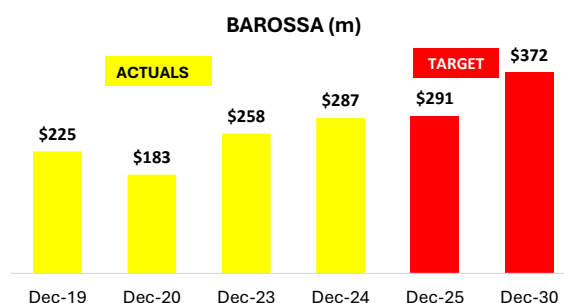




OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2024

- Currently, the Barossa contributes \$287 million to the year end December 2024 South Australian expenditure of \$9.8 billion.
- The Barossa has achieved 99 per cent of their 2025 target of \$291 million and 77 per cent of their 2030 target of \$372 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2024

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	150,000	82,000	232,000	12,000	244,000
% of visits	61%	34%	95%	5%	100%
Share of Regional SA	4%	7%	5%	9%	5%
% Across Regional SA					
	73%	24%	97%	3%	100%
% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international					
Nights	341,000	312,000	653,000	184,000	837,000
% of nights	41%	37%	78%	22%	100%
Share of Regional SA	4%	7%	5%	7%	5%
% Across Regional SA					
	57%	28%	85%	15%	100%
% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international					
Average Length of Stay	2.3	3.8	2.8	15.3	3.4
ALOS Regional SA	2.9	4.2	3.2	19.8	3.7
Total Expenditure					\$287,000,000
Overnight Expenditure	\$81,000,000	\$79,000,000	\$161,000,000	\$11,000,000	\$172,000,000
Day Trip Expenditure					\$115,000,000
Domestic Day Trips					898,000

- The Barossa saw 244,000 overnight visitors for the year end December 2024.
- 61 per cent of overnight visitors were from intrastate, 34 per cent from interstate and 5 per cent from overseas.
- The 150,000 intrastate overnight visitors stayed 341,000 nights with an average length of stay of 2.3 nights.
- There were 82,000 interstate overnight visitors who stayed 312,000 nights with an average length of stay of 3.8 nights.
- The region saw 12,000 international visitors with an average length of stay of 15 nights and spend of \$11 million.
- 898,000 day trips were taken to the Barossa for the year with spend of \$115 million.

ALOS = Average Length of Stay

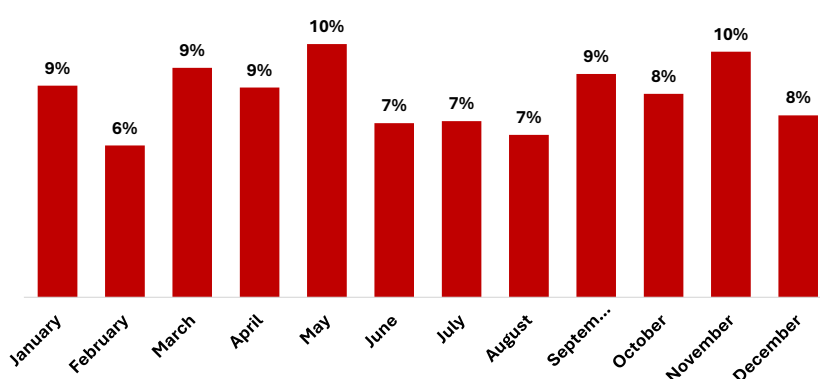


PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	156,000	62,000	9,000	20,000	244,000
% of visits	64%	25%	4%	8%	100%
Share of Regional SA	6%	6%	1%	7%	5%
% Across all regions	53%	24%	19%	7%	100%
Nights	422,000	365,000	17,000	33,000	837,000
% of nights	50%	44%	2%	4%	100%
Share of Regional SA	5%	9%	1%	2%	5%
% Across all regions	49%	25%	17%	9%	100%
Average Length of Stay	2.7	5.9	1.9	1.7	3.4
Expenditure					
Annual Overnight Exp	\$114,000,000	\$42,000,000	\$4,000,000	\$12,000,000	\$172,000,000
Expenditure 2019	\$95,000,000	\$26,000,000	\$20,000,000	\$5,000,000	\$145,000,000
Av spend per night	\$270	\$115	\$235	\$364	\$205
Av spend per night Reg SA	\$190	\$103	\$176	\$218	\$169
Share of Regional SA	3%	5%	1.3%	2%	3%

- 89 per cent of overnight visitors to the Barossa are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$270 per night compared to VFR visitors who spend \$115 per night.
- Leisure overnight visitors spent \$156 million for the year, making up 91 per cent of all overnight expenditure.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO BAROSSA



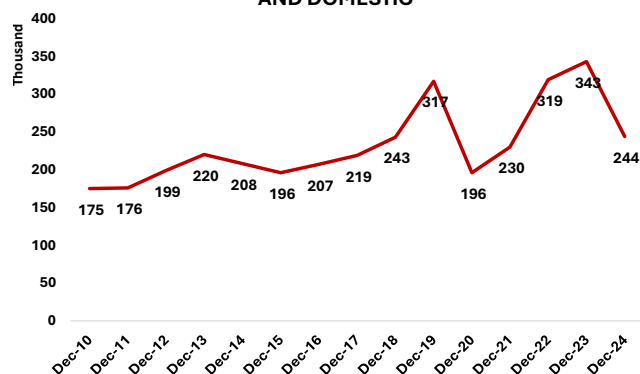
- National Visitor Survey data shows us that May and November are the strongest months for visitation in the Barossa.
- November is a busy month, driven by pleasant spring weather that is warm but not too hot.
- September is strong on the back of the school holidays.

Source: NVS year end December 2024

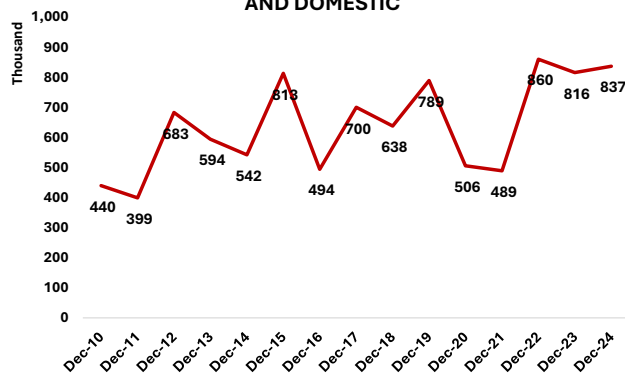


TOTAL OVERNIGHT VISITATION 2010 - 2024

VISITORS BAROSSA 2010 - 2024 - INTERNATIONAL AND DOMESTIC



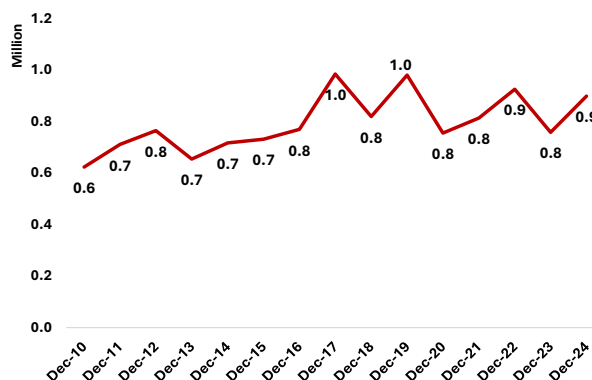
NIGHTS BAROSSA 2010 - 2024 - INTERNATIONAL AND DOMESTIC



TOTAL EXPENDITURE BAROSSA 2010 - 2024 - INTERNATIONAL AND DOMESTIC



DAY TRIPS BAROSSA 2010 - 2024 - 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-24	Change on Dec-19	Dec-24	Change on Dec-19
Adelaide	3,933,000	0%	\$5,800,000,000	29%
Adelaide Hills	200,000	-12%	\$192,000,000	-7%
Barossa	244,000	-23%	\$287,000,000	27%
Clare Valley	222,000	9%	\$162,000,000	38%
Eyre Peninsula	455,000	-22%	\$455,000,000	-17%
Fleurieu Peninsula	727,000	-19%	\$519,000,000	-7%
Flinders Ranges and Outback	699,000	-25%	\$603,000,000	17%
Kangaroo Island	182,000	-12%	\$197,000,000	4%
Limestone Coast	807,000	4%	\$662,000,000	57%
Murray River, Lakes and Coorong	396,000	-12%	\$223,000,000	-20%
Riverland	464,000	8%	\$236,000,000	21%
Yorke Peninsula	620,000	4%	\$358,000,000	49%
Regional SA	4,615,000	-11%	\$3,950,000,000	11%
South Australia	8,034,000	-6%	\$9,800,000,000	21%



BAROSSA TOURISM LISTINGS

Category	# Listings
RESTAURANT	181
ACCOMM	131
ATTRACTION	92
EVENT	92
TOUR	79
GENSERVICE	30
HIRE	6
INFO	3
DESTINFO	3
TRANSPORT	2
JOURNEY	1
Grand Total	620

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

199,000

YEAR END DECEMBER 2024

ACCOMMODATION LEADS

95,000
48%

FOOD & DRINK LEADS

61,000
31%

TOUR LEADS

16,000
8%

*OTHER LEADS

27,000
13%

TOP 5

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

TOP 5

- HARVEST KITCHEN
- FINO SEPPELSFIELD
- MAGGIE BEER'S FARMSHOP
- SEPPELSFIELD ROAD DISTILLERS
- ARTISANS OF BAROSSA

TOP 5

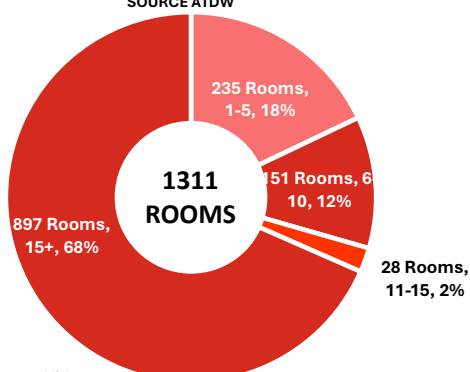
- BAROSSA BALLOON ADVENTURES
- BAROSSA HELICOPTERS EXPERIENCES
- BAROSSA VALLEY BALLOONING
- BAROSSA BOUTIQUE WINE TOURS
- THE FARM EATERY COOKING SCHOOL

* 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



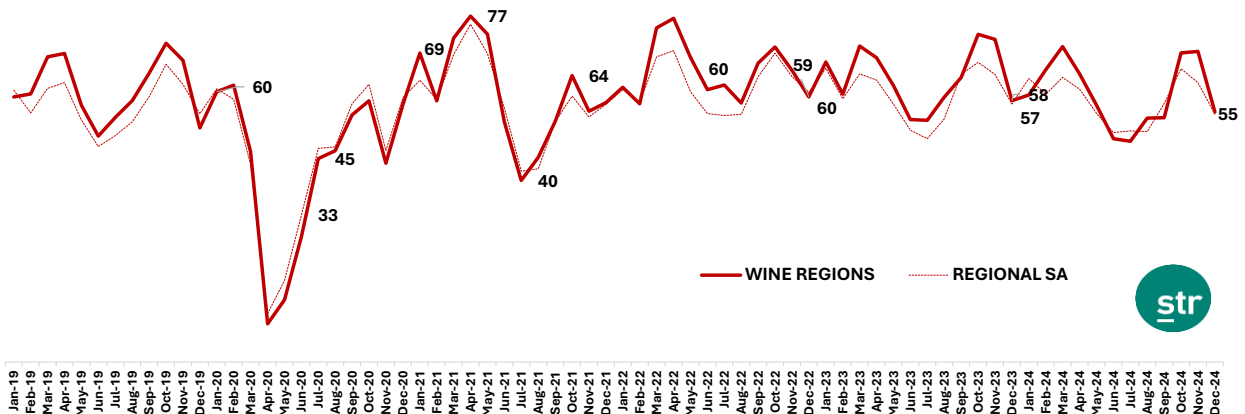
Rooms refers to rooms per establishment

- Currently there are 130 establishments in the Barossa that accommodate guests.
- These 130 establishments account for 1311 rooms across the region.
- 68 per cent of rooms fall into establishment with 15 or more rooms.
- 18 per cent of rooms fall into the 1-5 room establishments.



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY WINE REGIONS

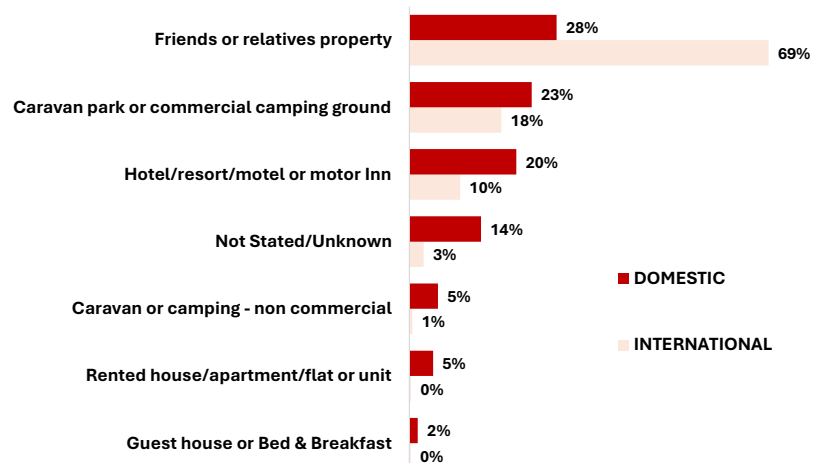


- The wine regions include accommodation data for the Adelaide Hills, the Clare Valley and the Barossa. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Wine Regions was 61%, this fell to 44% in 2020, rose to 65% in 2022, 63% in 2023 and fell in 2024 to 60%.

VISITOR USE OF ACCOMMODATION

- 28 per cent of domestic overnight visitor nights in the Barossa are spent with Friends or Relatives compared to the international market with 69 per cent.
- 28 per cent of domestic nights were spent in Caravan Park or Commercial Camping Ground. This compares to 19 per cent for International visitors.
- 20 per cent of domestic visitors stay in a hotel/resort/motel. This compares to 10 per cent of international visitors who chose the same accommodation.

ACCOMMODATION USED IN BAROSSA FOR DOMESTIC VISITORS



TRANSPORT - DOMESTIC OVERNIGHT

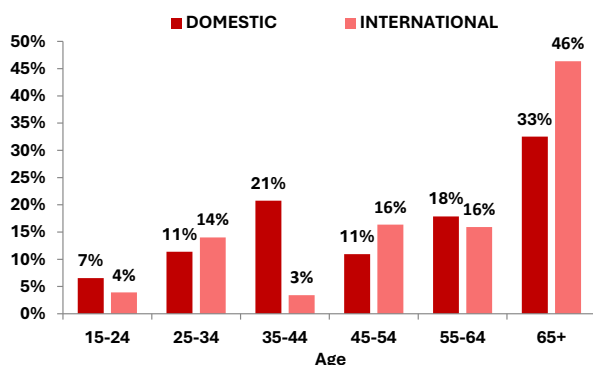


- The main method of transport used on trips to the Barossa was a self drive vehicle.
- 95 per cent of visitors used this type of transport.
- 5 per cent of people used an aircraft to get to the region.



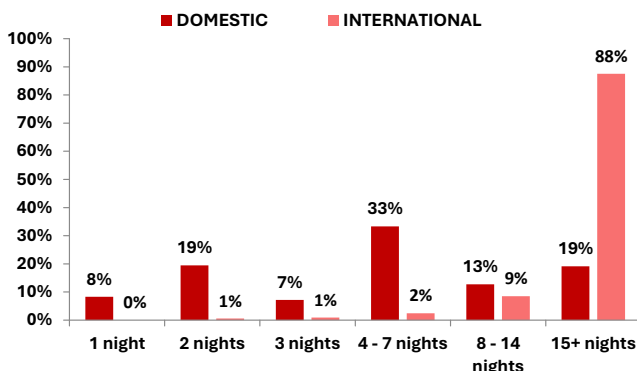
VISITOR PROFILE

AGE OF VISITORS TO BAROSSA



- Overnight domestically peak in the 35-44 and the 65+ age group with 25 per cent and 33 per cent of visits.
- 46% of international visitors are aged 65+.

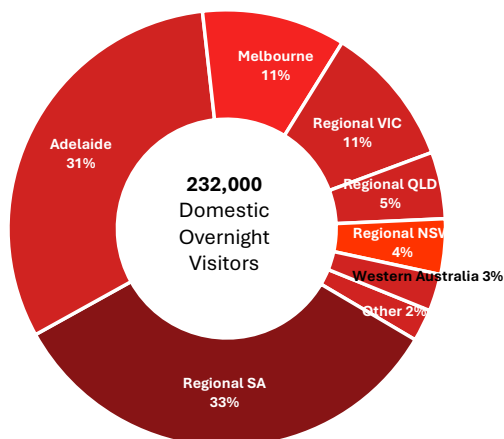
LENGTH OF VISIT TO BAROSSA



- 27 per cent of domestic overnight visitors like to stay 1 to 2 nights.
- 33 per cent of domestic visitors stayed 4-7 nights.
- 88 per cent of international visitors stayed 15+ nights, The majority for the purpose of employment.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO BAROSSA

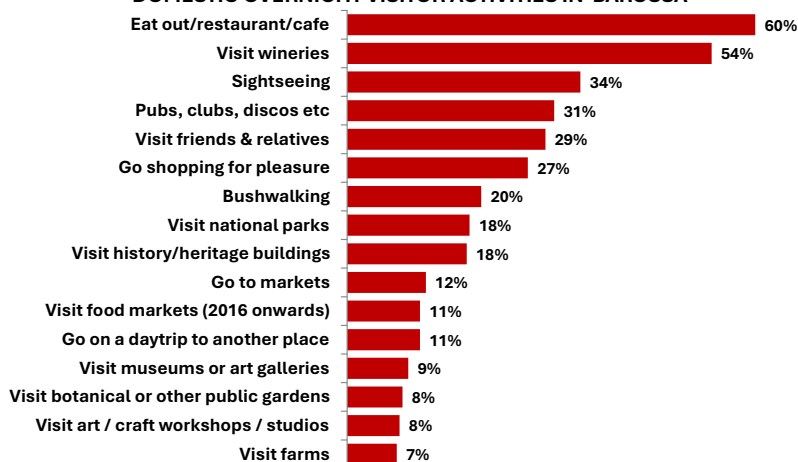


- Victoria at 22 per cent and Queensland at 7 per cent are the Barossa's biggest interstate overnight domestic markets.
- Regional South Australia contributes 33 per cent of visitors to the Adelaide Hills.
- 31 per cent of visitors come from Adelaide.

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 national parks, going to markets and seeing the sights.

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN BAROSSA





REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2023-24, the tourism industry contributed an estimated \$379 million to the Barossa regional economy and directly employed approximately 1,000 people.

Employment

- 1,000 jobs for people employed directly by the tourism industry, 700 indirect jobs and a total employment impact of 1,700 people.

Gross Value Added (GVA)

- \$75 million and \$89 million in direct and indirect tourism GVA, and \$164 million in total tourism GVA.

Gross Regional Product (GRP)

- \$87 million and \$108 million in direct and indirect tourism GRP and \$196 million in total tourism GRP.

Tourism Consumption

2023-24

Tourism products - directly consumed

- Takeaway and restaurant meals 19%
- Fuel (petrol, diesel) 15%
- Long distance passenger transportation 15%
- Shopping (including gifts and souvenirs) 14%
- Accommodation services 9%
- Alcoholic beverages and other beverages 6%
- Food products 6%

Tourism Employment

2023-24

Tourism Industries - 1,000 directly employed

- Cafes, restaurants and takeaway food services 29%
- Retail trade 24%
- Accommodation 22%
- Clubs, pubs, taverns and bars 6%
- Other sports and recreation services 5%
- Road transport and transport equipment rental 4%
- All other industries 3%
- Education and training 3%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2024

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...

- Relaxation seekers
- Those seeking an 'adults only' experience
- Lovers of food and wine

Prepared by the South Australian Tourism Commission, December 2024

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 2024.

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 Intrastate participants (70% metro, 30% regional), — 20 Interstate 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