

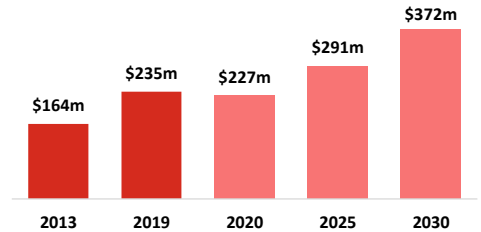
BAROSSA REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE ANNUAL AVERAGE FOR THE 3 YEARS TO THE YEAR END DECEMBER 2019 AND RELATES TO DATA PRIOR TO COVID-19 RESTRICTIONS

- Currently the Barossa contributes \$235 million to the December 2019 South Australian expenditure of \$8.1 billion.
- The Barossa has achieved their 2020 target of \$227 million and 63 per cent of their 2030 target of \$372 million.



Annual Visitor Summary December 2017 - December 2019

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	150,000	96,000	246,000	14,000	260,000
%	61%	39%	95%	5%	100%
Nights	315,000	282,000	597,000	112,000	709,000
%	53%	47%	84%	16%	100%
Average Length of Stay	2	3	2	8	3
Domestic Day Trips					927,000
International Day Trips*					90,000

PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	140,000	85,000	27,000	9,000	260,000
%	54%	33%	10%	3%	100%
Nights	359,000	226,000	81,000	43,000	709,000
%	51%	32%	11%	6%	100%
Average Length of Stay	3	3	3	5	3
Expenditure					
Average Annual Expenditure	\$ 165,000,000	\$ 44,000,000	\$ 15,000,000	\$ 11,000,000	\$ 235,000,000

- 95 per cent of the Barossa visitors are **Domestic** visitors and 5 per cent are **International** visitors.
- **Domestically**, 61 per cent are from within the state compared to 39 per cent from Interstate.
- 87 per cent of visitors to the Barossa are Leisure visitors (Holiday + VFR).

* 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
Food and Drink	166
Accommodation	118
Event	93
Attraction	50
Tour	36
General Services	24
Destination Information	7
Hire	3
Information Services	3
Transport	2
Grand Total	502

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

BAROSSA MEDIA COVERAGE



Source: Advertising Space Rate - 2018

BAROSSA REGIONAL PROFILE



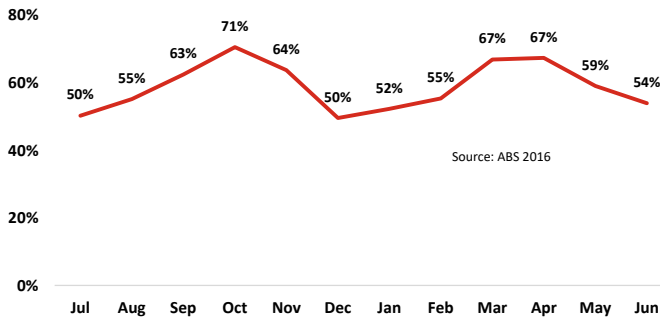
ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms

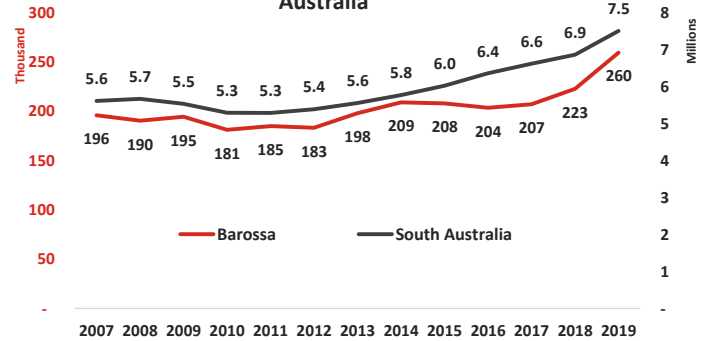
Establishments	9
Rooms	365
Occupancy	59%
Takings	\$14,000,000

- 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

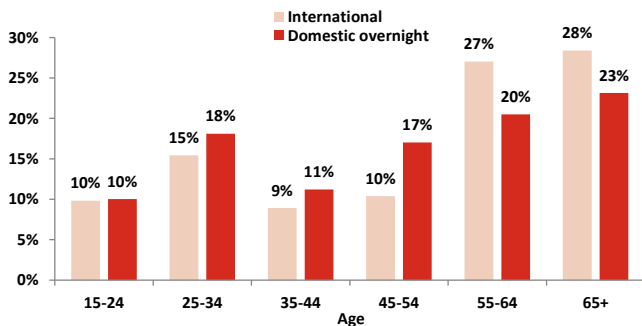


Total Overnight Visitation to Barossa & South Australia

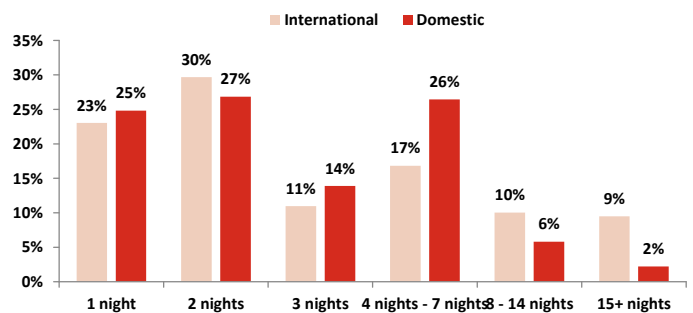


VISITOR PROFILE

Age of Visitors to Barossa



Length of Visit to Barossa



- **International** visitors peak in the 65+ age group at 28 per cent.
- **Domestically** the over 55 age group make up 43 per cent of the market.

- 53 per cent of **International** visitors prefer to stay 1 or 2 night in the Barossa.
- 52 per cent of **Domestic** visitors prefer to stay 1 or 2 nights.
- 4-7 night stays also popular in the region.

BAROSSA REGIONAL PROFILE



DOMESTIC VISITOR PROFILE

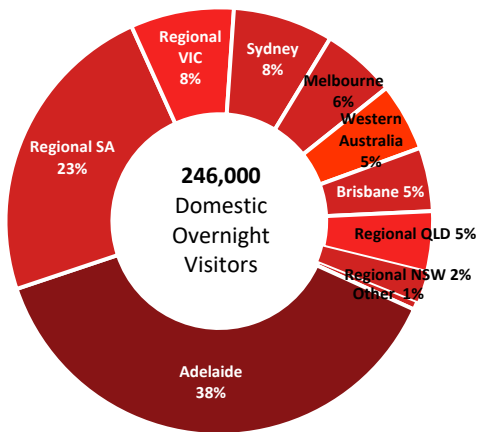
Purpose	Holiday	VFR	Other	Total
Visits	130,000	82,000	35,000	246,000
%	53%	33%	14%	100%
Nights	312,000	187,000	100,000	597,000
%	52%	31%	17%	100%
ALOS	2	2	3	2

INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	9,000	3,000	2,000	14,000
%	64%	21%	14%	100%
Nights	47,000	39,000	25,000	112,000
%	42%	35%	22%	100%
ALOS	5	13	13	8

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Barossa



Origin of International Visitors to Barossa



- New South Wales 10 per cent and Victoria 14 per cent are the Barossa's biggest interstate Markets.
- Regional South Australia contributes 23 per cent of visitors to the Barossa.
- Adelaide visitors contribute 38 per cent of the visitors to the Barossa.
- **Internationally**, Europeans contribute 48 per cent of the visits to the Barossa with the United Kingdom contributing 19 per cent.
- 16 per cent of visitors to the Barossa are from New Zealand.

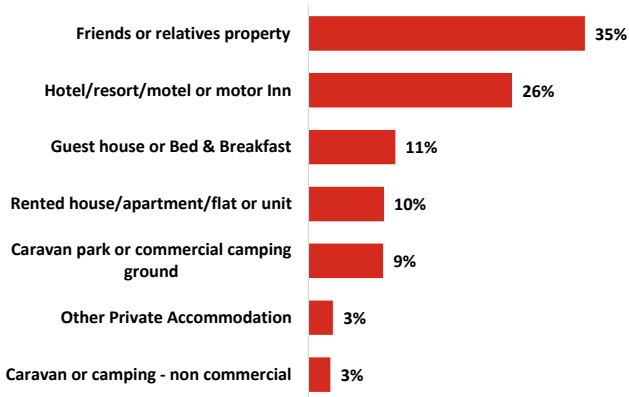
BAROSSA

REGIONAL PROFILE

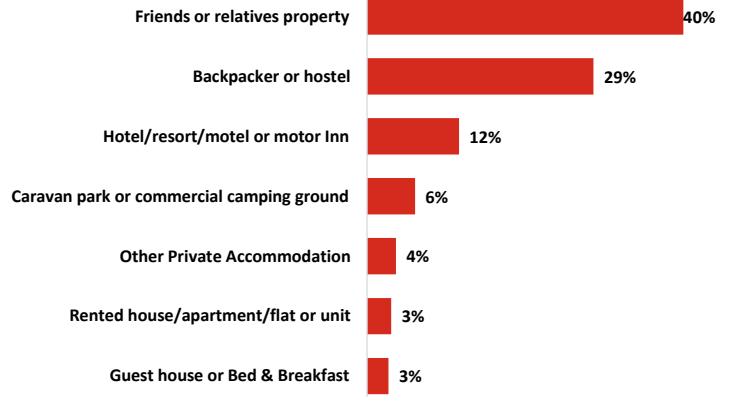


VISITOR USE OF ACCOMMODATION

Accommodation used in Barossa for Domestic Visitors



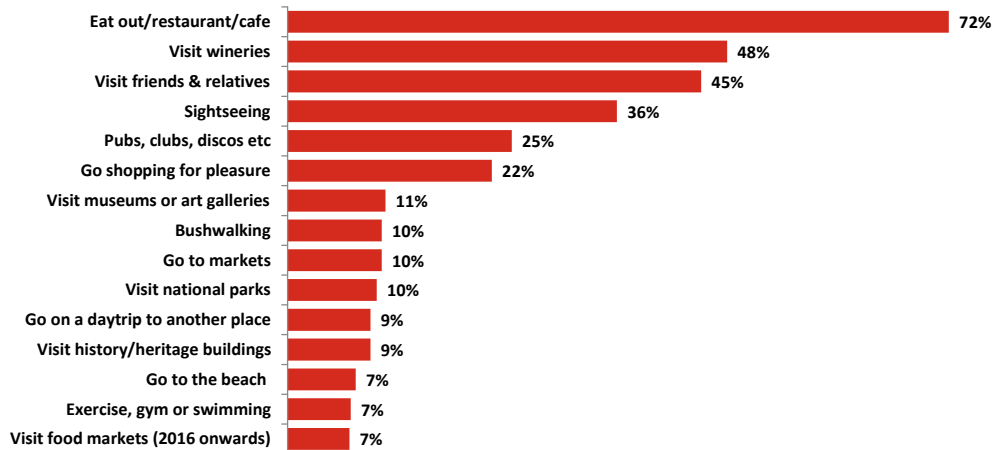
Accommodation used in Barossa for International Visitors



- 61 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 52 per cent of visitors staying with Friends or Relatives or in Hotels and similar accommodation.
- 29 per cent of **International** visitors also like to stay in a Backpacker or hostel.
- Caravan and camping contribute 9 per cent of **Domestic** nights and 6 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 2017-18, the tourism industry contributed an estimated \$235 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.

Tourism output

- \$100 million and \$136 million in direct and indirect tourism output, and \$235 million in total tourism output.

Gross Value Added (GVA)

- \$53 million and \$57 million in direct and indirect tourism GVA, and \$109 million in total tourism GVA.

Gross Regional Product (GRP)

- \$57 million and \$65 million in direct and indirect tourism GRP and \$122 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

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 2019

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 2017 to December 2019.
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. 86 35455001
Consumer Demand Product Testing Phase 1 - BDA Marketing

Tourism Champions Case Study

SEPPELTSFIELD, BAROSSA



ABOUT SEPPELTSFIELD

First established in 1851, Seppeltsfield is a wine, food and art paradise situated on an estate with more than 10 heritage listed buildings.

Seppeltsfield offers a range of experiences for visitors including a cellar door, a range of wine tastings and tours, heritage tours of the Estate, a range of dining options including destination restaurant FINO at Seppeltsfield, and JamFactory at Seppeltsfield.

BUSINESS GROWTH

In 2012 Seppeltsfield created a tourism master plan that guided the business' growth and has allowed for the business to expand to its current offerings.

Visitation to Seppeltsfield has grown by over 60 per cent in the last three years - up from 90,000 to 150,000 visitors per year.

Employment has also grown. In 2009 Seppeltsfield employed less than 20 staff, currently the business employs 56 staff.

Seppeltsfield has won a variety of tourism accolades including national and state wins in the tourism wineries, distilleries or breweries category at the 2016 Australian and South Australian Tourism Awards and Great Wine Capitals Best of Wine Tourism award for international excellence in wine tourism services.

CHALLENGES

The biggest challenge for Seppeltsfield is the continual development of its offerings to ensure visitation numbers continue to grow.

THE FUTURE

Seppeltsfield strives to continually refresh and invest in development and will soon welcome Vasse Virgin, an organic skin care business, to the Seppeltsfield offering.

Seppeltsfield's five-year goal is to increase visitation to 200,000 visitors per year.

COMMUNITY IMPACT

Seppeltsfield aims to engage with the local community as much as possible.

The business hosts a variety of events regularly which not only bring the local community together but also significantly impact the local economy.

Seppeltsfield runs a community membership program that in the past year has seen local Barossa members almost double in numbers from 450 to 890.

"The first port of call whenever starting anything in the tourism industry is the South Australian Tourism Commission. It's where everything begins."

Seppeltsfield's vision is to become a must-see destination, making it something that people want to come back to time and time again."

Nicole Hodgson, Tourism and Events Manager, Seppeltsfield.

SOUTH AUSTRALIAN TOURISM COMMISSION COLLABORATION

Seppeltsfield has attended the Australian Tourism Exchange as well as a number of trade missions to China with the help of the SATC.

The SATC featured Seppeltsfield in their latest global television campaign.

In 2017, Seppeltsfield hosted the Rural Runway event as part of SATC's Adelaide Fashion Festival.

