



BAROSSA AUSTRALIA ANNUAL REPORT 2023/24



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THE BOARD 2023-2024

Kevin Scarce AC, CSC, RAN (Rtd)
Chair

Stefan Jury - Special Appointment
Jones Harley Toole Lawyers

Marc Allgrove - Special Appointment
Evans + Ayers

Will Holmes - Grape
Woodbridge Farm

John Lienert - Grape
Lienert Vineyards

Amelia Nolan - Wine
Alkina Wines

Courtney Ribbons - Wine
Pernod Ricard Winemakers

Jon Durdin - Tourism
Seppeltsfield Road Distillers

Sarah Baddams - Tourism
Novotel Barossa

STAFF 2023-2024

Scott Hazeldine
Chief Executive

Ruby Stobart
Head of Brand and Demand Driving

Ben Patten
Head of Destination

Annabel Mugford*
Head of Education & International Market Development

Nicki Robins
Viticultural Development Manager

Amber Rushton (Until April 2024)
Digital Marketing Manager

Monica Hage
Office Manager

Ashleigh Hogan
Membership and Events Officer

Ashleigh Fox*
Events and Member Services

Chai Hua Loke (Until February 2024)
Finance Manager

Emma Rowe* (Commenced February 2024)
Finance Manager

Marcela Sandoval (Until January 2024)
Assistant Content Creator

*indicates part-time



WHAT WE STAND FOR

OUR UNDERLYING VISION, MISSION AND VALUES



VISION

Barossa, a world-renowned icon of wine, food and tourism. Born from unique heritage and driven by quality, innovation, and sustainability



MISSION

To sustain, protect and enhance Barossa's brand



VALUES

Leadership
Collaboration
Distinctive
Mastery
Inclusive

OUR KEY PRIORITIES

These priorities extend across all pillars, sitting at the centre of the quadrant.



SUSTAINABILITY

Alignment of intent, resource and outcome



CAPABILITY

Investing in our present and our future



CONNECTIVITY

Participation and investment by our community and customers

OUR FOUR PILLAR STRATEGY

STRATEGIC OBJECTIVES AND KEY INITIATIVES

Barossa Australia stakeholders work together to create a prosperous and sustainable future

- Regional water security
- Resilient landscapes
- Viticulture research and capability development
- Generational farming

To grow the value of the wine industry and the visitor economy

- International activations
- Barossa Wine School (inc. L3)
- Capability development programs
- Barossa be Curious
- The Barossa Cellar activations
 - Commercial
 - Industry and Capability

CAPABILITY

OUR OWN
BACKYARD

OUR
BRIGHT
FUTURE

GROWTH

INNOVATION

OUR
BRAND
PROMISE

OUR
COLLECTIVE
VOICE

INFORMATION

Barossa Australia delivers an inclusive and distinctive brand

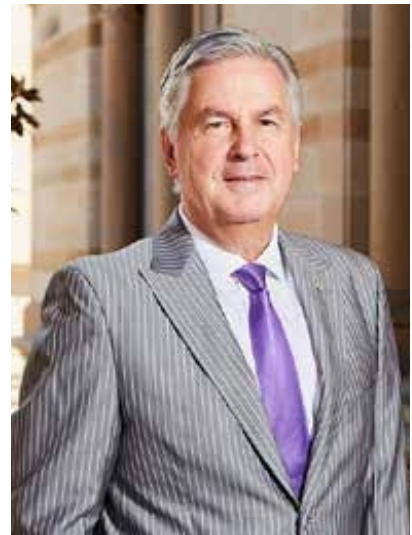
- Governance, local, state, national and international
- University of Adelaide MOU
- Net Zero Carbon Glass Wine Bottle
- Barossa Australia Well-being Fund
- Reconciliation Barossa
- Barossa Vintage Festival (regional events review)

To grow and stay connected to an engaged, global audience

- Digital media
- Social media
- Traditional media and PR
- Barossa Wine Show
- Data and insights - Localis, CRM

CHAIR REPORT

Kevin Scarce AC, CSC, RAN (Rtd) Chair



I am pleased to report on Barossa Australia's work and progress for the 2023-2024 year, acknowledging that the past year has been one marked by persistent challenges for many in the grape, wine and tourism sectors both here in the region and further afield. These have served to both sharpen the resolve and focus the thinking of the Barossa Australia Board, and continue to spur us on in our endeavours.

The need to remain active on key advocacy issues such as long-term water security for the region, reengagement in the China market, and the need for continued support of wine exports through the availability of the Export Market Development Grant have remained front of mind throughout the year. A recognition of the softening regional tourism landscape also prompted the Board to support the delivery of a key piece of regional marketing activity under the Barossa Be Curious banner, which has yielded pleasing results in driving traffic to member websites and expanding our audiences.

The Board has also taken time this year to review the organisation's strategic framework ensuring it remains fit for purpose, best able to respond to the current operating environment, and reflective of a truly integrated organisation. The outcome of this work has been crucial in informing the Association's Annual Operating Plan for 2024 – 2025 and beyond.

As we finally emerge from both the COVID pandemic and the merger of Barossa Australia, the organisation continues to develop its longer-term strategic lens to set the course for future sustainability.

Ongoing advocacy on key regional issues, such as long-term water security, regional growth and development, plus the wine industry code of conduct review, will remain high on the agenda.

The opportunity to drive visitation and demand in the region and its products will present itself via a busy 2025 events program including the Barossa Vintage Festival, the Barossa Wine Auction and hosting the AFL Gather Round in region in April. It is paramount the region is best placed to convert these opportunities.

I am confident the current strategic approach and the responsible allocation of resources will enable Barossa Australia to continue to best navigate the challenges at hand and ensure the region remains visible, engaged and able to pursue all opportunities to deliver benefit for our membership.

My thanks go to Scott and the Barossa Australia team for their passionate and dedicated commitment to ensuring we deliver genuine value for our membership during these challenging times.

I would like to acknowledge the members of our various industry committees and associated working groups who give their time freely and provide vital conduit into the board. Also, I thank my fellow Board Directors for their committed and ongoing service to the Association.

I look forward to working with the Board and Chief Executive to continue to strengthen the organisation and deliver increased support and successful outcomes to our members over the next 12 months.

Kevin Scarce

CEO REPORT

SCOTT HAZELDINE



As I sit down to compile my annual report for 2023/2024, I reflect on a year that has required a certain amount of fortitude and resilience from us all, as the operating environment has continued to remain dynamic and challenging for many in our industries and our region.

While the outstanding 2024 vintage and the reopening of the China market offer some welcome optimism, ongoing challenges remind us to stay informed, focused, and adaptable. We've been working to ensure our goals are clear and our approach agile, setting the best path forward for our region and members.

Despite the challenges, the past year has also delivered much operational progress and achievement. The creation and delivery of sustained regional marketing activity under the banner "Barossa Be Curious" has been highly successful in its goals of broadening the region's audience and driving traffic to members websites. The Barossa Wine School has continued to provide an effective and important vehicle to continue to expand our networks, and influence both at home and abroad, and the first Barossa Grenache Symposium provided opportunity for genuine interrogation and discussion around this important regional variety.

In addition, the region's capability and skills have continued to be enhanced via the delivery of a comprehensive program of seminars, workshops, and training opportunities during the year. This has covered everything from possible career pathways in operational viticulture for local high school students, through to an international trade-ready program for tourism operators. Thought leadership and innovation have also been demonstrated by the continuation of the Barossa Net Zero Carbon Bottle Project and our MoU with the University of Adelaide.

A provisional operating surplus of \$44,191 off set by the extraordinary expense of \$150,000 towards the regional marketing activity Barossa Be Curious ensures we ended the financial year 2023/2024 with a deficit of \$105,809. Supporting the delivery of key initiatives such as this whilst ensuring the organisation remains financially strong with a strong balance sheet and total equity above \$2.42million, has been particularly pleasing.

Chai Hua Loke retired from the role of Finance Manager in February after a significant tenure, but Emma Rowe arrived shortly thereafter to ensure a smooth transition. My sincere thanks to the entire Barossa Australia team for their continued commitment and dedication to our members and the region.

We have used the opportunity in recent months to assess and revise our strategic focus, develop our relationships with key regional and industry stakeholder partners, and deliver an annual operating plan for the coming year that is fiscally responsible, clear in its focus and comprehensive in its breadth. This work has us, I believe, well placed to best deliver benefit for all our members across the region for the coming year, as we draw on our collective resilience and connectedness. I have no doubt the Barossa will emerge stronger and well placed to take advantage of future opportunities.

Scott Hazeldine

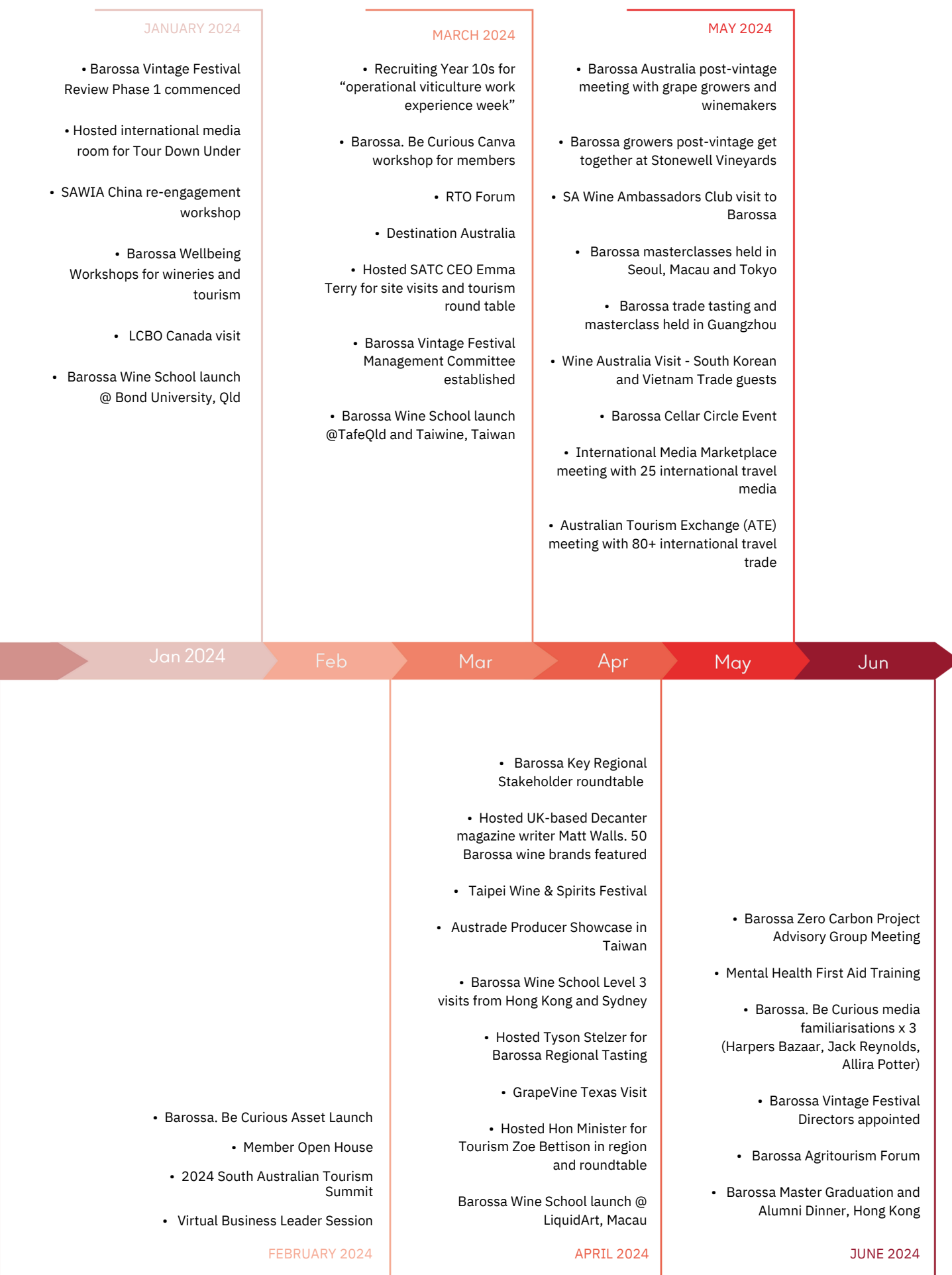


FY23/24 YEAR AT A GLANCE



2023/2024: YEAR AT A GLANCE

JULY 2023 Operational viticulture work experience week for Year 10s Young Ambassador program launched • First Taste of Vintage • Barossa Wine School Educator Training Visit Hosted Ned Goodwin for James Suckling tasting	SEPTEMBER 2023 • Barossa Wine Show • Barossa VitiWatch #1 • International Trade Forum • Project Destination Barossa Session 1 • SATC Rezdy Workshop • Barossa Zero Carbon Bottle Project Forum • Grapefest Texas • US market visit	NOVEMBER 2023 • Barossa VitiWatch #2 • Barossa Vineyards Irrigation Management & Water Budgeting Workshop • Wine Australia visit • ATEC Meeting Place • TiCSA Tourism Marketing Workshop • Project Destination Barossa Session 2 • Barossa Wine Show Trophy Winners and Sponsors Dinner • Barossa. Be Curious content photo and video shoot (4 days) • Launch of The Australian Ark			
July 2023	Aug	Sep	Oct	Nov	Dec
• India Barossa Knowledge Summit • Barossa Grounds with Dilmah from Sri Lanka • First Nations Workshop • Finlaysons Roadshow • Business Intelligence Virtual Session AUGUST 2023	• Aus Hub Vietnam Dinner • Committee Champagne visit to region • SAQ buyer visit • Barossa Vintage Festival Review Phase 1 commenced • Australian Regional Tourism Conference • Dave Brookes Halliday Wine Companion Tasting • Barossa Grenache Symposium • Barossa Wine School launch @ Melbourne Wine School OCTOBER 2023	• Barossa VitiWatch #3 and #4 • Barossa Wellbeing Workshops for growers • Asian Market Update • Barossa Cellar Circle End of Year event • Guildsomm Trade Webinar, North America DECEMBER 2023			



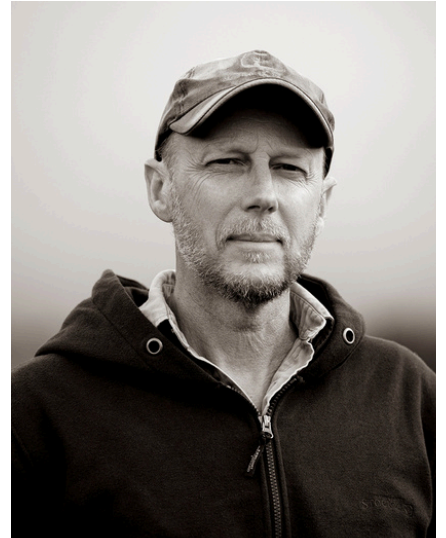


GRAPE GROWING



GRAPE BAROSSA REPORT

EVAN GOBELL



2024 Barossa growing season and harvest

Despite a reasonable break at the end of the 2023 harvest, Barossa did not receive the soaking winter rains growers had hoped for.

Winter saw below average rainfall (-28% Barossa Valley, -20% Eden Valley), and spring was even drier with only 56 mm in Barossa Valley and 119 mm in Eden Valley.

Due to the dry winter and spring, budburst was three weeks earlier than the year before. Canopy growth in September was swift, with temps well above average (Barossa Valley 3.4C and Eden Valley 3.5C). Frost in September and October meant some vineyards had significant damage, which reduced their yield.

Some pre-Christmas/early January rainfall meant vines were well placed for the proceeding summer months in terms of soil moisture, although with some increased powdery mildew risk due to increased humidity. Harvest saw relatively mild temperatures compared to average, with excellent ripening conditions and no significant adverse weather events.

The 2024 Barossa vintage yielded 56,881 tonnes, 1% above the five-year average and 22% down on last year's above-average 73,000 tonnes. Due to declining prices, the value of the Barossa crush was \$105 million, 14% below the five-year average of \$120 million.

In BV, Wine Australia's price dispersion data showed a downward shift, with 41% of red varieties purchased at \$2000 per tonne or above, compared with 49% in 2023. In EV, the price dispersion showed 45% of all grapes were purchased at \$2000 per tonne or above, compared with 52% in 2023.

Some highlights in 2023-24 included:

Lifting of China tariffs

On 29 March 2024, the Chinese Government lifted over three years of 200+% tariffs on Australian wine. And throughout April, May and June our Asia Ambassador Anson Mui was quickly in-market in China, South Korea, Japan, Taiwan and Hong Kong, holding Barossa masterclasses and pressing the flesh with trade and consumers alike to promote our great region in these growing markets.

Barossa water security

The past 12 months saw Barossa Australia's continued participation in the joint government industry working group focused on securing a supplementary source of irrigation water for Barossa. Following the public release of the KBR report, progress has been slow. However, a Ministerial press release recognized an overall need for the region, with BIL as a key partner, and Eden Valley as a critical priority.

Sustainable Winegrowing Australia

The number of Barossa vineyards and wineries participating in Sustainable Winegrowing Australia has grown significantly to 183 members (up from 146 last year). Of these, 149 are vineyard sites. Barossa growers and winemakers who are certified members of SWA increased from 49 to 100.

Nearly 70% of Barossa's vineyard area (9,861 Ha out of the total 14,212 Ha) is now under Sustainable Winegrowing Australia membership.

Evan Gobell

Chair, Grape Barossa

GRAPE BAROSSA COMMITTEE

2023/24:

Evan Gobell

(Chair)

John Lienert

(Vice Chair)

Darren Westlake

Julie Ashmead

Carol Riebke

Paul Thomas

Jack Scholz

Trent Burge

Brad Currie

Adrian Hoffmann

(Invited as Barossa Rep and

Chair of WGCSA)

Nicki Robins

(Barossa Australia)

Scott Hazeldine

(Barossa Australia)



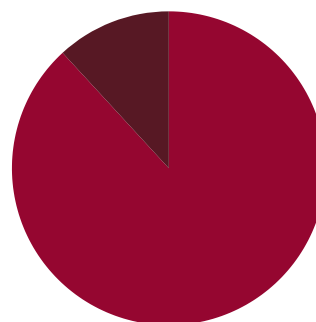
GRAPE GROWING KEY STATISTICS

BAROSSA AUSTRALIA 2024 BAROSSA VINTAGE REPORT

Barossa's 2024 winegrape crush was 56,881 tonnes, 1% above the five-year average and 22% down on last year's above-average 73,000 tonnes. Due to the lower yield and declining prices, the value of the Barossa crush was \$105 million, 14% below the five-year average of \$120 million.

Wine Australia's National Vintage Report revealed the 2024 Australian winegrape vintage was up 9% on last year's record-low vintage but still well below the 10-year average.

BAROSSA WINE ZONE TOTAL CRUSH 56,881 TONNES*



Barossa Valley
50,145 Tonnes*
(down 24% from 2023)

Eden Valley
6,736 Tonnes*
(down 6% on 2023)

Data source: 2024 Wine Australia National Vintage Report

*Due to an approximately 10% non-response rate, the total Barossa wine grape yield reported in the National Vintage Report is regularly 10-15% lower than the actual crush determined by the Barossa levy collected by the Primary Industries Funding Scheme.



Crush (tonnes)
56,881
-22%



Average per tonne
\$1,832
-5%



Total crush value
\$105M
-26%



Percentage of total
Australian tonnes
4.5

2024 BAROSSA VALLEY AVERAGE PRICE per tonne (% up or down, compared to 2023 vintage)

Shiraz	\$1865	-6%
Cabernet Sauvignon	\$1764	-5%
Grenache	\$2354	-2%
Mourvedre	\$2293	+3%
Chardonnay	\$879	+13%

2024 EDEN VALLEY AVERAGE PRICE per tonne (% up or down, compared to 2023 vintage)

Shiraz	\$2715	+3%
Cabernet Sauvignon	\$2339	+6%
Grenache	\$3043	-2%
Riesling	\$2020	+1%
Chardonnay	\$1744	0%



100

people attended
Grenache
Symposium



70%

Barossa vineyard
area in Sustainable
Winegrowing
Australia

Our Own Backyard – best practice viticulture 2023/24

Sustainable Winegrowing Australia

- 183 Barossa members (up from 146 last year). Includes 149 vineyard sites and 34 winery sites.
- 100 Barossa certified members (up from 49 last year).
- Nearly 70% (9,861 Ha) of Barossa's total 14,212 Ha of vineyard area is now under Sustainable Winegrowing Australia membership (up 1,144 Ha from last year).

Barossa "VitiWatch"

Barossa Australia delivered four "VitiWatch" bulletins to growers on 13 September, 1 November, 1 December and 14 December, providing vineyard management advice following spring frost, heavy summer rainfall, and prevention of downy and powdery mildew. 2023/24 was Barossa Australia's 11th year providing a 'crop watch' service to Barossa growers.

Operational Viticulture

In July 2023, Barossa Australia hosted 16 high school students on its "operational viticulture work experience week" for Year 10s, bringing the total alumni to 58 students since 2019. Barossa growers have taken on 25 school-based apprentices since the program kicked off four years ago.

Barossa Grounds

On 30 August 2023, Barossa Australia, University of Adelaide and Yalumba's Louisa Rose delivered a Barossa Grounds tasting and presentation to the Dilmah family from Sri Lanka. Dilmah delivered a tea tasting.

Barossa Grenache Symposium

Over 100 people attended the Barossa Australia Grenache Symposium on 25 October. Led by MW Phil Reedman, the day featured an international Grenache styles benchmarking tasting, and expert speakers on growing, making, marketing and sales of Barossa Grenache.

Barossa Vineyards Water Management Workshop

85 growers attended the Barossa VitiTech Group's "irrigation management and water budgeting workshop" held on 8 November 2023, featuring climate scientist Darren Ray, soil moisture monitoring expert Adam Brown, irrigation specialist Greg Hocking, and a panel of local viticulturists experienced in managing vineyards in hotter, drier seasons.

Barossa Wellbeing Workshops

80 Barossa growers attended breakfasts at Ebenezer, Vine Vale and Eden Valley in December 2023, focused on developing mental resilience in challenging times. The sessions were run by wellbeing expert Bec Weatherill and included an update from Barossa Australia CEO Scott Hazeldine. "Wellbeing in the workplace" workshops were delivered to 15 Barossa winery and tourism members in January 2024.



Benchmarking Barossa against international examples at the Oct 2023 Barossa Grenache Symposium



Sixteen Yr 10 students completed Barossa Australia's "operational viticulture work experience week" in July 2023. Barossa growers have taken on 25 school-based apprentices since 2019



The Barossa crew at the June 2024 Clare Pruning Comp. L-R: Roger Maywald, Paul Weigand, Kirsty Waller, Bruce Henderson, Chris Parbs, David Vaughan



Over 100 people attended the Barossa Australia Grenache Symposium in October 2023, led by MW Phil Reedman. Panellists L-R: Adrian Hoffmann, Dr Dylan Grigg, Marco Cirillo, Dean Willoughby, John Lienert



80 Barossa growers attended breakfast workshops focused on developing mental resilience in challenging times, led by wellbeing expert Bec Weatherill in Dec 2023



Defending South Australian Pruning Champ, Barossa's David Vaughan in action at the Clare Valley Pruning Comp



85 growers attended the BVTG's Irrigation Management & Water Budgeting Workshop" in Nov 2023

A person wearing a dark blue suit is seated at a table with a white tablecloth. Two wine glasses are visible on the table; the one in the foreground is partially filled with red wine. The person's hands are resting on the table. The word "WINE" is centered in white capital letters, with a thin white horizontal line extending from its left side across the middle of the image.

WINE



WINE BAROSSA REPORT

COURTNEY RIBBONS



The Wine Barossa Committee's primary mandate is to support Barossa Australia in implementing its strategic objectives, including;

- To act as a representative body for Barossa wineries on a range of Barossa wine related topics
- To identify areas of research and development in relation to economic and environmentally sustainable practices
- To implement marketing and promotional initiatives for the benefit of Barossa winemakers in accordance with the specific responsibilities and authority delegated by the Barossa Australia Board
- To advise the Barossa Australia Board, Chief Executive Officer and other relevant Barossa Australia staff on matters relating to promotion, marketing, policy and practice.

The 2023/2024 financial year continued to present numerous challenges for the industry including geopolitical tensions, supply chain disruption, an increasingly complex regulatory environment, increases in raw material costs, inflation, interest rate increases, intense competition, oversupply, and fluctuating export sales. This year the China tariffs were lifted and although initial export figures are positive, the next 12 months will be crucial in understanding the market dynamics and opportunities.

Congratulations to Marie Clay and the Barossa Wine Show Committee, who delivered the 47th Wine Show in September 2023, which featured 722 entries from 96 exhibitors which included 19 Wine of Provenance submissions.

There were three hectic days of judging followed by the awards presentation dinner, held at Peter Lehmann Wines Old Redemption Cellar. The show's reputation as the country's premier regional wine show remains a source of pride and a worthy reward for the dedication and hard work of all involved.

This year saw the launch of the "Barossa Be Curious" campaign, delivered through a range of media activations from print to digital and social. As a key metric, the committee and Board reviewed interaction with the campaign and the amount of traffic it generated for member's websites.

Barossa Australia took some time this year to gather feedback and data from the industry to understand how to improve the impact and reach of domestic activations. This feedback will inform activities in the 2024/2025 financial year.

The Cellar Door Circle has continued to focus on building capability, facilitating links with tour operators and accommodation providers, and informing the Committee of crucial happenings in this area.

Matt McCulloch and Ben Chapman have continued to provide considered and well-informed insight and guidance to support the region's navigation of challenging export markets. A strong focus has remained on our primary Asian, North American, and UK markets, along with the re-opening of China. Export activities including masterclasses, trade shows and education, plus attendance at Grapefest and Vinexpo ensured Barossa had a strong presence in these key markets.

Sincere thanks to all members of the Committee who give their time voluntarily and without complaint.

As we look to the future, the Wine Barossa Committee will look to review our working groups to ensure alignment with the strategic objectives of Barossa Australia and a strong focus on the needs of the industry. We look forward to continuing to represent Barossa on behalf of the winery members.

Courtney Ribbons
Chair, Wine Barossa

THE WINE BAROSSA COMMITTEE 23/24

Matthew McCulloch
(Interim Chair)

Ben Chapman

Belinda Hughes

Heather Fraser

Lauren Mudge

Courtney Ribbons

Marie Clay

Mark Smith

Scott Hazeldine
(Barossa Australia)



WINE KEY STATISTICS

The lifting of the China tariffs on wine in late March 2024 was greeted with relief by Barossa wine exporters. The data shows how quickly sales picked up with the value of wines exported to China in the last three months of FY2024 increasing by 1,900% (albeit from a very low base). Hong Kong also showed an increase, most likely in preparation for the tariffs lifting. Through our in-market ambassador, Anson Mui, we were well positioned to host the Barossa Trade Tasting and Masterclass in Guangzhou in May, the first Australian wine region to host an activation in China post tariffs lifting.

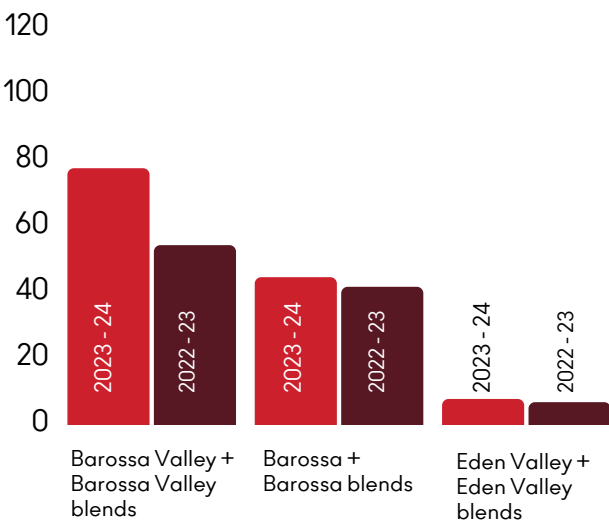
However, sales to the United Kingdom and the USA show a decline, and to New Zealand only a small increase demonstrating trading conditions in other key markets continue to be challenging.

At Barossa Australia we have continued to support the diversification of export markets through in market activities and education, and hosting both Wine Australia and South Australia Wine Ambassador Club visits to the Barossa.

The Barossa Australia International Market Development Strategy supports the sell-through of stock in China plus builds on the market diversification strategy in other Asian Markets. Recognising the importance of the USA, this market is also a focus for Barossa Australia.

BAROSSA ZONE EXPORTS MAT** Growth to June 2024

Exports by Geographical Indication (value)



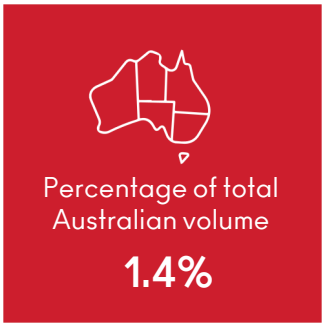
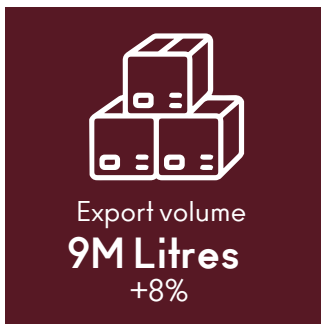
**MAT = Moving Annual Total
Data source: 2024 Wine Australia Export Report

Exports by variety, top 5 (value)

Shiraz	\$87M	+24%
Shiraz blend	\$16.9M	+64%
Cabernet Sauvignon	\$9.2M	+15%
Grenache blend	\$4.1M	+21%
Chardonnay	\$2.4M	+9%

Destination market, top 5 (value)

China	\$32M	+1,900%
UK	\$15.9M	-9%
New Zealand	\$15.9M	+2%
USA	\$11.1M	-6%
Hong Kong	\$12.2M	+37%



OUR
BRIGHT
FUTURE



428

Barossa Wine
School
participants

Barossa Wine School

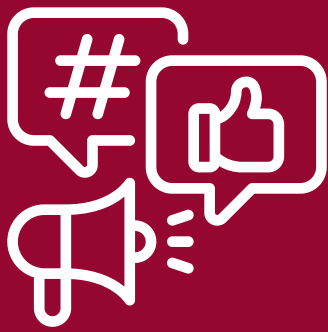
- 26 licenced educators across 16 markets
- BWS Level 1 = 18 classes with 253 participants
- BWS Level 2 = 3 classes with 34 participants
- BWS Level 3; co-hosted in the Barossa with Corvino = 15 guests *
- Barossa Wine School online registrations = 126

*This visit generated \$188,400 in visitor spend. The spend is projected to increase local output by \$249,053, value-added by \$127,000 and employment by 2.4 annual local jobs as calculated by the RDABGLAP using an event impact assessment model and calculator.

Graduation and Alumni dinner held in Hong Kong on 31 May with 49 people (including 5 Barossa representatives) attending, 8 Barossa wines presented in the pre-dinner tasting, and 6 wines presented with dinner.



OUR
BRIGHT
FUTURE



31.2M

Media
impressions via
GrapeFest



Asia Activations - April to June 2024

- Aus Hub Vietnam Dinner, partnering with Yalumba. 70 Vietnamese wine trade and media attended.
- Taipei Wine & Spirits Festival – Six brands represented. 80+ attendees participated in Introduction to Barossa mini-classes hosted by Anson Mui.
- Austrade Producer Showcase in Taiwan – Four brands participated with 70 wine related trade attending. 40 attendees participated in a Barossa masterclass hosted by Anson Mui.
- Barossa Masterclasses held in Seoul, Macau and Tokyo co-hosted by Barossa Wine School educators and Anson Mui. 79 participants in total across the three events.
- Barossa trade tasting and masterclass held in Guangzhou hosted by Anson Mui. 40 Chinese trade attended the masterclass and 160 trade and media attended the trade tasting.

North America

GrapeFest Texas, USA – September 2023

- Barossa Australia co-ordinated 8 wineries to attend GrapeFest Texas, USA.
- 7,000+ attendees at the International Wine Experience area.
- 5,488 x 60ml glasses of Barossa wines poured to consumers = 105 dozen sold to GrapeFest.
- Two BWS Masterclasses held with 97 people attending across each session.
- 51 volunteers (41% total) registered for BWS Online Course
- 31.2+ million media impressions through
 - 4 radio appearances
 - 2 live TV studio appearances
 - 15 live on location outside broadcast appearances

Guildsomm – November 2023

- Barossa Webinar held in December with 1112 registrations.

India

Barossa x Sonal Holland Wine Academy – July 2023 to February 2024

- 886 registrations for Introduction to Barossa online course
- 4000 registrations for Barossa Knowledge Summit

Buyers and Media

- SAQ buyer visit
- LCBO buyer visit
- Decanter "Barossa" Tasting & Matt Walls Shiraz and Grenache focused visit to region

BAROSSA WINE SHOW 2023



722
entries



78
gold medals
awarded



111
silver medals
awarded



237
bronze medals
awarded

The 2022 Mataro from “Red by Caroline Dunn”, a small producer from Barossa, was recognised as the Best Barossa Wine at the 2023 Barossa Wine Show.

Mataro is one of Barossa’s most beguiling varieties, which showcases quintessential Barossa-ness in a bright, modern way, as seen in this award-winning wine. Red by Caroline Dunn took home three trophies, Best Barossa Wine, Best Red Wine and Best Mataro/Mourvèdre.

Sue Bell completed her third and final year as Chair of Judges.

Chair of Judges: Sue Bell

Panel Chair Judges: Rob Diletti, Adam Walls, Belinda Thomson

Judges: Emma Norbiato, Jane Skilton, Brett Smith, Ben Thoman, Andrea Pritzker, Shavaughn Wells

Associate Judges: Lauren Hutton, Ally Gossen, Ollie Thomas, Tpsi Wallace, Ashleigh Seymour, Kristen Zerk

Wine of Provenance Judges: Sue Bell, Jane Skilton MW, Shavaughn Wells, Janelle Zerk

Committee: Adam Sloane, Alexey Doumbuaya, Angus Seabrook, Ashleigh Fox, Belinda van Eyssen, Katelin Boase, Sam Pfeiffer, Scott Hazeldine, Tim Dolan, Tim Pelquest-Hunt

MAJOR TROPHIES

Best Barossa Wine

Red by Caroline Dunn 2022 Mataro

Best Barossa Red Wine

Red by Caroline Dunn 2022 Mataro

Best Barossa White Wine

Leo Buring 2023 Eden Valley Riesling

Most Outstanding Red Wine of Provenance

Saltram Wine Estate No.1 Shiraz - 2021, 2016, 2010

Most Outstanding White Wine of Provenance

Rieslingfreak No. 4 Eden Valley Riesling - 2023, 2017, 2013

Best Single Vineyard Wine

Yelland & Papps 2022 Single Vineyard Old Vine Grenache
Viticulturist: Kevin Schild

Best Small Sized Winery

Yelland & Papps

Best Medium Sized Winery

Murray Street Vineyards

Best Large Sized Winery

Seppeltsfield



2023 Barossa Wine Show Judges



2023 Best Barossa Wine, Caroline Dunn & Neil Hahn



Grapefest 2023 Grape Stomp Winners



2024 Barossa Wine School Level 3 Visit - Corvino



2024 Shanghai Barossa masterclass at the Wine Australia China Road Show



92 attendees at the Shanghai Barossa masterclass

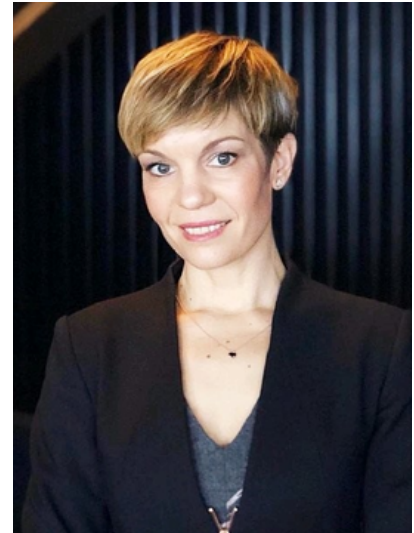
A man with short brown hair, wearing a green t-shirt, is smiling and looking towards the right. He is working on a brown leather bag on a workbench. To his left, a woman with glasses and a dark shirt is partially visible, looking at him. To his right, a woman with long dark hair, wearing a blue dress, is smiling and looking at him. The background is a workshop with various tools and materials.

TOURISM



TOURISM BAROSSA REPORT

SARAH BADDAMS



The 2023/24 year has been one of consolidation and return to more typical travel patterns following the extensive disruption (2020/21) and the following domestic tourism boom for regions (2021/22). The calendar year of 2022 broke visitor economy records which now, upon reflection, was a time of very specific circumstances.

Early in the 2023/24 year it became clear that the high levels of domestic visitation (particularly intrastate) were slowing. Increased cost of living was having an impact on discretionary spending and household savings that had been used to fund 'revenge travel' post-COVID were expended.

In October 2022, Barossa Australia invested in a new tool – Localis Data. As a region we were one of the first to be impacted by the visitation slow-down and the first to be able to quantify and respond to it.

Throughout 2023/24 Barossa Australia provided timely and granular data to stakeholders including the South Australian Tourism Commission (SATC) and our industry, to ensure correct information and the ability to respond in region.

The early awareness and quantification of the slow down enabled the Barossa Australia Tourism Board Directors to advocate for an additional \$150,000 in funding to promote the region to interstate and intrastate audiences. This activity, known as Barossa. Be Curious began in October 2023 and ran for the duration of 2023/24.

Some key outcomes of Barossa. Be Curious (as at end of June 2024) include:

- 1,727,187 predominantly Millennial social media accounts reached by influencers
- 800,000 impressions and 100,000 video thru plays of new content from paid social media activities
- Users to Barossa.com increased by 14% and sessions increased by 32% (traffic)
- Bookeasy – BOOK NOW – increased by 18% (Council to operator channel)
- Views of ATDW Operator Page listings (on Barossa.com) increased by 20%
- Website users exiting to Operator Website increased by 19%
- Barossa.com conversions increased by 10% (327,150 from Jan 2024 – Jun 2024)

In 2023/24 Barossa Australia has enjoyed support from The Barossa Council, RDA BGLAP and Light Regional Council. Collaboration across the four organisations has improved, including a CEO Roundtable in March 2024 as part of the development of Barossa Australia's Annual Operating Plan and to share organisational priorities for the upcoming year. This level of respect and collaboration ensures that organisational activities are clear, efficiency is achieved, and duplication is avoided.

THE TOURISM BAROSSA COMMITTEE 23/24

An updated membership structure implemented from July 2023 enables members to choose their membership level (from 4 options) and introduced online and part payment methods. 68% of members chose to pay online and each membership category level was well supported.

In addition to Barossa. Be Curious, the team have had a busy year including:

- 80 face-to-face industry site visits
- Held three "Open House" events and hosted the Tourism Minister in region in September 2023
- Delivered Barossa Product updates to SATC and famil programs to the SATC Destination Development team, Tourism Australia and travel media.
- Delivered two business intelligence sessions utilizing SATC data and Localis data
- Exhibited at the Australian Tourism Exchange including 94 trade meetings and media activities
- Regular Visitor Information Centre meetings.

The 2024 Annual Operating Plan outlined key projects that were completed throughout the year. These included:

- A two-phase review of the Barossa Vintage Festival was completed and adopted
- The delivery of the International Trade Ready Program with four businesses graduating
- A destination training program with 66 front line staff trained by Barossa Australia staff
- Ongoing destination management including the State Government Regional Tourism Review
- Implementation and enhancement of Localis Data Analytics tool
- Agritourism Forum – development and delivery – completed June 2024

Local Government support continues to play an important role in our investments for our tourism industry, along with delivery of collaborative projects with The Barossa Council including the Regional Visitor Guide, Barossa Touring Map, MyBarossa social platforms and Barossa.com.

I thank The Barossa Council and Light Regional Council for their ongoing financial and operational support.

Despite a challenging year, the outcomes of the State Tourism Regional Review demonstrate that Barossa Australia, as a truly merged association representing three key sectors of the Barossa region, is the way forward.

We look forward positively to the next 12 months and beyond, working with valued collaboration and respect toward the best possible future for our region.

Sarah Baddams

Chair – Barossa Tourism Committee

Sarah Baddams
(Chair)

Jon Durdin

Bridgette Hastings

Chad Elson

Jenny O'Brien

Lisa Anderson

Michael Krueger

Tony Tschärke

Zoe Wilde

Pippa Merrett

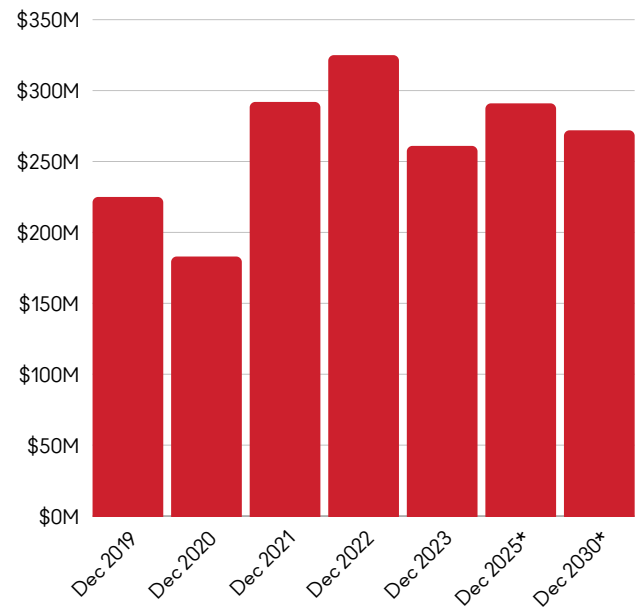
Ben Patten
(Barossa Australia)

Ashleigh Hogan
(Barossa Australia)

TOURISM KEY STATISTICS

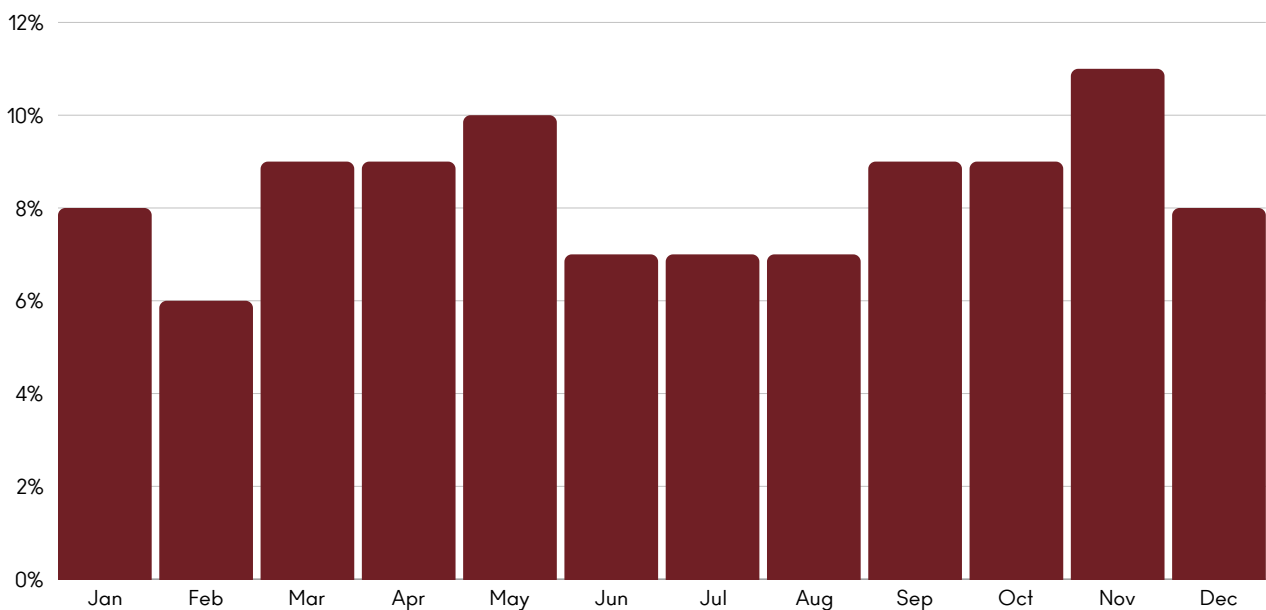


BAROSSA TOURISM EXPENDITURE



*Target

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO BAROSSA 2023



Data source: South Australian Tourism Commission, Barossa Regional Profile 2023

TOURISM KEY STATISTICS - LOCALIS

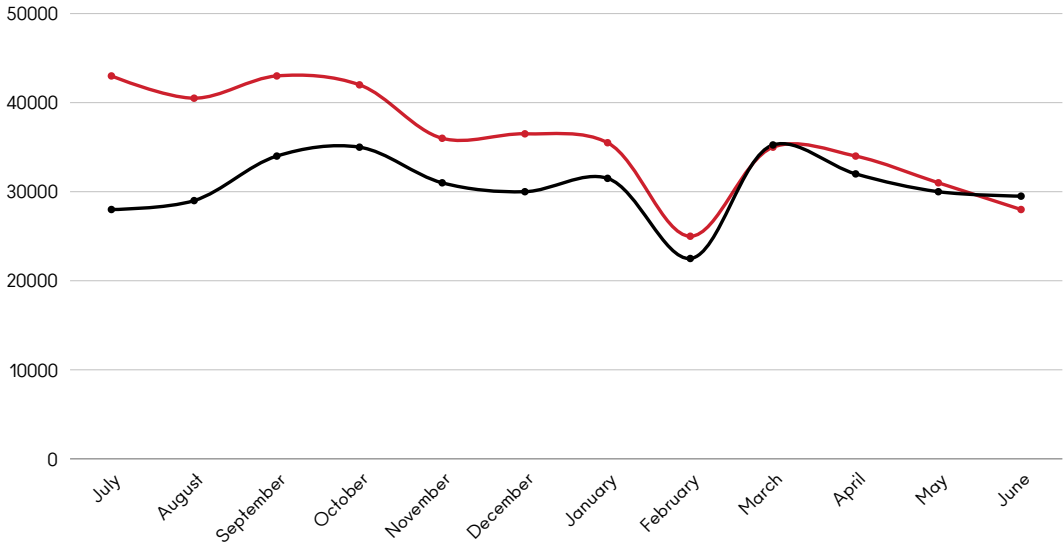


Annual Occupancy
51%
-12% YOY

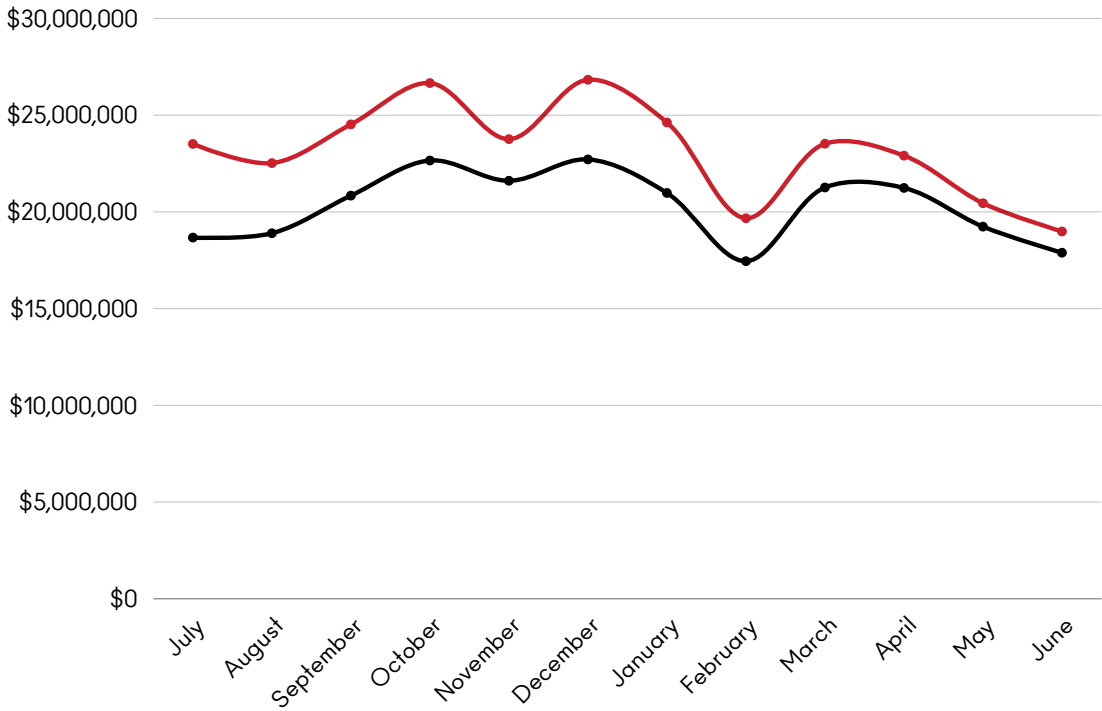


Average Daily Rate
\$274
+1.4% YOY

OVERNIGHT VISITORS TO BAROSSA 2022/23 & 2023/24



BAROSSA TOURISM EXPENDITURE BY MONTH 2022/23 & 2023/24



Barossa
Source Markets



Intrastate
93%
-1% YOY

Interstate
7%
+1% YOY

Data source: Localis Data and Analytics 2023
Spend data reflected in the table above was introduced in October 2024, but allows the ability to backcast.
This information was not available in 2023/24 for action but will be for 2024/25

OUR
BRIGHT
FUTURE



\$261M

visitor
expenditure

OUR
BRIGHT
FUTURE



208K

qualified leads to
Barossa tourism
businesses from
ATDW

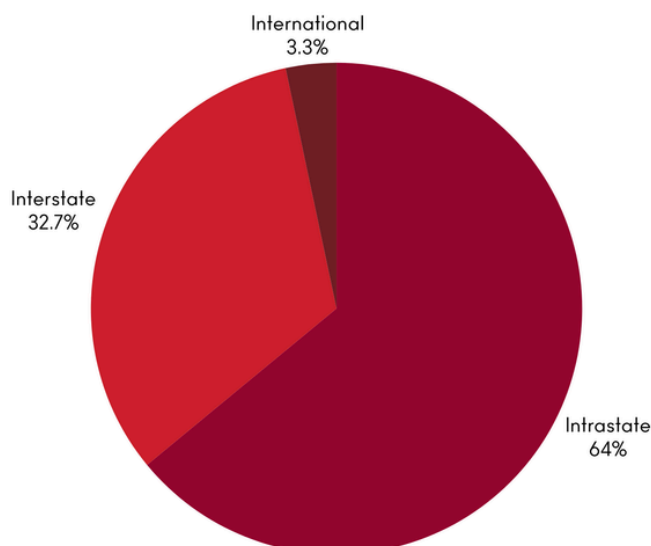
Marketing Insights

- 208K clicks to member listings on Barossa.com (Australian Tourism Data Warehouse) for Jan 2023- Dec 2023 (estimated data pulled from multiple sources due to Google G4 changes)
- Barossa Australia staff met with over 100 international travel trade and media at the Australian Tourism Exchange (ATE) 2024. Connections were made with Inbound Tour Operators, Wholesalers and Retail Travel Agents to promote Barossa and continue its positioning as a "must-do" inclusion in any travel itinerary
- Mybarossa.com, our digital tourism hub designed for the travel trade, was significantly updated in early 2024 for ATE 2024. This hub gives trade and travel media access to seasonally updated dedicated itineraries, photo galleries and direct ATDW listings of Barossa operators at any time

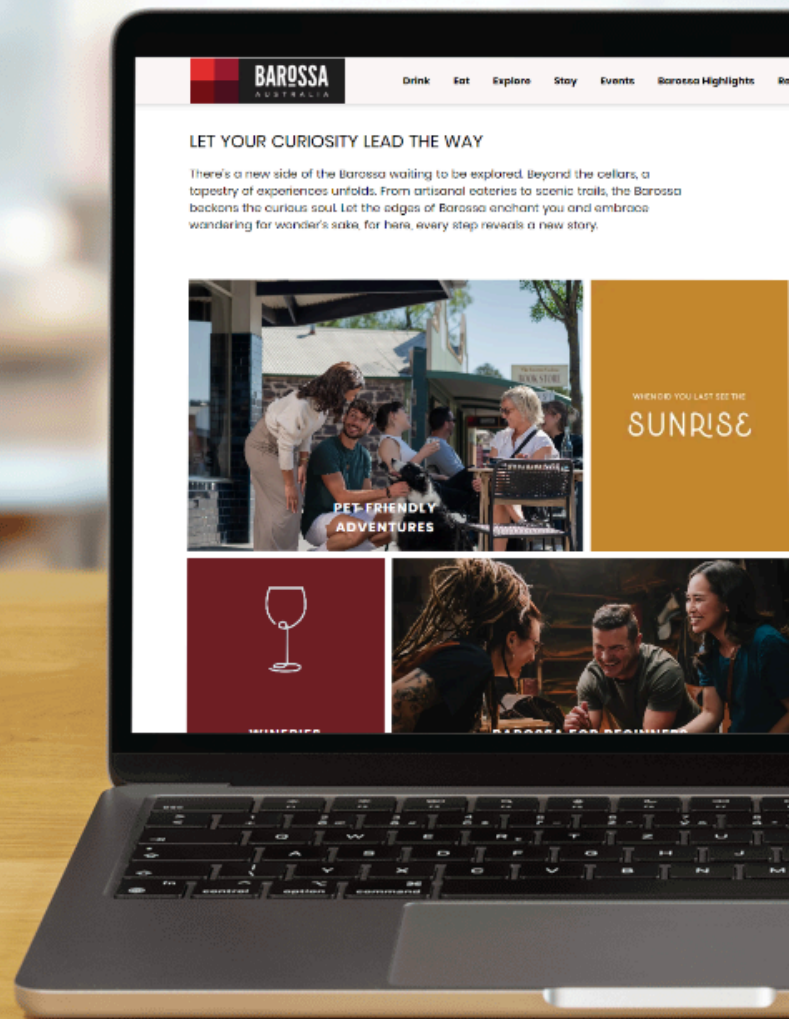
Industry Engagement / Regional Projects

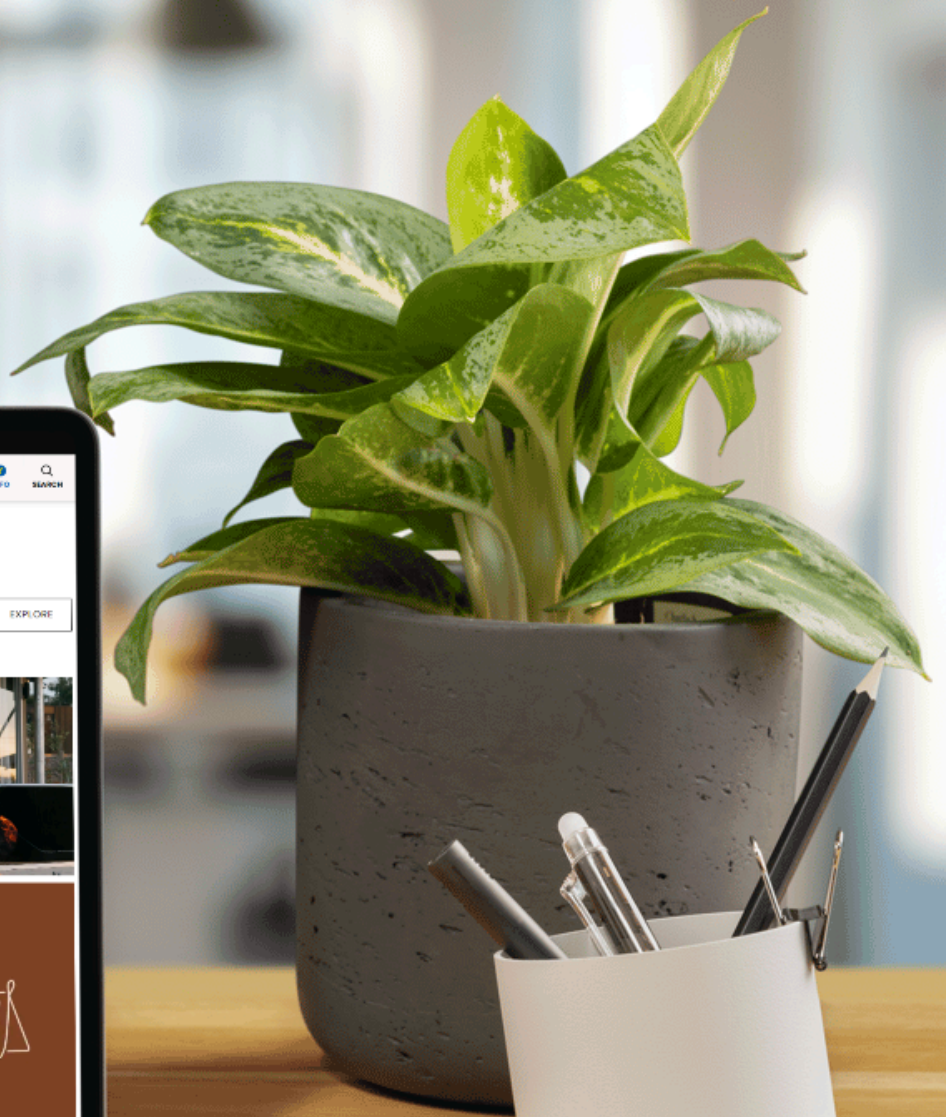
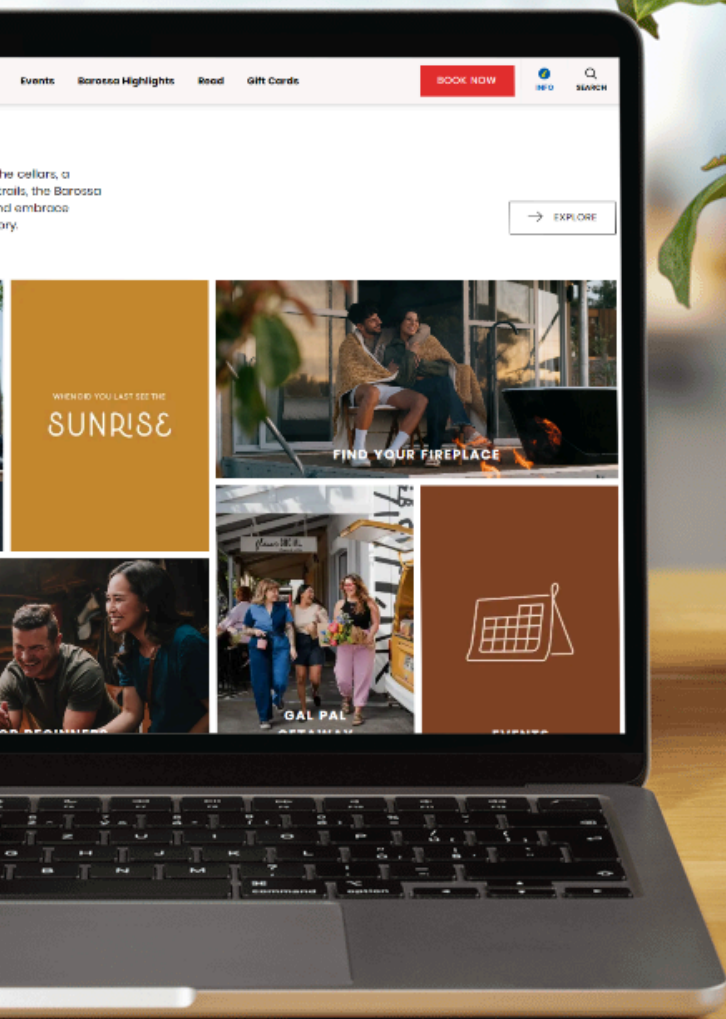
- 80 face-to-face industry site visits
- Held three "Open House" events
- Hosted the Tourism Minister in region for a full day itinerary in September 2023
- Hosted four Regional Visitor Information Centre meetings including Barossa, Light, Gawler Councils and RDABGLAP
- Barossa Australia funded and coordinated a two-phase, externally facilitated review of the Barossa Vintage Festival to ensure it's long term viability and purpose for the region
- Following the BVF review a regional-led management committee was appointed as were new Festival Directors for BVF25
- 66 front line staff were trained in the Project Destination Barossa initiative
- Four new businesses developed internationally bookable product as a result of the International Travel Ready (ITR) program

Overnight Visitors per year



MARKETING





BAROSSA. BE CURIOUS

A multi-channel marketing campaign to increase destination awareness and travel intent.

WHY?

In response to a mid-2023 slowdown in trade and tourism, the Barossa Australia Board approved its largest-ever marketing spend to support the region.

To support the Barossa's growth and appeal, Barossa Australia focused activity with three key goals: address immediate trade and visitation challenges, enhance planned marketing activities, and act on insights from the 2022 JMP Research Project.

In September 2023, the Board committed up to \$150,000 in marketing for FY24, along with dedicated support from Barossa Australia's team.

WHAT?

A centerpiece of this strategy, the Barossa. Be Curious campaign, aims to reshape perceptions of Barossa from a "traditional, intimidating" wine region to a vibrant, multifaceted destination. By broadening awareness of Barossa's diverse offerings, the campaign encourages both first-time and returning visitors across Millennial age groups to stay longer and discover more.

HOW?

Barossa Australia leveraged a powerful media mix through partnerships with Super Studio PR Agency and The Digital Picnic, along with our own channels. This integrated approach combines Barossa Australia's digital reach with targeted traditional media from Super Studio, reaching top platforms for domestic travellers. With expanded touchpoints, the campaign is designed to strengthen brand recognition and actively move consumers toward booking.



TOFU

Top of Funnel

Out of Home Advertising
Print Advertising

MOFU

Middle of Funnel

Print & online media articles
Influencer social media
activity

Digital marketing (desktop &
mobile)

BOFU

Bottom of Funnel

Digital marketing (desktop &
mobile)

BAROSSA. BE CURIOUS

CONTENT & ASSETS

Barossa. Be Curious is all about encouraging visitors to discover a new side of Barossa, one that's waiting to be explored and savoured. Whether they are seasoned wine lovers, or simply chasing a new experience, the campaign encourages them to let their curiosity lead the way to new and exciting adventures in this world-famous destination.

BAROSSA BE CURIOUS

The Barossa Australia team engaged highly regarded industry professionals to develop a new suite of visual assets including logos, images and videos that would be attractive to target audiences. Over 100 images and 10+ hero videos were shot during a 4-day photoshoot with professional lighting, talent, cinematographer and photographer. 14+ local tourism businesses / shoot locations were used in this process.

NEW IMAGERY EXAMPLES



BRAND DISSEMINATION

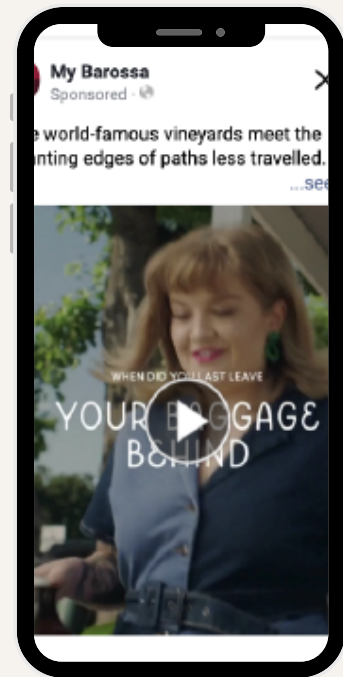
New imagery and videos were added to Barossa.com, and shared across the multiple marketing channels. Results can be seen further in this report.

Getting Barossa Australia members involved in the marketing activity was a top priority and Barossa Australia created a dedicated industry website with:

- New imagery and video assets
- Barossa. Be Curious Member Toolkit
- Brand Guidelines and usage
- Taglines and written content
- Templates for social media

BAROSSA. BE CURIOUS OBJECTIVES

- 1 Increase brand awareness among Millennials to broaden the Barossa's appeal beyond the 55+ demographic
- 2 Increase traffic to Barossa.com and provide more leads to the region's operators
- 3 Grow the number of inter and intrastate visitors, their length of stay and to boost the visitor economy



CORE AUDIENCES

Millennial Travelers (Aged 25–40)

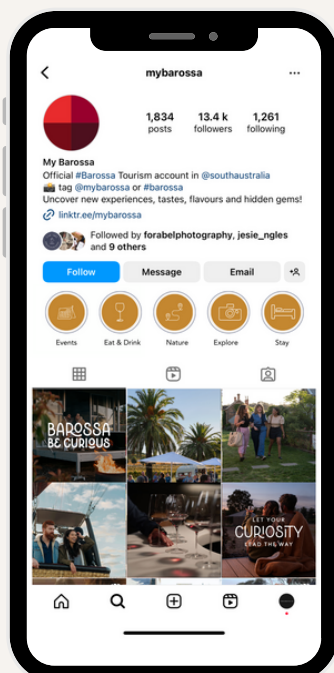
Audience Profiles: Couples seeking shared experiences and small groups of friends looking for memorable getaways

Primary Regions: Greater Adelaide, Sydney, and Melbourne

MEDIA MIX

Media channels employed : Out-of-home, print advertising, media famils with earned articles, influencer partnerships, and paid social media.

PAID SOCIAL MEDIA



INFLUENCER AND MEDIA FAMILS



TRADITIONAL MEDIA PLACEMENTS



BAROSSA. BE CURIOUS RESULTS



BAROSSA.COM

1 December 2023 to 1 Jul 2024

30%

Increase in traffic to Barossa.com

220K

The number of times an operator listing was viewed (ATDW)

42,113

Direct leads to operator website

PAID SOCIAL MEDIA

MYBAROSSA FACEBOOK AND INSTAGRAM

Barossa Australia has been working with The Digital Picnic on both strategy and paid activity in relation to social media. Results are as follows:

452K

People reached

163K

Video thruplays of Barossa. Be Curious content

13,022

Link clicks to Barossa.com driving traffic to tourism operators

OOH MEDIA PLACEMENTS

21 Bus stop ads through MEL & SYD



15 Bus back placements through Adelaide CBD



4 Billboard placements through metro Adelaide



Over 1 million impressions achieved

708,893 Impressions achieved

92 hours play time

INFLUENCER & MEDIA FAMILIS

Barossa Australia team worked with PR agency Super Studio to hand select three journalists and three influencers to participate in Barossa. Be Curious. These were:

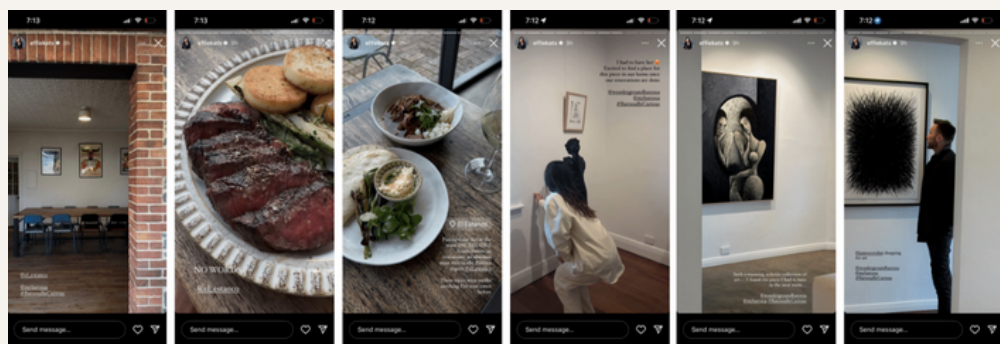
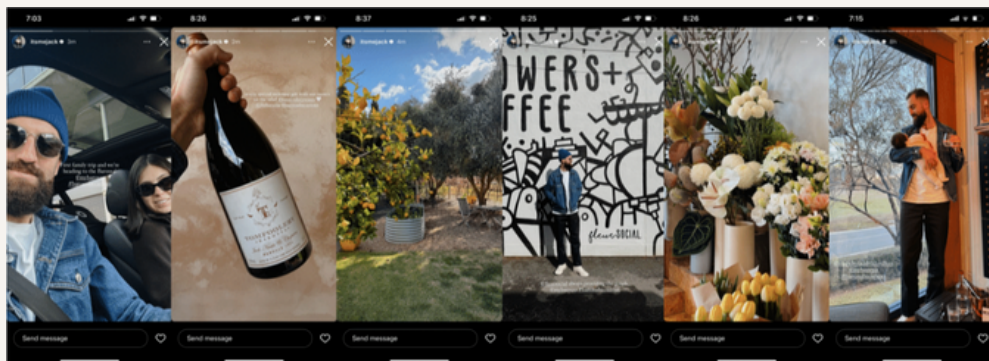
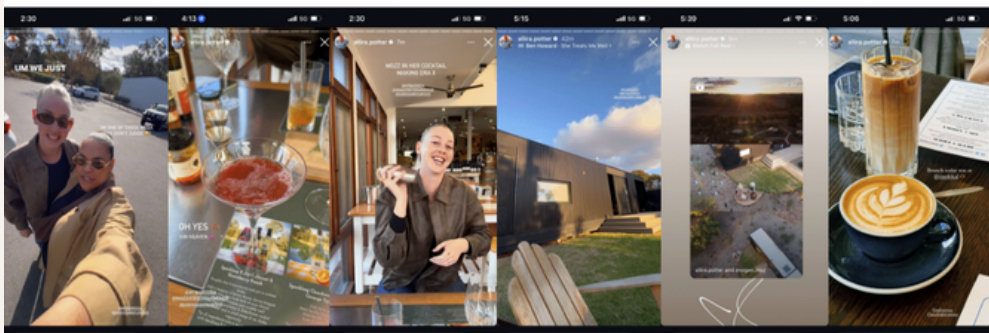
- Writers / Journalists: Jane Rocca - Harper's Bazaar, Michael Harry - Broadsheet (National), Claudia Dichiera - CityMag
- Content Creators / Influencers: Allira Potter, Jack Reynolds, Effie Kats

We developed the Barossa. Be Curious brand into three multi-day itineraries that could be pitched to influencers and media dependent on their publication, focuses and audiences.

These were:

- Barossa Balance
- Barossa Classic with a Twist
- Barossa Max

INFLUENCER INSTAGRAM STORIES EXAMPLES:



INFLUENCER & MEDIA FAMILIS

KEY RESULTS:

The “Barossa. Be Curious” campaign successfully reached 3.26million Australians within Sydney, Melbourne and Adelaide throughout the 20 weeks of activity. Earned media by way of written articles and social media influencers held an overwhelmingly positive sentiment. Indicating that when re-introduced to Barossa, the target Millennial audience responds well and is ready to consider the region as a holiday destination. Cumulatively, influencer activity resulted in 107 Stories, Reels and Grid posts.

6

Media in region

40+

Barossa operators showcased

3.26M

Total combined media reach

8

Earned media stories achieved

\$340K

Achieved media value

Achievements include:

- Harper's Bazaar: The Best Luxury Stays and Cellar Doors in the Barossa Valley
- Broadsheet: How to Spend a Weekend in the Barossa (but not as you know it)
- CityMag: A Gen Z's Guide to the Barossa



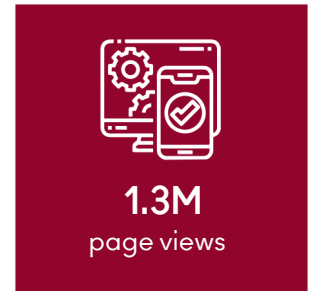
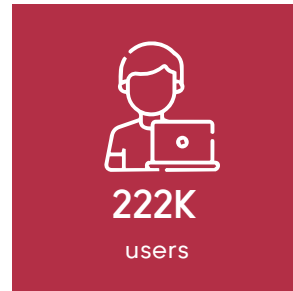
Barossa. Be Curious won Best Tourism & Marketing Campaign at the 2024 South Australian Tourism Awards

DIGITAL MARKETING STATISTICS

ON-GOING DIGITAL ACTIVITY

BAROSSA.COM

- 74% of all website visitors find Barossa.com organically (average is 50-60%) indicating Barossa's strong digital presence and brand recognition
- Website users are primarily in South Australia, aged 25-34, majority female, and use their phones to interact with the site
- Website users Top 7 countries:
 1. Australia
 2. USA
 3. New Zealand
 4. United Kingdom
 5. China
 6. Singapore
 7. Canada
- The most popular sections on Barossa.com are: Wineries, Events, Restaurants, and Accommodation



DEVICES

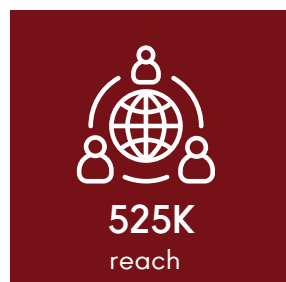
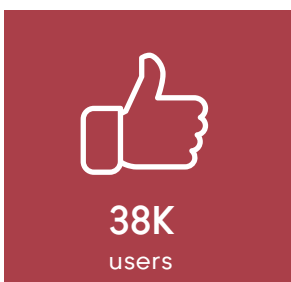
Mobile: 61.5%
Desktop: 35.8%
Tablet: 2.7%

DEMOGRAPHICS

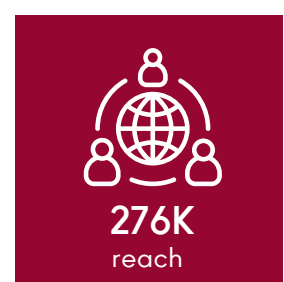
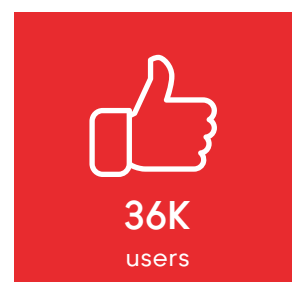
Female: 60%
Male: 40%

SOCIAL CHANNELS

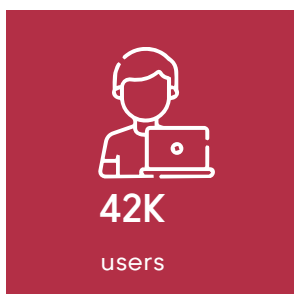
MyBarossa - Facebook & Instagram



Barossawines - Facebook & Instagram



BAROSSAWINE.COM



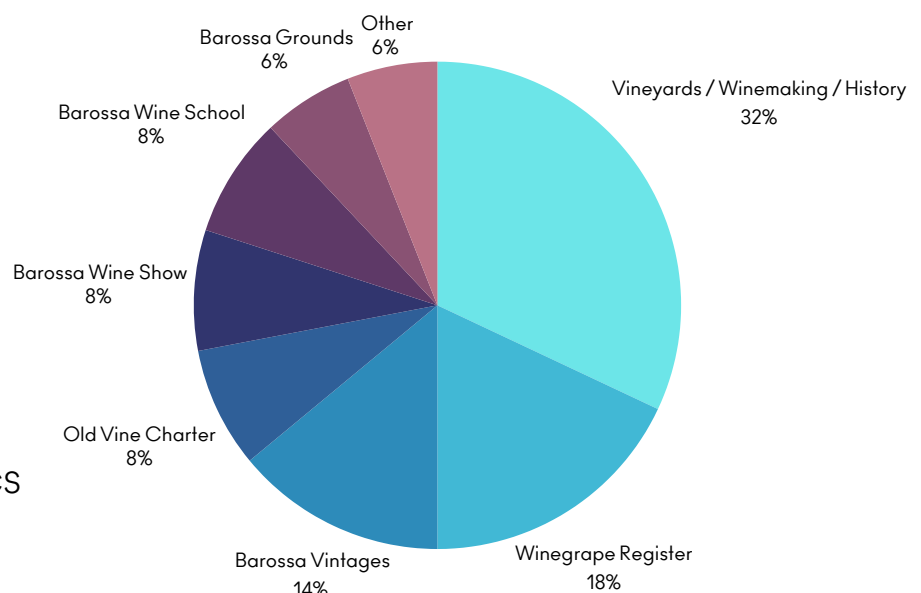
Website users Top 7 countries:

1. Australia
2. USA
3. China
4. United Kingdom
5. Singapore
6. New Zealand
7. Hong Kong

DEMOGRAPHICS

Male: 51%
Female: 49%

Barossawine.com Top Pages



THE POWER OF BRANDING

How Marketing Activities Fuel Barossa's Success



BUILDING THE BAROSSA BRAND

Marketing and promotions ensure Barossa stays top of mind with our key audiences.

GROW AWARENESS OF BAROSSA AS A PREMIER WINE + TOURISM DESTINATION

We're creating new customers in Australia and key international markets, expanding the love for Barossa far and wide.

BOOST DEMAND AND LOYALTY FOR BAROSSA'S WINES, FOOD + EXPERIENCES

By connecting with the right audience, we're fueling growth in both value and demand. Barossa isn't just a name - it's an experience that resonates deeply, creating a lasting bond that goes beyond price.

INCREASE PROFITABILITY ACROSS THE BAROSSA VALUE CHAIN

With stronger brand loyalty, Barossa products, whether wine, food, or tourism, can command higher prices, benefiting everyone in the region.

FOSTER BUSINESS GROWTH FOR OUR GRAPE GROWERS, WINERIES + TOURISM OPERATORS

By growing the brand, we're paving the way for more jobs, more investment, and greater capacity for all Barossa businesses.

SUPPORT THE BAROSSA COMMUNITY

From growers to winemakers, hospitality, and tourism operators and their next generations, our branding efforts uplift the entire community, ensuring Barossa continues to thrive.

IN THE PRESS

Harper's Bazaar covered Barossa Luxury: The Best Luxury Stays and Cellar Doors in the Barossa Valley
Estimated reach: 233,000

The best luxury stays and cellar doors in the Barossa Valley

Discover the most luxe accommodations and cellar doors for your next trip to the Barossa Valley.
By Jane Rocca



LE MAS

AN HOUR'S drive north-east of Adelaide gets you to South Australia's prestigious Barossa Valley — a world-renowned region known for its wines, and where they pronounce 'shiraz' a little differently to the rest of Australia. Yes, it's the home of giants like Penfolds, Jacob's Creek, Seppeltsfield and Henschke; but it's also where you'll unearth luxe cellar door experiences with contemporary winemaking practices.

CityMag covered Barossa Balance: A Gen Z's Guide to the Barossa
Estimated reach: 216,000

A Gen Z's guide to the Barossa

CityMag hit the Barossa to find the pick of places for a younger foodie to eat and drink.



One of the only times I've travelled to the Barossa was to catch a glimpse of One Direction playing golf when they stayed at the Novotel in September 2013 for the Adelaide leg of their *Take Me Home* Tour.

Words and pictures: Claudia Dichiera

So when I headed north to the Barossa Valley, I was excited but not sure what to do. Sure, the weekend away would involve wine and some food,

ABC News online covered: A delegation from France's Champagne region and the Wine Origins Alliance visit to Barossa

ABC RURAL

From Champagne in France to the Barossa, wine regions band together to protect their valuable names

ABC Rural / By Selina Green
Posted Wed 25 Oct 2023 at 12:16pm



Broadsheet covered Barossa Classic: How to Spend a Weekend in the Barossa (but not as you know it)
Estimated reach: 901,554

How To Spend a Weekend in the Barossa Valley (but Not As You Know It)



Foreign Supply Co - Photo: Courtesy of Barossa Australia

A Long Brunch: Vino Lokal

Dubbed "Brunswick in the Barossa" after the cool Melbourne suburb, *Vino Lokal* brings bohemian cafe vibes to the main street of Tanunda. Owners Wendy and Elisa Trotta and Lucy Koehler run another coffee spot, *Darling's*, a few doors away, which is the town's unofficial meeting spot. *Vino* is more a place to settle in with a big breakfast plate - hello house-made potato cakes - or a pastry from local bakers *Becaking Bread*. As the day progresses, it turns into a wine bar and shop, offering some of the most exciting examples of Barossa wine. Each week, it hosts *Knock Off* Fridays in the adjoining lane, with wine tastings and more. 64 Murray Street, Tanunda, vinolokal.com.

Mid-Morning Wine: Artisans of Barossa

How early is too early to get on the sauce? At *Artisans of Barossa*, as soon as doors open at 10am is fair game. This sleek building on the outskirts of Tanunda is a one-stop shop, with eight wineries coming together in one venue for a mega cellar door. The standout tasting flight is the Grenache Project (\$75), showcasing an experiment where each of the eight wineries made grenache with the same tonne of fruit (with wildly different results). The resilient vine was originally grown for brandy, then gained traction in the GSM blends of the '70s and '80s. Now grenache is booming in the Barossa, offering a lighter, pinot noir-ish alternative to the more common shiraz. 24 Vine Vale Road, Tanunda, artisansofbarossa.com.

ACKNOWLEDGEMENTS

Barossa Australia would like to acknowledge our valued partners for their long-term support and commitment to the region.



Barossa Valley Toyota

This information has been made available to assist in the understanding that Barossa Australia is not rendering professional advice. The information is not legally binding and is not intended to be a substitute for legal advice. The information is based on Barossa Australia's understanding regarding the requirements of the market at the time. Barossa Australia does not accept responsibility for the results of any actions taken on the basis of this information nor for the accuracy or completeness of any material contained in it. Barossa Australia expressly disclaims all and any liability and responsibility to any person in respect of the consequences of anything done in respect of reliance, whether wholly or in part, upon this information.

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Images are courtesy of Wine Australia, Barossa Australia, Shaun Li and Dragan Radocaj.



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+618 8563 0650

We acknowledge the Ngadjuri, Kaurna and Peramangk peoples as the traditional owners of the landscape many of us know as the Barossa. We recognise their continuing connection to land, water and community and we pay our respects to elders past and present.