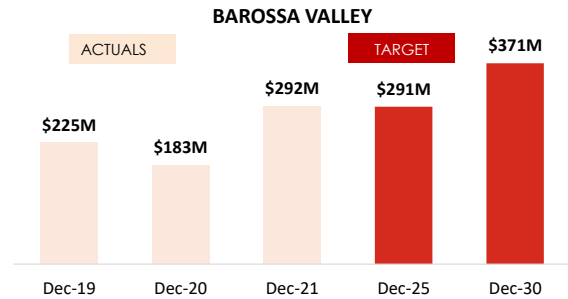




OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2021

- Currently the Barossa contributes \$292 million to the year end December 2021 South Australian expenditure of \$6.2 billion.
- The Barossa has achieved their 2025 target of \$291 million and 78 per cent of their 2030 target of \$371 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2021

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	170,000	60,000	230,000	-	230,000
%	74%	26%	100%	0%	100%
<i>Share of Regional SA</i>	4%	4%	4%	0%	4%
<hr/>					
<i>% Across Regional SA</i>	76%	23%	100%	0%	100%
<hr/>					
Nights	333,000	156,000	489,000	-	489,000
%	68%	32%	100%	0%	100%
<i>Share of Regional SA</i>	2%	2%	2%	0%	2%
<hr/>					
<i>% Across Regional SA</i>	60%	38%	98%	2%	100%
<hr/>					
Average Length of Stay	2.0	2.6	2.1	-	2.1
ALOS Regional SA	3.0	6.2	3.7	-	3.8
<hr/>					
Total Expenditure					\$292,000,000
Overnight Expenditure	\$107,000,000	\$68,000,000	\$176,000,000	\$0	\$176,000,000
Day Trip Expenditure					\$116,000,000
<hr/>					
Domestic Day Trips					813,000

- The Barossa saw 230,000 domestic overnight visitors for the year end December 2021.
- 74 per cent of overnight visitors were from intrastate and 26 per cent from interstate.
- The 170,000 intrastate overnight visitors stayed 333,000 nights with an average length of stay of 2.0 nights.
- There were 60,000 interstate overnight visitors who stayed 156,000 nights with an average length of stay of 2.6 nights
- There have been limited international arrivals with borders closed.
- 813,000 day trips were taken to the Barossa for the year with spend of \$116 million.



PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	160,000	39,000	10,000	20,000	230,000
%	70%	17%	4%	9%	100%
<i>Share of Regional SA</i>	5%	2%	1%	4%	4%
<hr/>					
<i>% Across all regions</i>	49%	28%	18%	8%	100%

Nights	374,000	72,000	17,000	26,000	489,000
%	76%	15%	3%	5%	100%
<i>Share of Regional SA</i>	3%	1%	0%	1%	2%
<hr/>					
<i>% Across all regions</i>	50%	26%	17%	8%	100%

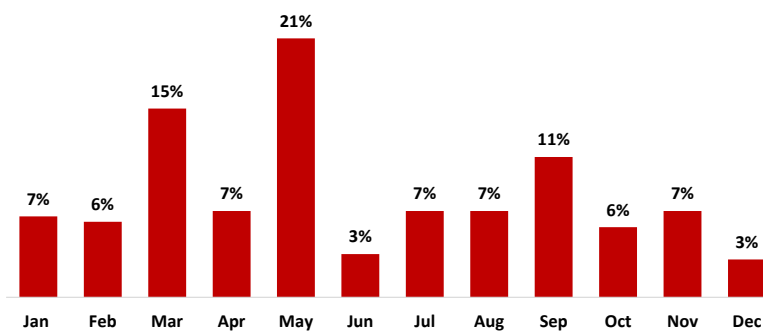
Average Length of Stay	2.3	1.8	1.7	1.3	2.1
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Expenditure					
Annual Expenditure	\$142,000,000	\$12,000,000	\$10,000,000	\$12,000,000	\$176,000,000
Expenditure 2019	\$95,000,000	\$26,000,000	\$20,000,000	\$5,000,000	\$145,000,000
Av spend per night	\$380	\$167	\$588	\$462	\$360
Av spend per night Reg SA	\$154	\$58	\$84	\$80	\$112
Share of Regional SA	6%	3%	6%	1%	5%

- 87 per cent of overnight visitors to the Barossa are either on holiday or visiting friends and relatives.
- Overnight holiday visitors on average spend \$380 per night compared to VFR visitors who spend \$167 per night.
- Leisure overnight visitors spent \$154 million for the year, making up 81 per cent of all overnight expenditure.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO BAROSSA YEAR END
DECEMBER 2021



Source: NVS year end December 2021

- National Visitor Survey data shows us that March, May and September were the strongest months for visitation to the Barossa Valley.
- September was strong with the school holidays attracting intrastate visitors to the region.
- March with the long weekend saw a surge in visitation.
- May was a strong month across regional SA as interstate border opened and restrictions were easing.



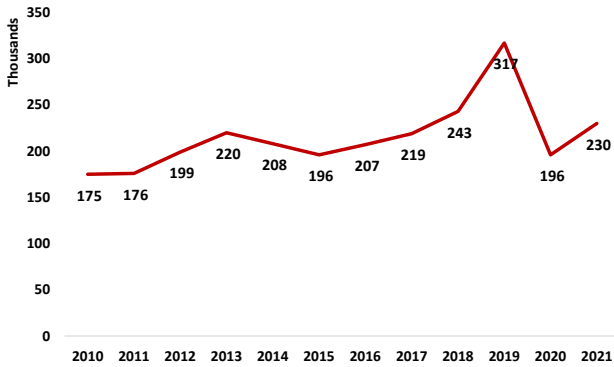
BAROSSA

REGIONAL PROFILE

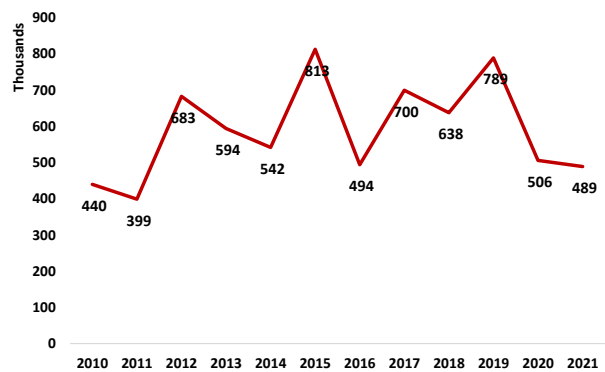


TOTAL OVERNIGHT VISITATION 2010 - 2021

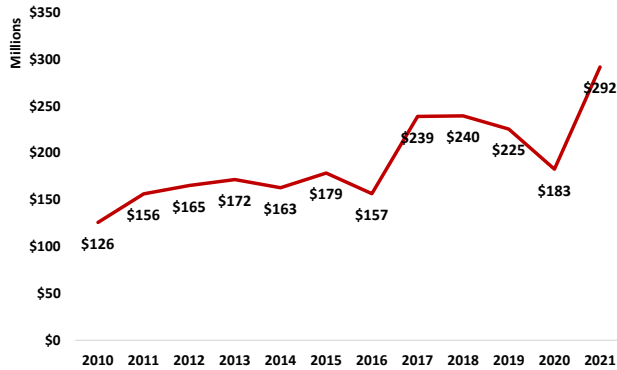
VISITORS BAROSSA 2010 - 2021 - INTERNATIONAL AND DOMESTIC



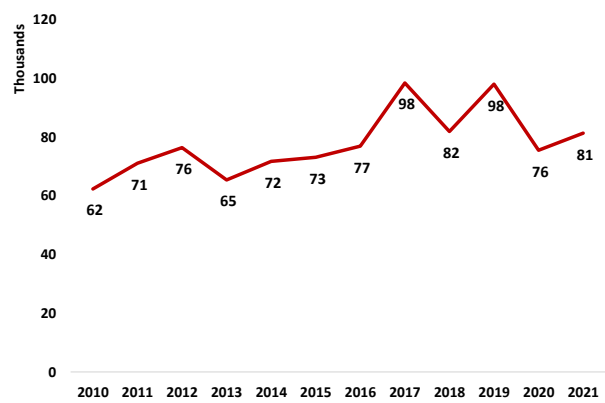
NIGHTS BAROSSA 2010 - 2021 - INTERNATIONAL AND DOMESTIC



TOTAL EXPENDITURE BAROSSA 2010 - 2021 - INTERNATIONAL AND DOMESTIC



DAY TRIPS BAROSSA 2010 - 2021 - DOMESTIC



Regions	Visits		Expenditure	
	Dec-21	Change on Dec-19	Dec-21	Change on Dec-19
Adelaide	1,982,000	-49%	2,549,700,000	-44%
Adelaide Hills	184,000	-18%	204,500,000	-1%
Barossa	230,000	-28%	291,600,000	29%
Clare Valley	282,000	38%	171,700,000	46%
Eyre Peninsula	482,000	-17%	488,400,000	-11%
Fleurieu Peninsula	894,000	-1%	662,900,000	19%
Flinders Ranges and Outback	638,000	-31%	359,700,000	-30%
Kangaroo Island	189,000	-9%	238,500,000	25%
Limestone Coast	610,000	-21%	438,600,000	4%
Murray River, Lakes and Coorong	391,000	-13%	211,200,000	-25%
Riverland	345,000	-20%	231,600,000	19%
Yorke Peninsula	620,000	4%	279,500,000	16%
Regional SA	4,424,000	-14%	3,601,600,000	1%
South Australia	6,077,000	-29%	6,151,300,000	-24%



BAROSSA VALLEY TOURISM LISTINGS

Category	# Listings
Food and Drink	169
Accommodation	131
Attraction	88
Tour	79
Event	57
General Services	24
Hire	6
Transport	4
Information Services	3
Journey	1
Destination Information	1
Grand Total	563

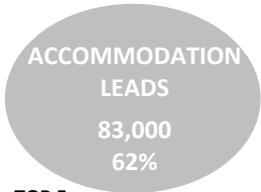
The **Australian Tourism Data Warehouse (ATDW)** is Australia's national platform for digital tourism information. Eligible tourism businesses can create a listing for their accommodation, tour, food and drink establishment, event and more, free of charge. These listings appear on websites such as southaustralia.com

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 VALLEY
AUSTRALIAN TOURISM DATA WAREHOUSE
LEADS
135,000
YEAR END DECEMBER 2021**



TOP 5

- DISCOVERY PARKS BAROSSA VALLEY
- BAROSSA PAVILIONS
- THE NOVOTEL BAROSSA VALLEY RESORT
- THE LOUISE
- BAROSSA TOURIST PARK

TOP 5

- MAGGIE BEERS FARM SHOP CAFE
- FINO SEPELTSFIELD
- THE FARM EATERY
- HENTLEY FARM CELLAR DOOR AND RESTAURANT
- 1847 CHATEAU YALDARA

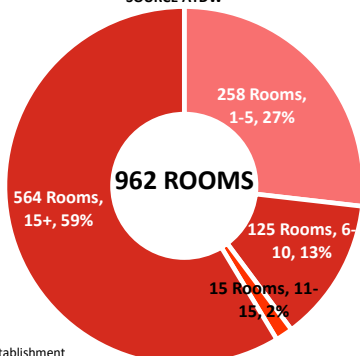
TOP 5

- BAROSSA HELICOPTERS PTY LTD
- BAROSSA BALLOON ADVENTURES
- BAROSSA VALLEY BALLOONING
- THE FARM EATERY EXPERIENCE CENTRE
- 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**



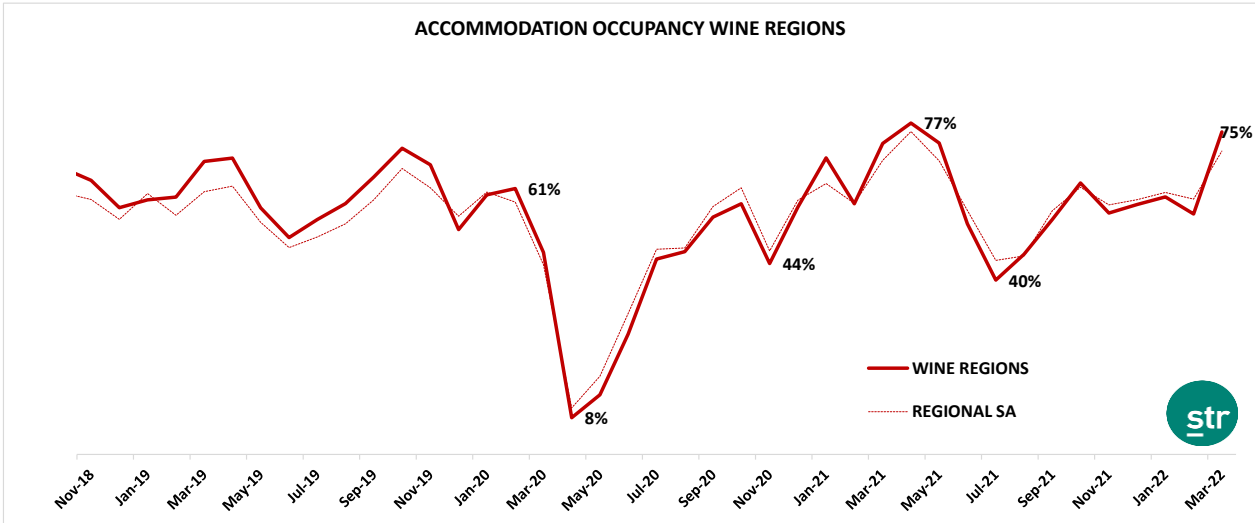
Rooms refers to rooms per establishment

- Currently there are 133 establishments in the Barossa that accommodate guests.
- These 133 establishments account for 962 rooms across the region.
- 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 STR

ACCOMMODATION OCCUPANCY WINE REGIONS

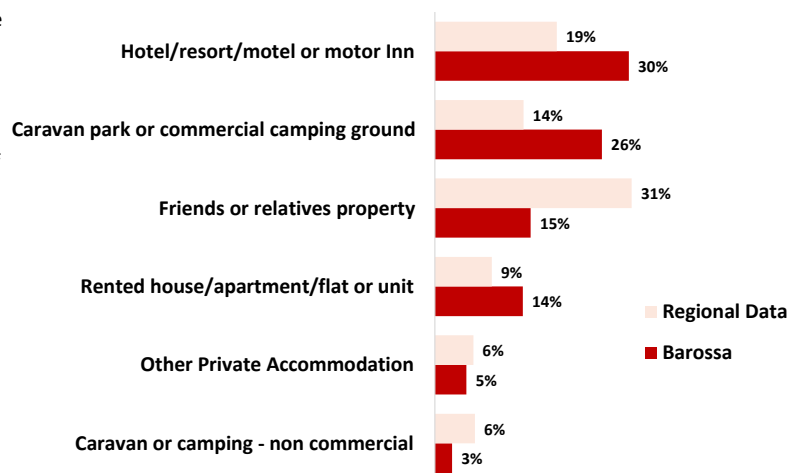


- The wine regions include accommodation data for the Adelaide Hills, the Clare Valley and the Barossa. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the wine Regions was 61%, this fell to 44% in 2020, rose to 60% in 2021 and for the first 3 month of 2022 the average is 63%.

VISITOR USE OF ACCOMMODATION

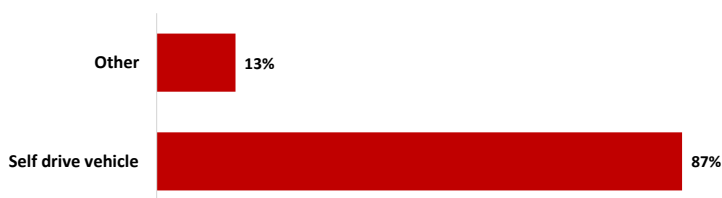
ACCOMMODATION USED IN BAROSSA FOR DOMESTIC VISITORS

- 30 per cent of domestic visitor nights in the Barossa are spent in Hotels/resorts/Motels or motor inns.
- In the last 2 years Caravan and Camping has grown in popularity with 29 per cent of nights accounted for by this group. Pre COVID this was only 9 per cent of visitor nights.



TRANSPORT

TRANSPORT BAROSSA DECEMBER 2021

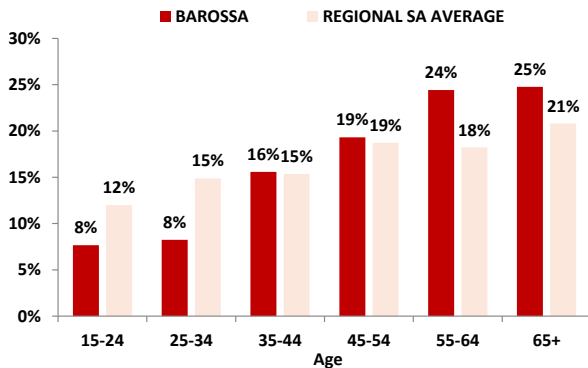


- The main method of transport used on trips to the Barossa was a self drive vehicle.
- 87% of visitors used this type of transport.
- 13% of people used another form of transport, this included planes, helicopters, buses etc.



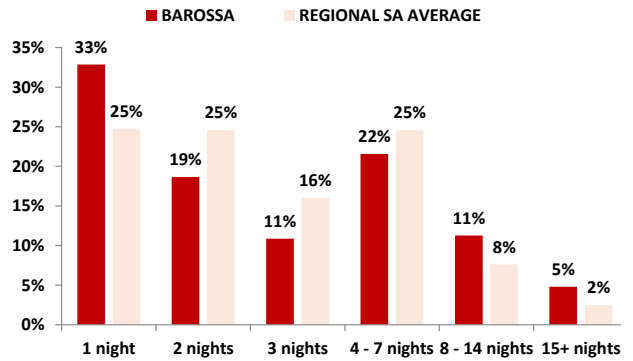
VISITOR PROFILE

AGE OF VISITORS TO BAROSSA



- Overnight domestically there is a peak in the 55+ age group at 49 per cent.
- This is well above the average of 39 per cent for the 55+ age group for regional SA.
- 45+ age groups account for 68 per cent of all visitors.

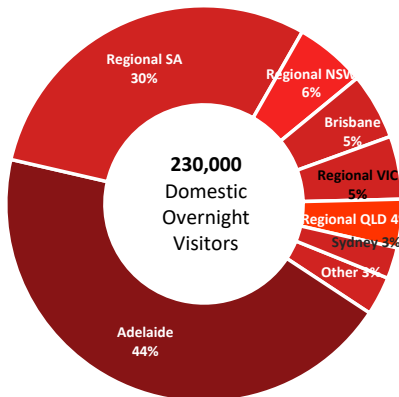
LENGTH OF VISIT TO BAROSSA



- 33 per cent of domestic overnight visitors like to stay 1 night.
- The 16 per cent who stay longer than 8 nights are predominantly staying with friends and relatives or working in the region.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO BAROSSA

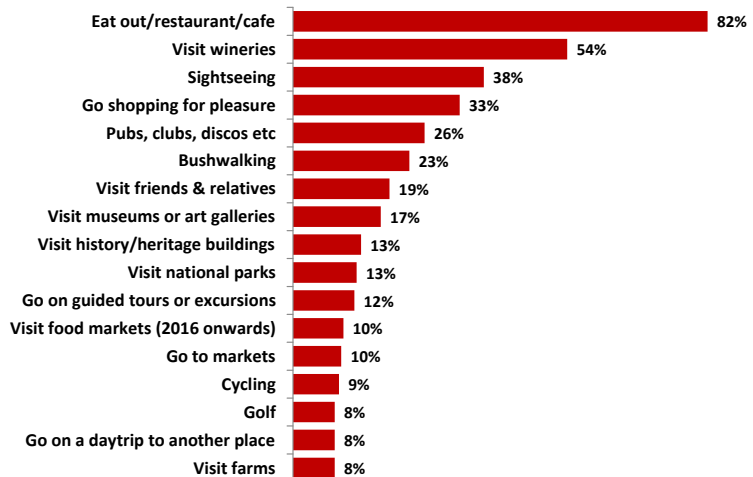


- Queensland at 9 per cent and New South Wales at 8 per cent are the Barossa's biggest interstate overnight domestic markets.
- Regional South Australia contributes 30 per cent of visitors to the Barossa.
- 44 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

- The most popular activities when coming to the Barossa are to eat out at a restaurant or cafe or visit a winery.
- Other popular activities include visiting a friend or relative, bushwalking, visiting museums, art galleries or heritage buildings, national parks, going to markets and seeing the sights.

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN BAROSSA





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 <i>Tourism products</i> - 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
• 5% Accommodation services

Tourism Employment

2019–20 <i>Tourism Industries</i> - 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 the World for promoting the region.

Prepared by the South Australian Tourism Commission, December 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 December 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. 8635455001
Consumer Demand Product Testing Phase 1 - BDA Marketing