TheBarossaCouncil

NOTICE OF MEETING

Notice is hereby given that the next ordinary meeting of an Sister Cities Advisory Committee will be held on Thursday 27 June 2024 in the Council Chambers, 43-51 Tanunda Road, Nuriootpa, commencing at 5.30pm.

Jo Moen
DIRECTOR CORPORATE SERVICES & BUSINESS INNOVATION
THE BAROSSA COUNCIL

A G E N D A

Welcome by the Mayor

1. ATTENDANCE RECORD

1.1 Members Present

Apologies

Nil

Not Present

Nil

Leave of Absence

Nil

2. CONFIRMATION OF PREVIOUS MINUTES

2.1 Minutes of previous meetings – for confirmation:

2.1.1 Sister Cities Advisory Committee meeting held on Thursday 28 March 2024 at 5.30pm

2.2 Matters arising from previous minutes

Nil

3. MATTERS FOR INFORMATION

4. PRESENTATION

4.1 Event Management Framework - Presentation by Wayne Hampel, Manager Customer Experience

5. DEBATE REPORT

6. CONFIDENTIAL AGENDA

Nil

7. URGENT OTHER BUSINESS

8. NEXT MEETING

Thursday 25 July 2024 at 5.30pm

9. CLOSURE

MATTERS FOR INFORMATION

3.1 STUDENT EXCHANGE PROGRAM - UPDATE

Author: Executive Business Partner
24/29887

Naomi Saenz, Sister City Program Manager, Grapevine, Texas has contacted Council regarding a future Student Exchange Program.

She has advised that they had a meeting with the Agricultural staff at their High School regarding the 2025 Mission to Barossa Valley. Mission dates are of utmost important for several reasons to include obtaining approval from their school district for travel. *'There is so much excitement about this student exchange'*.

The dates suggested are sometime during the first 2 weeks in April of 2025. These work best for their students because of their 2025 Spring Break (March), finals and college prep exams.

We are still waiting for additional information and confirmation to provide the committee for actioning. The Committee will be briefed once more information is provided.

ATTACHMENTS

Nil

SUPPORTING REFERENCES

Nil

MATTERS FOR INFORMATION

3.2 COMMITTEE MEMBER VISIT TO GRAPEVINE - ITINERARY AND OVERVIEW

Author: Executive Business Partner
24/34662

Committee Member, Ingrid Day planned a personal holiday overseas and was able to be in Grapevine, Texas for one day in early June 2024.

Naomi has said, '*We are thrilled to have you visit Grapevine and just as happy to know you are a Sister City committee member!' We promise to showcase our amazing community while sharing Sister City Program information.*

Naomi Saenz, the Sister City Program Manager arranged for Ingrid to be hosted as a delegate for the day, with the following itinerary planned:

Draft Schedule:
June 12, 2024

9:00 am	Pick up.
9:15 am	Tour of Grapevine Main Station/Harvest Hall Tour Grand/Tower Galleries (Council Office*) and meet Convention & Visitors Bureau Staff/Executive Director, Paul W. McCallum; Driving tour of Settlement to City Museums, Sister City Friendship Hall, Nash Farm and school campuses (students are on summer holiday)
11:45 am	Rotary Lunch meeting at Palace Arts Centre - Various City Council Members and School officials also attend Rotary.
1:15-3:00 pm	Walking Tour of historic Main Street: Bruce and Rene Herndon, Sister City Co-Chairs for Barossa Valley, to meet during the tour at the International Wine Competition (observation only).
3:00 pm	Driving tour to: Grapevine Lake, Golf courses, Grapevine Mills (short stops along the way)
6:00 pm	Drop off.

Ingrid Day will provide the Committee with a verbal update on her visit.

ATTACHMENTS

Nil

SUPPORTING REFERENCES

Nil

MATTERS FOR INFORMATION

3.3 BAROSSA VINTAGE FESTIVAL 2025 COMMITTEE UPDATE - VERBAL UPDATE FROM SCOTT HAZELDINE

Author: Executive Business Partner
24/47100

A verbal update from CEO, Barossa Australia, Scott Hazeldine on the Barossa Vintage Festival 2025 Committee.

ATTACHMENTS

Nil

SUPPORTING REFERENCES

Nil

MATTERS FOR INFORMATION

3.4 GRAPEVINE, TEXAS SALES MISSION TO AUSTRALIA WITH A VISIT TO THE BAROSSA -1 & 2 AUGUST 2024

Author: Executive Business Partner
24/47104

P. W. McCallum, Executive Director of The Grapevine Convention and Visitors Bureau and Heather Egan, Director of International Leisure Sales, will be on a sales mission to Australia.

Their sales mission ends on July 31 in Adelaide and they will be making a short visit to the Barossa on 1st and 2nd August 2024.

More details will be provided to the Committee when received.

ATTACHMENTS

Nil

SUPPORTING REFERENCES

Nil

MATTERS FOR INFORMATION

3.5 BAROSSA AUSTRALIA - VERBAL UPDATE ON ATTENDANCE AT GRAPEFEST 2024

Author: Executive Business Partner
24/47308

CEO Barossa Australia, Scott Hazeldine will give the Committee a verbal update on the wine sector attendance at 'Grapefest' 2024 in Grapevine, Texas.

ATTACHMENTS

Nil

SUPPORTING REFERENCES

Nil

MATTERS FOR INFORMATION

3.6 KEY FINDINGS FROM DESTINATION MARKETING PLAN RESEARCH

Author: Executive Business Partner
24/47338

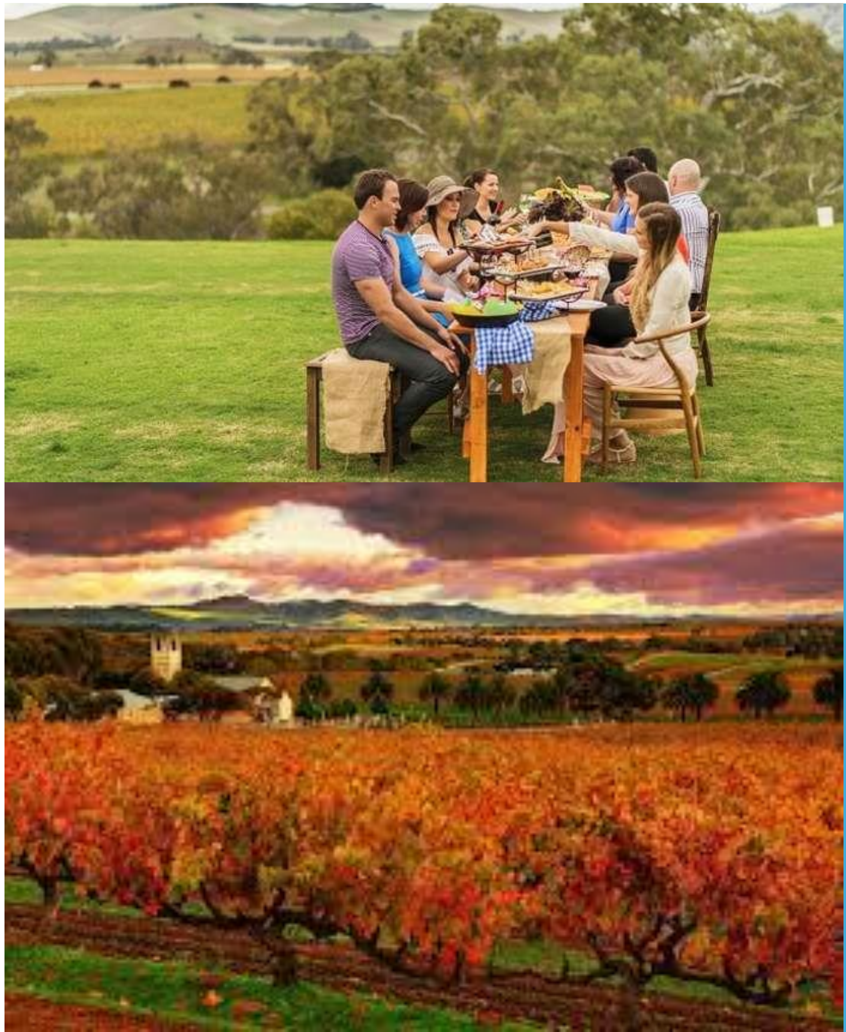
Manager Tourism Services, Jo Seabrook has provided data as per Attachment 1, from a research paper that was developed - Visitor Research Findings for a Barossa Region Destination Marketing Plan, and will discuss the data during the Committee Meeting.

ATTACHMENTS

Attachment 1 Barossa Australia - JMP Consultants Consumer Research Survey - Key Findings ⇩

SUPPORTING REFERENCES

Nil



jmp CONSULTANTS
EVIDENCE-BASED SOLUTIONS

BAROSSA AUSTRALIA

VISITOR RESEARCH FOR A BAROSSA REGION DESTINATION MARKETING PLAN

KEY FINDINGS

JULY 2022

Index

Attachment 1

Background & Methodology

Research approach and methodology

This research project was completed via an online survey which used the online research panel provider Dynata to access respondents.

To complete the survey participants had to:

- Be over 18 years of age
- Have a household income of $100,000 or higher
- Live outside Barossa
- Be likely to take a domestic holiday in the next 18 months
- Consider South Australia as a potential leisure destination

The research period commenced on 10 June, 2022 and concluded on 22 June, 2022.

Non-probability sample

All research has limitations. For this project, the limitation is that it is from an online panel which is a non-probability sample.

Representation of the market

The research is designed to represent the market as described in the requirements shown at the left of this page.

Respondent Sample

The total sample size was 1,159. This gives a confidence level of ± 2.8% at the 95% confidence level.

Respondents were from the three main source markets for visitors to the Barossa, namely:

- South Australia
- NSW
- Victoria

A state representative (i.e. capital city v. regional residents) sample of 385 respondents from each State completed the survey. This gives a confidence level of ± 4.9% at the 95% confidence level.

Analysis used and colours in tables

Scales

In the report some questions have been asked as a 0 to 10 scale. This has been reported in two ways:

- Combining 0 to 6 as ‘low’, 7 and 8 as ‘medium’ and 9 and 10 as ‘high’
- As an index – mean score from 0 to 100

Colours in tables

Tables have colours to show statistical significance.

- Blue – above average
- Black – average
- Red - below average

The statistical test applied depends on the data. Grids will compare the data in each row.

Device used to complete survey	%
COMPUTER (above average)	55
MOBILE (below average)	45

Rounding

Please note that all tables may not add up to 100%, either due to rounding, or if respondents were able to select more than one response.

Attachment 1

Executive Summary

Attachment 1

Travel to/in South Australia

- 56% of NSW and Victorian residents have travelled to SA for leisure purposes in the past 5 years. However, only 24% of those visitors travelled to the Barossa.
- An overwhelming 96% of South Australians have travelled for an overnight leisure trip (more than 40 kms from home) in SA during the past 5 years.
- Only 14% of respondents would not consider SA as a potential travel destination and these were screened out of the survey.
- Of those who were interested, 70% were either extremely interested (33%) or very interested (37%) in SA as a leisure travel destination.
- In excess of 80% of South Australians were either extremely interested or very interested in SA as a leisure travel destination.
- Regional Victorian residents were most likely (69%) to be extremely interested or very interested in SA as a potential leisure travel destination, followed by Sydney (68%) and Regional NSW residents (65%). Melbourne residents ranked the lowest, but still came in at 62%.

Consumer Travel Preferences

- When travelling for leisure, most Australians from SA, NSW and Victoria travel with their partner or spouse (60%) or with friends (30%). However, families with either school-aged children (24%) or pre-school children (18%) are still two other key groups to consider.
- The most preferred times of year for leisure travel was over the summer holiday period (December / January) or during the Spring. However, 25% of respondents have no real time of year preference **OR** prefer to travel outside of school holidays.
- The two most common forms of leisure booking are done either directly online with the tourism business on their website (including airline and accommodation components) at 60%, or via an online booking with a travel aggregator.
- On average respondents chose 2.44 booking services. Almost half (48%) use travel aggregation websites (expedia, wotif), followed by AirBnB (37%). Just over one-third (35%) book directly through an airline, while over one-quarter (26%) also book directly with an accommodation provider.
- The preferred duration for domestic travel is 4-7 days (29%) closely followed by 7-10 days (27%). 23% prefer 3-4 days. Interstate capital city residents prefer trips of 3-10 days duration, while regional residents prefer slightly longer trips of 4-14 day trips.
- The Top 5 preferred types of accommodation were AirBnB / Stayz style short term accommodation (48%), followed by Standard Hotels (46%) and then Serviced Apartments (41%). Just under one third of respondents prefer Luxury Accommodation (30%) or to stay with friends or family (30%).
- Google is the primary source of leisure travel information for all respondents, followed by friends and family (even more by SA residents) and then TripAdvisor. State and Region tourism, plus travel aggregator websites, are also common. However, interstate residents will look to a Region's website more than a State tourism website.

Attachment 1

Travel Motivations, Barriers & Attitudes

- In terms of consumer attitudes and preferences towards leisure travel, the Top 2 factors are that they see travel as a chance to relax and unwind, and also to try new things. Other common preferences are unique places and activities, travelling independently, getting back to nature and being outdoors. Having a local's experience is also seen as important.
- Using Principal Components Analysis, Australian leisure travellers can be broken into four components or groups. They are not mutually exclusive but do have a strong correlation:
    - Back to nature - 25%
    - Luxury travellers – 15%
    - New things and unique experiences – 15%
    - Unplanned – 7%
- Respondents outlined their Top 5 considerations when booking an Australian holiday.
    1. Value for money
    2. Good food and wine
    3. Quality accommodation
    4. A range of tourist attractions
    5. Nature / Natural Beauty
- Australians are planning to travel both domestically and/or internationally in the next 18 months. Over half (56%) are planning to visit an interstate regional area - Regional Victoria (73%) Regional NSW (68%), Melbourne (58%) and Sydney (54%). Only 2% are not planning to travel at all.
- Beach and coastal leisure destinations were rated #1 by all respondents. However, Food and Wine regions were ranked overall #3, but #2, by regional NSW and regional Victorian residents. Capital cities ranked #2 overall, with Nature based destinations and Historic or Heritage destinations making up the Top 5.

Travel Motivations, Barriers & Attitudes

- The key motivation for an Australian holiday is simply ‘really needing a holiday’ (56%). However, the shadow of COVID-19 still remains, with 48% feeling safer in Australia should they fall ill, and this percentage may well increase given the recent surge in case numbers. Respondents also stated that they were keen to get out now that COVID-19 restrictions were easing, and many were also very keen to visit family and friends.
- High cost is the main barrier to domestic leisure travel (38%) at present. This is followed by the ability to afford to travel (20%) and the concern that COVID-19 restrictions could be implemented at any time (19%). Again, this may now have increased with the latest surge in COVID-19 cases.
- Despite the residual concern about COVID-19 travel restrictions, 72% of respondents are considering travelling domestically, either ‘actively’ (38%) or ‘currently considering’ (34%).
- Most Australians are in the ‘consideration stage’ for their next domestic holiday. Just under half (44%) are ‘currently thinking’ about their holiday and 24% are ‘actively planning’ their next holiday. Just over one-in-five (21%) have already booked their domestic holiday.
- Most Australians plan to travel soon on a domestic holiday, with 66% planning to travel in the next 6 months.
- Research participants were asked to rank their top 5 activities while on holiday. Other than family activities (#1) and beach activities (#2) and socialising (#4) key ones in the Top 10 for the Barossa include:
  - Golfing (#3)
  - Outdoor and nature (#5)
  - Cycling (#6)
  - Sightseeing (#7)
  - Dining out (#8)
  - Mountain biking (#9)
  - Wineries, wine tasing, tours (#10)

Attachment 1

Working from Home & "Workcations"

- Sixty-percent (60%) of those employed full time, part time or casually worked some, or all days from home due to COVID-19. This was rate was significantly higher in both Sydney (71%) and Melbourne (67%).
- Of the group that worked at home (i.e. 60% of all employed), 78% are currently working some or all days from home. This is higher for Melbourne (84%) and lower for 'elsewhere in South Australia' (59%).
- Of the 78% of employed people currently working from home, they are on average, working 3.1 days per week at home. 23% are working every day at home.
- Of those currently working from home, over half (55%) would consider a 'Workcation' where they work remotely while also travelling for leisure.

Barossa Travelling Experience

- Over half (53%) of respondents have travelled to the Barossa for an overnight leisure trip. Residents of South Australia are more likely to have travelled to the Barossa which is not surprising, however, just over one third of Sydney residents have visited since 2020. By comparison, almost 40% of Melbourne residents have not visited since before 2015.
- In terms of visitor satisfaction, 44% of visitors rated their stay a 9 or 10 (“high”), 46% said 7 or 8 (“medium”), while 10% rated their stay between 0 and 6 (‘low”). Sydney residents were less likely to rate their visit as ‘high’ (35%) and also more likely to rate their visit as low’ (16%).
- Barossa visitors who had a positive experience (a rating of 7 - 10) were asked why they gave that rating. There are many positive attributes for the Barossa, but wine and food play a strong role in these. Very few visitors undertook activities like cycling, walking, running or golf. However, this could potentially be due to the fact that they were unaware they could undertake activities such as this. The Top 5 attributes were as follows:
    - The wineries and wine are fantastic
    - Great cafes and restaurants
    - Easy to get around
    - Great service at a winery or wineries
    - Friendliness of locals
- Of the 10% of visitors who rated their experience as 0 - 6 (low), the three key reasons for their dissatisfaction were:
    - There are wineries and restaurants but not much else
    - Everything was expensive
    - Nothing much to do
- The overall Net Promoter Score (NPS) for all visitors was 38. When examined by place of residence, SA residents gave the Barossa an NPS over 50, while Sydney residents (25) and Regional Victorians (24) were much lower.

Barossa Travelling Experience

- Australians who have visited the Barossa are aware that the region is about much more than wine. While 74% identify wine, 69% are aware of food experiences, 59% 'food and wine', 43% markets, and 41% walking and hiking trails. However, 37% still think that Hahndorf is located in the Barossa. There is also much lower overall awareness of State and National parks (26%), cycling (26%), art galleries (26%), golf (24%), music concerts (17%) and mountain biking (15%).
- South Australians are much more likely to be aware of some activities such as hiking, cycling and golfing, but are even less aware than interstate residents of State and National Parks, mountain biking and festivals.
- Just under one-third of respondents (31%) rated the Barossa's leisure destination appeal as high (9 or 10), 35% as medium (7 or 8) and 34% as low (0-6). Past visitors are also far more likely to rate appeal as 'high' (40%).
- Key barriers to visiting the Barossa are:
  - Preference for coastal destinations – 31%
  - Want to visit other regions first – 26%
  - 'Only has wineries' – 24%
  - Don't know much about Barossa – 20%
- Residents of Sydney are more likely to 'not know much about' the Barossa (30%).
- Those who rated their interest as 'high' or 'medium' were asked what they found attractive about the Barossa. Wineries and wine (59%) was rated the highest followed by cafes and restaurants (56%). The combined food and wine experience is therefore highly compelling. Other attractive elements are being 'close to Adelaide' (53%), easy to get around (45%) and the overall enjoyment of exploring the destination (40%).
- Respondents feel that the Barossa would appeal to couples of all ages and groups of adult friends. However, they do not see the Barossa as a destination for families with kids of any age. It is also not seen as an 'active' destination.
- Respondents were also asked to rate nine regional destinations on a 0 to 10 scale, again using a scale of high (9 or 10), medium (7 or 8) and low (0-6) interest. Of the nine destinations, Barossa has the highest appeal followed closely by Margaret River and the Adelaide Hills. With the only exception of Adelaide residents (#1 was Adelaide Hills), the Barossa has the highest appeal amongst all other destinations across all respondents.

Product & Experience Testing

- Four existing and new event products and experiences were tested with respondents to see if they resonate, and also if respondents would travel to the Barossa to attend them.
- The four existing and new event products and experiences which were tested were as follows:
  - Blockbuster Gallery Event - similar to the Elvis and Marilyn Munroe exhibitions in Bendigo
  - The Barossa Contemporary Festival
  - The Barossa Vintage Festival
  - Mass Participation events of different genres like running and cycling
- Comparison by place of residence shows that Sydney residents are more likely to travel to all of the above events compared to other residents, while residents of South Australia are less likely overall to travel to any of the four events.
- Each of the events tested appear to be quite niche in their audiences and appeal. As such, the overall interest may not be that high for some, each of them is still likely to find a very passionate and highly supportive following. The key will be to ensure that each event can effectively target the consumers who they will likely appeal to.

Attachment 1

Key Findings & Tourism Trends

Key Findings & Tourism Trends

Interest in South Australia and the Barossa as a Leisure Destination

- SA is rated highly as a potential leisure travel destination by consumers from key visitor source markets.
- Barossa still holds primacy from a regional wine and food brand perspective across all of its key visitor source markets – but your nearby competitors have significantly upped their game – e.g. Adelaide Hills now rated more highly than Barossa by Adelaide residents.
- But what will bring visitors beyond wine and food?

Key Impacts of COVID-19 & Emerging Tourism Trends

- There is large scale pent-up demand to travel amongst Australians…………particularly for domestic travel.
- There is a very slow recovery in outbound international travel, particularly by older, wealthier Australians.
- Australians have built up large amounts of leave and savings during COVID-19……..however, increasing cost of living will likely impact on this.
- COVID-19 also led to Australians craving open spaces, increased remoteness and getting back to nature. This has led to more regional touring, road trips and caravanning and large numbers of new caravan and campervan owners………people wish to avoid dense crowded spaces. This suits regional destinations like Barossa perfectly.
- COVID-19 is still playing a major part in Australian's travel choices….some reluctance to travel and particularly overseas. The latest variants and increasing case numbers are likely to further impact Australian's travel choices over the short to medium term…….Advantage Barossa.
- Getting back to nature is a key trend to emphasise. All of the TRA data over the last 2 years points to a large increase in Australians undertaking this activity, and visitation to State and National Parks has risen markedly…but most people are unaware of this in the Barossa.
- China has hit the wine industry hard….therefore there is a need to pivot to other revenue sources……tourism should be seen as a key opportunity.

So what does this all mean for the Barossa and how can you tap into these trends?

Key Findings & Tourism Trends

Is the Barossa viewed as being too traditional and not exciting enough?

- Myth – The Barossa is not seen as old and stuffy – but it definitely does skew towards older demographics.

Is the Barossa really only known for wine and food?

- On the whole this is the consumer perception.

Has COVID-19 benefitted regional locations like the Barossa?

- Most certainly. Increased visitors, but mainly captive SA residents. But the key trend towards remoteness, clear air, nature, few crowds are here.

What is the key thing driving Australians at the moment?

- They just really need a holiday. Given most of them don't want to go overseas, the Barossa has an ideal opportunity that won't last forever. Need to act quickly to be able to take advantage of this. Aussies are actively looking to travel in the next 2-12 months.

What are the key attributes to reinforce about the Barossa?

- Value for money. Good food and wine. Quality accommodation. A range of tourist attractions. Nature. Plus emphasise the following: A great place to relax unwind and try new and unique things. You will be able to get back to nature, embrace the outdoors and live like a local. It is COVID-safe.

What are the three key points that the Barossa needs to be address now?

- There are ***wineries and restaurants but not much else***, Everything is ***expensive*** and that there ***Nothing else much to do.***

What are some unique visitor segments that the Barossa can potentially target?

- Visitors who wish to: Get Back to Nature; Luxury Travellers. New and Unique Experience Seekers. Unplanned travellers.

When do we look to target visitors to come?

- This Spring and over the summer holidays. However, outside school holidays and anytime of year are still favoured by 25%.

Key Findings & Tourism Trends

- **COVID-19 is still a key factor** for many Australians when considering travelling, and this may soon increase given the spiking case numbers. It can be somewhat overcome by reinforcing the key attributes of the Barossa – outdoors, remote, clean air, few crowds, etc. as well reinforcing safety protocols and reassuring potential visitors.
- **The less people know about a destination, the lower the likelihood of appeal**….hence why far more SA residents are extremely interested or very interested in SA as a leisure travel destination. The interstate markets needs to be educated, particularly Sydneysiders.
- **Barossa needs to be about more than just wine and food –** although you should not shy away from it being the thing that sets you apart and it is still important for many consumers. To grow market share you will need to enable consumers to understand more about what the Barossa has to offer. What else is in your sweet spot? Perhaps combining food/wine with other options and activities – walking, hiking, cycling. mountain biking, golf………..heritage, history, etc. Food and wine are central but what other hooks can you provide to make the Barossa a more compelling proposition across a broader range of potential visitors?
- **Barossa is not seen as an active destination**. When getting back to nature and embracing the outdoors are two key current tourism trends, this needs to be addressed. Not even SA residents are aware of some of the key activities that the Barossa offers such as State and National parks and mountain biking. The vast majority of interstate residents are also unaware that the Barossa has wonderful State and National Parks, hiking and walking trails, great golf courses, cycle paths for serious, recreational and family cycling outings, along with excellent mountain bike trails.
- **The sweet spot for future visitor types to the Barossa are couples and groups of friends –** This is not new, but this is who the Barossa resonates most with, and this is a market that is looking to escape from the big cities and who have plenty of money to spend. This does not rule out families but you need to provide families with options and activities that mean they do not feel guilty partaking in food and wine activities (e.g. family bike ride around the wineries).
- **Barossa relies heavily on visitors aged 55+** ……but given the impacts of COVID-19 which are likely to continue and perhaps escalate in the short term means that a lot of travellers (particularly older ones) are very reluctant to go overseas……so need to give these potential visitors a very good reason to come to the Barossa.

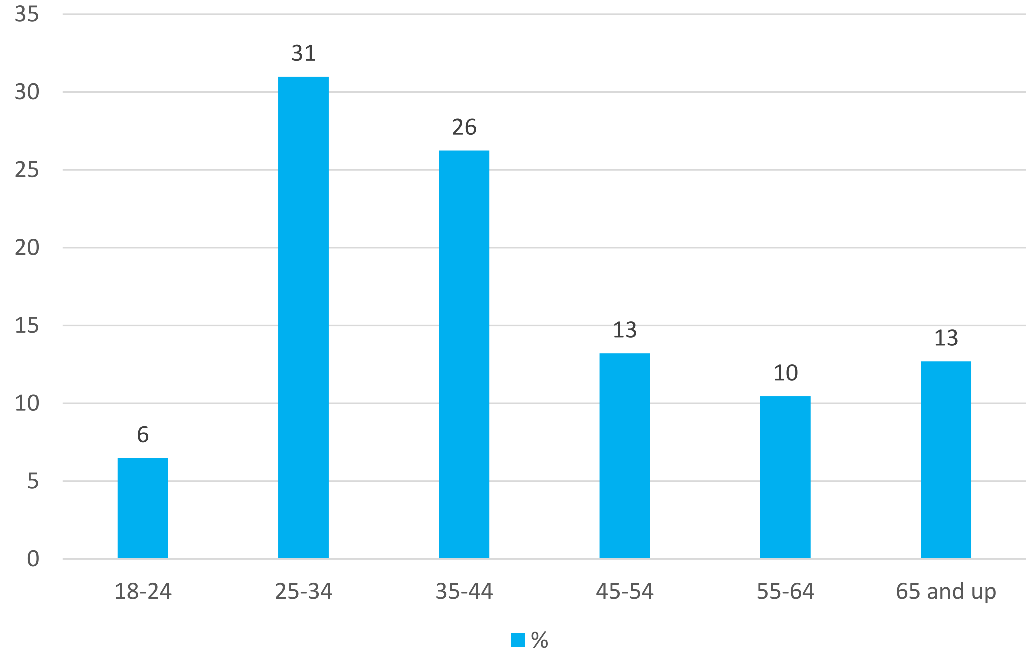
Key Findings & Tourism Trends

- **Most people get their travel information** from Google and other search engines and then recommendations from family and friends. Interstate residents will also look to a Region's website more than a State tourism website….make it easy for them to plan given their key interest areas.
- **Midweek seasonality is a major challenge –** This a key issue for most regional destinations but there are some potential (partial) solutions. The vast number of new caravan and campervan owners who are looking to undertake regional touring which has seen the good old fashioned Aussie road trip back in vogue….other research also suggests higher-end glamping / cabins / resorts are attracting a higher yielding audience. Older, wealthy Australians who are reluctant to travel overseas (not just the grey nomads) and all those predominantly younger workers who can work from anywhere……come and work in the Barossa for a week, month…….
- **Workcationers** just need reliable internet and a destination that appeals. Key targets are Adelaide, Melbourne and Sydney residents.
- **Barossa has the types of accommodation visitors want to stay in.** Need to tell them that they are all available here. Short term rentals, standard hotels, serviced apartments and luxury accommodation.
- **We know how long interstate visitors ideally wish to travel for**. Build potential itinerary options for them based on their wants and needs. Wine. Food. Shopping and Markets. Active. Nature, History. Events & Festivals. Help educate and guide them and increase length of stay.
- **Encourage younger / different audiences to diversify visitor profile.** Hunter Valley….amazing job working with music promoters and festivals amongst the wineries. Drives overnight visitation but also proves to be a key sampling opportunity to encourage repeat visitation.
- **Events should be seen in the same light.** They are an ideal mechanism to drive passionate visitors to come and sample a destination they may not have otherwise. I would look to pursue something like a Barossa Classic cycling event– perhaps over the Tour De France period and over 2 weekends. Work with SATC to identify and support events like this as well as mass participation events in your key USP areas – cycling, hiking/trail running, mountain biking and golf. While the blockbuster gallery event support was not overwhelming, for passionate cultural supporters it would be a beacon. Plus it would likely go for 2-3 months, filling up mid-week occupancy and driving on-going visitation – not just for one weekend. Sydney appears to be where events resonate best.

Demographics

Age

Those under 18 years were screened out from the survey.

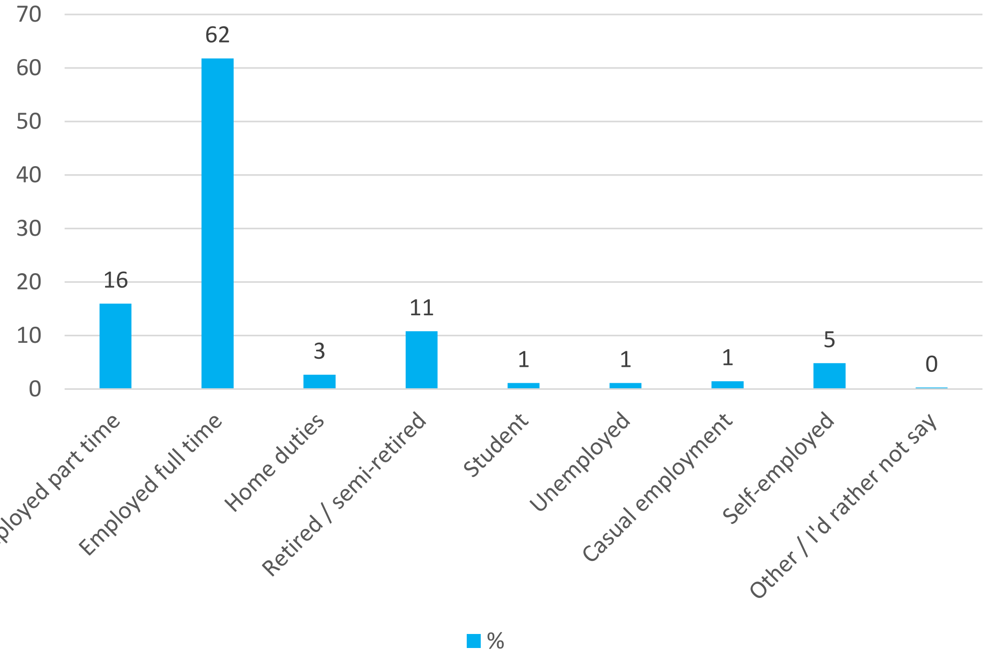


Base: all research participants *n*=1,159

Q1 What is your age?

Employment status

Almost two-thirds (62%) of respondents are employed full time.



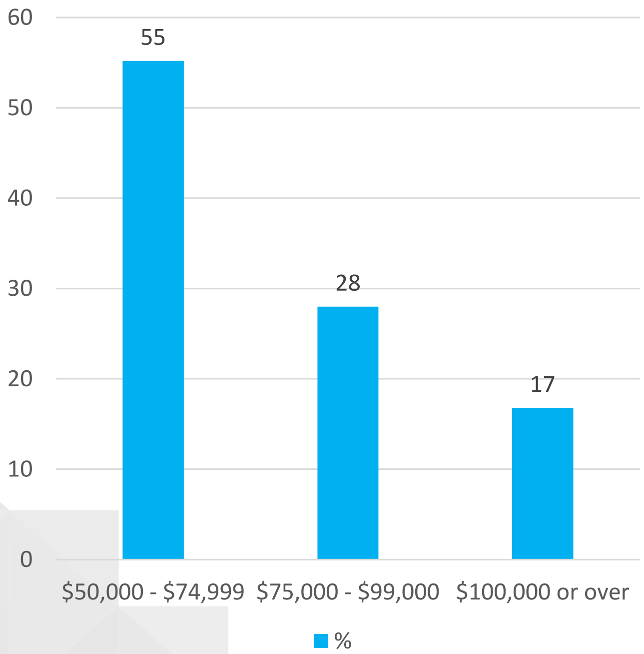
Base: all research participants *n*=1,159

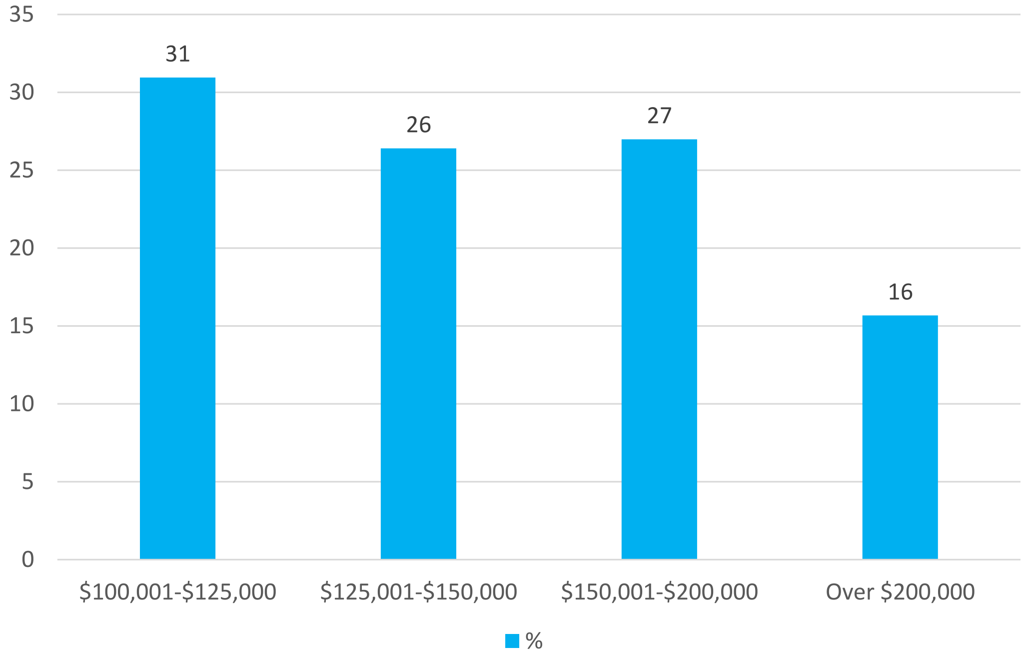
Q15 Which of the following best describes your current employment situation?

Attachment 1

Household income

Availably to superannuation/investments for retirees
Household income for those employed





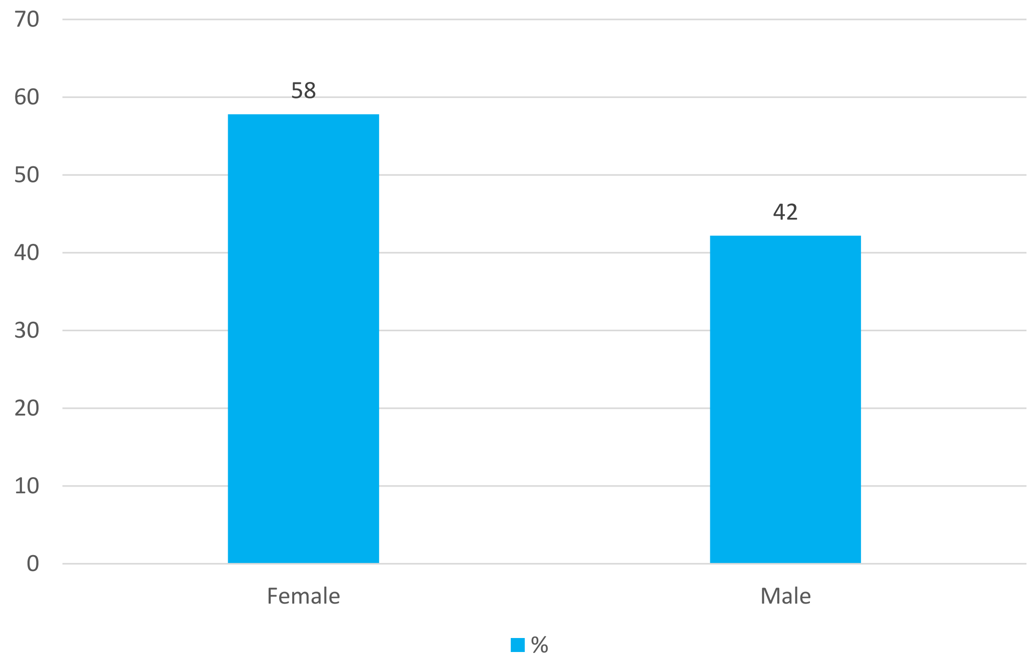
Base: all research participants *n*=1,159

Q2 Approximately how much income do you receive from your superannuation and/or investments each year? n=

Q2 What is your total annual household income before tax? n=1,034

Gender

There are slightly more women than men in the sample.

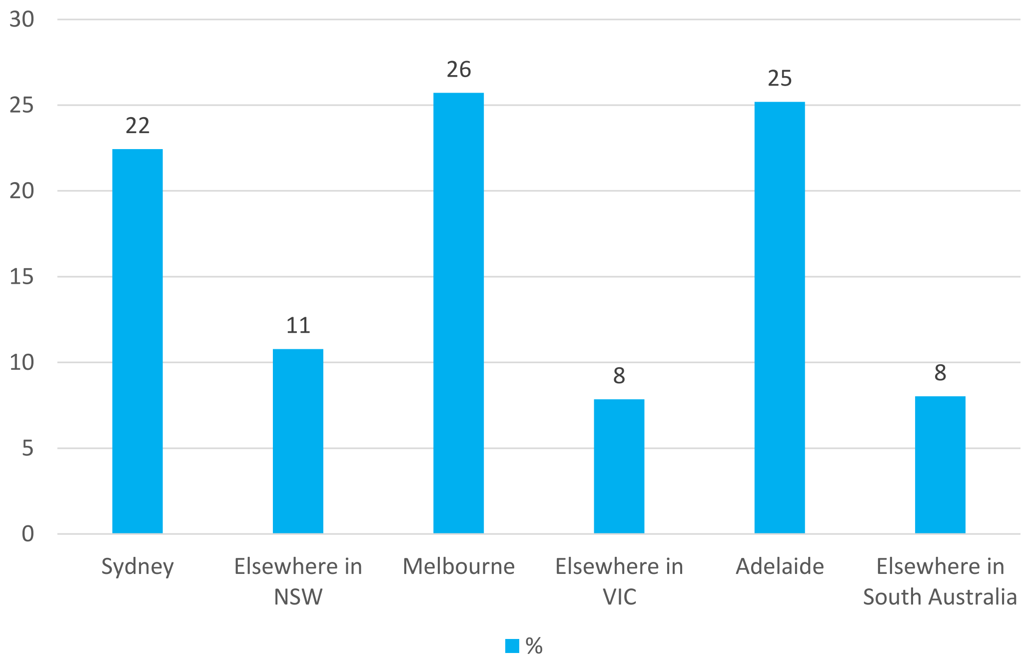


Base: all research participants *n*=1,159

Q3 What is your gender?

Where respondents live

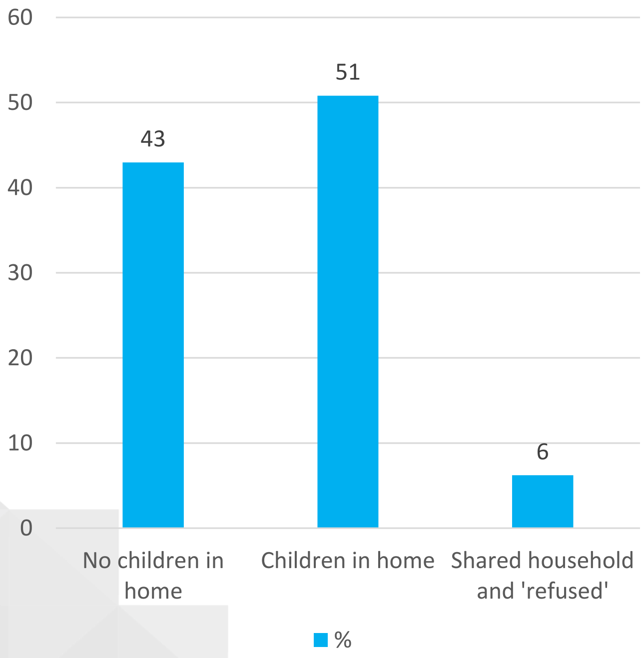
The location where respondents live is used in the report for comparative analysis.



Base: all research participants *n*=1,159

Q4 Where do you live?

Household structure



	%
Couple - never had children	21
Family with mainly pre-school aged children	16
Family with mainly primary school aged children	15
Couple all children have left home	14
Family with mainly high school aged children	11
Family with children who have left school	9
Solo household - never had children	6
Shared household	6
Single all children have left home	2
Other / I'd rather not say	1

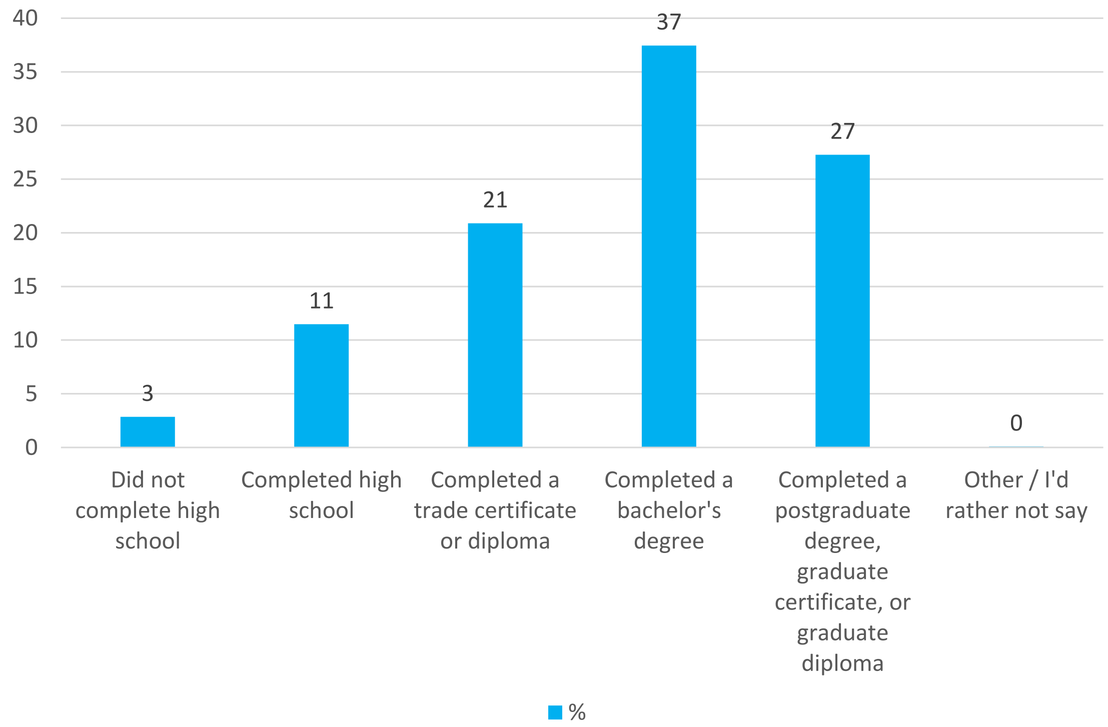
Base: all research participants *n*=1,159

Q13 Which of the following best describes your household structure?

Highest level of education

Almost two-thirds (65%) have a Bachelor's degree or post-graduate qualifications.

Almost 80% of Sydney residents and almost 70% of Melbourne residents have a degree or postgraduate qualification reinforcing higher income earners.



Base: all research participants *n*=1,159

Q14 What is the highest level of education you have attained?

Attachment 1

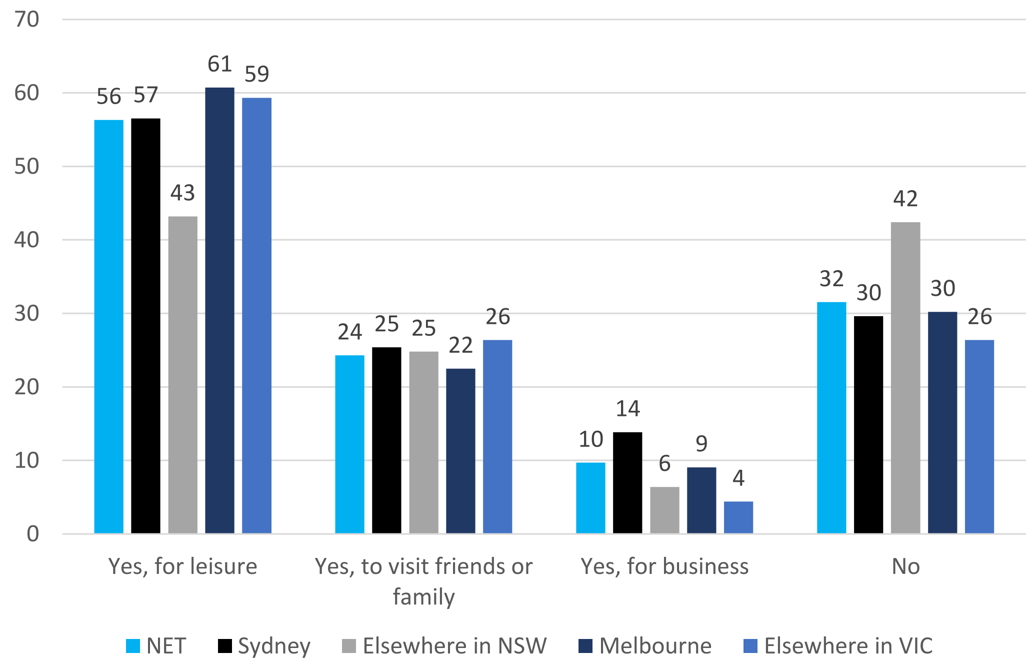
Travel to/in South Australia

Travelled to South Australia in last 5 years for leisure – Interstate Visitors

Over half of the respondents have visited South Australia in the last 5 years for leisure purposes.

There are very few differences by place of residence:

- Regional NSW was less likely to visit (43%)



Base: live outside South Australia *n*=774

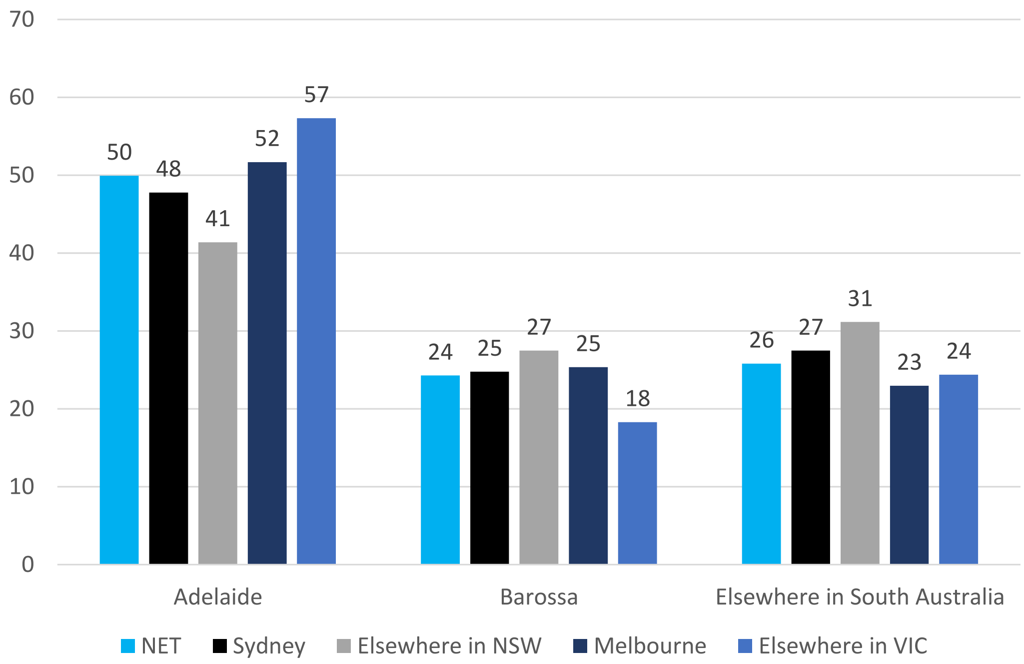
Q7 Have you travelled to South Australia within the past 5 years?

Places visited in South Australia in last 5 years – Interstate Residents

This chart shows the ‘percent share’ of locations for visits by interstate visitors. This allows for multiple visits to South Australia in the last 5 years.

Barossa has just under one-quarter (24%) of visits which is almost identical to other regional areas of South Australia.

There were no statistically significant differences by residential location.



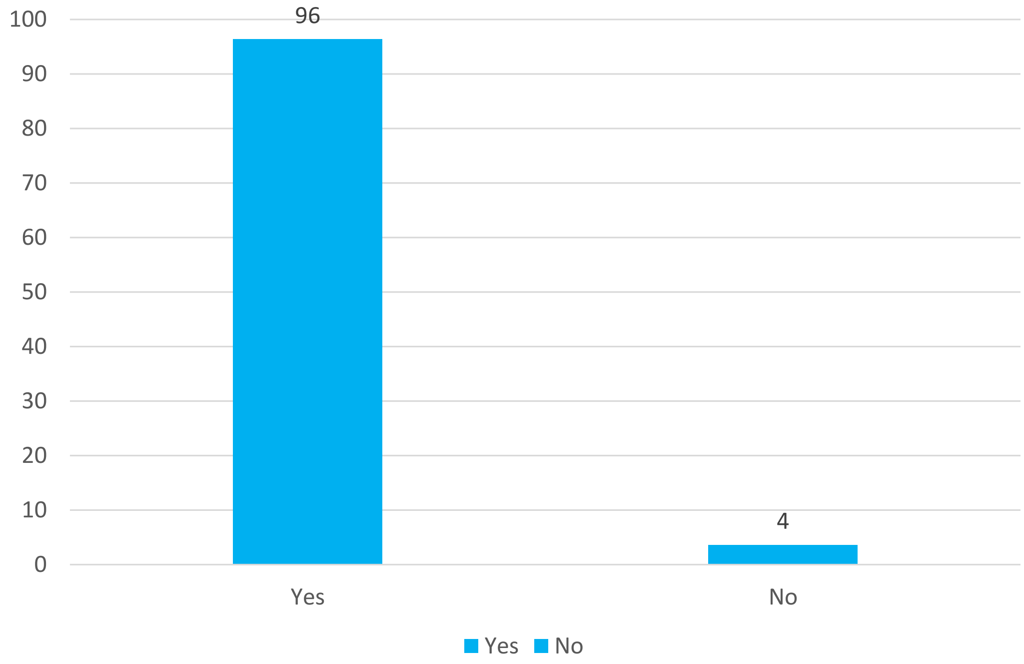
Base: live outside South Australia and travelled to South Australia for leisure in last 5 years *n*=530

Q8 In thinking about your combined business and/or leisure travel, how many times have you travelled to South Australia within the past 5 years?

South Australian intrastate travel

Almost all South Australians have travelled in the State for leisure (where the trip was more than 40 kilometres from their home) in the last 5 years.

A trip of more than 40 kilometres is the requirement to be considered a 'trip' in Australian tourism statistics.

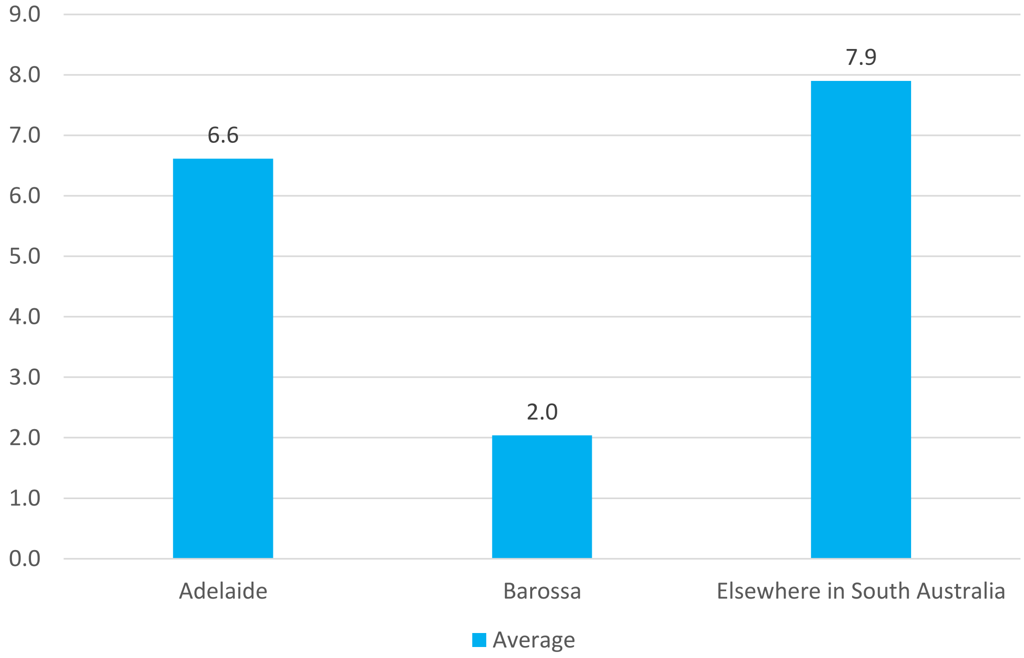


Base South Australian residents *n*=385

Q11 Have you travelled within South Australia for leisure purposes (trip of more than 40km away from home) within the past 5 years?

South Australian intrastate travel – Average number of trips

On average, South Australian residents have made 2 trips to Barossa in the last 5 years.



Base South Australian residents who have travelled more than 40km in last 5 years for leisure *n*=385

Q12 In thinking about your leisure travel, how many times have you travelled within South Australia (at least 1 night away from home) within the past 5 years?

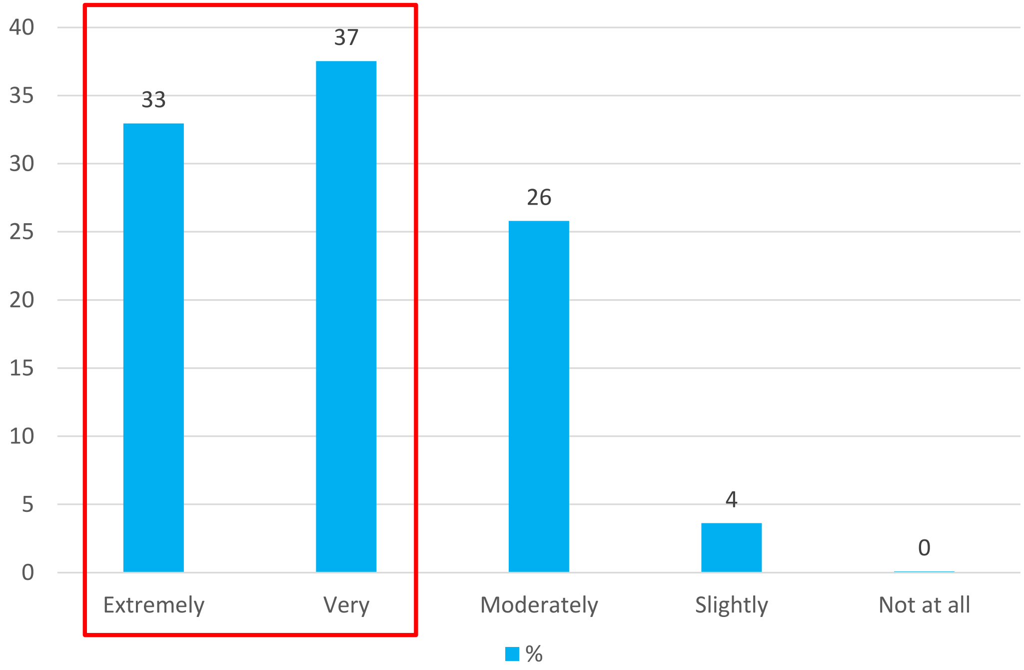
Attachment 1

Interest in South Australia as a leisure destination

All respondents who would not consider South Australia as a leisure destination were screened out from the survey.

However, the screen out rate on this question was low with only 14% of the sample rejecting the State as a potential leisure destination.

Of those who would consider South Australia as a leisure destination, there is high interest with a Top 2 Box of 70%. (33% extremely interested + 37% very interested).



Base: all research participants *n*=1,159

Q16 How interested are you in South Australia as a leisure travel destination?

Top 2 Box for interest in traveling to/in South Australia

This chart shows the Top 2 Box for each region in the survey.

Residents of South Australia have above average interest in travelling within the State while residents of Melbourne have lower than average interest in leisure travel to South Australia.

There are no statistically significant differences in interest for other regions.

Base: all research participants *n*=1,159

Q16 How interested are you in South Australia as a leisure travel destination?

Attachment 1

Consumer Travel Preferences

Typical travel group make up

The most common travel group for respondents are couples (spouse or partner 65%) followed by ‘with friends’ (30%).

Combined, this makes up 75% of travel groups (this allows for people who chose both options).

There is no difference by locality, but the findings reinforce that couples and groups of couples are a key target market for future marketing campaigns.

However, families cannot be ignored with, families of school aged children making up 24%, and those with children under 6 years of age making up 18%.

Please note multiple options could be chosen	%
With a spouse or a partner	65
With friends	30
With family, mainly children under 6 years of age	18
By myself	15
With family, mainly primary school aged children	14
With family and other relatives	11
With family, mainly high school aged children	10
With family, adult children	9
Other	0

Base: all research participants *n*=1,159

Q18 Thinking about your typical leisure or holiday travel, who are you most likely to travel with?

Preferred times for leisure travel

The summer holiday period is the time when most visitors would prefer to travel for leisure, followed by Spring. 25% are happy to go at anytime and 25% also prefer outside school holidays.

During school holidays was only preferred by around 16% and 19% during winter.

There is no difference by place of residence.

Please note multiple options could be chosen	%
Summer holidays (December / January)	32
Spring (September - November)	27
No preference for time of year	25
Outside school holidays	25
Summer (December - February)	25
Autumn (March - May)	20
Winter (June - August)	19
During school holidays	17

Base: all research participants *n*=1,159

Q19 Which months / times of year do you most prefer to travel for leisure?

Preferred booking method for domestic tourism

Unlike international tourism where travel agents play a big role, most domestic tourism bookings are completed online without a travel agent.

The two main forms are:

- Booking directly with the tourism business on their website
    - This would include airlines and accommodation components
- Booking online with travel aggregators

A smaller, but significant group, book through a destinations tourism website. This shows the value of a regional portal for tourism options.

Please note multiple options could be chosen	%
Online - I book directly with the tourism business on their website	60
Online - I book via an online travel website (e.g. booking.com, Expedia, Wotif, trivago, Agoda etc.	58
Online - I book via a destination's tourism website	28
In person with a traditional travel agent (e.g. Flight Centre store or other travel agency shopfront	17
Over the phone / email - directly with a tourism business	11
Over the phone / email - with a traditional travel agent/Visitor Centre	8

Base: all research participants *n*=1,159

Q20 Which method of booking do you most often use for your leisure travel?

Booking services used most often for domestic holidays

Respondents could select more than one booking service. On average they chose 2.44 services.

- Almost half (48%) use travel aggregation websites, followed by AirBnB (37%)
- Just over one-third (35%) book directly through an airline
- Over one-quarter (26%) use an accommodation provider

Please note multiple options could be chosen	%
Travel booking websites (booking.com, Wotif.com, Agoda etc.)	48
AirBnB	37
Directly through airline	35
Accommodation provider (NRMA, Accor, Hilton etc.)	26
Travel agent (Flight Centre, Webjet, etc.)	23
TripAdvisor	20
A Destination or Region's tourism website (i.e. Barossa.com)	18
Stayz / Vrbo	11
Visitor centres	11
Tour operator	10
Other	4

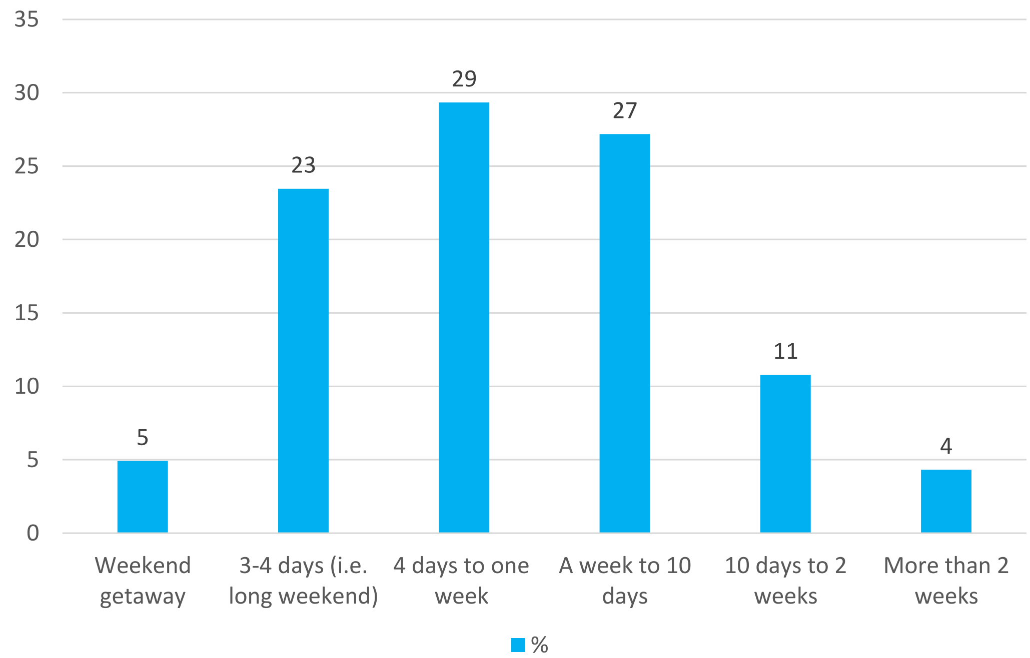
Base: all research participants *n*=1,159

Q24 Which services do you most often use to book your domestic leisure holidays?

Attachment 1

Preferred length for domestic holiday

While many Australians travel for weekend getaways, the preferred length for domestic travel is longer with 23% preferring 3 to 4 days, 29% 4 days to one week and 27% a week to 10 days.



Base: all research participants *n*=1,159

Q21 What is your preferred trip length for [INTERSTATE/INTRASTATE] leisure travel?

Preferred length for domestic holiday

Sydney residents will consider a long weekend of 3-4 days but 31% prefer 4 days to one week and 28% prefer a week to 10 days.

Regional NSW and regional Victorian residents prefer a week to 10 days while one third of Melbournians prefer 4-7 days or 7-10 days (30%).

There is very little interest in a weekend getaway by interstate visitors or a trip of more than 2 weeks.

	Sydney	Elsewhere in NSW	Melbourne	Elsewhere in VIC	Adelaide / SA
Weekend getaway	5	4	1	1	9
3-4 days (i.e. long weekend)	22	15	16	11	37
4 days to one week	31	19	33	20	29
A week to 10 days	28	37	30	41	18
10 days to 2 weeks	9	15	14	22	5
More than 2 weeks	5	10	6	5	1

Base: all research participants *n*=1,159

Q21 What is your preferred trip length for [INTERSTATE/INTRASTATE] leisure travel?

Accommodation used for domestic leisure

Australian domestic travellers stay in a wide range of accommodation types. In this question they could choose more than one type and on average they selected 3.04 accommodation types.

This shows that accommodation chosen will vary by the type of holiday chosen. For example:

- Sydney residents are more likely to choose a standard hotel – 53%
- Sydney residents are far less likely to choose a caravan park – 15%

Please note multiple options could be chosen	%
AirBnB, Stayz type short term rental accommodation	48
Standard Hotel	46
Serviced apartment	41
Luxury accommodation	30
With Friends or Family	30
Bed & Breakfast /Guesthouse	27
Caravan Park / Holiday Park	26
Motel	26
Camping	18
In own holiday home	10
Other	1

Base: all research participants *n*=1,159

Q22 What forms of accommodation do you most often stay in during your leisure travel?

Information sources for domestic travel

A wide range of information sources are used for planning a domestic holiday. This is supported by the finding that most people self-book through an online booking service.

This means that research is self-driven rather than through the advice of a travel agent.

Google and other search engines are the primary source of leisure travel information for all respondents, followed by recommendations from friends and family (even more by SA residents) and then TripAdvisor.

State and Region tourism websites plus other travel aggregator sites bring up the Top 6 however, interstate residents will look to a Region's website more than a State tourism website.

Please note multiple options could be chosen	%		%
Google and other website search engines for specific locations	59	Visitor Information Centres	22
Friends and family	47	Travel agencies (Flight Centre, etc.)	20
TripAdvisor	35	Travel Guides (Lonely Planet, Frommers etc.)	17
State Tourism organisation websites (i.e. SouthAustralia.com)	31	Television Advertising	11
Other Travel booking websites (Expedia, Booking.com, Wotif.com etc.)	31	Newspaper travel sections	10
A Destination or Region's tourism website (i.e. Barossa.com)	30	Other social media (Pinterest, Twitter, etc)	10
AirBnB	28	Travel magazines	10
Instagram	26	Stayz / Vrbo	8
Facebook	23	Other	2

Base: all research participants *n*=1,159

Q23 Where do you most often seek information about your future leisure travel?

Attachment 1

Travel Motivations, Barriers & Attitudes

Travel attitudes and preferences

This question was asked on a 5-point Likert scale and then for greater insight converted to an Index (score from 0 to 100).

	Index
Travel is an opportunity to relax and unwind	79
Travel provides an opportunity to try new things	77
I am eager to try unique experiences	72
I want to have a local's experience when I travel	70
I prefer to undertake and explore a destination independently (no tours and so forth)	67
I like to be amongst nature when I holiday	63
I am happy to book paid experiences	62
I prefer outdoor activities	61
I want a high-end travel experience	57
I like experiences where I get to meet new people	57
I like to get out of my comfort zone when I travel	54
I prefer a destination where I can learn new skills	49
I prefer adventure-based holidays	49
I travel for luxury	46
I prefer to holiday closer to home	36
I prefer holiday by purchasing ready-made tour packages	34

Base: all research participants *n*=1,159

Q17 In thinking about your attitude and preferences towards interstate/intrastate travel, how much do you agree with each of the following statements?

Holiday attributes – What are Australians seeking?

Using Principal Components Analysis Australian leisure travellers can be broken into 4 components or groups.

- Back to nature - 25%
- Luxury travellers – 15%
- New things and unique experiences – 15%
- Unplanned – 7%

These groups are not totally mutually exclusive but have strong correlation for each of the key variables.

Principal Component Loadings

4 components explaining 62.6% of the variance

	Component 1 (24.9%) Eigenvalue: 3.98	Component 2 (15.4%) Eigenvalue: 2.46	Component 3 (15.1%) Eigenvalue: 2.42	Component 4 (7.26%) Eigenvalue: 1.16
I prefer outdoor activities	0.793			
I prefer adventure-based holidays	0.761			
I prefer a destination where I can learn new skills	0.734			
I like to be amongst nature when I holiday	0.712			
I like to get out of my comfort zone when I travel	0.584			
I like experiences where I get to meet new people	0.555			
I am happy to book paid experiences	0.411			
I travel for luxury		0.880		
I want a high-end travel experience		0.817		
I prefer holiday by purchasing ready-made tour packages	0.494	0.545		
I prefer to holiday closer to home	0.415	0.466	-0.456	
Travel provides an opportunity to try new things			0.789	
I am eager to try unique experiences			0.671	
Travel is an opportunity to relax and unwind			0.587	
I want to have a local's experience when I travel	0.474		0.527	
I prefer to undertake and explore a destination independently (no tours and so forth)				0.853

Rotated loadings; Input: Correlation matrix; Missing data setting: Use partial data (pairwise correlations); Sample size: 1159 to 1159; Rotation: Varimax; Unrotated eigenvalues: (1) 5.76, (2) 1.87, (3) 1.38, (4) 1.01, (5) 0.87, (6) 0.78, (7) 0.66, (8) 0.59, (9) 0.56, (10) 0.45, (11) 0.42, (12) 0.40, (13) 0.38, (14) 0.31, (15) 0.31, (16) 0.24

Base: all research participants *n*=1,159

Q17 In thinking about your attitude and preferences towards interstate/intrastate travel, how much do you agree with each of the following statements?

Top 5 considerations for booking an Australian holiday

Research participants were asked to rate their top 5 considerations when booking an Australian holiday.

The above average considerations are:

- Value for money
- Good food and wine
- Quality accommodation
- A range of tourist attractions
- Nature / Natural Beauty
- Water, coastal or pristine beaches

Good food or wine was either #2 or #3 for all respondents. Top 5 factors are relatively consistent across all residential areas, although safety and security was #4 for Sydney residents, water or coastal locations was #4 for regional NSW residents who are not as concerned with quality accommodation, while this was #2 for Melbourne residents.

	%		%
Value for money	59	History and heritage	25
Good food and wine	47	Shopping	20
Quality accommodation	46	Friendly and open locals	18
A range of tourist attractions	43	Bushwalking / walking / hiking trails	17
Nature / Natural Beauty	40	Wildlife	17
Water, coastal or pristine beaches	35	Remoteness / Getting away from it / uncrowded	16
A range of unique free or paid experiences	30	Access to State or National parks	15
Safety and security	30	Sports and Adventure options	13
Family friendly	30		

Base: all research participants *n*=1,159

Q25 Which of the following factors do you consider are your TOP 5 considerations when selecting an interstate/intrastate leisure destination?

Travel planning in next 18 months

Australians are planning travel both domestically and internationally in the next 18 months.

Almost two-thirds (64%) are planning a trip to an interstate capital city.

Only 2% are not planning any travel.

Over half (56%) are planning to visit an interstate regional area. This means that Barossa should be in the consideration set.

	%
Interstate capital city	64
Regional area in my state	57
Interstate regional area	56
Overseas	47
Capital city in my state	26
I will unlikely be travelling for leisure purposes due to COVID-19	1
I will unlikely be travelling for leisure purposes due to other reasons other than COVID-19	1

Base: all research participants *n*=1,159

Q27 Thinking of travel over the next 18 months, which best describes where you intend on travelling for leisure purposes?

Travel planning in next 18 months

Over half of residents from outside South Australia are planning travel to an interstate regional area.

- Sydney – 54%
- Elsewhere in NSW – 68%
- Melbourne – 58%
- Elsewhere in Victoria – 73%

Interstate regional areas were favoured most by regional NSW (68%) and regional Victorian (73%) residents.

While 54% of Sydney and 58% of Melbourne residents favoured interstate regional areas (which was higher than regional areas in their own states).

	Sydney	Elsewhere in NSW	Melbourne	Elsewhere in VIC	Adelaide	Elsewhere in South Australia
Interstate capital city	65	62	66	64	65	51
Regional area in my state	44	60	49	70	69	68
Interstate regional area	54	68	58	73	46	55
Overseas	54	41	51	41	48	25
Capital city in my state	31	30	20	36	21	39
I will unlikely be travelling for leisure purposes due to COVID-19	1	0	1	0	1	4
I will unlikely be travelling for leisure purposes due to other reasons other than COVID-19	2	1	0	0	0	1

Base: all research participants *n*=1,159

Q27 Thinking of travel over the next 18 months, which best describes where you intend on travelling for leisure purposes?

Type of destinations for leisure

Australian travellers are most likely to choose a ‘beach or coastal destination’ (69%). However, food and wine regions are high on the list of preferences with almost half (49%) likely to travel to this type of destination.

There is no statistically significant difference in selection of ‘food and wine regions’ by where Australians live.

Beach and coastal destinations were rated #1 for all respondents but Food and Wine regions were ranked overall #3 but #2 for regional NSW and regional Victorian residents.

	%
Beach / coastal destinations	69
Capital cities	50
Food and Wine Regions	49
Nature focused destinations (e.g. State or National parks)	40
Historic / heritage destinations	39
Reef / island destinations	32
Inland rivers and lakes	27
Theme park destinations	24
Snow / skiing destinations	16
Other regional areas	27
Other destinations	3

Base: all research participants *n*=1,159

Q28 What type of destinations do you primarily travel to for leisure purposes?

Key motivations for an Australian holiday

The key motivation for an Australian holiday is simply 'really needing a holiday' (56%).

However, the shadow of COVID-19 still remains, with 48% feeling safer in Australia should they fall ill.

Any destination marketing should potentially focus on the fact that Australians just "really need a holiday", particularly South Australian residents, who are also keen to visit family and friends more than interstate respondents.

	%
I just really need a holiday	56
Australia is relatively safe to travel in and I will have access to high quality medical care should I fall ill	48
It is now possible to travel giving the easing of COVID-19 restrictions	37
I want to visit friends or family	36
COVID-19 is no longer a major concern for me	23
I am frustrated by COVID-19 and need to travel again	22
There are some excellent travel deals at present	22
I would not feel safe travelling overseas at present due to COVID-19	19
I have excess annual leave and need to use some	13
I have saved up money during COVID-19 and want to spend it on travel	11
I need to use travel refunds / vouchers I was unable to use during COVID-19	11
Other	3

Base: all research participants *n*=1,159

Q29 What are your key motivations for wanting to travel within Australia for leisure purposes?

Key barriers to Australian leisure travel

High cost is the main barrier to domestic leisure travel (38%).

This is followed by the ability to afford to travel (20%) and the concern that COVID-19 restrictions could be implemented at any time (19%).

The survey was completed in mid-June which shows that despite the removal of COVID-19 restrictions there are still residual concerns that restrictions could again be implemented.

Differences by residential area are:

- Cannot afford to travel higher for SA regional residents – 40%
- Concern about COVID-19 travel restrictions being implemented higher for Sydney residents – 24%
- COVID-19 'a concern for me' higher for Sydney residents – 22%

	%
High cost of travel at present	38
I cannot afford to travel at present	20
COVID-19 restrictions can be implemented at any time and may impact my travel	19
The places I wish to travel to are booked up	16
COVID-19 is a major concern for me generally	15
I do not have enough annual leave	14
I will be unlikely to receive a refund due to border closures / COVID-19	10
I am not thinking about travelling at present	5
I am unable to use travel refunds / vouchers I received due to COVID-19	4
Other	3
None of these	23

Base: all research participants *n*=1,159

Q30 What are the key barriers which may prevent you travelling within Australia for leisure purposes in the next 18 months?

Current attitudes to Australian leisure travel

Despite the residual concern about COVID-19 travel restrictions, 72% are considering travelling either 'actively' (38%) or 'currently considering' (34%).

The Australian domestic tourism market therefore appears to be extremely healthy.

The only difference by residential area is that Sydney residents are slightly more likely to seek an overseas holiday – 16%

	%
I am actively seeking to travel within Australia in the near future	38
I am currently considering travelling within Australia	34
I just want to travel overseas for my next holiday	11
I am cautious about travelling within Australia at present	6
I would be travelling within Australia now if it were not for potential travel restrictions due to COVID-19	4
I cannot see myself travelling within Australia for at least the next 18 months	2
None of these	4

Base: all research participants *n*=1,159

Q31 What is your current attitude towards travelling within Australia for leisure purposes?

Current planning for domestic leisure travel

Most Australians are in the 'consideration stage' for their next domestic holiday. Just under half (44%) are 'currently thinking' about their holiday and 24% are 'actively planning' their next holiday.

Just over one-in-five (21%) have already booked their holiday.

	%
I am currently thinking about my next leisure trip / holiday	44
I am actively planning and researching my next leisure trip / holiday	24
I have already booked my next leisure trip / holiday	21
I am not thinking about my next leisure trip / holiday at present	11

Base: all research participants *n*=1,159

Q32 What are your current thoughts around your next [interstate/intrastate leisure trip?

Timing for the next Australian leisure holiday

Most Australians plan to travel for a domestic holiday soon, with 66% planning to travel in the next 6 months.

The biggest window of opportunity to attract visitors is for the next 2-12 months with Sydney residents more likely to travel in the next 2-6 months (57%).

	%
I will not be travelling interstate for a leisure trip / holiday in the next 2 years	1
Next month	16
Within the next 3 months	22
3- 6 months	29
6-12 months	19
12 -18 months	7
Over 18 months away	1
Unsure	5

Base: all research participants *n*=1,159

Q33 What is your intended timing for your next interstate leisure trip within Australia?

Top 5 activities for leisure trips

Research participants were asked to rank their top 5 activities when on a leisure holiday. For this analysis this has been converted into an index (score from 0 to 100).

Relevant to Barossa are:

- Golfing – index of 57
- Outdoor and nature – index of 54
- Cycling – index of 54
- Dining out – index of 52
- Mountain biking – index of 51
- Wineries, wine tasing, tours – index of 50

There is no difference in the data by place of residence.

	Index		Index
Family activities	59	Cultural activities - theatre, ballet, symphonies, museums, art galleries etc.	47
Beach activities - surfing, swimming, walking on the beach	58	Combined Food & Wine Experiences	45
Golfing	57	Spectator - Attend major sporting events	45
Social - visiting friends and relatives, etc.	54	Music concerts or festivals	45
Outdoor and nature - hiking, walking, running, etc.	54	Theme Parks	45
Cycling	54	Markets, Shopping etc.	42
Sightseeing - organised tours, tourism attractions etc.	53	Participant events - organised active sporting events	40
Dining out, restaurants, food experiences etc.	52	Wellness - Massage, Day Spa, etc.	38
Mountain biking	51	Other active or sporting pursuits	25
Wineries, wine tasting, winery tours etc.	50	Other	23

Base: all research participants *n*=1,159

Q34 Which of these activities do you normally prioritize during your domestic leisure trips? RANK

Attachment 1

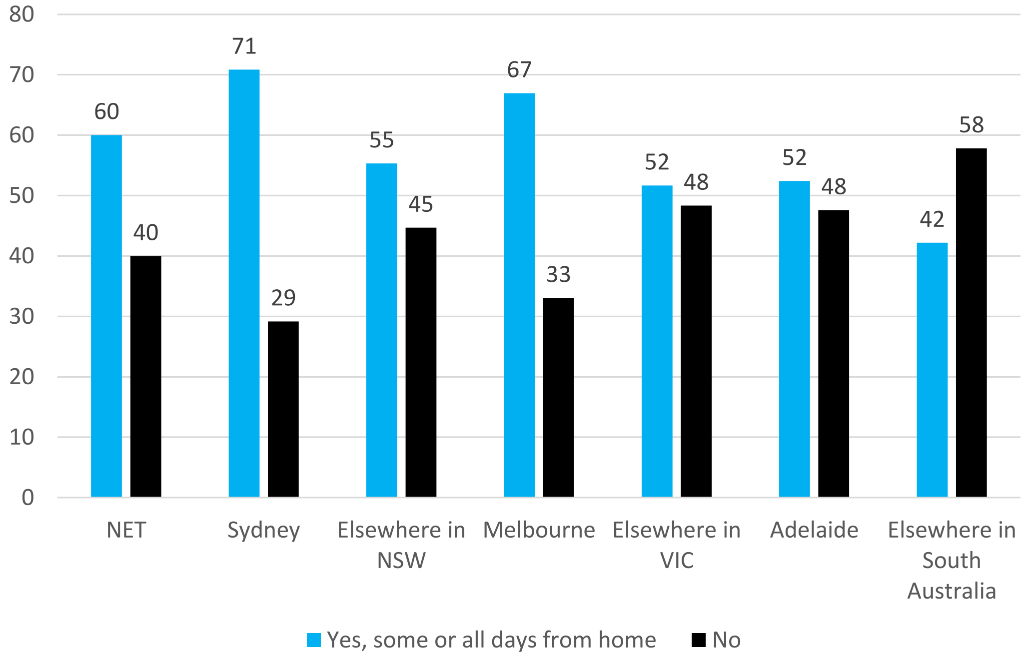
Working from Home & “Workcations”

Attachment 1

Working some days from home due to COVID-19

Sixty-percent (60%) of those employed full time, part time or casually worked some or all days from home due to COVID-19.

This was higher in Sydney and Melbourne.



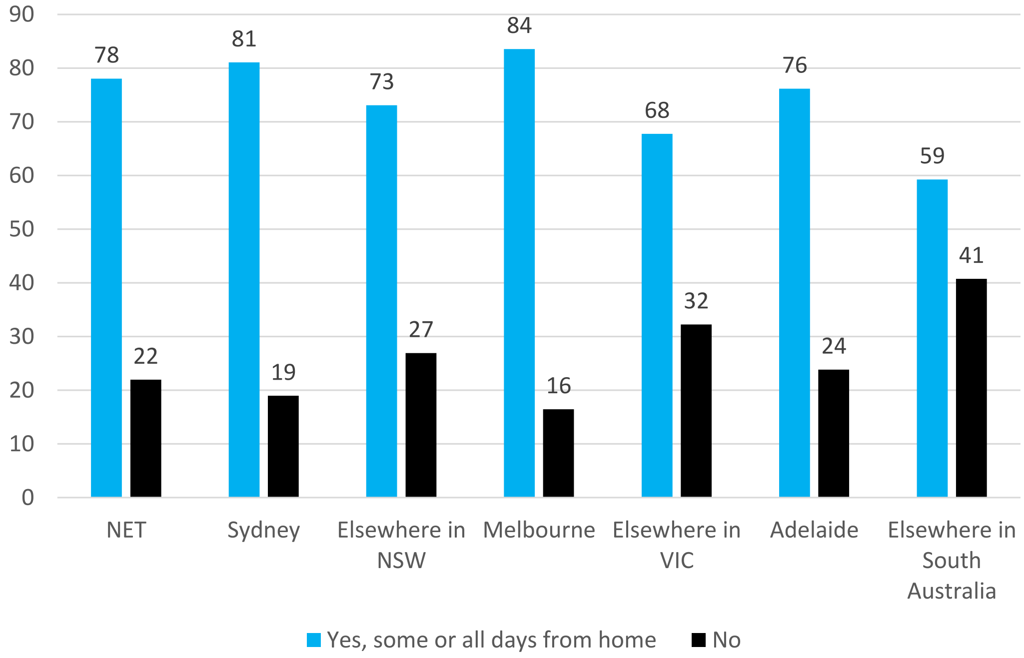
Base: employed full time, part time or casual *n*=918

Q35 As a result of COVID-19, did you switch to working from home?

Currently working some days from home

Of the group that worked at home (60% of all employed), 78% are currently working some or all days from home.

This is higher for Melbourne (84%) and lower for ‘elsewhere in South Australia’ (59%).



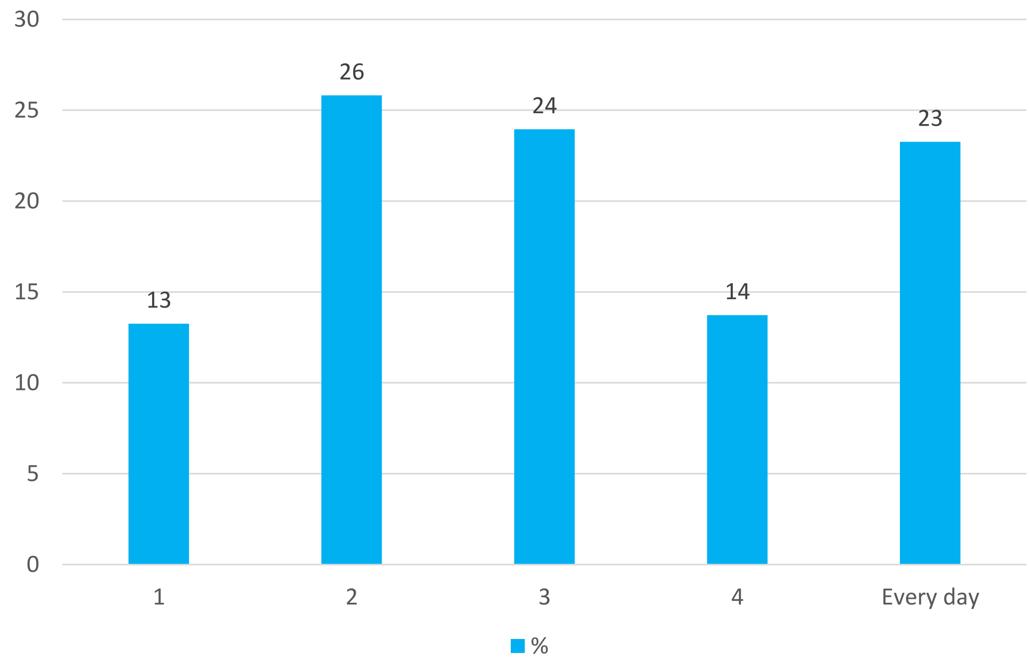
Base: employed full time, part time or casual *n*=918

Q36 And are you continuing to work from home currently?

Number of days working from home

Of the 78% of employed people currently working from home, they are on average working 3.1 days per week at home.

23% are working every day at home.



Base: working from home *n*=390

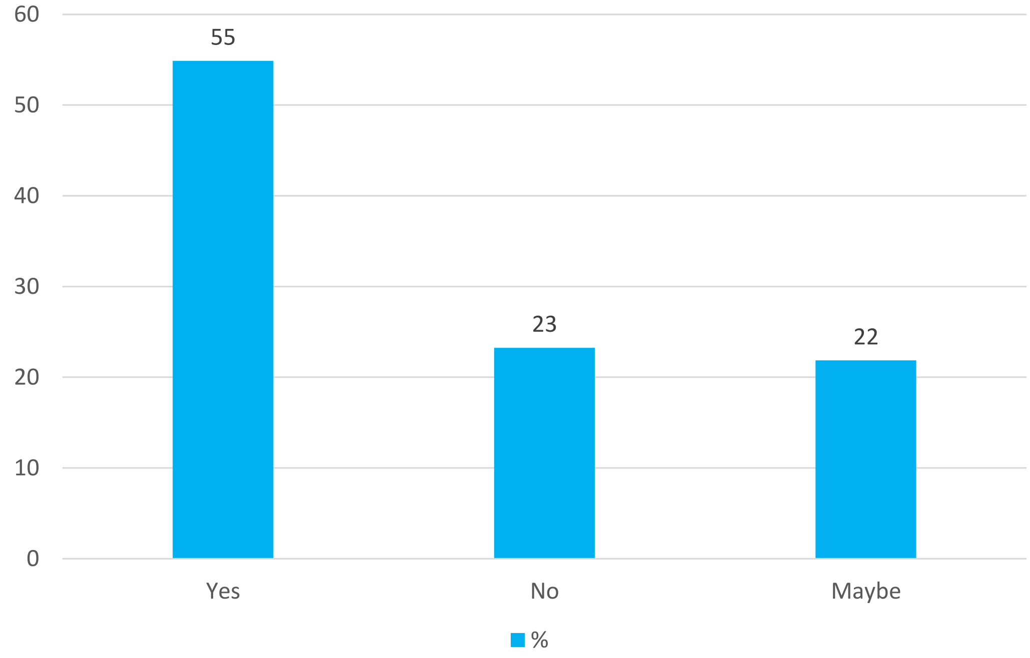
Q37 On average, how many days per week are you currently working from home?

Consider a 'WorkCation'

Of those currently working from home over half (55%) would consider a 'WorkCation' where they work remotely while also travelling for leisure.

There is no statistically significant difference by residential area.

A workcation is potentially a large potential opportunity with around 55% saying yes and another 22% saying maybe. 25% of respondents are still working from home 5 days per week and 63% of Sydney and 70% of Melbourne residents are still working from home 3-5 days per week.



Base: working from home *n*=390

Q38 Would you consider taking a "WorkCation" [INTERSTATE/INTRASTATE] where you worked remotely while also travelling for leisure?

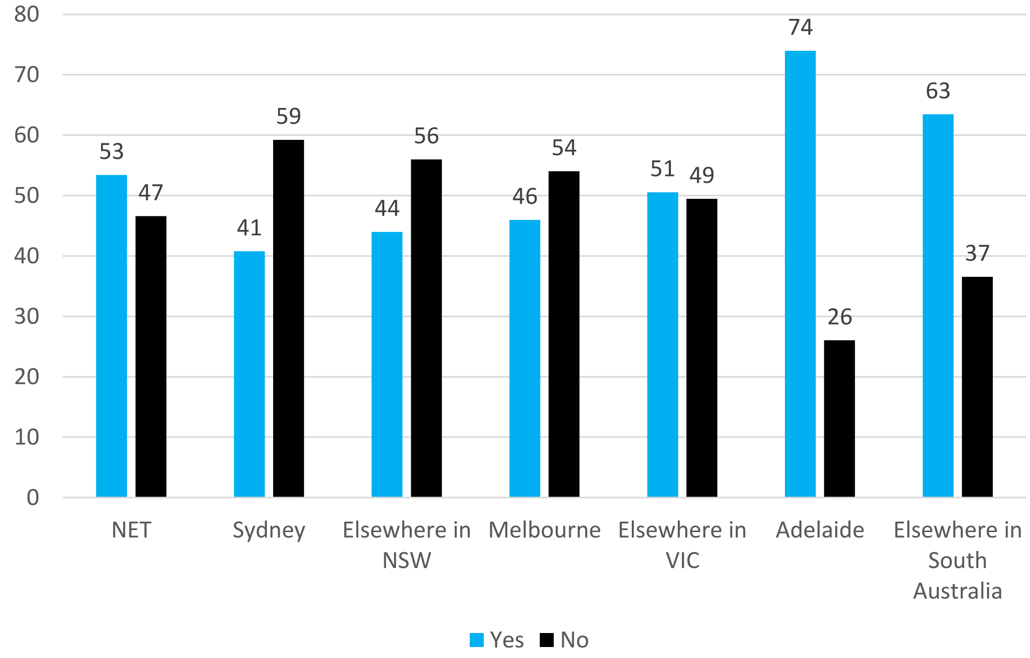
Barossa Travelling Experience

Travelled to Barossa (any time)

Over half (53%) of Australians have travelled to the Barossa for an overnight leisure trip.

Residents of South Australia are more likely to have travelled to the Barossa which is not surprising. However interstate visitors have also visited:

- Sydney - 41%
- Elsewhere in NSW – 44%
- Melbourne – 46%
- Elsewhere in Victoria – 51%



Base: all research participants *n*=1,159

Q39 Have you travelled to Barossa, South Australia for an overnight leisure holiday trip before?

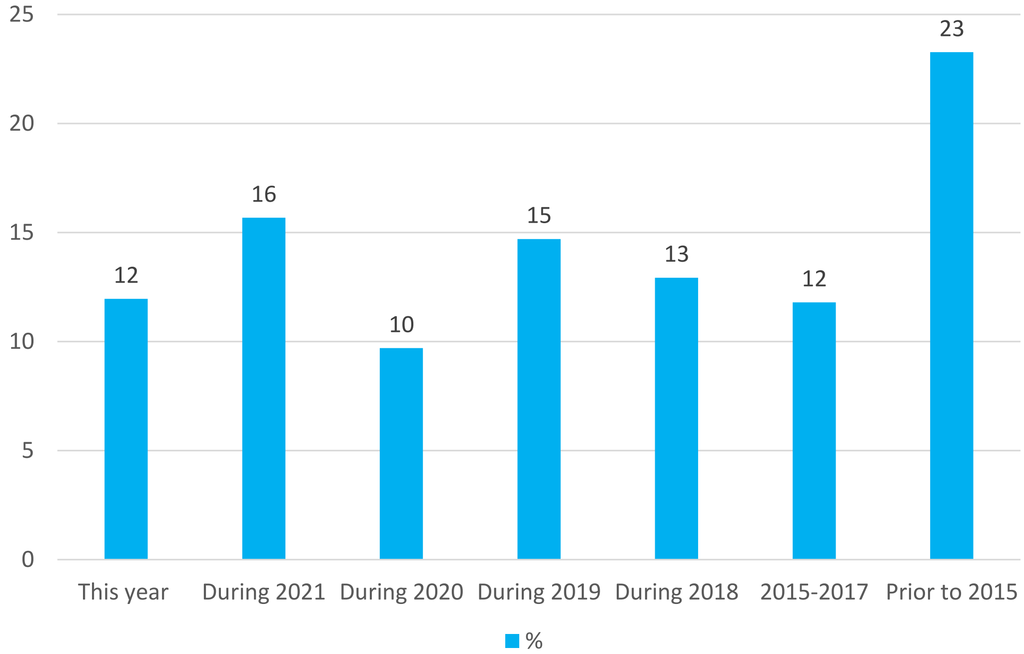
Travel to Barossa

Fifty-three percent (53%) of respondents have travelled to Barossa in the past.

Of this group there is a wide range of years when they last visited.

Fifty-two percent (52%) have visited Barossa between 2019-2022.

Analysis by place of residence is on the following page.



Base: past visitors to Barossa *n*=619

Q40 How long ago was your last overnight leisure holiday trip to the Barossa?

Travel to Barossa

Analysis by place of residence shows that there are significant differences.

Visits this year and in 2021 are much higher for Adelaide residents, undoubtedly due to COVID-19 lockdown impacts.

Visits between 2020 and 2022 (the CVOID-19 impacted years) are shown in the bottom row of the table.

57% of Adelaide residents visited Barossa in this period but only 16% of Melbourne residents.

	NET	Sydney	Elsewhere in NSW	Melbourne	Elsewhere in VIC	Adelaide	Elsewhere in South Australia
This year	12	9	0	7	4	20	15
During 2021	16	17	15	4	11	25	10
During 2020	10	8	9	5	13	12	12
During 2019	15	14	18	12	11	15	19
During 2018	13	10	20	21	13	6	15
2015-2017	12	15	4	13	24	8	15
Prior to 2015	23	25	35	38	24	13	14
Visited in 2020 to 2022	38	34	24	16	28	57	37

Base: past visitors to Barossa *n*=619

Q40 How long ago was your last overnight leisure holiday trip to the Barossa?

Attachment 1

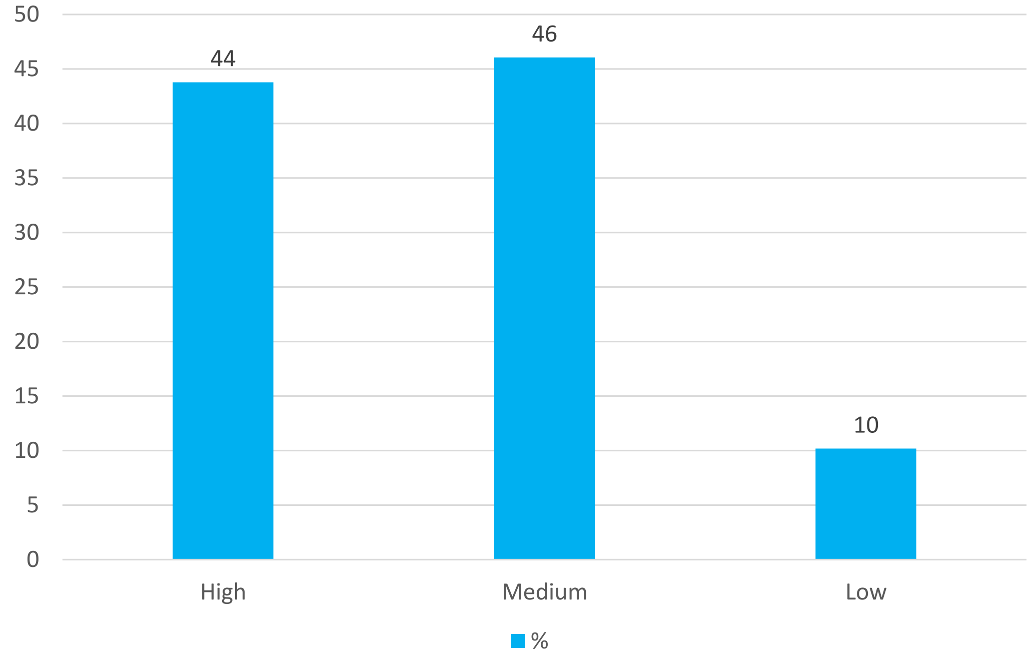
Barossa visitor satisfaction

Research participants rated their experience on a 0 to 10 scale. This has been combined into:

- 0 to 6 – low
- 7 / 8 – medium
- 9 / 10 – high

The findings show that most visitors have had a very good to excellent Barossa experience.

Residents of Sydney are less likely to rate their visit as 'high' (35%) and more likely to rate their visit as 'low' (16%).



Base: research participants who have visited Barossa *n*=619

Q41 Thinking about your satisfaction with your overall visit to the Barossa region with 0 being "It was a poor experience" and 10 being "It was a great experience", please rate your enjoyment of your experience.

Key reasons for a positive Barossa experience

Barossa visitors who had a positive experience (rating of 7 to 10) were asked why they gave that rating.

There are many positive attributes for the Barossa, but wine and food play a strong role in these.

Very few visitors undertook activities like cycling, walking, running or golf. However, this could potentially be due to the fact that they were unaware they could undertake activities such as these.

Sydney residents are:

- Less likely to find positive 'great cafes and restaurants' – 44%
- More likely to find 'undertaking activities' as positive – 27%

	%
The wineries and wine are fantastic	63
Great cafes and restaurants	62
Easy to get around	56
Great service at a winery or wineries	52
Friendliness of locals	40
Lots of open space, lack of crowds and felt like an escape	38
Excellent and unique places to shop	30
There is so much to do	29
Weather	28
I could undertake a range of cultural activities (i.e. markets, museums, galleries etc.)	22
Lots of paid and/or free activities that I enjoy	17
I could undertake activities I like (sporting – cycling, walking, mountain biking, running, golf etc.)	14
Other	1

Base: research participants who have visited Barossa and had positive experience *n*=556

Q43 What were some of the key factors that positively impacted your experience in the Barossa?

Reasons for Barossa dissatisfaction

The 10% of visitors who rated their experience as 0 to 6 (low) where asked the reason for their low rating.

The three key reasons for dissatisfaction are:

- There are wineries and restaurants but not much else
- Everything was expensive
- Nothing much to do

	%
There are wineries and restaurants but not much else	33
Everything was expensive	32
Nothing much to do	25
Weather	17
The places I wanted to go to were booked out	14
Lack of service	13
It is not a destination for families	13
Not enough accommodation, or the type I was after	13
Unfriendliness or poor service at a winery or wineries	5
Unfriendliness of locals generally	3
Unfriendliness or poor service at a café or restaurant	3
Other	8

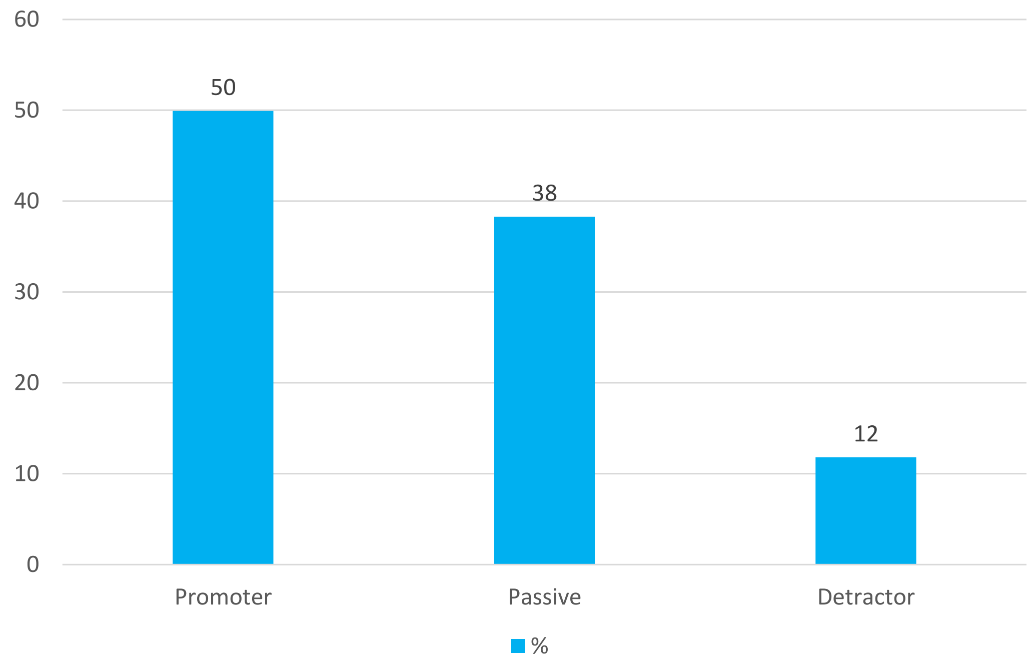
Base: research participants who have visited Barossa and had poor experience *n*=63

Q42 What were some of the key factors that negatively impacted your experience in the Barossa?

Net Promoter Score - NPS

The Net Promoter Score for Barossa is 38.

Half (50%) are Promoters, 38% are Passives, and only 12% are Detractors.



Base: research participants who have visited Barossa *n*=619

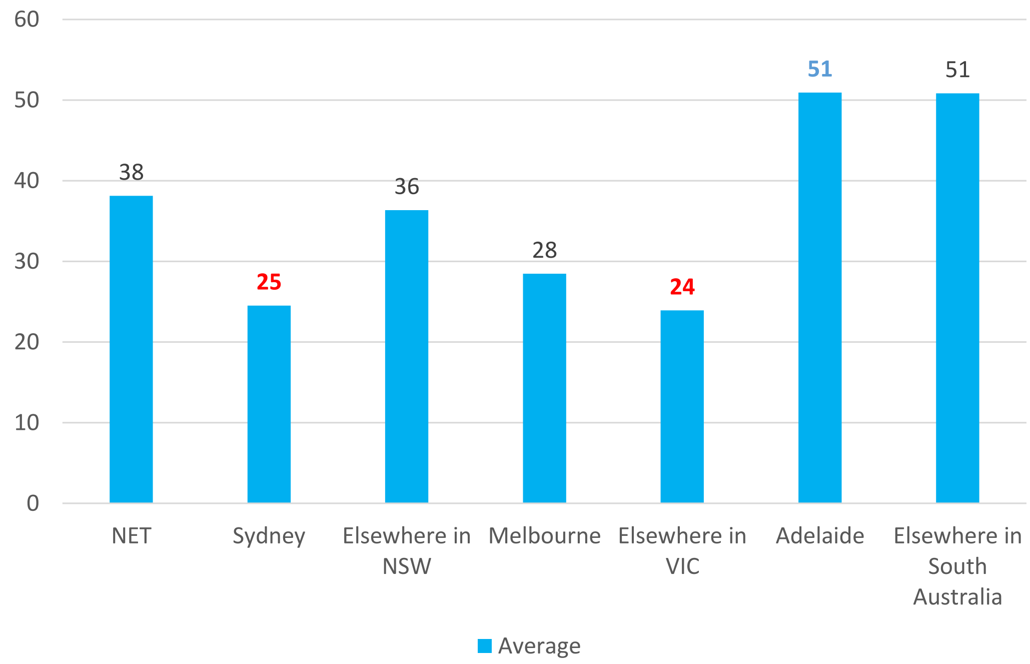
Q44 On a scale of 0-10 with 0 being "Very unlikely" and 10 being "Very likely", how likely are you recommend the Barossa region as a place to visit to your friends, family or colleagues?

Net Promoter Score - NPS

This charts shows the NPS as only the score.

Sydney and Regional Victorian residents are below average with a score of 25 and Adelaide residents are above average with a score of 51.

The other differences are not statistically significant.



Base: research participants who have visited Barossa *n*=619

Q44 On a scale of 0-10 with 0 being "Very unlikely" and 10 being "Very likely", how likely are you recommend the Barossa region as a place to visit to your friends, family or colleagues?

Experiences thought to be available in the Barossa

Australians who have visited the Barossa are aware that the region is about much more than just wine. While 74% identify wine, 69% are aware of food experiences, 59% ‘food and wine’, 43% markets, 41% walking and hiking trails, and 37% the town of Hahndorf.

There is much lower awareness of art galleries 26%, golf 24%, music concerts 17%, mountain biking 15% and The Cube 13%.

The following page shows awareness of experiences by place of residence. This shows that Sydney residents who have visited the Barossa are in general less aware of the variety of experiences on offer.

However, residents of Adelaide are more aware of most experiences.

	%		%
Wineries, wine tasting, winery tours etc.	74	State and National Parks	26
Dining out, restaurants, food experiences etc.	69	Cycling	26
Joint food and wine experience at the one venue	59	Art Galleries	26
Markets	43	Golfing	24
Hiking and walking trails	41	Music concerts	17
The town of Hahndorf	37	Mountain biking	15
Festivals	31	The Cube	13
The Whispering Wall	30	Sporting events	10
Activities for a family to undertake	29	Beaches	10
Historical museums	29	Theme Park	7
Wellness - Day Spa, etc.	29	Other active or sporting pursuits	3

Base: research participants who have visited Barossa *n*=619

Q45 What type of experiences, that you are you aware of, are available in the Barossa region?

Experiences thought to be available in the Barossa

	NET	Sydney	Elsewhere in NSW	Melbourne	Elsewhere in VIC	Adelaide	Elsewhere in South Australia
Wineries, wine tasting, winery tours etc.	74	58	65	74	72	83	83
Dining out, restaurants, food experiences etc.	69	51	55	69	63	81	80
Joint food and wine experience at the one venue	59	48	53	55	57	69	61
Markets	43	35	35	45	46	46	44
Hiking and walking trails	41	30	33	36	28	51	53
The town of Hahndorf	37	36	42	50	54	21	44
Festivals	31	27	35	31	43	30	22
The Whispering Wall	30	19	11	14	15	47	56
Activities for a family to undertake	29	21	25	21	28	37	37
Historical museums	29	31	20	25	39	31	27
Wellness - Day Spa, etc.	29	19	33	20	24	35	46
State and National Parks	26	34	36	23	30	24	17
Cycling	26	25	15	15	24	36	31
Art Galleries	26	26	22	27	37	23	29
Golfing	24	24	20	11	17	33	31
Music concerts	17	13	27	12	22	20	15
Mountain biking	15	19	18	12	22	13	14
The Cube	13	14	11	10	15	14	14
Sporting events	10	13	16	6	15	8	14
Beaches	10	18	11	12	13	6	5
Theme Park	7	12	18	9	4	4	0
Other active or sporting pursuits	3	0	5	1	4	4	5

Base: research participants who have visited Barossa *n*=619

Q45 What type of experiences, that you are you aware of, are available in the Barossa region?

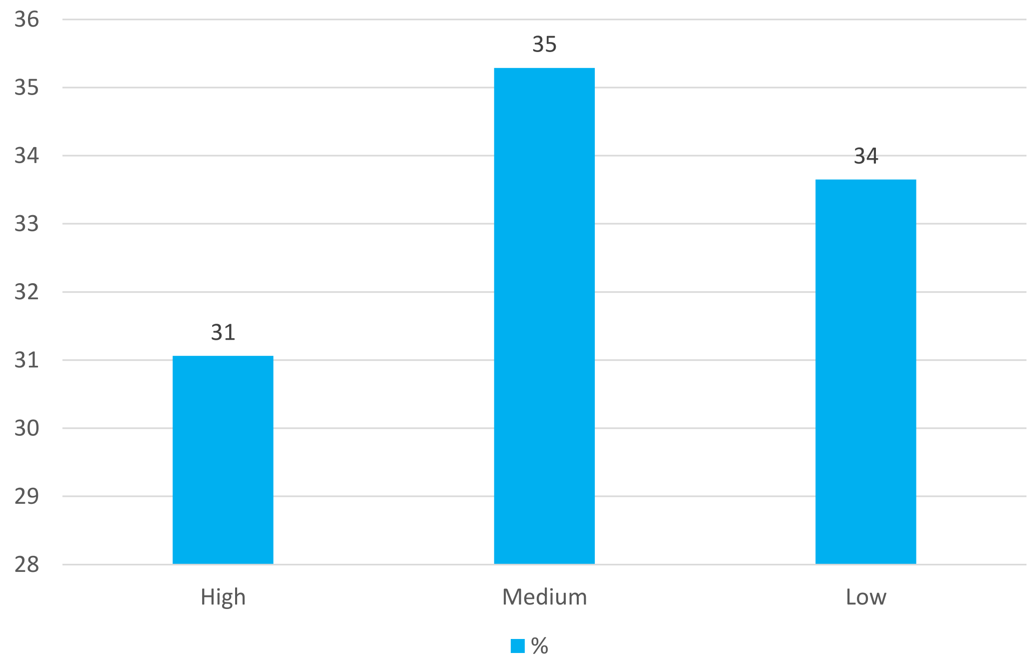
Barossa's appeal as a leisure destination

Respondents were asked to rate the appeal of the Barossa on a 0 to 10 scale which has been grouped into high, medium and low.

Just under one-third (31%) rate Barossa's appeal as high, 35% as medium and 34% as low.

Past visitors are more likely to rate appeal as 'high' (40%).

There is no difference in appeal by place of residence.



Base: all research participants *n*=1,159

Q46 Level of Agreement: "The Barossa is a region that appeals to me as a leisure holiday destination"

Why Barossa does not appeal?

Barriers to visiting the Barossa are:

- Preference for coastal destinations – 31%
- Want to visit other regions first – 26%
- 'Only has wineries' – 24%
- Don't know much about Barossa – 20%

Residents of Sydney are less likely to wish to visit other destinations first (16%) and more likely to 'not know much about' the Barossa (30%).

Only 24% see the Barossa as a 'winery only' destination.

Most other barriers can be potentially addressed with more information about experiences and attractions in the region.

	%
I prefer coastal holiday destinations	31
There are other destinations I would prefer to go to before visiting the Barossa but I would like to go some day	26
The Barossa only has wineries and these do not interest me	24
I don't know much about the Barossa	20
The Barossa is just not on my list of potential holiday destinations	17
It does not offer the type of activities I like to do	16
Nothing much to do in the Barossa	15
It is not a destination for families	12
I prefer city destinations to regional destinations	10
It is too far away and hard to get to	10
Climate does not appeal	5
The Barossa is too traditional and not exciting enough	4
Other	7

Base: those who rated appeal as low *n*=390

Q47 Why doesn't the Barossa appeal to you as a leisure holiday destination?

What is appealing about the Barossa?

Those who rated their interest as 'high' or 'medium' were asked what they found attractive.

Key appealing aspects of the Barossa are as follows:

- Fantastic wine and wineries
- Great cafes and restaurants
- Easy access from Adelaide
- Easy to get around
- A unique destination to explore

Wineries and wine (59%) was rated the highest followed by cafes and restaurants (56%). The combined food and wine experience is therefore very compelling.

Other attractive elements are 'close to Adelaide' (53%), easy to get around (45%) and enjoyment of exploring the destination (40%).

Low on the level of appeal are shopping (30%), cultural activities (30%), 'activities I enjoy' (28%) and outdoor activities like sport, golf, mountain bike riding (18%).

There is an opportunity to develop understanding of the range of experiences even in those already interested in visiting.

	%
I have heard the wineries and wine are fantastic	59
The Barossa has great cafes and restaurants	56
It is easily accessible from Adelaide	53
The Barossa is easy to get around	45
I really like exploring new and unique destinations like the Barossa	40
There is so much to do in the Barossa	38
I like open space, lack of crowds and a place to escape	37
There are excellent and unique places to shop	30
I could undertake a range of cultural activities (i.e. markets, museums, galleries etc.)	28
Lots of paid and/or free activities that I enjoy	21
I can undertake activities I like (sporting – cycling, walking, mountain biking, running, golf etc.)	18

Base: all research participants n=1,159

Q48 What specifically appeals to you about the Barossa as a leisure holiday destination?

What appeals about Barossa as a holiday destination?

South Australian residents know far more about the key appeal elements than interstate residents, and again Sydney residents have a lower awareness of these.

The findings show that communicating the positive aspects of the Barossa to interstate visitors will likely increase its appeal as a destination.

	Sydney	Other NSW	Mel	Other Vic	Adelaide	Other SA
I have heard the wineries and wine are fantastic	51	64	56	60	65	63
The Barossa has great cafes and restaurants	47	54	53	53	67	66
It is easily accessible from Adelaide	42	40	47	54	77	45
The Barossa is easy to get around	32	43	40	47	59	52
I really like exploring new and unique destinations like the Barossa	40	35	43	53	39	29
There is so much to do in the Barossa	35	32	39	40	39	38
I like open space, lack of crowds and a place to escape	35	36	36	33	40	40
There are excellent and unique places to shop	29	22	31	35	30	29
I could undertake a range of cultural activities (i.e. markets, museums, galleries etc.)	29	20	30	44	25	23
Lots of paid and/or free activities that I enjoy	21	26	17	23	25	12
I can undertake activities I like (sporting - cycling, walking, mountain biking, running, go	19	17	17	19	20	12
Other	1	1	1	2	1	0

Base: all research participants *n*=1,159

Q48 What specifically appeals to you about the Barossa as a leisure holiday destination?

What is appealing about the Barossa? Sydney v. Adelaide

There are key differences between Sydney and Adelaide.

Sydney residents have lower agreement with the first four areas of appeal which is matched by Adelaide residents having higher agreement with those same areas of appeal.

There are no other major differences by residential area.

	NET	Sydney	Adelaide
I have heard the wineries and wine are fantastic	59	51	65
The Barossa has great cafes and restaurants	56	47	67
It is easily accessible from Adelaide	53	42	77
The Barossa is easy to get around	45	32	59
I really like exploring new and unique destinations like the Barossa	40	40	39
There is so much to do in the Barossa	38	35	39
I like open space, lack of crowds and a place to escape	37	35	40
There are excellent and unique places to shop	30	29	30
I could undertake a range of cultural activities (i.e. markets, museums, galleries etc.)	28	29	25
Lots of paid and/or free activities that I enjoy	21	21	25
I can undertake activities I like (sporting – cycling, walking, mountain biking, running, golf etc.)	18	19	20

Base: those who rated appeal as high or medium *n*=769

Q47 Why doesn't the Barossa appeal to you as a leisure holiday destination?

Who does Barossa appeal to for a leisure trip?

Asking who the Barossa would appeal to gives insight into the perception of the destination.

Australians feel that the Barossa would appeal to couples of all ages and groups of adult friends.

They do not see the Barossa as a destination for families with kids of any age.

It is also not seen as an ‘active’ destination.

	%
Couples (30-65 years of age)	56
Retiree Couples	49
Groups of adult friends (30-65 years of age)	48
Young Couples (18-30 years of age)	48
Groups of younger adult friends (18-30 years of age)	40
Families with adult children	29
Retiree groups	29
Families with mainly primary school or younger children	22
Families with mainly high school aged children	18
Active people looking to undertake active pursuits	15
Kids	5
Don't know	5

Base: all research participants *n*=1,159

Q49 Which of the following groups do you feel the Barossa would appeal most to for a leisure trip?

Who does Barossa appeal to for a leisure trip?

Similar to the perception of appeal, there are key differences between Sydney and Adelaide residents.

Sydney residents are less likely to feel that the Barossa appeals to any of the groups while Adelaide residents, who are far more familiar with the Barossa, feel that it appeals to almost all groups.

From this, it is clear that an increased knowledge of the Barossa destination broadens its overall appeal.

	NET	Sydney	Adelaide
Couples (30-65 years of age)	56	44	69
Retiree Couples	49	35	62
Groups of adult friends (30-65 years of age)	48	37	62
Young Couples (18-30 years of age)	48	37	63
Groups of younger adult friends (18-30 years of age)	40	37	54
Families with adult children	29	22	36
Retiree groups	29	17	38
Families with mainly primary school or younger children	22	22	29
Families with mainly high school aged children	18	17	20
Active people looking to undertake active pursuits	15	14	17
Kids	5	5	7
Don't know	5	6	1

Base: all research participants *n*=1,159

Q49 Which of the following groups do you feel the Barossa would appeal most to for a leisure trip?

Appeal of competitor regional destinations

Research participants were asked to rate 9 regional destinations on a 0 to 10 scale which has been grouped into high, medium and low interest.

Of the 9 destinations included the Barossa has the highest appeal followed closely by Margaret River and the Adelaide Hills.

The lowest overall interest was in Coonawarra and Mudgee.

	High	Medium	Low
The Barossa, S.A	34	38	28
Margaret River, W.A	28	38	34
Adelaide Hills, S.A	27	39	34
McLaren Vale, S.A	24	38	38
Clare Valley, S.A	23	37	40
Yarra Valley, Victoria	22	38	40
Hunter Valley, NSW	22	40	38
Coonawarra, S.A	16	34	49
Mudgee, NSW	13	23	64

Base: all research participants *n*=1,159

Q50 On a scale of 0-10 where 0 is extremely unappealing and 10 is extremely appealing, can you please rate the following regional destinations in terms of appeal as a leisure holiday destination?

Appeal of competitor regional destinations

In this table the rating has been converted to an index (score from 0 to 100).

This analysis shows that regional areas in the home state of Australians generally have higher appeal.

The analysis also shows that the appeal of the Barossa is exceptional in that there is no statistically significant difference by residential area.

With the exception of Adelaide residents, the Barossa has higher appeal than all other destinations across every locality.

The findings show that the Barossa has high appeal and the task is to then turn this appeal into bookings.

	NET	Sydney	Elsewhere in NSW	Melbourne	Elsewhere in VIC	Adelaide	Elsewhere in South Australia
The Barossa, S.A	75	74	75	75	73	76	76
Adelaide Hills, S.A	72	69	67	69	71	78	76
Margaret River, W.A	71	72	73	72	73	69	71
McLaren Vale, S.A	70	66	66	67	68	77	72
Hunter Valley, NSW	68	74	72	66	68	65	64
Yarra Valley, Victoria	68	69	69	73	71	65	61
Clare Valley, S.A	68	67	67	65	66	72	74
Coonawarra, S.A	64	65	63	63	66	65	64
Mudgee, NSW	56	66	63	54	55	50	48

Base: all research participants *n*=1,159

Q50 On a scale of 0-10 where 0 is extremely unappealing and 10 is extremely appealing, can you please rate the following regional destinations in terms of appeal as a leisure holiday destination?

Attachment 1

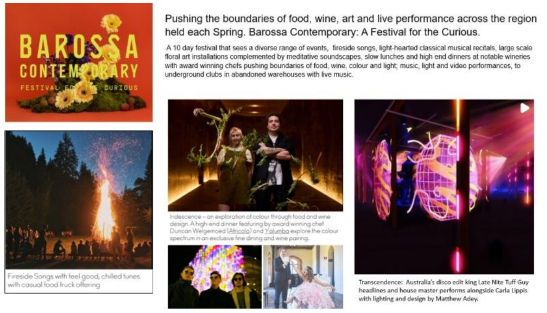
Product & Experience Testing

Experiences tested

Regional art galleries

Vintage Festival

Contemporary Festival



Mass Participation Events

Contemporary Festival

Research participants rated each value on a 0 to 10 scale which has been grouped.

The Contemporary Festival has no statistically significant difference in the level of agreement as ‘high’ in any of the statements.

There is higher agreement in the medium group that it is ‘unique’ (38%).

Over half (51%) do not believe it is a uniquely South Australian event.

	This experience interests me	This experience makes me want to visit the Barossa in South Australia	This experience looks unique	This experience makes me more interested in learning what the Barossa in South Australia has to offer	This experience seems distinctly South Australian
High	21	21	18	22	19
Medium	32	30	38	32	30
Low	47	49	44	46	51

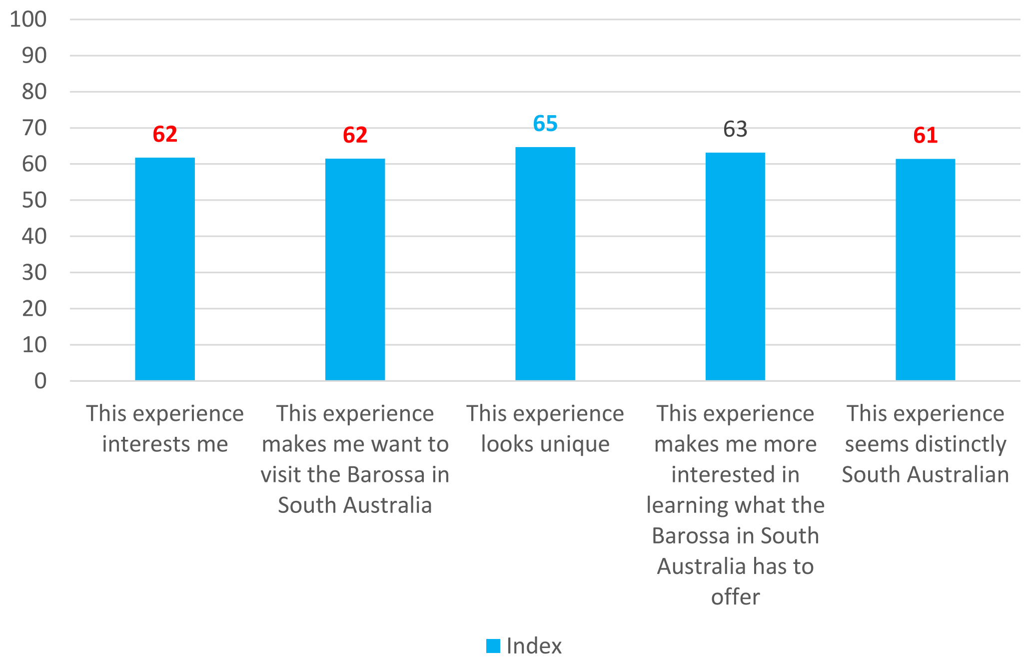
Base: all research participants *n*=1,159

Q51 Please indicate your agreement with the following statements, with 0 being Do Not At All Agree and 10 being Very Strongly Agree

Contemporary Festival

The data has been converted to an Index (0 to 100 score) to compare statements.

This analysis shows that the Contemporary Festival is successful in being seen as 'unique' compared to other values.



Base: all research participants *n*=1,159

Q51 Please indicate your agreement with the following statements, with 0 being Do Not At All Agree and 10 being Very Strongly Agree

Contemporary Festival

Comparison of Index by residential area shows that Sydney residents are more likely to agree that the Contemporary Festival is:

- Interesting to them
- Makes them want to visit Barossa
- Creates interest in learning about the Barossa
- The event is distinctly South Australian

	Sydney	Elsewhere in NSW	Melbourne	Elsewhere in VIC	Adelaide	Elsewhere in South Australia
This experience interests me	69	64	62	61	57	55
This experience makes me want to visit the Barossa in South Australia	67	63	62	62	58	54
This experience looks unique	67	64	63	64	65	66
This experience makes me more interested in learning what the Barossa in South Australia has to offer	70	65	61	63	59	61
This experience seems distinctly South Australian	66	62	62	57	60	57

Base: all research participants *n*=1,159

Q51 Please indicate your agreement with the following statements, with 0 being Do Not At All Agree and 10 being Very Strongly Agree

Vintage Festival

Research participants rated each value on a 0 to 10 scale which has been grouped.

The Vintage Festival is higher in being unique (23% high) and very low in being ‘distinctly South Australian (9% high).

	This experience interests me	This experience makes me want to visit the Barossa in South Australia	This experience looks unique	This experience makes me more interested in learning what the Barossa in South Australia has to offer	This experience seems distinctly South Australian
High	21	20	23	20	9
Medium	30	31	36	31	32
Low	49	49	40	49	59

Base: all research participants *n*=1,159

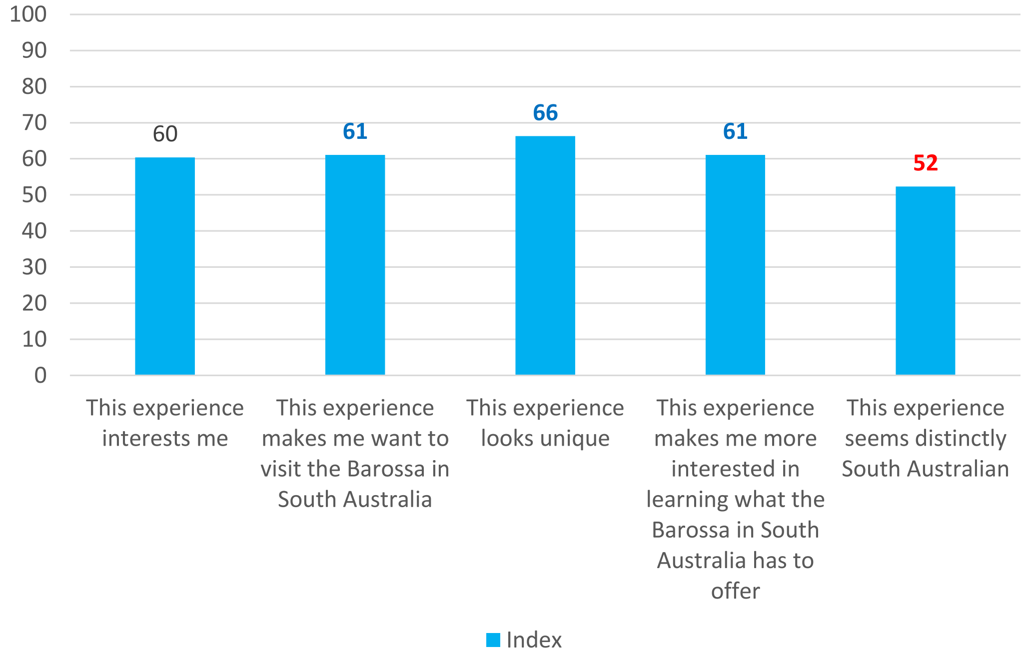
Q51 Please indicate your agreement with the following statements, with 0 being Do Not At All Agree and 10 being Very Strongly Agree

Vintage Festival

The data has been converted to an Index (0 to 100 score) to compare statements.

In this analysis the Vintage Festival is rated higher in:

- Makes me want to visit
- Unique
- Creates interest in learning about the Barossa



Base: all research participants *n*=1,159

Q51 Please indicate your agreement with the following statements, with 0 being Do Not At All Agree and 10 being Very Strongly Agree

Vintage Festival

Comparison of Index by residential area shows that Sydney residents are more likely to agree with that the Vintage Festival is:

- Interesting to them
- Makes them want to visit Barossa
- The experience is unique
- Creates interest in learning about the Barossa
- The event is distinctly South Australian

	Sydney	Elsewhere in NSW	Melbourne	Elsewhere in VIC	Adelaide	Elsewhere in South Australia
This experience interests me	67	63	59	62	57	53
This experience makes me want to visit the Barossa in South Australia	67	64	60	62	57	58
This experience looks unique	69	69	66	67	63	64
This experience makes me more interested in learning what the Barossa in South Australia has to offer	67	64	60	62	57	58
This experience seems distinctly South Australian	57	53	52	51	50	48

Base: all research participants *n*=1,159

Q51 Please indicate your agreement with the following statements, with 0 being Do Not At All Agree and 10 being Very Strongly Agree

Mass Participation Events

Research participants rated each value on a 0 to 10 scale which has been grouped.

Mass Participation events are higher in 'this experience interests me' (22% high).

There is no significant difference in agreement with other statements.

	This experience interests me	This experience makes me want to visit the Barossa in South Australia	This experience looks unique	This experience makes me more interested in learning what the Barossa in South Australia has to offer	This experience seems distinctly South Australian
High	22	19	18	19	19
Medium	19	18	19	18	17
Low	59	63	63	64	64

Base: all research participants *n*=1,159

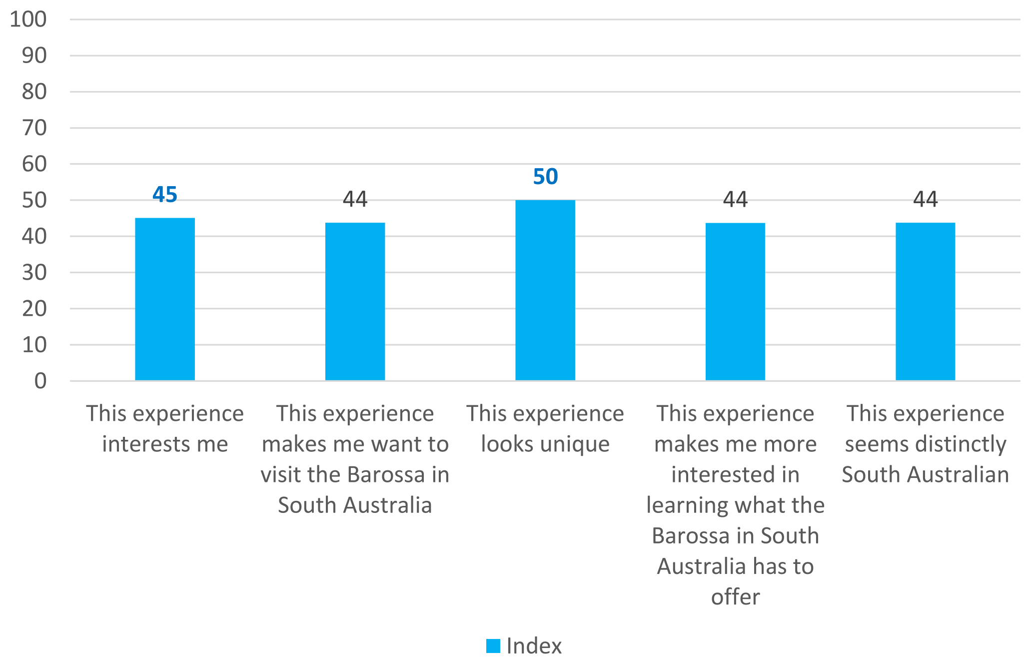
Q51 Please indicate your agreement with the following statements, with 0 being Do Not At All Agree and 10 being Very Strongly Agree

Mass Participation

The data has been converted to an Index (0 to 100 score) to compare statements.

In this analysis the Mass Participation is rated higher in:

- Experience interests me
- Unique



Base: all research participants *n*=1,159

Q51 Please indicate your agreement with the following statements, with 0 being Do Not At All Agree and 10 being Very Strongly Agree

Mass Participation

Comparison of Index by residential area shows that Sydney residents are more likely to agree with that the Vintage Festival is:

- Interesting to them
- Makes them want to visit Barossa
- The experience is unique
- Creates interest in learning about the Barossa
- The event is distinctly South Australian

	Sydney	Elsewhere in NSW	Melbourne	Elsewhere in VIC	Adelaide	Elsewhere in South Australia
This experience interests me	53	45	43	45	42	35
This experience makes me want to visit the Barossa in South Australia	51	46	41	44	42	37
This experience looks unique	57	55	46	51	46	40
This experience makes me more interested in learning what the Barossa in South Australia has to offer	51	45	41	44	41	38
This experience seems distinctly South Australian	50	45	43	45	40	38

Base: all research participants *n*=1,159

Q51 Please indicate your agreement with the following statements, with 0 being Do Not At All Agree and 10 being Very Strongly Agree

Major exhibitions at Barossa Regional Gallery

Research participants rated each value on a 0 to 10 scale which has been grouped.

Regional gallery events are higher than other statements ‘this experience interests me’ (26% medium).

There is no significant difference in agreement with other statements.

	This experience interests me	This experience makes me want to visit the Barossa in South Australia	This experience looks unique	This experience makes me more interested in learning what the Barossa in South Australia has to offer	This experience seems distinctly South Australian
High	15	14	16	14	14
Medium	23	23	26	24	23
Low	62	63	58	63	64

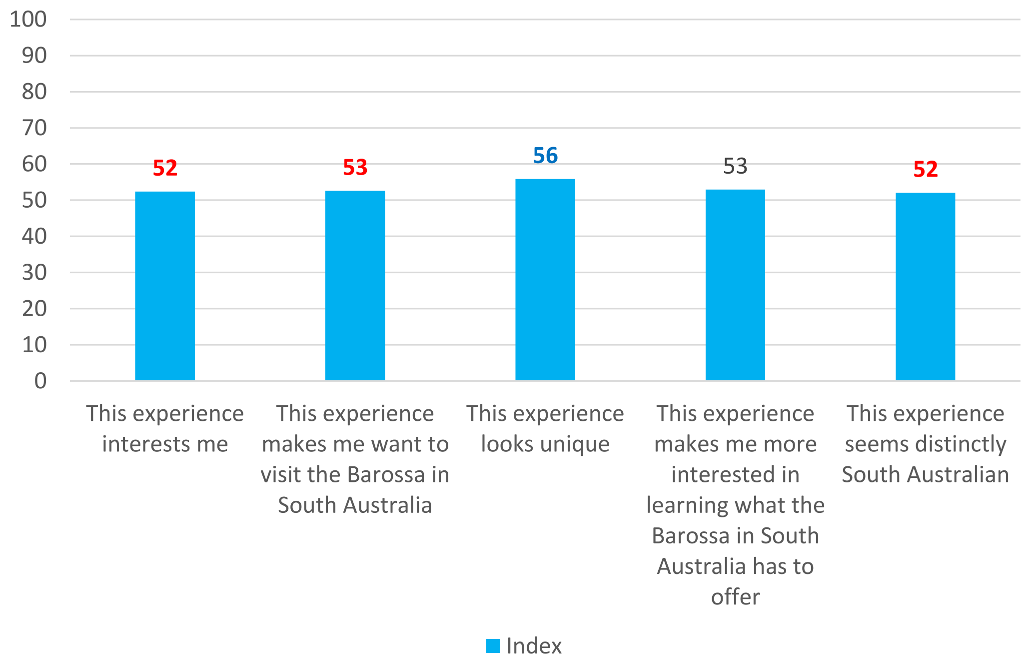
Base: all research participants *n*=1,159

Q51 Please indicate your agreement with the following statements, with 0 being Do Not At All Agree and 10 being Very Strongly Agree

Major exhibitions at Barossa Regional Gallery

The data has been converted to an Index (0 to 100 score) to compare statements.

In this analysis is Regional Gallery events are rated higher in being unique.



Base: all research participants *n*=1,159

Q51 Please indicate your agreement with the following statements, with 0 being Do Not At All Agree and 10 being Very Strongly Agree

Major exhibitions at Barossa Regional Gallery

Comparison of Index by residential area shows that Sydney residents are more likely to agree with that the Vintage Festival is:

- Interesting to them
- Makes them want to visit Barossa
- The experience is unique
- Creates interest in learning about the Barossa
- The event is distinctly South Australian

Residents of South Australia have lower agreement with most statements.

	Sydney	Elsewhere in NSW	Melbourne	Elsewhere in VIC	Adelaide	Elsewhere in South Australia
This experience interests me	62	52	54	51	46	43
This experience makes me want to visit the Barossa in South Australia	61	52	54	50	47	45
This experience looks unique	63	55	55	51	54	50
This experience makes me more interested in learning what the Barossa in South Australia has to offer	62	52	54	50	47	46
This experience seems distinctly South Australian	60	54	52	53	46	45

Base: all research participants *n*=1,159

Q51 Please indicate your agreement with the following statements, with 0 being Do Not At All Agree and 10 being Very Strongly Agree

Likely to travel to events

Research participants rated each value on a 0 to 10 scale which has been grouped.

Of the four events in this analysis the Contemporary Festival has the highest likelihood of travelling to Barossa.

	Barossa Contemporary Festival	Barossa Vintage Festival	Mass Participation Events	Major exhibitions at Barossa Regional Gallery
High	17	16	11	14
Medium	29	28	17	20
Low	55	57	72	66

Base: all research participants *n*=1,159

Q52 How likely are you to travel to the Barossa for this experience?

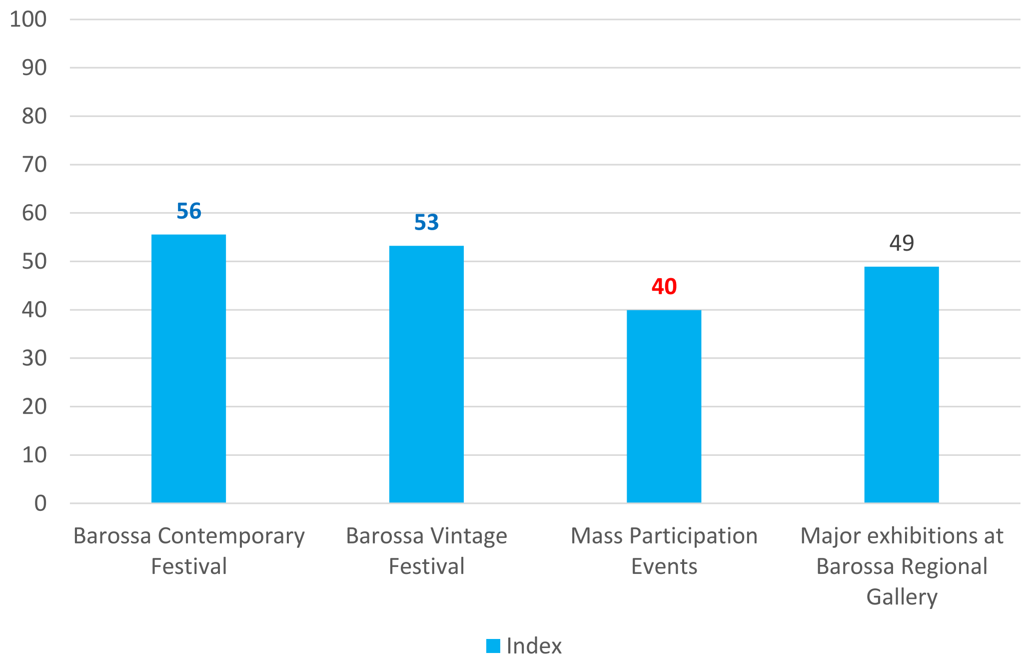
Likely to travel to events

The data has been converted to an Index (0 to 100 score) to compare statements.

In this analysis travelling to Barossa is higher for:

- Barossa Contemporary Festival
- Barossa Vintage Festival

Likelihood of travelling is lowest for Mass Participation Events.



Base: all research participants *n*=1,159

Q52 How likely are you to travel to the Barossa for this experience?

Likely to travel to events

Comparison of Index by residential area shows that Sydney residents are more likely to travel to all events compared to residents of other areas.

Residents of South Australia are less likely to travel to any of the events.

	Sydney	Elsewhere in NSW	Melbourne	Elsewhere in VIC	Adelaide	Elsewhere in South Australia
Barossa Contemporary Festival	66	54	54	56	52	45
Barossa Vintage Festival	61	55	52	53	48	47
Mass Participation Events	50	43	37	39	36	32
Major exhibitions at Barossa Regional Gallery	59	48	51	47	41	39

Base: all research participants *n*=1,159

Q52 How likely are you to travel to the Barossa for this experience?

Appeal of events

Research participants rated each value on a 0 to 10 scale which has been grouped.

Of the four events in this analysis the Barossa Vintage Festival has the highest appeal.

	Barossa Contemporary Festival	Barossa Vintage Festival	Mass Participation Events	Major exhibitions at Barossa Regional Gallery
High	16	19	8	12
Medium	26	26	13	22
Low	58	54	79	66

Base: all research participants *n*=1,159

Q53 For each of the following tourism products, please rate how appealing you find the experience, with 0 being Not At All Appealing and 10 being Extremely Appealing

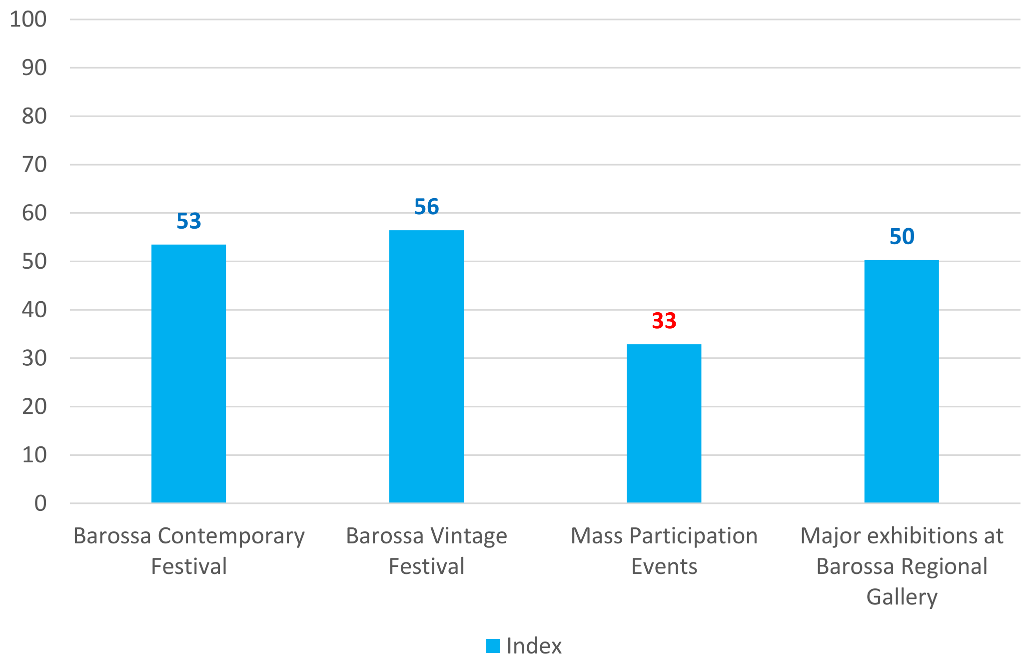
Appeal of events

The data has been converted to an Index (0 to 100 score) to compare statements.

In this analysis appeal is higher for:

- Barossa Vintage Festival
- Barossa Contemporary Festival
- Major Exhibitions at Regional Galleries

Appeal is lowest for Mass Participation Events.



Base: all research participants *n*=1,159

Q53 For each of the following tourism products, please rate how appealing you find the experience, with 0 being Not At All Appealing and 10 being Extremely Appealing

Appeal of events

Comparison of Index by place of residence shows that Sydney residents are more likely to travel to all events compared to residents of other areas.

Residents of South Australia are less likely to travel to any of the events.

	Sydney	Elsewhere in NSW	Melbourne	Elsewhere in VIC	Adelaide	Elsewhere in South Australia
Barossa Contemporary Festival	60	52	54	52	51	45
Barossa Vintage Festival	63	59	56	57	52	50
Mass Participation Events	42	33	30	36	30	24
Major exhibitions at Barossa Regional Gallery	57	53	52	52	43	41

Base: all research participants *n*=1,159

Q53 For each of the following tourism products, please rate how appealing you find the experience, with 0 being Not At All Appealing and 10 being Extremely Appealing

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DEBATE REPORT

5.1 FUTURE PLANNING

Author: Executive Business Partner
24/34718

PURPOSE

Future planning session to agree and determine the main focus areas for the Committee. It is suggested the Committee undertakes a short suspension of formal meeting procedures to undertake discussions.

RECOMMENDATION

That Sister Cities Advisory Committee endorse the following main focus areas that the Committee determines as a priority for the next 12 months, those being:

1) ……………………………………………………
2) ……………………………………………………
3) ……………………………………………………
4) ……………………………………………………
5) ……………………………………………………

REPORT

Discussion
The Committee is asked to undertake a brainstorming session to determine a consensus on the main focus areas for the Committee. This will be facilitated by Council Officers.

It is suggested that the Mayor calls for a Short Suspension of Meeting Procedures, pursuant to Council's Code of Practice for Meeting Procedures (Supporting Reference below) for 30 minutes to undertake the discussion.

These main focus areas will not hinder new ideas or projects but give direction to the Committee so as to undertake projects that align with the objectives in the Sister City and Relationship Policy (Supporting Reference below).

ATTACHMENTS OR OTHER SUPPORTING REFERENCES

Nil

Supporting references
Sister-City-Relationships-and-Engagement-Policy.pdf (barossa.sa.gov.au)
Code-of-Practice-for-Meeting-Procedures-2024.pdf (barossa.sa.gov.au)

COMMUNITY PLAN / CORPORATE PLAN / LEGISLATIVE REQUIREMENTS

Corporate Plan

BS4 Council and Committees - Provision of support to Council and Committees through the provision of required information, agendas, and minutes. Council and Committees are provided with support to enable informed decisions.

Legislative Requirements

Nil

FINANCIAL, RESOURCE AND RISK MANAGEMENT CONSIDERATIONS

Nil

COMMUNITY ENGAGEMENT

Nil