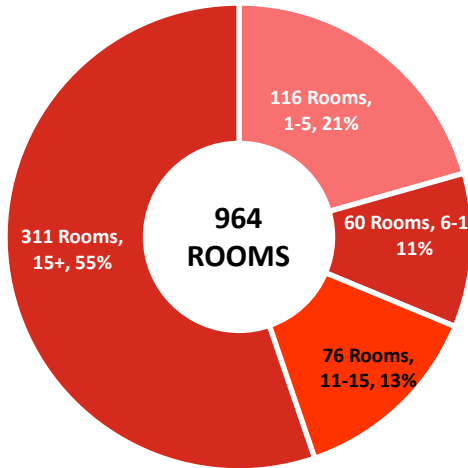
- BAROSSA VALLEY BALLOONING
- BAROSSA HELICOPTERS
- BAROSSA BALLOON ADVENTURES
- TASTE THE BAROSSA
- BAROSSA BOUTIQUE WINE TOURS

* 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



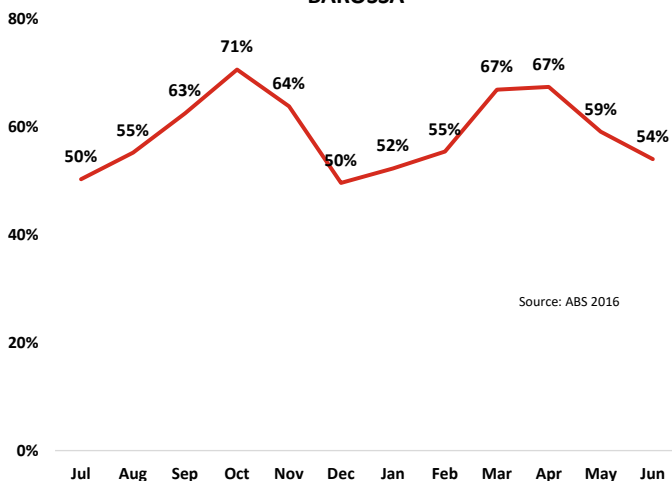
- Currently there are 133 establishments in the Barossa that accommodate guests.
- These 133 establishments account for 964 rooms ranging from 1 room to over 50.
- 59 per cent of rooms fall into establishment with 15 or more rooms.
- 27 per cent of rooms fall into the 1-5 room establishments.

ACCOMMODATION SUPPLY

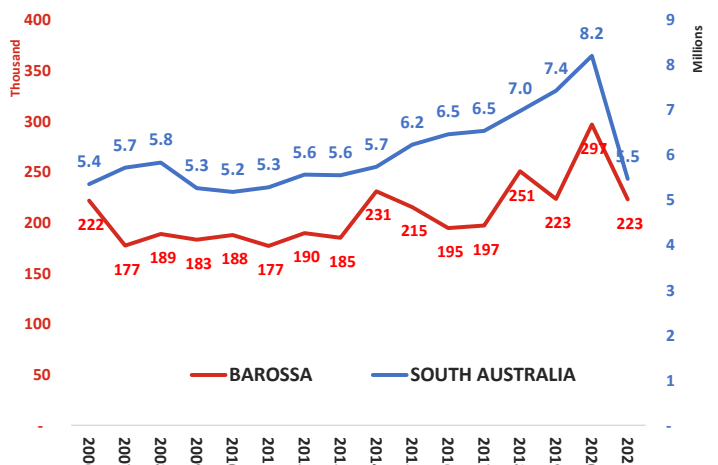
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	9
Rooms	365
Occupancy	59%
Takings	\$14,000,000

- 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.

MONTHLY OCCUPANCY RATES YEAR END JUNE 2016 - BAROSSA



TOTAL OVERNIGHT VISITATION TO BAROSSA & SOUTH AUSTRALIA

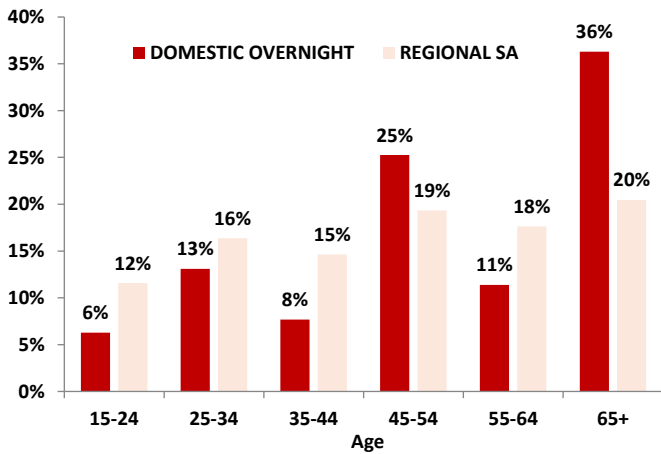


Note: Fluctuations can occur in visitation data due to small sample sizes. Prior regional profiles used data averaged over three years to smooth these fluctuations.



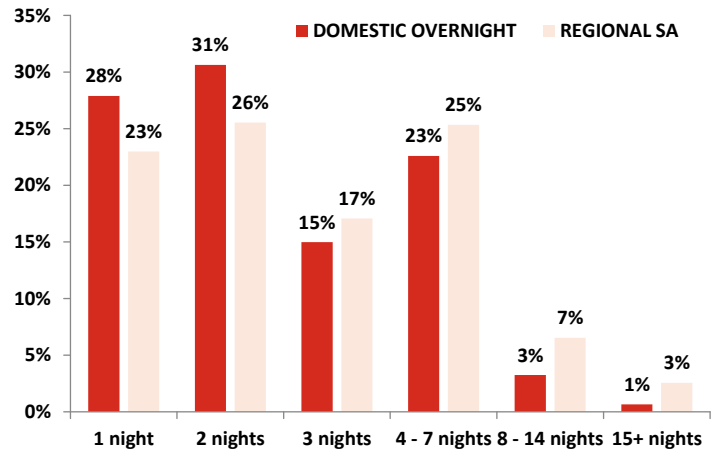
VISITOR PROFILE

AGE OF VISITORS TO BAROSSA



- Overnight domestically there is a peak in the 65+ age group at 36 per cent.
- This is well above the average of 20 per cent for the 65+ age group for regional SA.
- 45+ age groups account for 72 per cent of all visitors.

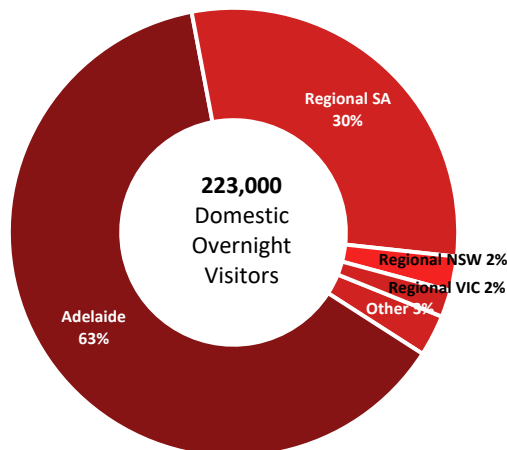
LENGTH OF VISIT TO BAROSSA



- 59 per cent of domestic visitors like to stay 1 to 2 nights.
- 4-7 night stays also popular in the region.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO BAROSSA

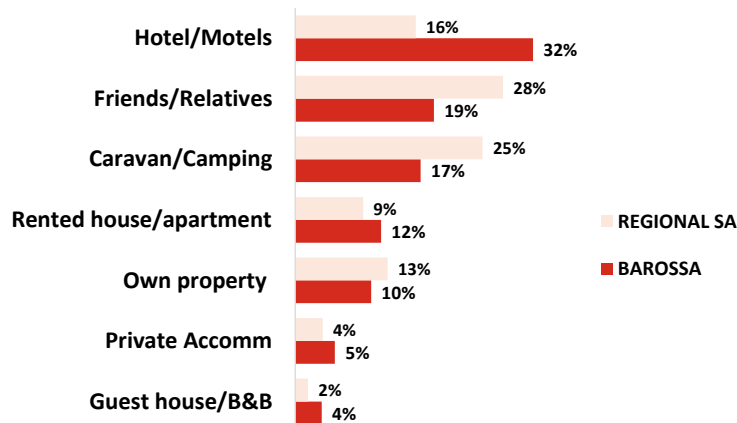


- Regional New South Wales and Regional Victoria each accounted for 2 per cent of visitors to the Barossa. Pre COVID New South Wales 10 per cent and Victoria 14 per cent were the Barossa's biggest interstate Markets.
- Regional South Australia contributes 30 per cent of visitors to the Barossa.
- 63 per cent of visitors come from Adelaide.



VISITOR USE OF ACCOMMODATION

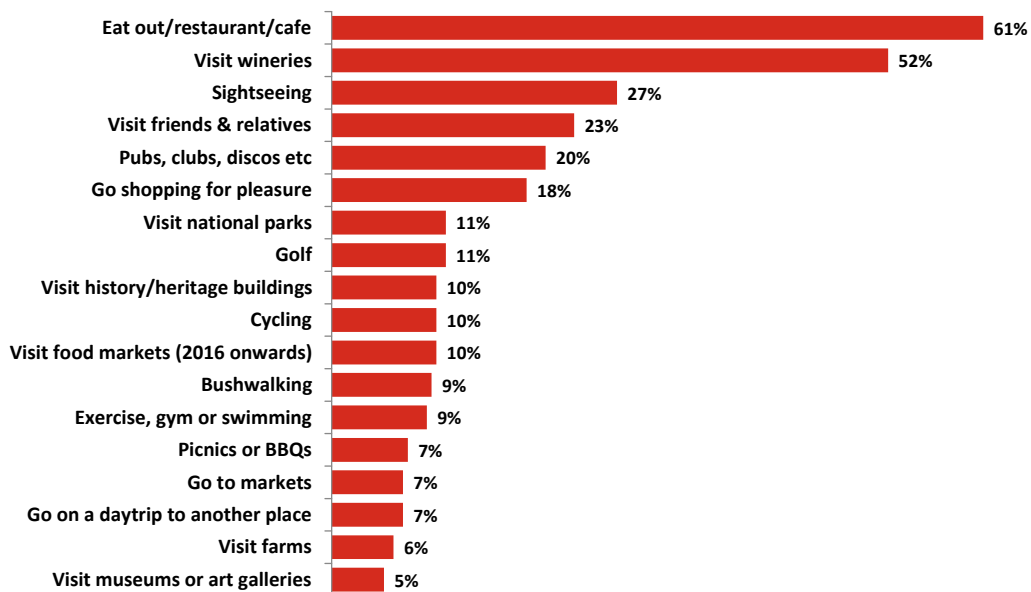
ACCOMMODATION USED IN BAROSSA FOR DOMESTIC VISITORS



- 51 per cent of domestic visitor nights in the Barossa are spent either with Friends or Relatives or in Hotels and similar accommodation.
- In the last year Caravan and Camping has grown in popularity with 25 per cent of nights accounted for by this group. Pre COVID this was only 9 per cent of visitor nights.

VISITOR ACTIVITIES

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN BAROSSA



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

BAROSSA

REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2019-20, the tourism industry contributed an estimated \$225 million to the Barossa regional economy and directly employed approximately 800 people.

Employment

- 800 jobs for people employed directly by the tourism industry, 400 indirect jobs and a total employment impact of 1,200 people.

Gross Value Added (GVA)

- \$54 million and \$52 million in direct and indirect tourism GVA, and \$106 million in total tourism GVA.

Gross Regional Product (GRP)

- \$58 million and \$67 million in direct and indirect tourism GRP and \$125 million in total tourism GRP.

Tourism Consumption

2019–20

Tourism products - directly consumed

- 17% Takeaway and restaurant meals
- 16% Shopping (including gifts and souvenirs)
- 14% Long distance passenger transportation
- 12% Fuel (petrol, diesel)
- 7% Travel agency and tour operator services
- 6% Alcoholic beverages and other beverages
- 6% Accommodation services

Tourism Employment

2019–20

Tourism Industries - 800 directly employed

- 24% - 206 - Cafes, restaurants and takeaway food services
- 23% - 197 - Retail trade
- 14% - 121 - Accommodation
- 8% - 70 - Travel agency and tour operator services
- 5% - 44 - Education and training
- 5% - 40 - Road transport and transport equipment rental
- 5% - 40 - All other industries

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2020

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. 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

Prepared by the South Australian Tourism Commission, March 2021

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 March 2021.

Consumer Demand Product Testing Phase 1 - BDA Marketing - 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.

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. 865455001
Consumer Demand Product Testing Phase 1 - BDA Marketing