

The page features large, white line-art decorative elements on a light beige background. On the left, there are two concentric semi-circles. Below them is a large, stylized 'U' shape. To the right of the 'U' is a tall, narrow rectangle. Further right is a large, stylized 'N' shape. These elements are positioned behind the text.

APPENDIX 3

Economic Impact Report : Ekistics



SOUTHERN BAROSSA WINERY & TOURIST ACCOMMODATION PROJECT

REGIONAL ECONOMIC IMPACT ANALYSIS

July 2025

REF#01504



ACKNOWLEDGEMENT TO COUNTRY

Ekistics respectfully acknowledges the traditional owners and custodians of the land on which we work and we pay our respects to Elders past and present.

PROPRIETARY INFORMATION STATEMENT

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1. INTRODUCTION

1.1. Purpose of this report

This *Regional Economic Impact Analysis* presents a high-level analysis for the Southern Barossa Wine and Tourist Accommodation Project's (SBWTAP) Environmental Impact Statement (EIS) Report, providing insight into the current economic conditions of the Barossa and evaluating the potential benefits and adverse effects of the proposed development. The analysis identifies and quantifies the likely economic contributions of the project to the regional and state economies, while also considering potential risks to the local economy and outlining strategies for their mitigation. The report also examines the economic implications for the region and the state should the project not proceed.

This report is in direct response to the Assessment Criteria that guides the preparation of the Environmental Impact Statement (EIS). Specially, the following criteria:

Provide a Regional Impact Analysis (RIA) of the direct impacts of the proposal on the local, regional and state economies during construction and operation. The economic analysis should give consideration to the following matters for both the construction and operational stages (and in the alternative, describe any economic impacts for South Australia and/or the region if the proposal does not proceed).

This report is intended to inform the Minister for Planning's decision on the SBWTAP proposal. It should be read in conjunction with the broader EIS and supporting documentation.

The analysis draws upon publicly available data and confidential information provided by Strategic Alliance (the Proponent). Key sources include:

- *South Australia Regional Visitor Strategy* (South Australian Tourism Commission) – February 2021
- *Scoping Study* (Hotellerie) – September 2023 (confidential)
- *The Value of Tourism in the Barossa* (South Australian Tourism Commission) – December 2023
- *South Australia Regional Blueprint 2024–2025* (Regional Development South Australia) – November 2024
- *Barossa Regional Profile* (South Australian Tourism Commission) – December 2024
- *Regional Impact Assessment Report* – Regional Development Australia Barossa Gawler Light Adelaide Plains (RDA BGLAP) – June 2025

This report provides:

- An overview of the SBWTAP and its location
- An assessment of the regional and local economic context
- An analysis of projected economic impacts at the state, regional, and local levels
- A breakdown of impacts across the construction and operational phases of the whole project

1.2. Assessment method

This economic impact analysis draws upon a combination of economic modelling, regional data, and industry-specific research. The assessment is based on key documents listed in Section 2.1 and includes economic modelling of projected impacts, examination of the regional and project-specific economic profiles, as well as analysis of tourism demand and accommodation supply in the Barossa.

The methodology includes both quantitative and qualitative approaches to evaluate direct, indirect, and flow-on effects across construction and operational phases of the SBWTAP.

1.2.1. RDA Economic Modelling

Regional Development Australia Barossa Gawler Light Adelaide Plains (RDA BGLAP) utilised input-output modelling to estimate the broader economic effects of the SBWTAP across the local, regional, and state economies. This approach examines how changes in output (e.g. sales) or employment generated by the project influence other sectors through economic interlinkages.

The model is built using the National Economics (NIEIR) microsimulation framework, which reflects the structure and dynamics of the local economy. Modelling was undertaken for both the construction phase (assumed duration: two years) and the ongoing operational phase of the development.

1.2.2. Hotel Demand Analysis

Hotel demand for the Southern Barossa Wine and Tourist Accommodation Project has been assessed on the basis of a Scoping Study undertaken by Hotellerie in 2023, which examined tourism trends, accommodation performance, and market gaps in the Barossa .

1.2.3. Key Definitions

To aid interpretation of modelling results and key economic terms used throughout this report are defined below:

Economic Activity Indicators: Metrics used to quantify economic impacts, including employment, Gross Regional Product (GRP), Gross State Product (GSP), and household income.

FTE (Full-Time Equivalent): A standardised unit that measures employment in terms of full-time workload, allowing part-time and casual roles to be aggregated consistently.

Flow-on Effects: Indirect and induced impacts resulting from the project's influence on other sectors (e.g. supplier demand, household spending).

Value Added: The net economic contribution of a project, calculated as the difference between total output and intermediate inputs (e.g. raw materials, utilities). This metric more accurately reflects the real benefit to the economy and is central to GRP and GSP calculations.

Economic Multiplier: the level of addition expenditure and/or GDP which results from the initial expenditure or economic activity.

1.2.4. Limitations of analysis

While this report provides a robust economic impact assessment based on available data, there are inherent limitations to the analysis. Key assumptions rely on modelling inputs and multipliers developed for the RDA BGLAP region, which may not fully account for short-term market fluctuations, unanticipated policy changes, or global economic shocks. Workforce estimates are based on indicative roles and sector benchmarks, rather than confirmed hiring plans, and supply chain impacts have been projected without access to final procurement strategies. Additionally, some indirect and induced effects, particularly in consumer behaviour and long-term visitor trends, are subject to variation and may evolve over time. As such, findings should be interpreted as indicative projections, intended to support decision-making rather than precise forecasting.

2. THE PROJECT

The SBWTAP is a proposed five-star tourist development featuring a hotel with 150 rooms and associated guest facilities, together with a complimentary winery with integrated cellar door and event spaces. Strategically located in the heart of Southern Barossa, the project aims to enhance the region's tourism offering by combining luxury accommodation, wellness amenities, and premium wine experiences.

A comprehensive outline of the project and its components is provided in **Section 6** of the EIS.

The Proponent anticipates a construction investment of approximately \$110 million, with works scheduled to occur over a two-year period following the receipt of all necessary planning and environmental approvals. Subject to approval timelines, construction is targeted for completion by 2028. The project is expected to generate significant economic benefits and employment opportunities for the local and regional economy, as detailed throughout this analysis.

2.1. Study area

The subject site, located at Lot 102 Hoffnungsthal Road, Williamstown, comprises approximately 21.5 hectares on the traditional lands of the Kaurna People. It lies within the jurisdiction of the Barossa Council and the Northern and Yorke Landscape Management Region of South Australia.

Characterised by an irregular shape and a natural undulation of approximately 36m from south to north, the land is formally identified as Certificate of Title – Volume 6227 Folio 450 (Deposited Plan 120994, Allotment 102). The site features dual road frontages, including approximately 475m along Hoffnungsthal Road and 605m along Menzel Road. Situated in the internationally acclaimed Barossa region, the site benefits from its location within an area renowned for premium wine production, celebrated culinary offerings, and a landscape steeped in historical and cultural significance. For additional detail, refer to Section 5.2 of the EIS.

The site is located approximately one hour drive northeast of Adelaide between the regional towns of Lyndoch and Williamstown. Complementary tourist attractions and local businesses are also located nearby, including:

- Lyndoch Lavender Farm;
- Barossa Helicopter;
- Barossa Rodeo Grounds;
- The Dairyman Barossa;
- As well as 12 operating wineries and cellar doors, within a 5km radius of the project site.



Figure 2-1 Project Site & Region proximity within South Australia and Greater Adelaide

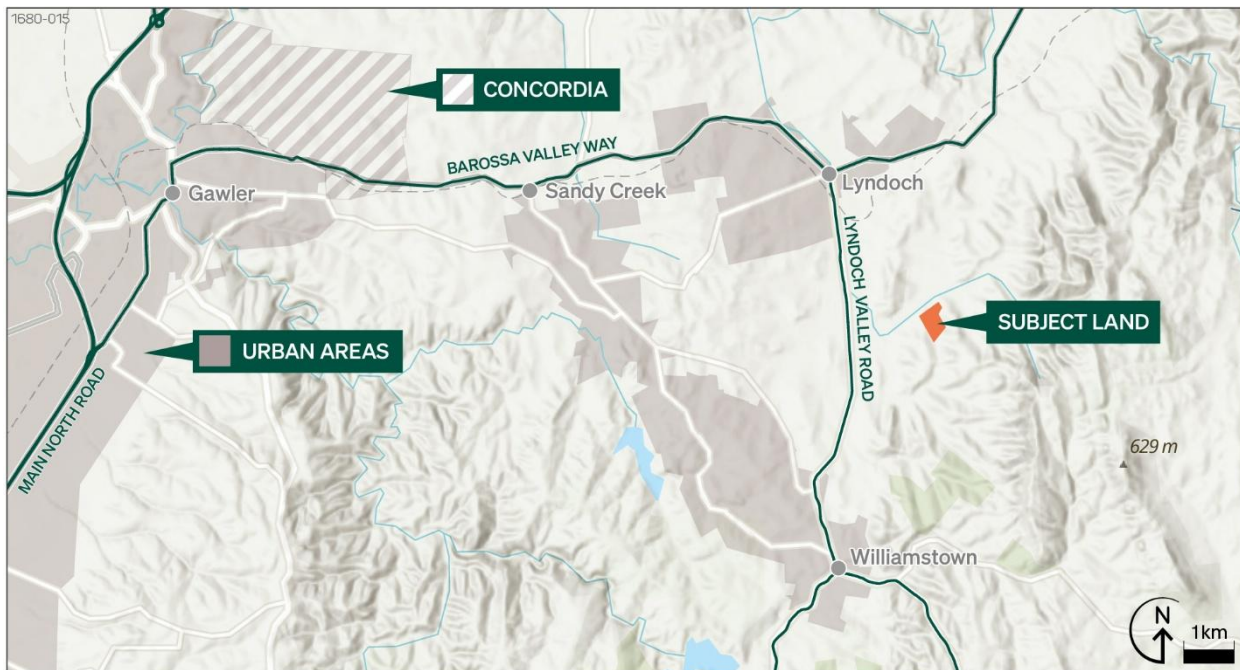


Figure 2-2 Regional Context

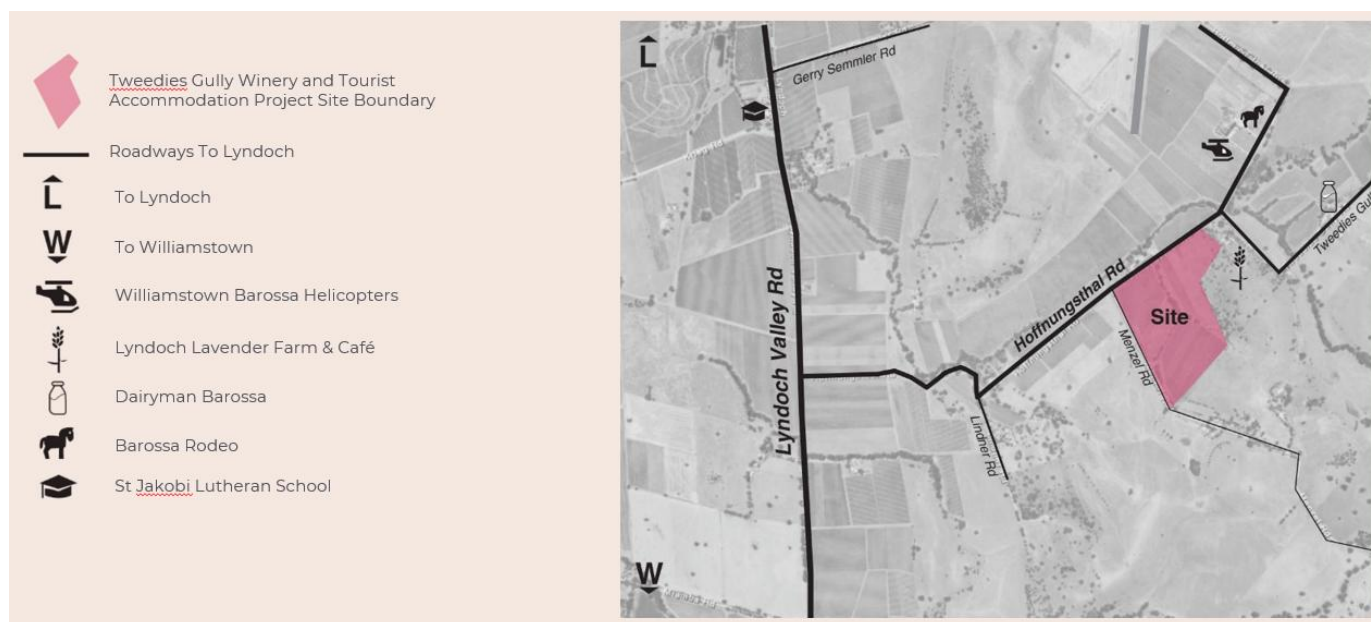


Figure 2-3 Locality Context (Source: Baukultur)

2.2. Existing regional economic environment

2.2.1. Economic context

The Barossa's economy is dynamic and diverse, underpinned by strong contributions from viticulture, manufacturing, tourism, and healthcare services. Key regional indicators as of 2024 include:

Table 2-1 Regional Indicators

Economic metric	Value (2024)
Gross Regional Product (GRP)	\$3.96 billion
Population	82,102
Local jobs	29,790
Employed residents	41,094
Local businesses	6,229
GRP growth (from 2023)	+4.92%
Project investment pipeline	\$3.76 billion (up from \$2.16B)

(Source: *Regional Impact Assessment Report*, RDA BGLAP, June 2025)

2.2.1.1. Labour Force Trends

The Barossa region exhibits strong labour participation, with 41,094 employed residents supporting a workforce spread across agriculture, manufacturing, health care, and tourism. However, there is a mismatch between available jobs (29,790) and resident employment, reflecting significant commuting outflows and unmet local demand. This reinforces the importance of place-based job creation strategies.

Youth employment and service-sector roles continue to grow, but seasonal fluctuations and skill shortages—particularly in hospitality, construction, and wellness services - pose challenges. Addressing these constraints through targeted development, such as the SBWTAP, offers an opportunity to anchor skilled employment locally and build capacity for future growth.

2.2.1.2. Viticulture and Tourism

The Barossa is globally renowned for its viticulture, which generates over \$740 million annually. Processing more than 600,000 tonnes of grapes each year, the region produces 27% of South Australia's wine output and sustains approximately 2,700 jobs. International recognition has grown steadily, with wine exports increasing from 402,000 cases in 2001 to over 1 million cases annually.

Viticulture supports and intersects with the tourism and retail sectors, which together contribute approximately \$164 million annually through visitor spending. The Barossa attracts approximately 154,000 day-trippers per year, with 94% of visitors from domestic origins and 6% from international markets. Further, only 5% of those staying overnight in the Barossa are international tourists. Tourism experiences revolve around wine tasting, gourmet dining, cycling trails, wellness retreats, natural landscapes, and local heritage.

2.2.1.3. Other Key Sectors

Manufacturing remains a cornerstone of exports and job creation in the Barossa, particularly in wine production and associated goods. Health care and social assistance is the largest employment sector, driven by population growth and increasing service demands.

Despite temporary economic disruption during the COVID-19 pandemic, the Barossa has demonstrated a strong recovery, with GRP expanding nearly 5% year-over-year. This resurgence reflects renewed business confidence, rising household incomes, and heightened investment activity. The current investment pipeline exceeds \$3.76 billion, a significant jump from \$2.16 billion in the previous year.

2.2.1.4. Tourism Growth and Accommodation Shortage

Tourism continues to be a strategic economic driver, contributing \$287 million annually - nearing the 2025 target and achieving 77% of the 2030 forecast. Annually, the region draws approximately:



898,000 day visitors



244,000 overnight visitors



837,000 total visitor nights annually

Despite this robust visitation, the region suffers from a shortage of high-quality accommodation, offering just 1,288 rooms and a 60% average occupancy rate. This bottleneck limits the ability to convert day-trippers into overnight guests, dampening potential economic returns.

The *Barossa Regional Blueprint 2024–2025* and *Barossa Council Local Economic Development Plan* both identify accommodation and tourism infrastructure as priority investment areas. These goals echo broader initiatives like South Australia's *Regional Visitor Strategy* and the *Growth State agenda*, which promote regional diversification, high-value tourism, and sustainable economic expansion.

Projects like the SBWTAP directly respond to these strategic objectives - bolstering local employment, enhancing regional branding, and delivering premium tourism offerings that extend visitor stays and economic returns.

2.2.2. Local workforce

Given the SBWTAP's focus on tourism, hospitality, and wellness, understanding the composition and capacity of the local workforce is critical to evaluating recruitment potential and identifying training needs during the operational phase.

The Barossa workforce is considered relatively young and dynamic, with nearly 60% of workers aged between 25 and 54. This dominant age cohort combines both experience and adaptability, forming a solid foundation for tourism-related employment.

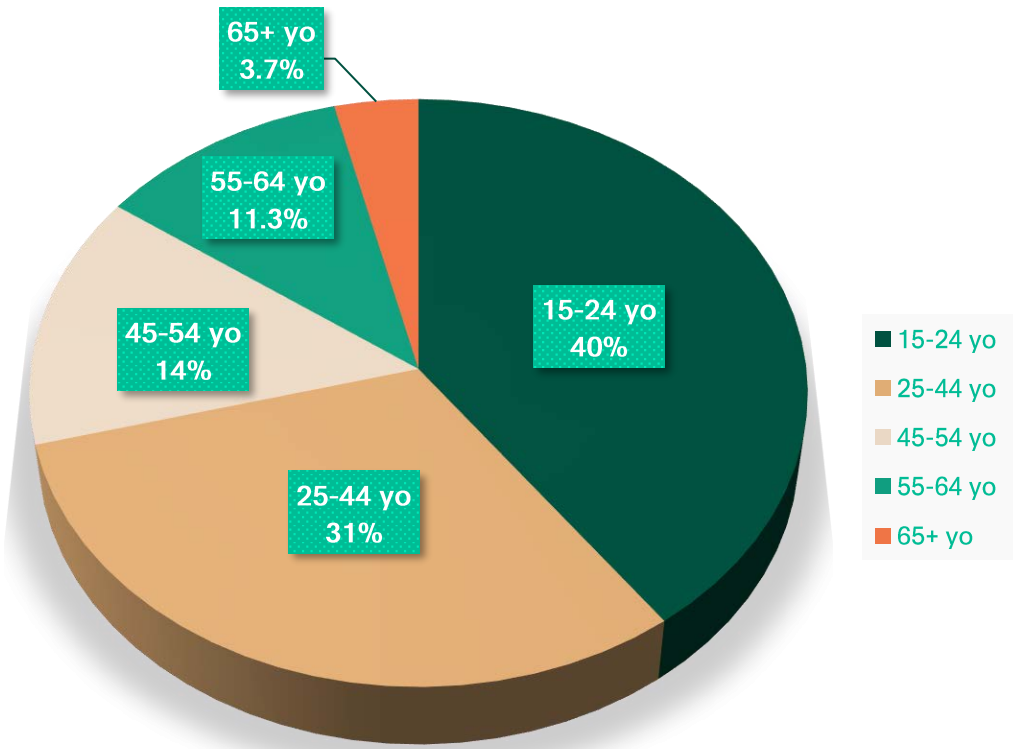


Figure 2-4 Age structure of the tourism and hospitality workforce (Source: *Regional Impact Assessment Report*, RDA BGLAP, June 2025)

Tourism employment is often underrepresented in traditional labour statistics, as roles span across multiple sectors and occupations. Nonetheless, Regional Development Australia (RDA) Barossa and recent local training initiatives offer valuable insights into industry capability.

Following a significant decline in hospitality staffing during the COVID-19 pandemic, RDA Barossa partnered with the Adelaide Institute of Hospitality and the Barossa Regional University Campus to deliver accelerated, hands-on training programs. These upskilled school leavers, mature-age job seekers, and long-term unemployed residents in essential frontline skills such as customer service, barista techniques, food handling, and regional tourism knowledge. All participants from the pilot cohort successfully transitioned into employment or further study, demonstrating the region's flexibility and willingness to engage with emerging workforce opportunities.

Complementing these efforts, the IHG Academy (Intercontinental Hotels Group) will further support workforce development through access to global hospitality training frameworks. The program offers work experience, internships, apprenticeships, and online modules - and has supported over 80,000 individuals over the past eight years, particularly targeting underserved communities.

Although formal tourism credentials remain limited across the region, there is a robust supply of individuals with transferable service skills and strong community engagement. With targeted training, partnerships, and employer support, the Barossa is well-positioned to meet operational staffing demands for new tourism ventures, including high-end accommodation and resort-style hospitality, through local sourcing.

2.3. Rationale for hotel component

This analysis highlighted through the Scoping Study undertaken by Hotellerie (September 2023) supports the rationale and scale of the proposed resort development in accordance with the following measures below.

2.3.1. Visitor Trends and Regional Performance

South Australia recorded \$7.3 billion in visitor expenditure for the year ending 2022 - exceeding post-COVID expectations - with strong domestic and intrastate travel contributing to the recovery. Regional areas, including the Barossa, accounted for \$3.8 billion of this total, up 6% from pre-pandemic levels.

The Barossa itself contributed \$326 million to the visitor economy in 2022, a substantial increase from \$101 million in 2019. This growth has already surpassed the projected 2025 expenditure benchmark (\$291 million) and is nearing the 2030 forecast (\$372 million). Despite continued international travel constraints, the region remains heavily domestic, with 66% intrastate visitation.

2.3.2. Accommodation Supply and Market Gaps

The region currently lacks large-scale traditional hotel offerings, with the majority of accommodation falling into 3–4 star motels or parks. Novotel Barossa Valley remains the only venue with significant scale (140 rooms), enjoying elevated room rates due to minimal competition. Three (3) new five-star boutique properties collectively offer just 31 rooms, each with nightly rates exceeding \$1000 and reported occupancy of 80%, indicative of unmet demand in the luxury segment. Airbnb and similar platforms account for 15% of overnight stays, considerably higher than the South Australian average.

The Barossa Product Gap Audit by the Australian Government and supporting scoping study conclude that the region requires expanded high-quality accommodation options to extend visitor length of stay, attract larger groups and conferences, and offer internationally branded hotels for broader market appeal.

2.4. Proposed development response

In alignment with the findings of the various analysis undertaken to date, the SBWTAP will target three key market segments:

- Leisure travellers (comprising approximately 86% of current visitation)
- Conference attendees, positioning the region as a new national conference destination
- Special event groups, leveraging both indoor and outdoor venue flexibility

The proposed hotel is designed to offer 150 rooms and suites, complemented by flexible conference and breakout facilities tailored to business and event needs. Guests will have access to an on-site restaurant serving breakfast and dinner, alongside bar services and all-day refreshment options to enhance the resort experience. Wellness amenities, including a spa, pool, and fitness centre - will provide opportunities for relaxation and recreation, while additional leisure activities suited to the site's natural landscape will contribute to a resort-style atmosphere. To accommodate the region's high rate of self-drive visitation, car parking will be provided for approximately 80% of the room count.

3. ECONOMIC IMPACT ASSESSMENT

The Assessment Criteria seeks an analysis of the '*Proposed measures to optimise local and regional employment opportunities, such as prioritising recruitment of workers from local and regional communities and improving local and regional skill capacity.*'

3.1. Initial construction phase

3.1.1. Construction Phase Impact

Over the course of the two-year construction phase, the SBWTAP will inject a direct investment of \$110 million into the regional economy. This activity is expected to generate a total economic output of approximately \$204.96 million, with a value-added contribution of \$60.95 million to the region's GRP. Employment impacts are also significant, with an estimated 461 FTE positions supported each year across direct construction roles and associated industries. The broader influence on the national economy is reflected in an estimated \$123.15 million contribution to GDP, highlighting the scale and reach of the project's economic stimulus.

A breakdown of this economic modelling is summarised in Table 4-1 below:

Table 3-1 Construction Phase Economic Impact

Contribution	Output(\$m)	GRP Value Added (\$m)	Local Jobs (FTE)
Direct	\$110	\$27.34	350
Indirect	\$94.96	\$33.60	111
Total	\$204.96	\$60.95	461

(Source: *Regional Impact Assessment Report*, RDA BGLAP, June 2025)

Construction benefits will extend to suppliers and regional services, such as logistics, equipment rental, and hospitality—helping support SMEs and spark business confidence across the supply chain.

3.1.2. Workforce

The construction phase of the SBWTAP is expected to generate significant employment opportunities over a two-year period. Based on Regional Development Australia (RDA) economic modelling and benchmarking against comparable projects, the following workforce impacts are anticipated:

- 350 FTEs directly associated with construction;
- 78 additional direct FTEs per year through local economic stimulation;
- 111 indirect FTEs per year, reflecting flow-on effects across supporting industries.

This equates to a total of approximately 461 FTE positions created during the construction phase.

Roles are expected to span a wide range of disciplines, including civil and structural trades, electrical and mechanical services, landscaping and environmental works, project management and site supervision, logistics, procurement, and administration.

While a detailed workforce profile is not yet available, the project is likely to draw on both local and regional labour pools, with potential for targeted training and apprenticeships to support skill development.

3.1.3. Supply chains

Construction of the SBWTAP will activate a broad supply chain network, generating economic activity across multiple sectors. Although specific procurement details are not yet finalised, typical supply chain impacts for projects of this scale and nature include:

- Building materials: Procurement of concrete, steel, timber, glass, and insulation from regional and state suppliers;
- Specialised equipment: Sourcing of HVAC systems, wellness and spa infrastructure, and commercial kitchen fit-outs;
- Professional services: Engagement of architects, engineers, surveyors, and environmental consultants;
- Transport and logistics: Increased demand for freight, warehousing, and delivery services; and
- Local subcontracting: Opportunities for small and medium enterprises (SMEs) in plumbing, electrical, tiling, and landscaping.

Supply chain activity is expected to support indirect employment and stimulate business growth across South Australia. The project may also contribute to supply chain resilience by fostering long-term relationships with regional suppliers and encouraging sustainable procurement practices.

Potential risks—such as material cost volatility or delivery delays—will be managed through proactive planning, diversified sourcing, and alignment with industry best practices for construction supply chain management.

3.2. Identified ongoing economic benefits

The SBWTAP is expected to deliver substantial economic benefits both during construction and throughout ongoing operations. Economic modelling developed by .id for the RDA BGLAP area supports the following projections.

3.2.1. Operational Workforce & Supply Chains

Outline local procurement planning and/or practices to optimise local and regional supplier participation and/or build local capacity and capability (where relevant).

An estimated 150 full-time equivalent (FTE) positions will be required to operate the hotel and associated winery, with an additional 79 indirect FTE roles expected to be generated across regional supply chains, supporting industries, and through increased local spending by employees. In total, the project is projected to support 229 ongoing jobs. Importantly, approximately 83.3% of these roles are expected to be filled by local residents, minimising economic leakage and ensuring that wages, consumer spending, and skills development remain within the community.

Direct operational roles span a diverse range of functions, including:



(Source: *Regional Impact Assessment Report*, RDA BGLAP, June 2025)

This diverse workforce profile offers clear pathways for career progression, with opportunities for entry-level staff to advance into supervisory and management positions. By anchoring long-term employment locally, the project contributes to skill retention and regional workforce stability, particularly important in areas where skilled talent may migrate toward metropolitan centres.

Recognising the Barossa’s tourism seasonality, marked by peak visitation during school holidays and lower activity in months like February, June, and August, IHG will adopt flexible employment structures, including cross-training across departments, casual contracts, and variable rostering. This operational model helps manage staffing levels while ensuring year-round job viability for employees.

The region’s high demand for skilled hospitality and wellness workers, as highlighted in *Jobs and Skills Australia’s 2024 Core Skills Occupation List* (CSOL), underscores the importance of targeted training initiatives. To support this, the hotel operator may engage with the IHG Academy, a global platform offering structured learning, hands-on experience, and career development tailored to the hospitality sector. The program has supported many individuals worldwide, especially people facing long-term unemployment, and individuals re-entering the workforce.

Additionally, the SBWTAP presents an opportunity to promote diversity and inclusion within the local workforce by actively creating employment pathways for First Nations peoples, youth, mature-age job seekers, and those historically underrepresented in hospitality roles.

3.2.2. Economic Multipliers

The modelling applies two types of multipliers to quantify broader regional impacts:

- Type 1 Multiplier: Captures direct and industrial effects within the supply chain.
- Type 2 Multiplier: Includes consumption effects, modelling increased spending by workers and consumers alongside direct and industrial components.

These multipliers help estimate not just raw output, but value added and employment impact relative to initial inputs.

Table 3-2 Regional Indicators

Phase	Multiplier Type	Output Multiplier	GRP Multiplier	FTE Multiplier
Construction	Type 1	1.79	2.07	2.19
Construction	Type 2	1.86	2.23	2.43
Operational	Type 1	1.38	1.35	1.31
Operational	Type 2	1.52	1.51	1.45

(Source: *Regional Impact Assessment Report*, RDA BGLAP, June 2025)

3.2.3. Operational Phase Impact

Following its transition into full operation, the SBWTAP is projected to deliver an annual total output of approximately \$61.62 million. This includes a value-added contribution of \$27.92 million to the region's GRP, underscoring its role in driving sustained economic activity. The project will also support an estimated 229 ongoing FTE jobs across direct hospitality and winery operations as well as through flow-on effects in local supply chains. On a broader scale, its annual impact on GDP is estimated at \$55.93 million, reflecting its significance as a long-term economic catalyst for the Barossa region and the state.

Table 3-3 Operational Contributions

Contribution	Output(\$m)	GRP Value Added (\$m)	Local Jobs (FTE)
Direct	\$40.62	\$18.51	150
Indirect	\$20.01	\$9.41	79
Total	\$61.62	\$27.92	229

(Source: *Regional Impact Assessment Report*, RDA BGLAP, June 2025)

These impacts stem from employment, visitor spending, and procurement across tourism, wellness, and winery operations. The resort is expected to diversify the region's visitor mix, with approximately 30% of guests projected to be conference or associate travellers, helping strengthen the business events sector.

With overnight guests spending an average of \$226.70 per night, compared to \$100 per day for day trippers, the development will help elevate the Barossa's night-time economy, increase length of stay, and support a wider range of local businesses.

3.2.4. Cumulative Impact

In its first three years (2 years of construction and 1 year of operation), the SBWTAP is projected to generate:

Table 3-4 Cumulative Contributions

Contribution	Output(\$m)	GRP Value Added (\$m)	Local Jobs (FTE)	GDP Impact (\$m)
Direct	\$150.62	\$45.85	500	-
Indirect	\$114.97	\$43.01	190	-
Total	\$265.59	\$88.86	690	\$179.08

(Source: *Regional Impact Assessment Report*, RDA BGLAP, June 2025)

This reinforces the SBWTAP's role as a strategic economic enabler, creating local jobs, attracting new visitor segments, strengthening infrastructure demand, and contributing to long-term regional prosperity.

3.3. Identified potential risks and constraints

3.3.1. Labour Market Pressures

While the SBWTAP offers significant employment opportunities, it also introduces challenges in an already tight labour market. South Australia's construction and hospitality sectors are marked by persistent skill shortages, as noted in the 2024 Core Skills Occupation List by Jobs and Skills Australia.

The introduction of a major development like the SBWTAP may intensify competition for skilled workers, potentially leading to construction delays, cost escalations, or talent displacement across other local projects. During operations, the demand for approximately 150 FTE roles may inadvertently draw staff away from existing businesses. Backed by a globally established brand, the hotel may offer more attractive conditions, unintentionally disrupting staffing stability for smaller local enterprises.

Furthermore, recruitment from outside the region could place added pressure on housing, transport, and essential community services, underscoring the need for a coordinated workforce strategy that prioritises local sourcing, phased hiring, and training partnerships.

3.3.2. Inflationary Pressures

Large-scale development may contribute to localised inflation, particularly in housing and service costs. Increased demand from incoming workers and rising tourism activity could elevate rental prices, stretch availability, and shift affordability thresholds. This may impact both residents and small businesses, limiting competitiveness and raising the cost of living. If unaddressed, inflation could dilute some of the project's wider economic benefits and create equity concerns within the region.

3.3.3. Economic Overdependence on Tourism

While tourism is a vital contributor to the Barossa's economy, an overreliance on this single sector may introduce risk, especially during global downturns, natural disasters, or shifts in consumer preferences. The COVID-19 pandemic underscored these

vulnerabilities. Projects like the SBWTAP, while strengthening tourism appeal, must be balanced against the need to support economic diversification across manufacturing, healthcare, education, and other resilient industries. The inclusion of an productive winery and vineyard assist this diversification.

3.3.4. Infrastructure Strain

The Assessment Criteria stipulates the following analysis is required:

On existing infrastructures: Detail the power, water and telecommunications (mobile phone, NBN etc.) infrastructure and service requirements for the development; the capacity of existing infrastructure and services; and proposed approach to addressing any infrastructure or service shortfalls required to meet the needs of the development while sustaining the performance of infrastructure and services for existing users.

An outline of the existing infrastructure and future capacity requirements is addressed in detail within the EIS (Section 6.2.4 and 10.6.2), and as such is not duplicated in this report.

It is acknowledged that the project will generate increased traffic volumes, waste production, and service demand, which if not managed properly, could place pressure on existing infrastructure. Without targeted investment, local road networks, water supply systems, emergency services, and health facilities may struggle to meet new expectations. This could lead to degraded service quality, rising maintenance costs, and potential public concern. Ensuring alignment with council infrastructure planning and ongoing coordination will be essential to avoid unintended fiscal burdens on local governments.

Infrastructure investigations undertaken to date have identified necessary asset and service upgrades and argumentation requirements and the proponent will continue to resolve these with the relevant agencies, including Council, as the project design development progresses.

3.4. Cost of not proceeding

Should the SBWTAP not proceed, the Barossa region stands to forgo a substantial economic opportunity. Modelling suggests that over the two-year construction phase alone, the region would miss out on approximately \$60.27 million in value added to GRP, a loss that would directly impact local contractors, suppliers, and service providers. Once operational, the project is expected to contribute a further \$11.47 million in annual GRP through ongoing employment, regional procurement, and tourism-related activity. Without this investment, job creation in both the construction and hospitality sectors would be significantly reduced, alongside diminished demand for local goods and services.

Importantly, the opportunity to enhance tourism infrastructure and attract new visitor segments would be lost, limiting efforts to diversify the regional economy and extend overnight stays. The project's cancellation would therefore represent not only a short-term economic setback, but a long-term missed opportunity to reinforce the Barossa's status as a premier destination and support broader regional development goals.

4. CONCLUSION

The Southern Barossa Wine and Tourist Accommodation Project offers a transformative opportunity for the Barossa region. It is strategically positioned to elevate South Australia's regional tourism profile, attract high-value visitors, and generate meaningful long-term economic returns.

By combining premium accommodation, conference infrastructure, and winery experiences, the SBWTAP enhances the Barossa's appeal to leisure travellers, business events markets, and international visitors. Its projected employment outcomes and economic contributions strongly support regional development goals while providing a platform for inclusive local workforce participation.

While risks related to workforce capacity, infrastructure, and market volatility are acknowledged, proactive mitigation strategies—including investment in skills development and collaboration with education providers, will help ensure that the project delivers net positive outcomes for the region.

Overall, the SBWTAP is a significant tourism and hospitality development, and a catalyst for broader economic growth, diversification, and resilience in the Barossa.

THE VALUE OF TOURISM IN THE BAROSSA

YEAR END DECEMBER 2023

VISITOR EXPENDITURE

\$225M
YE DECEMBER 2019



\$261M
YE DECEMBER 2023

TARGET YE DECEMBER 2025

\$291M



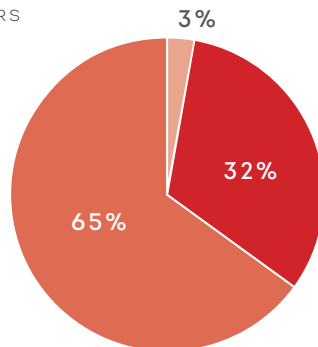
TARGET YE DECEMBER 2030

\$372M

OVERNIGHT VISITORS PER YEAR

343K

- INTERSTATE
- INTRASTATE
- INTERNATIONAL



VISITOR NIGHTS



817K

DOMESTIC DAY TRIPS



758K

TOURISM BUSINESSES YE JUNE 2023



410

HOTEL ROOMS YE DECEMBER 2023



529

DIRECT EMPLOYMENT IN TOURISM

500



DIRECT EMPLOYMENT RATIO

44:1

1 IN 44 JOBS RELATES
TO TOURISM



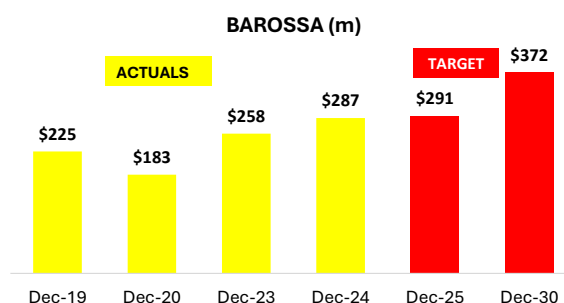
Sources: Tourism Research Australia - NVS & IVS. Employment Figures from the SA Regional Tourism Satellite Accounts FY 2021-22. Tourism Business estimates are derived by TRA using data sourced from the Australian Bureau of Statistics (ABS), for the FY 2022/2023. Full potential relates to the regional contribution to the 2030 \$12.8 billion target - refer to the South Australian Visitor Economy Sector Plan 2030. Tourist Accommodation data are sourced from the STR Global for the Year end December 2023.



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2024

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



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2024

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

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

ALOS = Average Length of Stay

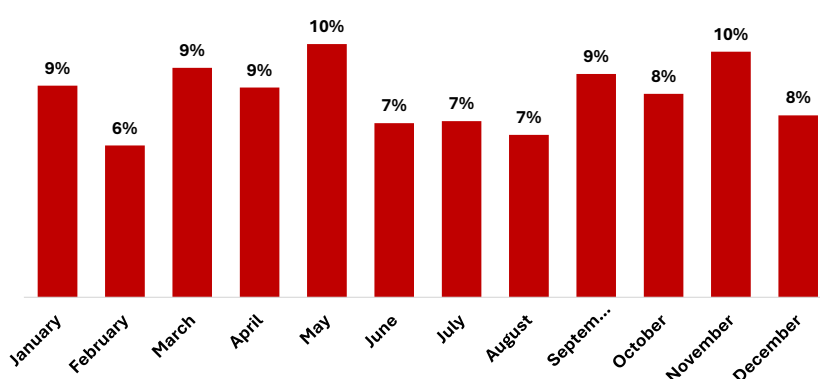


PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	156,000	62,000	9,000	20,000	244,000
% of visits	64%	25%	4%	8%	100%
Share of Regional SA	6%	6%	1%	7%	5%
% Across all regions	53%	24%	19%	7%	100%
Nights	422,000	365,000	17,000	33,000	837,000
% of nights	50%	44%	2%	4%	100%
Share of Regional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

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

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO BAROSSA



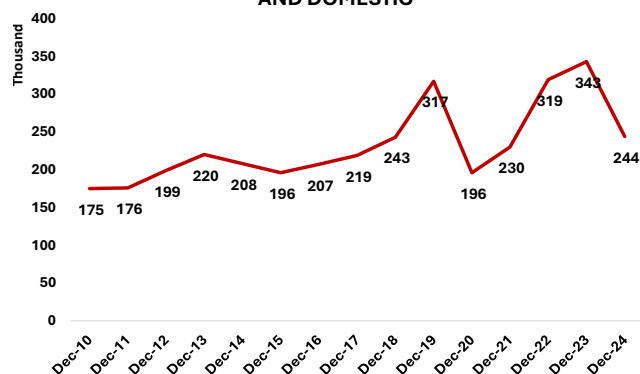
- National Visitor Survey data shows us that May and November are the strongest months for visitation in the Barossa.
- November is a busy time as this is when harvest occurs in the region.
- September is strong on the back of the school holidays.

Source: NVS year end December 2024

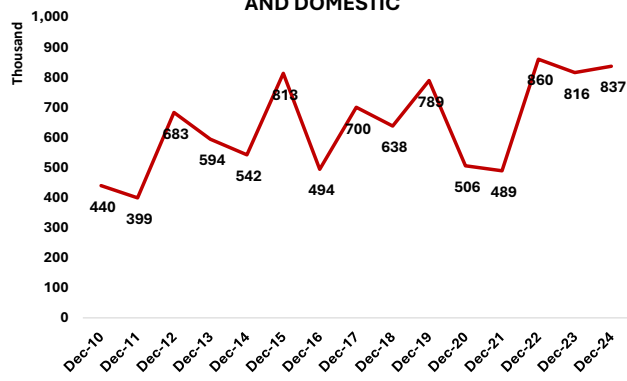


TOTAL OVERNIGHT VISITATION 2010 - 2024

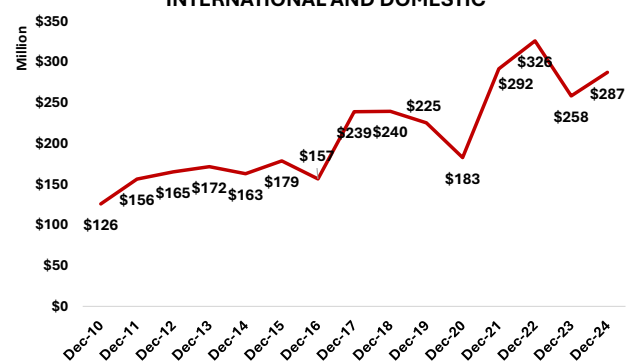
VISITORS BAROSSA 2010 - 2024 - INTERNATIONAL AND DOMESTIC



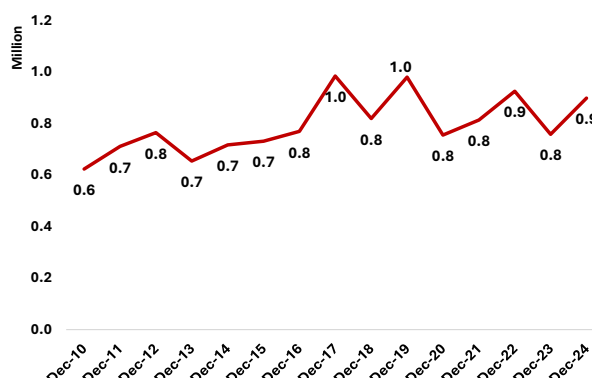
NIGHTS BAROSSA 2010 - 2024 - INTERNATIONAL AND DOMESTIC



TOTAL EXPENDITURE BAROSSA 2010 - 2024 - INTERNATIONAL AND DOMESTIC



DAY TRIPS BAROSSA 2010 - 2024 - DOMESTIC



Note: Fluctuations can occur in visitation data due to small sample sizes. Prior regional profiles used data averaged over three years to smooth these fluctuations.

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



BAROSSA

REGIONAL PROFILE



BAROSSA TOURISM LISTINGS

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

Note: some listings have multiple categories of accommodation
Source: Australian Tourism Data Warehouse
Categories above defined at - <https://tourism.sa.gov.au/support/atdw>

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

An **ATDW lead** is generated when a user performs one of the following actions when viewing an ATDW product page on southaustralia.com:

- Website click through (via visit website button or website URL)
- Book now button click
- Claim deal button click
- Clicking on contact email address to start writing email
- Clicking on a phone number to start a phone call (mobile only)

BAROSSA AUSTRALIAN TOURISM DATA WAREHOUSE LEADS

199,000

YEAR END DECEMBER 2024

ACCOMMODATION LEADS

95,000
48%

FOOD & DRINK LEADS

61,000
31%

TOUR LEADS

16,000
8%

*OTHER LEADS

27,000
13%

TOP 5

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

TOP 5

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

TOP 5

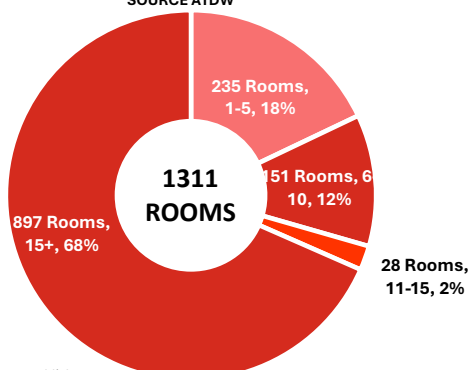
- BAROSSA BALLOON ADVENTURES
- BAROSSA HELICOPTERS EXPERIENCES
- BAROSSA VALLEY BALLOONING
- BAROSSA BOUTIQUE WINE TOURS
- THE FARM EATERY COOKING SCHOOL

* Other refers to leads for events, destination information, attractions, general services, hire and transport

ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS IN THE BAROSSA

SOURCE ATDW



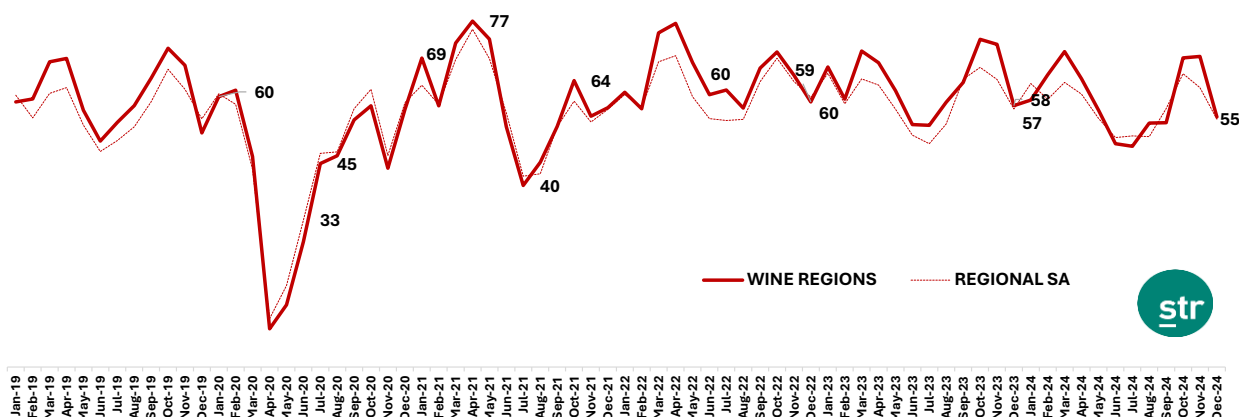
Rooms refers to rooms per establishment

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



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY WINE REGIONS

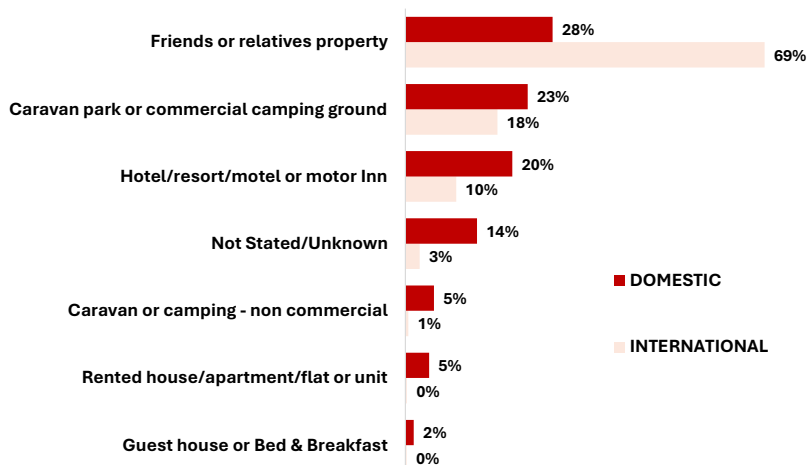


- The wine regions include accommodation data for the Adelaide Hills, the Clare Valley and the Barossa. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Wine Regions was 61%, this fell to 44% in 2020, rose to 65% in 2022, 63% in 2023 and fell in 2024 to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

VISITOR USE OF ACCOMMODATION

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

ACCOMMODATION USED IN BAROSSA FOR DOMESTIC VISITORS



TRANSPORT - DOMESTIC OVERNIGHT

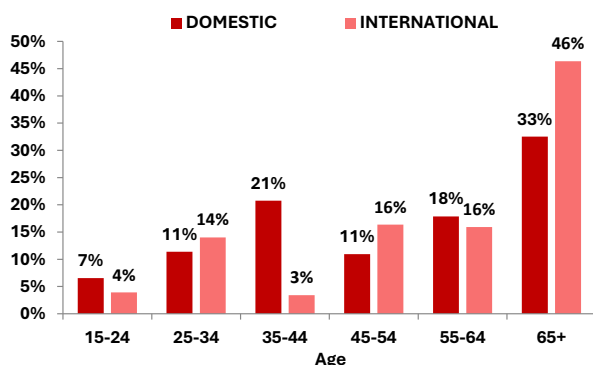


- The main method of transport used on trips to the Barossa was a self drive vehicle.
- 95 per cent of visitors used this type of transport.
- 5 per cent of people used an aircraft to get to the region.



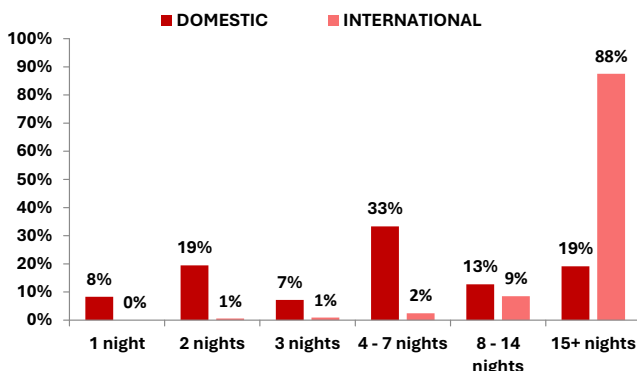
VISITOR PROFILE

AGE OF VISITORS TO BAROSSA



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

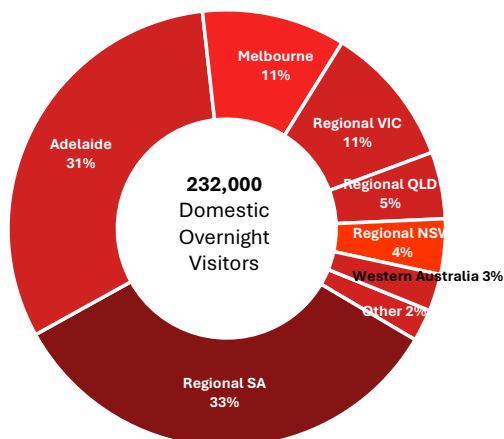
LENGTH OF VISIT TO BAROSSA



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

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO BAROSSA

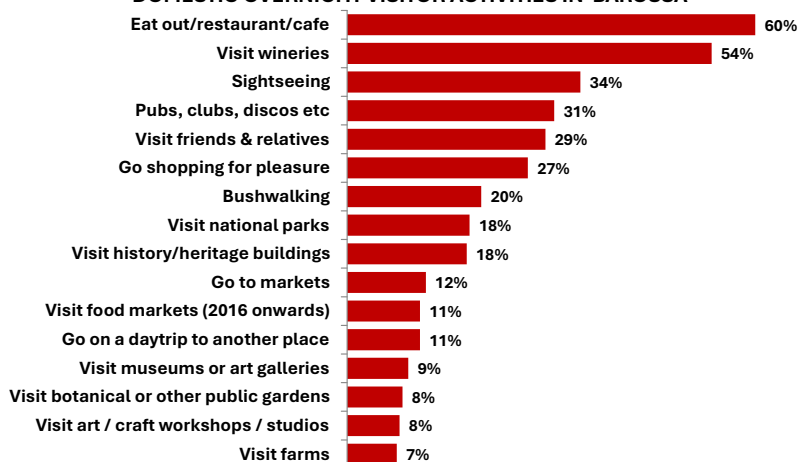


- Victoria at 22 per cent and Queensland at 7 per cent are the Barossa's biggest interstate overnight domestic markets.
- Regional South Australia contributes 33 per cent of visitors to the Adelaide Hills.
- 31 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

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

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN BAROSSA





REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

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

Employment

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

Gross Value Added (GVA)

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

Gross Regional Product (GRP)

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

Tourism Consumption

2023-24

Tourism products - directly consumed

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

Tourism Employment

2023-24

Tourism Industries - 1,000 directly employed

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

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

REGIONAL PERCEPTIONS REPORTING

- The Barossa Valley is arguably South Australia's best known region, driven predominantly by its strong wine associations.
- A significant challenge for the Barossa is that awareness rarely extends beyond food and wine experiences meaning the region is perceived as being for drinkers only, and not seen as a family friendly destination.
- People also see the Barossa as a place for a short stay or long weekend only, again linked to the perception that its just wine, and wine alone couldn't fill a holiday.

To drive increased visitation and expenditure, we recommend the Barossa:

Position the Barossa Valley as being more than wine

The perception of the Barossa Valley being a wine only region, means that the appeal among non wine drinkers, non drinkers, and families in general decreases dramatically. Building awareness of the non wine related activities travellers are able to do in the Barossa will help increase the appeal of the region to more people, promoting more visitors from new audiences that have previously perceived the region as being not for them.

Promote longer stays in the Barossa

By positioning the Barossa as more than wine, people will start to see the potential for a longer stay or holiday in the region. Currently, perceptions of the Barossa as a wine only region limit the amount of time people feel they could spend in the region. The potential for more diversity in experience should translate to longer stays.

Promote tourism in the less desirable seasons (particularly summer)

With so much happening in South Australia at the start of the year and in March, there are a great deal of opportunities to drive visitation to the Barossa Valley in the summer months of the year through activating existing events in the region. Managing concerns around how the heat is managed in the summer months, and how people can be kept warm in the winter will go a long way in reassuring potential travellers at this time of year.

Region appeals to...

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

Prepared by the South Australian Tourism Commission, December 2024

Sources Unless otherwise stated, all data in this report is from the International Visitor and National Visitor Surveys (IVS and NVS) conducted by Tourism Research Australia. These Sources are based on sample surveys and as with all sample surveys, are subject to sampling errors. Caution is required in interpreting some estimates, in particular, regional estimates can be affected by small sample sizes and can be subject to a high level of sampling error. Regional data should accordingly be used with a high level of caution and treated as being for indicative purposes only. Data refers to visitors 15 years and over. Unless otherwise stated, all data refers to the year end December 2024.

Regional Perceptions Testing - June 2022 - 3-day, online bulletin board (OBB) Approx. 40 mins of content per person, per day.

Participants were recruited as follows: — 22 Intrastate participants (70% metro, 30% regional), — 20 Interstate participants (Melbourne, Regional VIC and Sydney)

A mix of age (18-44 and 45-69) and gender was achieved across participants. Participants were willing travellers, non-rejectors of travelling to/within SA, and did not live in the region they were recruited to explore (for intrastate).

Notes and Abbreviations Totals may not add to 100% due to rounding. VFR: Visiting Friends and Relatives. np: Not Published due to small sample size. ALOS: Average Length of Stay



SOUTH AUSTRALIA

Regional Blueprint 2024-2025

Edition 5

November 2024



Acknowledgement of Country

Regional Development
South Australia would like to acknowledge the traditional owners of the South Australian lands on which we work and pay our respects to the elders past and present.



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Executive Chair Summary



The 2024 Regional Development South Australia Regional Blueprint reflects a record year with headline GRP growing from \$31.78B to \$35.89B - highlighting the significant economic contribution regions make to the South Australian economy.

GRP growth is led by the agricultural, forestry and fisheries sector with value added output representing 23.1% of GRP, mining 16.9% and the construction sector 11.7% (and the largest mover). We reflect on this whilst rainfall to date this year has been significantly down, in many cases close to or at record lows, which in all parts of the state will test our economy.

An analysis of 928 public and private sector projects in the Regional Development South Australia (RDSA) Regional Investment Pipeline highlights \$65.43B in Capital Expenditure (CAPEX) under contemplation in regional South Australia, up from \$62.562 last year. To be included in the pipeline, these investments must be under active contemplation, funding consideration and/or construction for commencement in the next five years.

Despite a record year we are very conscious that regional South Australia will require all its resilience, as two key factors weigh heavily. The first is the sustained cost pressure as inflation follows a slower than hoped pathway to the Reserve Bank's target range. The second- current drought conditions, with nearly all the State recording well below average rainfall, and recent frost events, meaning the agriculture industry will be severely impacted.

It is again the strongest year since Regional Development Australia (RDA) organisations began tracking forecast capital investment. Growth is incremental with the sharpest increase in CAPEX for forward projects being driven by an increase in renewable energy projects. Whilst we note that not all of these projects will come to fruition, the realisation of even 20% of these projects alone would generate up to 22,453 construction jobs (Source: REMPlan).

The ongoing, and ever pressing task, is to realise these projects. Our 5-year RDSA Infrastructure Prioritisation Report, released in January 2024, shows consistently that building enabling infrastructure and working to remove barriers (most notably releasing the workforce needed) is the pathway to delivering this forecast investment. As a state economy driven by regional success, where a quarter of its GRP is produced by regions (a substantially higher proportion than any other state), continuing to grow liveable regions with adequate housing is the most significant challenge.

As independent Executive Chair of RDSA, alongside the eight RDA Chairs, we recognise the enormous investment that all three levels of government are delivering to the regions. Our sincere thanks go to the following key stakeholders for their ongoing support:

Australian Government: Minister Catherine King MP and Minister Kristy McBain MP and the Department of Infrastructure, Transport, Regional Development, Communications and the Arts;

South Australian Government: Minister Claire Scriven MLC and the Department of Primary Industries and Regions SA;

Local Government: Mayor Dean Johnson, the Local Government Association of South Australia and all 52 regional local government partners;



RDA Staff Teams: The 57 employees who work tirelessly for our regional communities;

RDA Boards: The 76 local board members of RDAs across South Australia drawn from business and local government, who give their time for the betterment of their communities.

The ongoing commitment and passion of these collective supporters is greatly appreciated and we look forward to another year focused on long-term sustainability and economic transformation of regional South Australia.

Hon Rob Kerin

Executive Chair, Regional Development South Australia



**Regional
Development SA**

Chair: Hon. Rob Kerin

E: robkerin@ymail.com

Economic Foreword



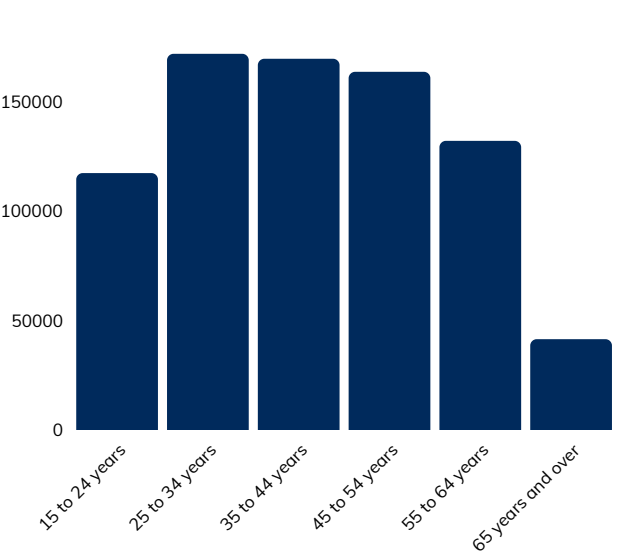
This has been a record year, exemplified by growth in Gross Regional Product and forecast regional capital investment. Delivery of future economic investment, sector and jobs growth will however be impacted by weather conditions and macro trade conditions which are rapidly evolving.

In 2024, we celebrate trends reflecting growth in economic output and population, tempered with commentary in relation to labor supply, participation and productivity.

There will be no greater challenge to regional South Australia in the next ten years than the supply of suitably qualified labor to meet existing and forecast workforce challenges. Workforce and skills shortages are being felt in regions due to both an ageing population and the significant construction and ongoing workers required to support both economic and population growth. If we are to bring new industry and capital investment to fruition, we must maintain a clear focus on creating local education and training pathways, attracting a skilled population and housing the workforce required.

RDSA has been consistent in highlighting the burgeoning issue of an ageing workforce (and associated loss of critical skills) and lack of housing required to both provide a replacement workforce as well as support growth. The RDSA *Growing our Regional Workforce Review Summary*, published in 2021 provides a comprehensive set of recommendations for growing our workforce. Please refer to [Resources - Regional Development South Australia](#) for further information.

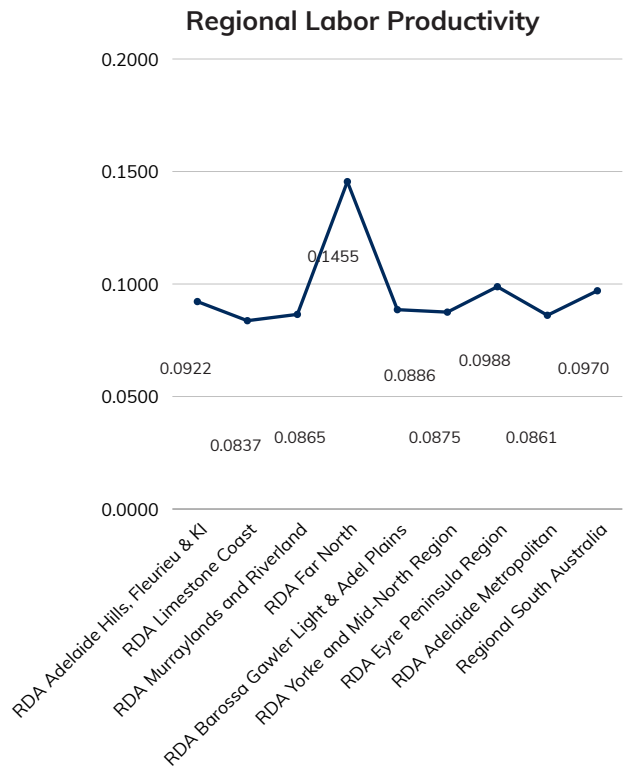
Local Worker Number - Regional South Australia



We need to train, and replace over 173,251 employees estimated to be due to exit the workforce in the next 10 years. Adding to that challenge is the need to attract additional skills and workers to deliver on our aspirations for growth (as evidenced in the forecast pipeline of investment), across all sectors. For the construction industry alone, there are an estimated 13,571 tradespeople currently aged over 55 in regional South Australia. We need collaborative action and place based solutions to ensure we not only maintain our workforce capacity, but grow capacity to support delivery of economic investment and jobs.

The second focus for growth is labor productivity. In February 2023, the Australian Government's Productivity Commission released their 5-year Productivity Inquiry: Advancing Prosperity. Since 2005, across Australia annual labour productivity growth (growth in output per hours worked) has been the best part of one percentage point below its long-term average in Australia and other developed countries.

Overall, the Australian Productivity Commission found this will lead to much-slower improvements in Australians living standards than in the past.



With the South Australian Productivity Commission undertaking an enquiry into positioning all South Australians to Share in the Benefits of Economic Growth, RDAs have undertaken an analysis at regional level. The substantially positive story is that regional South Australia is already performing above the state average for labor productivity. Please refer - [Positioning all South Australians to Share in the Benefits of Economic Growth](#).

Regional South Australia Labor Productivity measure sits at 0.097 and is higher than the 0.0861 in metropolitan Adelaide. There are regional variations and unsurprisingly the Far North with its capital deployed to mining is the most productive region. Put simply, for each hour worked, the South Australian economy gets more return than from any other region. In fact, only one region sits below metropolitan Adelaide, which is the Limestone Coast and it has seen a steady increase in productivity as the manufacturing base grows. What this means for regional South Australia is, while there is always room for improvement we are producing at the highest level in South Australia. Conversely this also means that our requirement for population growth and workers is also critical.

It is against this backdrop that RDSA’s Regional Blueprint 2024 sets out regional South Australia’s key priorities and investment pipelines. We encourage you to continue working with us as we work to realise the future economic potential for regional South Australia.

Leonie Boothby
CEO Regional Development Australia Adelaide

Regional South Australia's Economic Performance

531,583 ↑ 6,489

REGIONAL POPULATION

\$35.89 ↑ 4.11

GROSS REGIONAL PRODUCT (\$B)

47,038 ↑ 572

NUMBER OF BUSINESSES

\$65.43 ↑ 2.866

REGIONAL INVESTMENT PIPELINE (\$B)

220,490 ↑ 3,281

NUMBER OF JOBS

Source: Australian Bureau of Statistics
Gross Regional Product and Labour compiled by .id (Informed Decisions) and Regional Investment Pipeline compiled by Regional Development Australia. Accessed June 2024.

Regional Insights & Strategic Alignment

Regional Development South Australia Priorities



RDSA is an independent and non-partisan network. We are well-placed in providing specific local intelligence to advance regional challenges and evidence-based decision making. To realise the pipeline of investment opportunities, critical infrastructure needs to be aligned and coordinated effectively across all three levels of Government.

This year we note that the number of projects in the Regional Investment Pipeline reflects the completion of significant public capital works, and the commencement of construction on a number of renewable energy, construction and other projects.

Movement in Regional Investment

Number of Total Projects	928	-153
Number of Public Projects	340	-211
Number of Private Projects	588	+58
Value of Public Projects (\$B)	15.879	+1.812
Value of Private Projects (\$B)	49.551	+1.054

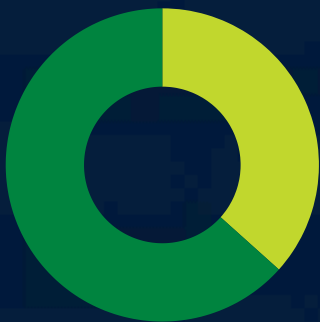
The overall data also presents some emerging trends:

- Completion of major infrastructure projects.
- The growth of renewable projects which fuel the continued need for construction trades.
- The movement of agriculture projects into manufacturing as we have refined our methodology to classify projects at the four digit ANSZIC Code level which gives a more accurate assessment of where forecast capital expenditure lies.
- A more incremental growth in the investment pipeline with an increase of \$2.866B this year as opposed to \$17.928B last year. This is reflective of two factors: the movement of several large projects beyond our 5 year timeline and a slowing in new development of scale entering the Regional Investment Pipeline.

Public & Private Projects – Number

588
Number of Private Projects

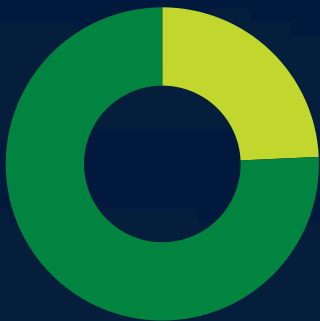
340
Number of Public Projects



Public & Private Projects – \$B

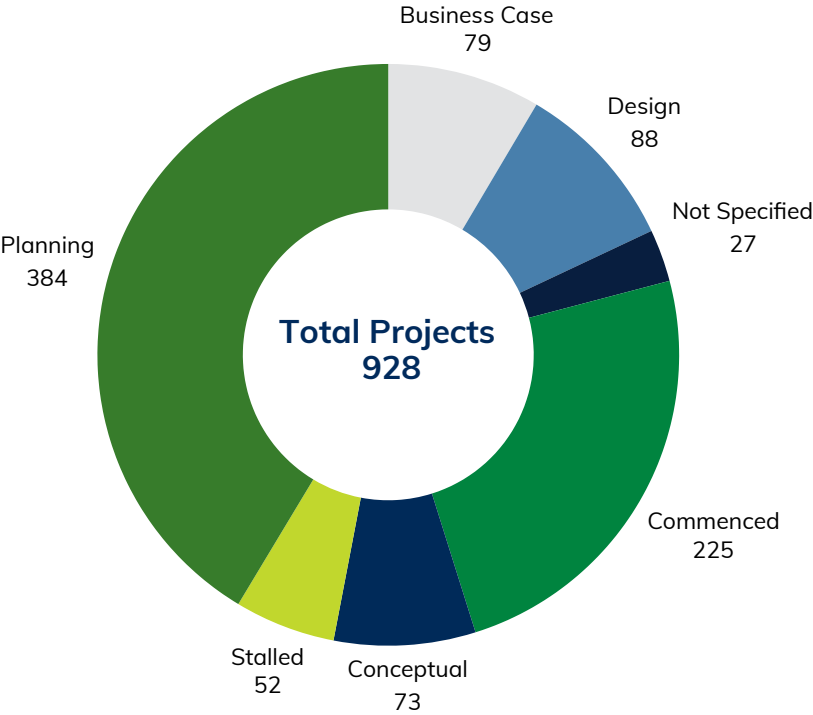
49.551
Value of Private Projects

15.879
Value of Public Projects



Regional Investment Pipeline

Project Stages



Regional Projects by Industry ANZSIC Code	Number	Value
A – Agriculture, Forestry and Fishing	32	\$462,455,722
B – Mining	13	\$4,409,000,000
C – Manufacturing	105	\$18,665,730,663
D – Electricity, Gas and Water and Waste Services	95	\$31,812,050,071
E – Construction	213	\$3,723,230,930
F – Wholesale Trade	6	\$40,278,500
G – Retail Trade	23	\$223,740,000
H – Accommodation and Food Services	141	\$1,601,830,000
I – Transport, Postal and Warehousing and Storage	45	\$1,180,128,438
J – Information Media and Telecommunications	14	\$34,676,531
K – Finance and Insurance Services	0	\$0
L – Rental, Hiring and Real Estate Services	3	\$17,700,000
M – Professional, Scientific and Technical Services	13	\$138,790,000
N – Administrative and Support Services	2	\$270,000
O – Public Administration and Safety	32	\$1,383,734,567
P – Education and Training	19	\$132,895,000
Q – Health Care and Social Assistance	55	\$705,958,647
R – Arts and Recreational Services	99	\$824,282,504
S – Other Services	9	\$9,645,000
Z – Not specified	9	\$65,048,007
TOTAL	928	\$65,431,444,581

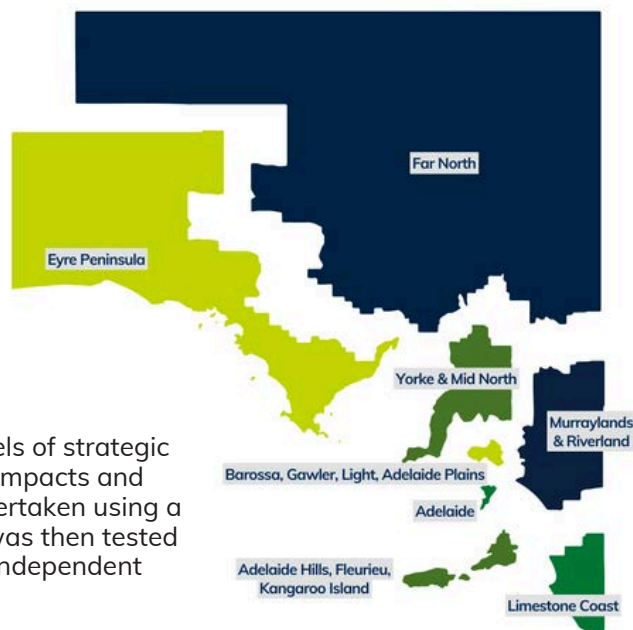
Infrastructure Prioritisation

Regional Development South Australia Priorities

In late 2023 we updated the RDSA Infrastructure Prioritisation, an exercise undertaken every 5 years. The projects listed overleaf have the potential to significantly enable regional SA economic growth. The status of each project has been identified and range from conceptual, feasibility, requiring advocacy, to investment ready.

The projects listed as high priority reflect high levels of strategic fit, expected economic, social and environmental impacts and deliverability. This prioritisation exercise was undertaken using a multi-criteria analysis (MCA) assessment which was then tested against local expertise with the assistance of an independent contractor.

In addition, we have also taken an holistic view and applied a program lens to major challenges facing South Australia's regions and provided some background on housing, childcare, telecommunications and digital infrastructure, water, freight connectivity, social and community infrastructure, tourism infrastructure and the circular economy.



Full information on each of the following projects, including economic analysis of their potential where available, is included in the full RDSA Infrastructure Prioritisation Report found at [Resources - Regional Development South Australia](#).

Highest Priority Projects in 2023 RDSA Infrastructure Prioritisation

Project	Region	Status
Mount Barker City Centre Project	Adelaide Hills Fleurieu & Kangaroo Island	Investment Ready
Mount Barker Wastewater Reuse Infrastructure	Adelaide Hills Fleurieu & Kangaroo Island	Advocacy
Critical Infrastructure to Support Phase One Establishment of Concordia Development	Barossa Gawler Light & Adelaide Plains	Advocacy
Flood Protection and Water Proofing for Gawler	Barossa Gawler Light & Adelaide Plains	Feasibility
Hydrogen Jobs Plan and Port Bonython Hydrogen Hub	Eyre Peninsula	Investment Ready
Northern Water Project	Eyre Peninsula / Far North	Feasibility
Cape Hardy Industrial Precinct and Port	Eyre Peninsula	Investment Ready
Southern Desalination Plant and Distribution Network Upgrade	Eyre Peninsula	Investment Ready
Thevenard Port Expansion and Efficiencies	Eyre Peninsula	Feasibility
Quorn Town Water Supply	Far North	Investment Ready
Multispecies Livestock Transshipping Hub	Far North	Feasibility
Regional telecommunications connectivity upgrades	Limestone Coast	Investment Ready
Mount Gambier Saleyards and Industrial Estate	Limestone Coast	Investment Ready
Upgrades to the Green Triangle road network	Limestone Coast	Advocacy
Upgrade of drainage network infrastructure in the Limestone Coast	Limestone Coast	Investment Ready
South Eastern Freeway Freight Route	Murraylands & Riverland / Adelaide Hills Fleurieu & Kangaroo Island	Investment Ready
Hydrogen and Biomethane Renewable Hubs	Murraylands & Riverland	Feasibility
Riverland Sustainable Growth Precinct	Murraylands & Riverland	Feasibility
Complete and implement master planning for Provincial Cities	Yorke & Mid North	Advocacy
Port Pirie Southwest Housing Project	Yorke & Mid North	Feasibility
Braemar Infrastructure Corridor	Yorke & Mid North / Far North	Feasibility
Barossa New Water & Clare Valley New Water	Yorke & Mid North / Barossa	Feasibility
Augusta Highway Upgrades	Yorke & Mid North	Feasibility
TOTAL VALUE OF HIGH PRIORITY INFRASTRUCTURE PROJECTS		\$12,758.30B

Two projects from the original list not included above, have been removed as they have now achieved funding required. In May 2024 the Commonwealth Government committed \$120M to upgrade the Mount Barker and Verdun Interchanges, alongside a State Government contribution of \$30M, as part of the 2024/2025 budget. In addition, regional telecommunications connectivity upgrades in the Limestone Coast valued at \$28M have been jointly funded by the Commonwealth and State Government.

ADELAIDE

Regional Development Australia Adelaide aims to capitalise on Regional South Australia's unprecedented opportunity for population and industry growth while focusing on bringing together data, policy and solutions to key challenges including workforce, housing, and infrastructure to meet industry demands.



Regional Development Australia Adelaide (RDAA) serves an integral role in facilitating economic development in all South Australian regions. We are funded by the Australian Government to assist other South Australian RDAs in increasing promotion and economic development in regional South Australia. RDAA also plays an important role in bringing together policy and capability for the Regional SA RDA's where capacity and the ability to augment place-based demands is required.

When setting the strategic priorities, we have ensured they can deliver outcomes in line with the RDA Charter and address critical issues which are relevant across multiple regions. These specifically include the four areas identified in the Australian government Regional Investment Framework:

1. Investing in People
2. Investing in Services
3. Investing in Places
4. Investing in Industries and Local Economies

The close working relationship RDA Adelaide has with Regional Development South Australia, and the seven regional RDAs across the State, enables strong collaboration. We will continue to advocate at both the State and Commonwealth level to facilitate action and deliver results across the entire network.

Regional Priorities

- 1** Building great relationships through increasing awareness of Regional SA's investment opportunities.
- 2** Increasing visibility of the work of RDA's by bringing together key initiatives and building branding and public relations activities.
- 3** Driving regional SA investment & economic growth by coordination of an investment pipeline and assisting in cross-regional investment.
- 4** Assisting in building robust data capture and sharing systems across RDAs to create efficiencies and maximise output.
- 5** Providing support in the development of Strategic Priorities for the whole of regional SA.

Adelaide Contacts



Chair:
Jan Turbill

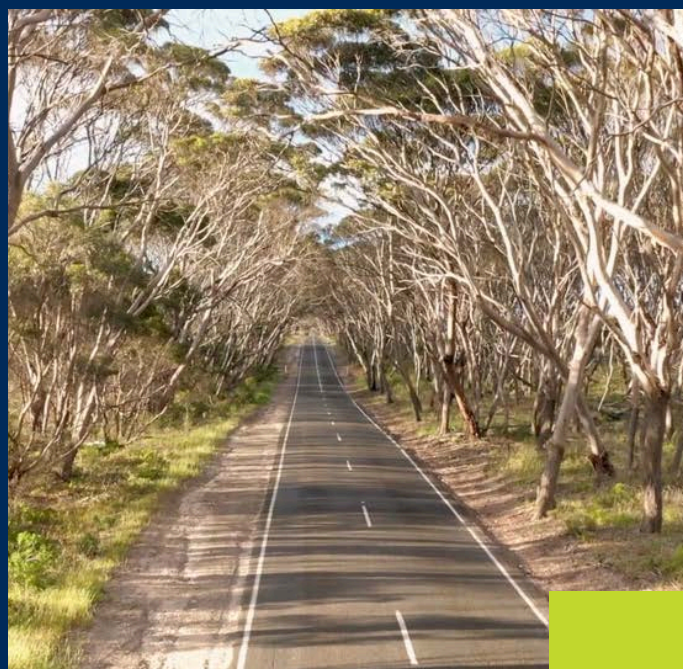


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ADELAIDE HILLS FLEURIEU & KANGAROO ISLAND

With a relatively stable investment pipeline from \$3.03B to \$2.73B this year, the Adelaide Hills Fleurieu & Kangaroo Island economy remains strong, underpinned by population growth and strong construction, manufacturing, accommodation and food services sectors.



This region is marked by incredible diversity, ranging from peri-urban to remote areas, quaint villages and rapidly growing regional cities. It spans high-intensity horticulture to broad-acre agriculture, and covers some of the wettest and driest parts of the state. With world-renowned wine regions, international tourist destinations, lakes, surf coasts, rivers, plains, and mountains, it offers a unique collection of environments.

As a result of this diversity, the region has experienced steady population growth of 1.6% per year, with GRP expected to grow 2% annually until 2027 led by agriculture, healthcare, and mining. However, job growth is forecast at just 0.4% annually, well below historic rates. To ensure continued success, the region must focus on RDA AHFKI's Regional Priorities.

Regional Priorities

1 **Growing Regional Productivity: Our aim is to ensure the region's productivity and liveability are unhindered by a lack of appropriate public infrastructure.**

Public infrastructure development is essential for our region's growth. It not only supports businesses by improving supply chains and market access but, also enhances liveability through better connectivity, job creation, and vibrant public spaces. RDA AHFKI partner with local governments to help develop, design, and secure funding for key community assets that promote community resilience and better quality of life.

2 **Enhancing Regional Innovation and Preparedness: Our aim is to ensure the region will be more resilient to disruption brought about by: Climate Change + Demographic Change + Digitisation + Demand for Skilled Workforce.**

The ability to adapt to disruption is crucial in an ever-changing world. Climate change, demographic shifts, digitisation, and the need for skilled workers are critical challenges for the region. Innovating in these areas will secure a stronger, more resilient future.

3 **Strengthening our most competitive industry sectors - tourism, manufacturing & agriculture: Our aim is to ensure the region's three most competitive industries continue to grow, increasing exports and growing employment.**

The region's economy thrives on its diversity, with tourism, manufacturing, and agriculture the leading drivers of value-added contributions, employment, and exports in the region. Strengthening these industries involves connecting businesses to resources, government programs, and investment opportunities. RDA AHFKI helps facilitate these core supports through direct business assistance and tailored initiatives like our Hills & Coast Business Grant that provides targeted assistance for local manufacturing growth.

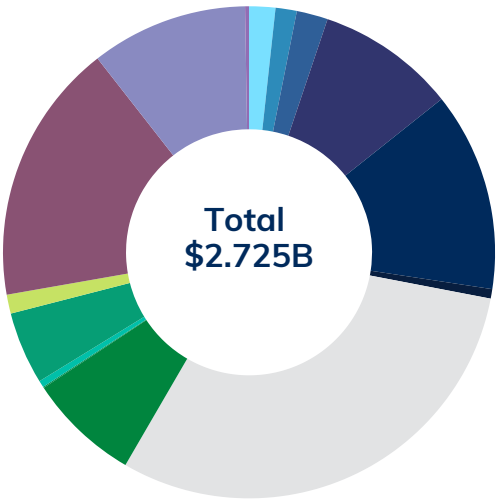
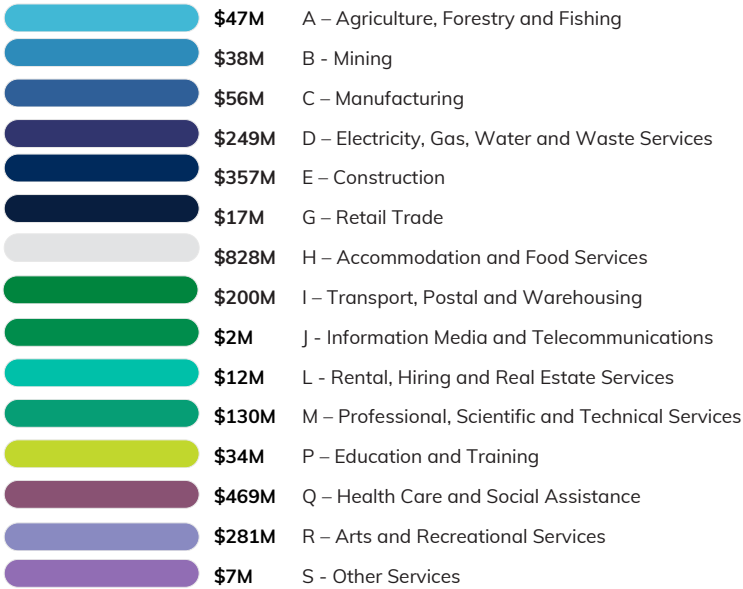
4 Connecting Region and Government: To ensure our region and government will be well connected and informed to make the most of economic development opportunities.

We endeavour to build strong connections between the region and all levels of government, industry, and communities. By sharing insights and promoting the region’s strengths, we help maximise economic opportunities. We also provide evidence-based advice to the Australian Government, advocating on key regional development issues that impact our communities.

Regional Data

	2024	2023	Difference	% Change
Population	142,556	140,089	2,467	1.76%
Number of Businesses	12,379	12,141	238	1.96%
GRP (B)	6.74	6.253	0.48	7.71%
Total Number of Jobs	48,527	46,527	2,000	4.30%
Pipeline Project Total Value (B)	2.73	3.03	-0.3	-9.9%
Tracked investment projects	165	165	0	0.00%

Regional Investment



Adelaide Hills, Fleurieu & Kangaroo Island Contacts



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RDA Adelaide Hills,
Fleurieu & Kangaroo
Island website

BAROSSA GAWLER LIGHT ADELAIDE PLAINS

Significant housing and population growth is forecast for the Barossa Gawler Light Adelaide Plains region with new greenfield housing developments approved for delivery and further land being released for future housing in several of our regional towns. This highlights the need to work on key economic enablers to facilitate this generational growth while maintaining a high quality lifestyle.



The RDA Barossa Gawler Light Adelaide Plains (RDA BGLAP) region is experiencing significant housing and population growth with further growth forecast for the next fifteen years and beyond. RDA BGLAP is focused on supporting delivery of economic investment, business sustainability and growth, job creation and local skills development to support that population growth. Advocating for delivery of infrastructure concurrently or ahead of housing development, preserving valuable primary industry land and maintaining liveability, character and amenity of the region is a key focus.

The pipeline of economic investment and business growth opportunities are aligned to our regional strengths and capitalise on our competitive advantages (including proximity to Adelaide, the port and airport). Our largest industries are manufacturing, healthcare and social assistance; and agriculture. Aligned to population growth, emerging growth sectors are healthcare, education and training; and professional, scientific and technical services; with agriculture also experiencing growth.

Our focus is on unlocking new investment, job creation, increasing economic diversity and sustainability, and unlocking latent skills, workforce, and housing capacity. Whilst significant housing growth is forecast for our region, there remains a critical shortage in rental housing required to attract and retain workforce and their families.

RDA BGLAP works collaboratively with stakeholders to gather and share regional data and intelligence to inform land use, infrastructure, core service and liveability planning to support sustainable communities and economic development. RDA BGLAP plays a vital role in connecting stakeholders, establishing common priorities, and advocating for action.

Regional Priorities

- 1 Housing:**
Advocate for initiatives to unlock latent housing supply, increase rental housing, affordable housing, and greater housing diversity (size, style, location and affordability), to increase housing supply for critical workers, families and to enable ageing in place.
- 2 Workforce, education & skills:**
Share intelligence around highest areas of need, connect employers to workers and to available support (and vice versa); and create local pathways into education and work to unlock latent workforce capacity.
- 3 Infrastructure and land use planning:**
Provide regional data and intelligence to inform land use and infrastructure planning processes by all three levels of government, and advocate for delivery of priority infrastructure to support planned growth.

- 4

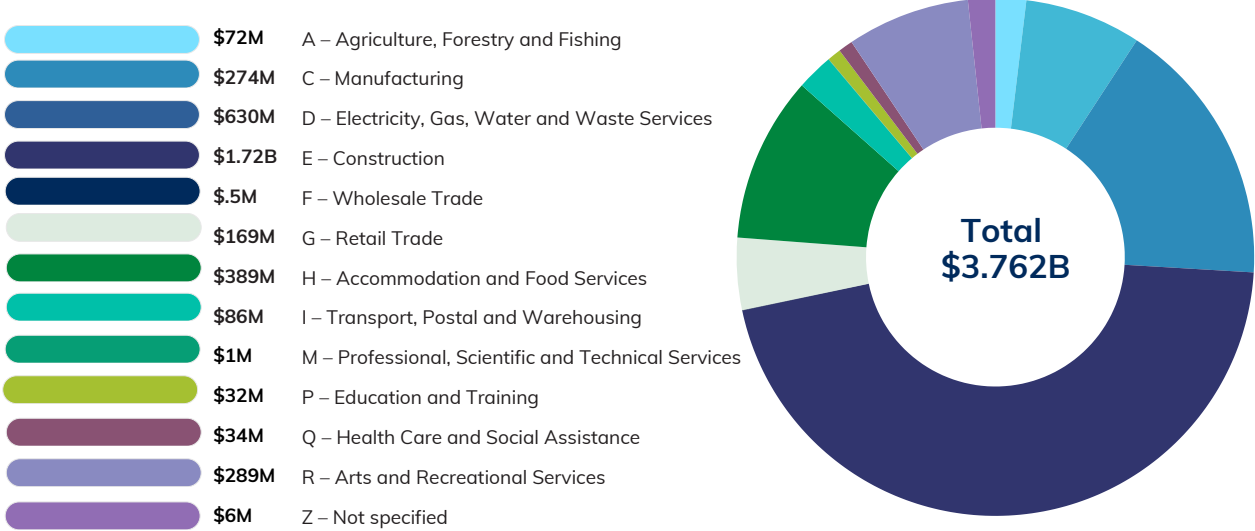
Water:
Support stakeholder supply and demand analysis and planning that enables long-term sustainability and growth. Identify and facilitate potential partnership projects to optimise sustainable use of available water, including opportunities for water capture and reuse.
- 5

Sustainability:
Support and advocate for priority environmental projects (climate, drought resilience, water security, circular economy), connect industry with government initiatives and programs and assist businesses to transition to net zero.

Regional Data

	2024	2023	Difference	% Change
Population	80,605	78,794	1,811	2.30%
Number of Businesses	6,064	5,986	78	1.30%
GRP (B)	4.048	3.858	0.19	4.92%
Total Number of Jobs	29,311	28,731	580	2.02%
Pipeline Project Total Value (B)	3.762	2.16	1.6	74.07%
Tracked investment projects	184	123	61	49.59%

Regional Investment



Chair:
Rolf Binder



CEO:
Leonie Boothby



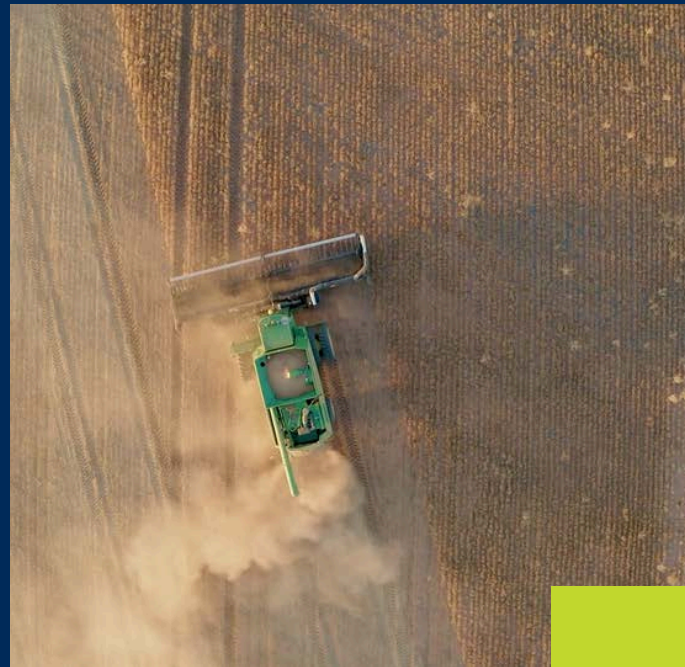
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RDA Barossa, Light,
Gawler & Adelaide
Plains website

EYRE PENINSULA

Today the Eyre Peninsula is one of South Australia's most productive regions generating over \$4 billion in gross regional product annually. With an abundance of wind, solar, copper, graphite and other rare-earth resources, it is set to be at the epicentre of the State's industrial renaissance. It will play a pivotal role in global efforts to decarbonise industry through renewable energy generation, green product and the transition to electrification.



The region is highly export oriented and benefits from established agriculture, commercial fishing and aquaculture industries, exporting on average over 90% of its grain and over 80% of seafood produced in the region. Linked to our new collaborative Eyre Peninsula Strategic Regional Plan 2023 - 2026 (jointly developed with Eyre Peninsula Local Government Association and Eyre Peninsula Landscape Board) we undertook a detailed economic analysis of the Eyre Peninsula and identified the following opportunities which will influence the region's economy over the coming years.

Regional Priorities

Our collaborative regional priorities remain focused on:

- 1 Social Capacity – Workforce attraction, retention, training and support:**
It is essential that RDA EP support and develop the foundations on which the community is built. The people of Eyre Peninsula are resilient and have a strong sense of identity. However, they need to be supported by a variety of services to grow and thrive. Retaining and attracting a strong population base and active workforce is a key goal of RDA EP and is vital to supporting economic growth and strong communities.
- 2 Infrastructure Capability – Provision of economic enabling infrastructure:**
Infrastructure plays a critical role in enabling investment in communities, services and markets. Having fit for purpose infrastructure is critical to facilitating growth and strong communities. Promoting strategic infrastructure investment is a key goal of RDA EP. The provision of adequate water, power, transportation and telecommunications infrastructure is vital to ensure business operations remain competitive and grow. The challenge of distance and connectivity remains an issue for the Eyre Peninsula. For this reason, it is critical that the region not only seek to enhance its network but also maintain existing infrastructure and services.
- 3 Economic Prosperity – Economic growth through improved business efficiencies and industry diversification:**
The Eyre Peninsula benefits from a strong economy. Rich mineral deposits form the foundation of a strong mining and manufacturing industry, while expansive plains and plentiful seas support agriculture and aquaculture. These industries are the largest sectors in terms of export value in the region. They are also significant on a state-wide scale, with the Eyre Peninsula producing approximately 80% of South Australia's seafood product and a considerable amount of its grain. However, supporting economic diversification through new and emerging industries linked to the region's natural and competitive advantage in renewable energy, hydrogen and space are high priorities.

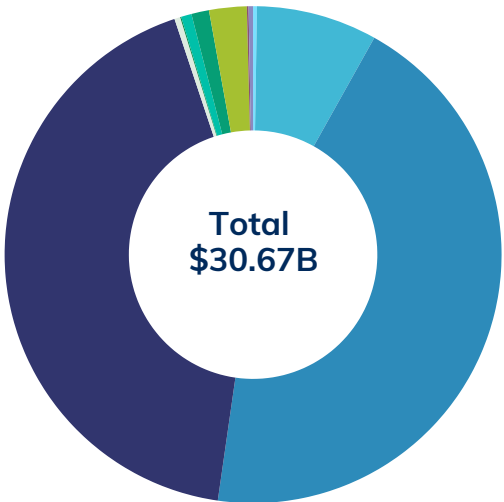
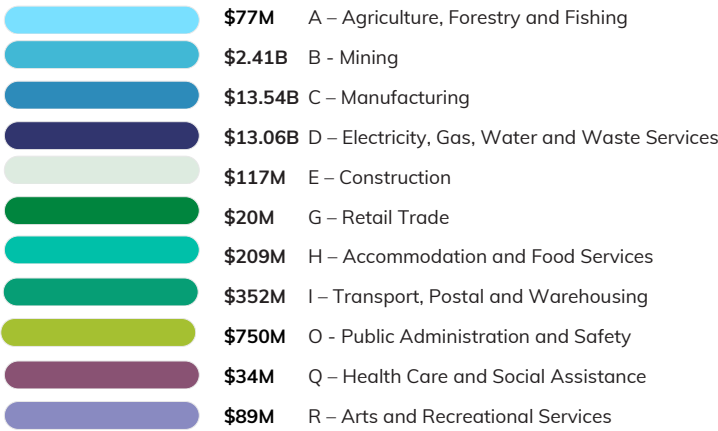
4 Environmental Sustainability- Ecologically sustainable development and natural resource management:

The Eyre Peninsula’s economy relies upon its environment. From resource extraction to agriculture, aquaculture and nature-based tourism, impacts associated with climate change will negatively affect the productivity of our existing and established industries. The future success of these industries will rely upon rapid decarbonisation as well as adapting to the effects of climate change. Stakeholders have recognised this and want to protect these assets for future generations by ensuring long term management and mitigation practices are at the forefront of decision-making processes.

Regional Data

	2024	2023	Difference	% Change
Population	59,207	58,953	254	0.43%
Number of Businesses	5,089	5,056	33	0.65%
GRP (B)	4,468	4,103	0.365	8.9%
Total Number of Jobs	26,554	25,995	559	2.2%
Pipeline Project Total Value (B)	30.67	28.49	2.18	7.6%
Tracked investment projects	112	154	-42	-27.27%

Regional Investment



Eyre Peninsula Contacts



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CEO: Ryan Viney



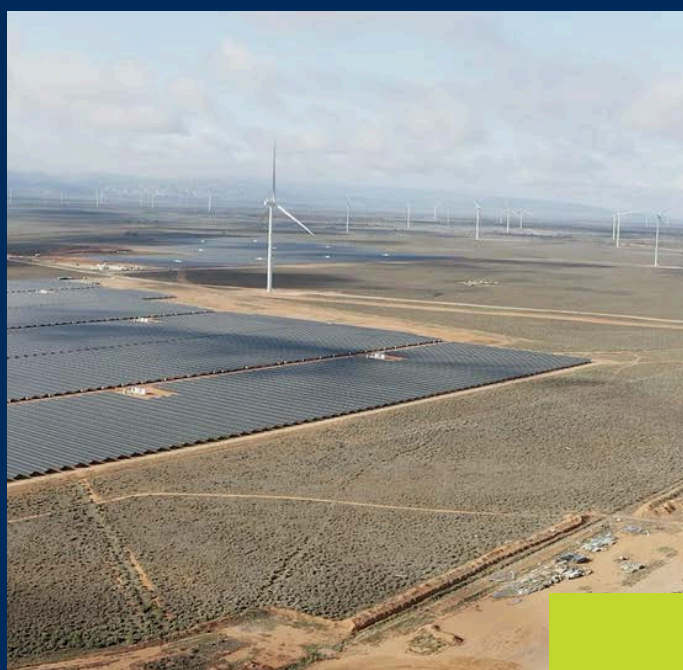
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RDA Eyre Peninsula website

FAR NORTH

The Far North continues to grow, as does its pipeline value from \$10.65B to \$10.83B. It has experienced the highest growth of any region in headline GRP up to \$6.616B. Fuelled by record copper production by BHP, alongside the increased activity by magnetite explorers in response to State Government's Green Iron and Steel Strategy have increased interest in the region. The relative abundance of critical minerals and the upgrade of critical infrastructure remain key to continued growth.



Regional Priorities

- 1 Economic Development:**
Advancing the major growth sectors in the Far North Investment Pipeline through working with key industry sectors and businesses to assist them to reach their potential.
- 2 Strategic Infrastructure Investment:**
Identifying strategic infrastructure requiring investment with a focus on connectivity across the Far North further opening the region to industry, tourism and business.
- 3 Business Capacity Building:**
Support private investment by local and regional businesses, and attraction of new industries and businesses addressing the visitor economy through the promotion of the region.
- 4 Population:**
Support projects and initiatives which improve the liveability of the Far North region.
- 5 Collaboration:**
Support collaboration with other key stakeholders, including RDAs across SA and Australia to share ideas and grow local knowledge.

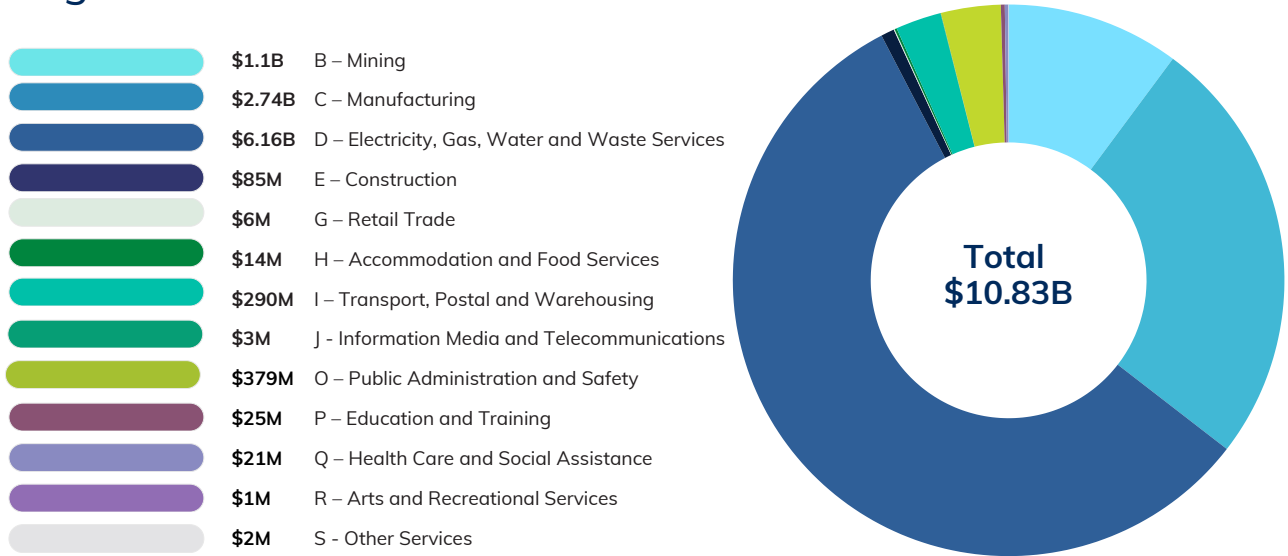
The gap in critical enabling infrastructure remains high with priority infrastructure projects including Coober Pedy Water Supply, Quorn Water Supply, a livestock hub at Port Augusta, Yorkeys Crossing and Outback water, roads, power and waste management.

Equally important is the critical need for housing to support sustainability and growth. By way of example Port Augusta is experiencing significant growth driven by the green energy and resources sector with the current investment pipeline of projects in the council region and immediate surrounding area totalling over \$6.5 billion, creating 5,360 jobs in construction and 1,987 jobs ongoing. This places significant pressure on Port Augusta's housing stock which is already under supplied. Recent investigation identified there are 18 housing development estates within Port Augusta with the ability to provide 1,085 houses, noting 148 of those are in lifestyle living villages. Most of these projects require enabling infrastructure and most particularly water supply.

Regional Data

	2024	2023	Difference	% Change
Population	27,403	26,672	731	2.74%
Number of Businesses	1,432	1,350	82	6.07%
GRP (B)	6.616	4.339	2.28	52.48%
Total Number of Jobs	20,337	19,586	751	3.83%
Pipeline Project Total Value (B)	10.83	10.65	0.18	1.73%
Tracked investment projects	72	66	6	9.09%

Regional Investment



Total

\$10.83B



Chair:
Scott McKay



CEO:
Claire Wiseman



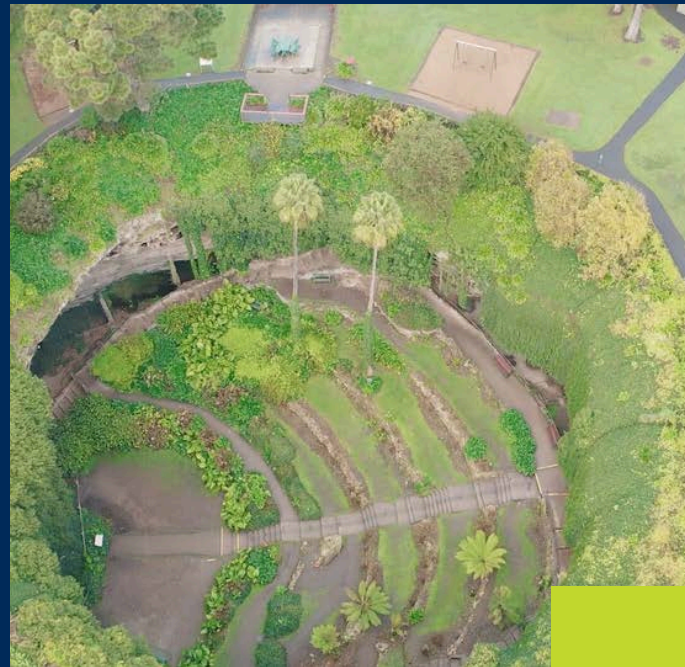
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RDA Far North
website

LIMESTONE COAST

Home to the State's biggest regional city, the Limestone Coast is a service hub for both the South East of South Australia and Western Victoria. The region offers a diverse economic profile including primary production, value added manufacturing, as well as a strong health care and social assistance sector. Self-drive tourism is also a key contributor, with the region providing a link between the Great Ocean Road, the Grampians and Adelaide.



In 2024, agriculture, fishing and forestry continues to be the largest employer in the Limestone Coast, followed by the manufacturing sector. However, the strongest job growth has been in manufacturing, closely followed by healthcare and social assistance. Challenging seasonal conditions, combined with changes in global markets, high interest rates and increasing costs of doing business have dampened growth in primary production over the past 12 months. The flow on effects for retail and service industries have been felt across the region.

RDALC Key Focus:

- **We support businesses where they're at** - in their business journey and geographically. Whether it is grant assistance, business planning, workforce issues or marketing, we work one on one with business owners, helping them to cut through red tape and build the skills they need to grow.
- **We encourage investment** - advocating for infrastructure, being a voice for the region, and helping businesses and community groups to attract funding.
- **We grow the leaders of tomorrow** - supporting existing leaders to build skills and networks, and encouraging emerging leaders to take their first steps.

This year we created a new Regional Growth Strategy in partnership with the Limestone Coast Local Government Association and the seven regional councils. The four goal areas of Live, Work, Visit and Build reflect both the aspirations and needs of residents, industry, visitors and stakeholders across the region. The new plan adds contemporary and emerging issues, building on the current regional priorities.

Regional Priorities

- 1 **Invigorate the working age population, by attracting and retaining more people across the region to fill key skills gaps and support vibrant and sustainable regional communities.**
- 2 **Take advantage of growing global demand for sustainable, high quality agricultural produce by building on our strong reputation for red meat, dairy, wine, horticulture, and fishing, as well as forestry production.**
- 3 **Capture employment opportunities in growing sectors of healthcare and social assistance.**
- 4 **Support the development of a vibrant business ecosystem.**
- 5 **Collaboration to develop a more coordinated regional tourism market.**

6 Securing investment to deliver regional infrastructure priorities enabling growth.

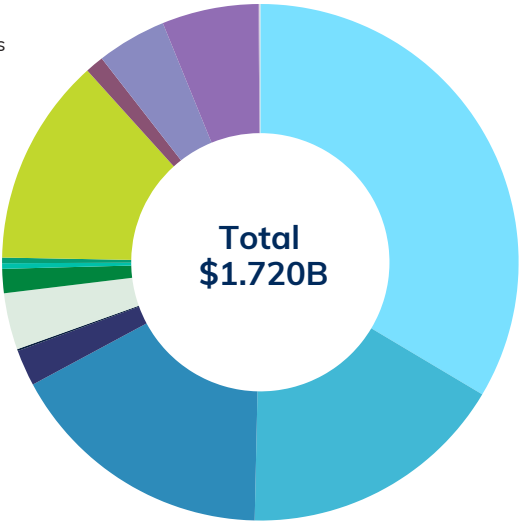
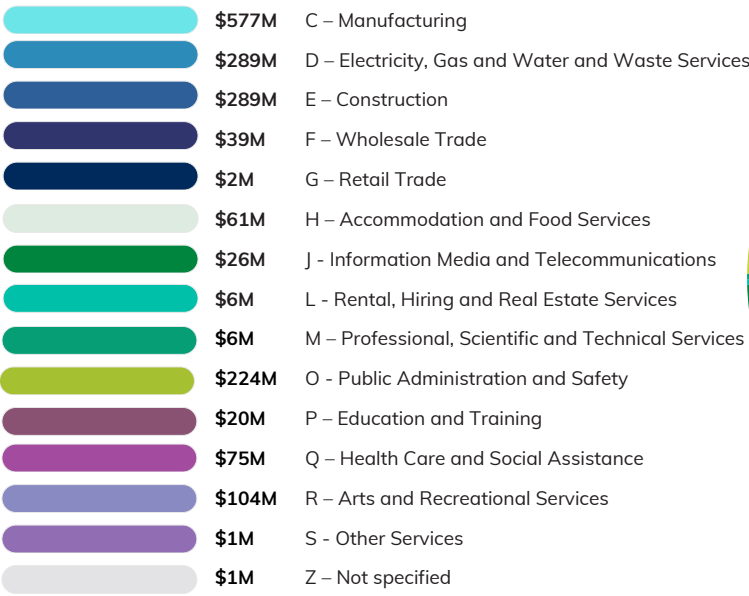
7 Support solutions to address the housing shortage across the region.

Regional Data

	2024	2023	Difference	% Change
Population	69,137	68,799	338	0.49%
Number of Businesses	7,766	7,764	2	0.03%
GRP (B)	4.704	4.612	0.09	1.99%
Total Number of Jobs	34,316	33,323	993	2.98%
Pipeline Project Total Value (B)	1.72	2.83	-1.11	-39.23%
Tracked investment projects	142	369	-227	-61.52%

The significant drop in the value of Pipeline Projects for the Limestone Coast between 2023 and 2024 is due to the removal of \$1.75B offshore wind projects following strong community dissent to the proposal. Without these projects in consideration, the value of other projects in the pipeline has grown by 59%. The drop in the number of projects is attributed to the completion of a large number of projects across the region.

Regional Investment



Limestone Coast Contacts



Chair:
Evan Flint

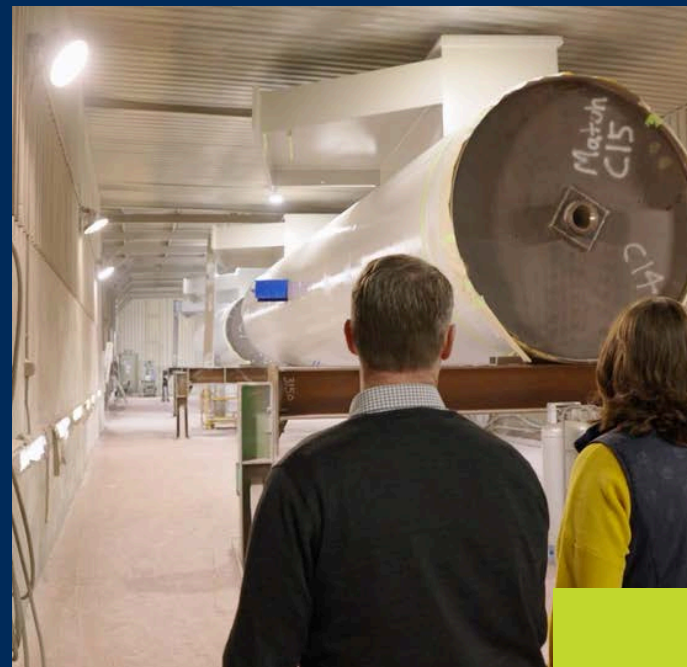


CEO:
Lauren Oxlade



MURRAYLANDS & RIVERLAND

In the Murraylands and Riverland, our vision is to be internationally recognised as a vibrant, world-leading circular economy by 2030.



Progress toward our vision is reflected in the development of circular economy precincts, like the Southern Food Energy and Water (SoFEW) Precinct being developed through a cross-sectoral partnership in the Murraylands, and private developments like the Circular Green Economy Proposal in Waikerie. The \$425 million waste-to-hydrogen Riverbend Energy Hub, being developed by Greenhill Energy in Tailem Bend, adds to our region's impressive renewable energy credentials. Small businesses like Woodlane Orchard, who dehydrate vegetables that would otherwise have gone to waste into ready-made meals, are the engine room of our regional circular ambitions.

We continue to connect our region for a resilient and sustainable future in line with the Murraylands and Riverland Plan, a Regional Drought Resilience Plan developed with over 550 locals (each contributing an average of seven hours), along with partners in community, business, and government. We are supporting communities and small businesses through our Regional Leadership Development Program (funded by PIRSA) and wellbeing programs, as well as providing support for workforce and new project development.

Across our region, we have examples of great opportunity, such as Murray Bridge and surrounds that face significant growth as a satellite suburb under the Greater Adelaide Regional Plan, including the recent announcement of the 17,000 house Gifford Hill housing development. We also have significant challenges for some of our irrigation communities as a result of poor market conditions for wine (with the Riverland being the largest wine producing region in Australia), floods, frosts and the increasing costs of production.

The Murray-Darling Basin Plan presents opportunities for our region, and in particular our Riverland communities. PIRSA are working closely with these communities to develop a water transition business case that looks into opportunities for the region to diversify and add value across the economy. We are grateful for this support and will continue to work on ways to assist these communities transition to a resilient, sustainable and prosperous future.

Regional Priorities

1 Leadership in Action- Develop a system of leadership and nurture both formal and informal leaders in the region:

- Leadership engages deeply with their community in shaping their futures
- Communities are respected and listened to
- Support leaders to grow, develop and connect with their communities

2 Prepared and Proactive- Create a proactive, adaptive, and innovate system of planning for leveraging disruption:

- Take a long-term strategic view to planning
- Planning focuses on both the reactive and the preventative
- Planning is collaborative across sectors, is community driven and evidence based

3 Productive and Collaborative Futures- Create the conditions for industry and business to thrive now and into the future by:

- Enabling improved collaboration, communication and information availability
- Encouraging diversification of industry both across the region and within sectors
- Investing in business- to encourage innovation, inclusivity, and a future focus
- Promoting the region

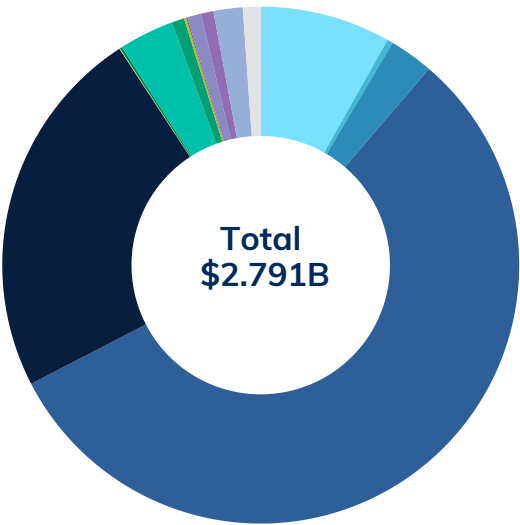
4 Together Community- Enable and Support the development of a connected and inclusive community:

- Don't leave anyone behind
- Provide easy access to services and supports
- Apply place-based models to enable communities to grow and develop

Regional Data

	2024	2023	Difference	% Change
Population	73,771	73,264	507	0.69%
Number of Businesses	6,699	6,672	27	0.40%
GRP (B)	4.818	4.641	0.18	3.81%
Total Number of Jobs	32,137	31,137	1,000	3.21%
Pipeline Project Total Value (B)	2.79	2.98	-0.19	-6.36%
Tracked investment projects	167	140	27	19.29%

Regional Investment



Murraylands & Riverland Contacts



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RDA Murraylands & Riverland website

YORKE & MID NORTH

Our region in the Yorke and Mid North is typified by its diversity - with its landscapes ranging from high-rainfall, highly productive broadacre cropping through to marginal and pastoral lands, and communities ranging from provincial cities of more than 13,000 residents through to settlements of fewer than 50 people.



It is home to more than 78,000 people living in nearly 36,000 households, working in and on more than 7,600 businesses, providing a host of services and supporting a range of activities that make our communities desirable places to call home.

Our region has an abundance of potential opportunities, drawing on deep roots in the primary production sector and related value-adding manufacturing activities, to more recent developments in the renewable energy and tourism sectors. These strong fundamentals provide the region with a positive basis for future success. Regional Development Australia Yorke and Mid North aims to further grow the region's prosperity and enhance the liveability of our communities.

Regional Priorities

- 1 Increased economic diversity:**
Greater capability and growth in sections of the economy that are growing sustainably.
- 2 Greater economic prosperity:**
Real growth in economic prosperity for the population, with the benefits widely distributed.
- 3 Better connections between people, places and markets:**
Stronger networks via improved infrastructure- both physical and digital.
- 4 Sustainable population:**
Securing the critical population mass needed to support services and opportunities, without compromising environments.
- 5 Better access to services:**
Improving the level and consistency of access to services and amenities needed for quality of life.
- 6 Greater workforce opportunities:**
Greater capacity and higher engagement in the labour force.
- 7 Improving outcomes across communities:**
Facilitating solutions to address disadvantage experienced by different groups within the community.
- 8 Supporting the transition to net zero:**
Help stakeholders manage the transition to net zero by 2050, and manage costs of adapting to climate change.

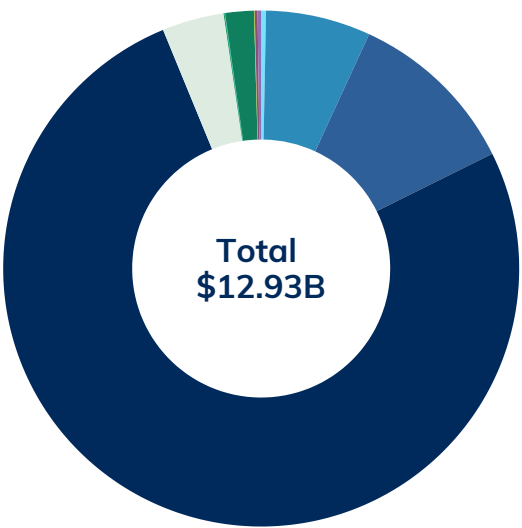
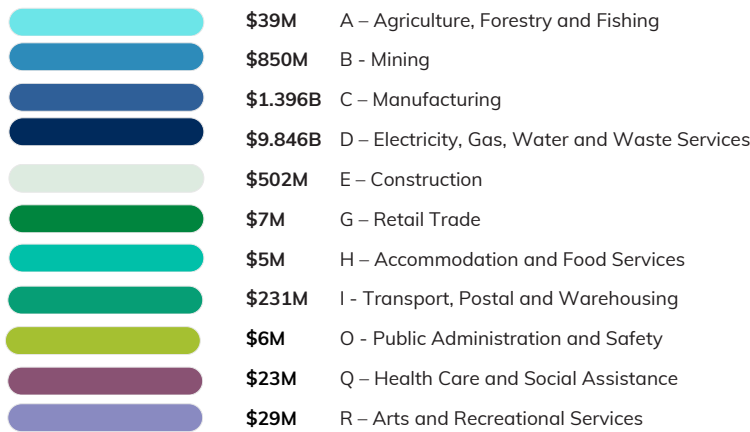
Priority Activities

- Connecting people, businesses and stakeholders with relevant peers, projects, programs and networks to enable them to succeed.
- Informing stakeholder to enable them to make better decisions by leveraging RDAYMN's knowledge, platforms and data to provide useful and insightful evidence.
- Advising stakeholders on how to proceed with their initiatives given the options, resources and constraints available to them.
- Planning (and trialling) projects, programs and initiatives with partners to maximise the chances of successful outcomes.
- Supporting partners to deliver initiatives by providing technical inputs, third-party reviews and expertise.
- Sharing examples and successes to inform stakeholders of new opportunities and to promote our partners and the region.
- Communicating the activities, outcomes, impact and value of our organisation to build engagement and understanding.
- Advocating to ensure policy settings, programs and funding resources meet the needs of our communities and stakeholders within the region.

Regional Data

	2024	2023	Difference	% Change
Population	78,904	78,529	375	0.48%
Number of Businesses	7,609	7,561	48	0.63%
GRP (B)	4.507	4.274	0.23	5.45%
Total Number of Jobs	29,308	29,361	-53	-0.18%
Pipeline Project Total Value (B)	12.93	12.16	0.77	6.37%
Tracked investment projects	86	64	22	34.38%

Regional Investment



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RDA Yorke & Mid
North website





An Australian Government Initiative



Regional
Development
Australia

Referencing:

Regional Development South Australia Regional Outlook
Edition 5 | November 2024

For further information about Regional Development South Australia, the Regional Development Australia network in South Australia, and economic development in regional South Australia visit regionaldevelopmentsa.com.au.

Co-ordinated by Regional Development Australia Adelaide on behalf of Regional Development South Australia.



Government
of South Australia



Local Government Association
of South Australia





An Australian Government Initiative



BAROSSA GAWLER LIGHT ADELAIDE PLAINS

BAROSSA GAWLER LIGHT ADELAIDE PLAINS

Regional Impact Assessment Executive Summary

Southern Barossa Winery & Tourist Accommodation Project
12 June 2025

Economic Impact Model

Economic impact modelling enables Regional Development Australia Barossa Gawler Light Adelaide Plains (RDA BGLAP) to explore how changes in employment or output (sales) due to a new project, business or policy will impact on all other sectors of the economy. It does this by using an input-output model derived from the local economy microsimulation model by National Economics (NIEIR) to model the flow-on effects across different industries.

Disclaimer

RDA BGLAP has undertaken economic modelling for this project using key parameters provided by the proponent with modelling undertaken utilising the Economic Profile .id Informed Decisions.

This analysis is informed by the economic modelling reports generated by RDA BGLAP and is provided for information purposes only.

There can be no assurance that actual results will be consistent with any forecasts or estimates provided within these reports.

The information in the reports and the reports themselves are subject to change without notice.

The modelling used to generate estimates of economic impacts within the reports is provided by National Institute of Economic & Industry Research (NIEIR). Neither RDA BGLAP nor .id gives any warranty nor bears any liability whatsoever with respect to the correctness, accuracy, currency, completeness, or otherwise of the NIEIR model, or other content generated from it within the reports.

Executive Summary

The Southern Barossa Winery & Tourist Accommodation Project (SBWTAP) is a new 150-room, five-star hotel proposed for the Barossa Valley. The scale and scope of the project position it as a major economic driver for the Barossa region and broader South Australia.

The proposed hotel will feature a restaurant, bar, day spa, and other facilities, catering to both the public and hotel guests. The development aims to use the 21.5ha site primarily as a fully operational vineyard with an upgraded existing vineyard and developing a new winery. The new buildings are designed to be mostly low-profile and in line to fit into the landscape.

This report compiled by Regional Development Australia Barossa Gawler Light Adelaide Plains (RDA BGLAP) uses publicly available information, data provided by the South Australian property investment firm Strategic Alliance and modelling by Economic Profile .id Informed Decisions to provide a high-level Regional Economic Impact Assessment.¹ This report also considers the economic assessment criteria for the Project identified by the South Australian State Planning Commission, which includes:

- workforce
- existing industries
- supply chains relevant to the development²

Key Findings

The Regional Impact Assessment identified a number of significant economic benefits for the BGLAP region and South Australia more broadly as a direct result of the SBWTAP Project (not exhaustive):

Economic Insight 1: The two-year construction phase with a \$110M spend will result in \$61M added to the economy (GRP) in addition to SBWTAP's anticipated construction workforce of 350 full time equivalent employees (FTE) (see table 1).

Economic Insight 2: The opportunity cost of not proceeding with the Project would result in a potential loss of over \$28M in unrealised Gross Regional Product (GRP) and 229 unrealised FTE in local employment opportunities (see table 1).

Economic Insight 3: The BGLAP region's workforce profile, and employment data (including, jobs to workers ratio and regional unemployment and under-employment data) indicates a strong opportunity for the SBWTAP Project to support increasing local workforce participation.

Economic Insight 4: RDA BGLAP's initial, high-level assessment indicated collaborative training and development pathways available through IHG Hotels and Resort's IHG Academy and the Barossa Regional University Campus (BRUC).

Table 1 Regional Economic Impact Modelling³

Phase	Contribution	Increase to GRP (Value Added) (\$m)	Local Jobs (per year) (FTE)
Construction Phase: <i>Based on estimated cost of \$110m provided by SBWTAP</i>	Direct	27.34	350*
	Indirect	33.60	111
	Total	60.95	461
Operational Phase: <i>Based on on-going jobs of 150FTE provided by SBWTAP</i>	Direct	18.51	150*
	Indirect	9.41	79
	Total	27.92	229
* Estimate provided by SBWTAP			

¹ This analysis is informed by the economic modelling reports generated by RDA BGLAP and is provided for information purposes only.

² South Australian State Planning Commission, as supplied to Ekistics (April 2025)

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An Australian Government Initiative



BAROSSA GAWLER LIGHT ADELAIDE PLAINS

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Regional Impact Assessment

Southern Barossa Winery & Tourist Accommodation Project

19 June 2025

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Acronyms

FTE Full Time Equivalent

GRP Gross Regional Product

GSP Gross State Product

GDP Gross Domestic Product

SBWTAP Southern Barossa Winery & Tourist Accommodation Project

Executive Summary

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The Regional Economic Impact Assessment involved modelling of the proposals impacts on the local, regional and state economies during (1) construction of the project over two years and (2) operational (ongoing) impacts. Any economic impacts for South Australia and/or the region if the proposal does not proceed have also been considered.

This report also considers the economic assessment criteria for the Project identified by the South Australian State Planning Commission, which includes:

1. Workforce

- a. A summary workforce profile, including the indicative number of direct and indirect full-time equivalent; professions and skill levels required; proposed nature of employment (e.g. employees, contractors, labour hire, sub-contractors, full time or casual); whether employment is seasonal or continuous/year-round.
- b. Proposed location and sourcing of the workforce and contractors, including external workers, training and development initiatives, and local employment opportunities (where relevant).
- c. Proposed measures to optimise local and regional employment opportunities, such as prioritising recruitment of workers from local and regional communities and improving local and regional skill capacity.
- d. Impacts on local and regional labour supply and demand, including flow-on impacts for existing industry sectors and businesses (e.g. possible labour shortages, skilled workers changing employment).

2. Existing Industries

- a. The positive and negative impacts on significant existing industry sectors in the local Barossa area, including through changes in cost and/or availability of inputs such as investment capital, labour, land, property, goods and services.

3. Supply Chains relevant to the development:

- a. Outline local procurement planning and/or practices to optimise local and regional supplier participation and/or build local capacity and capability (where relevant).

Unrealised Economic Impact

Analysis of regional economic opportunity cost in similar developments in SA demonstrates that non-progression typically results in foregone GRP uplift, job creation, and visitor economy growth⁶.

The RDA BGLAP's modelling estimates the project will provide the BGLAP region with a boost to Gross Regional Product of \$60.27 million over the two years of construction and a further \$11.47 GRP annually once operational. See table 1 for a detailed breakdown.

Construction Phase

The economic modelling for the construction phase was based on an anticipated \$110 million construction investment, provided by SWBTAP.

The model provided estimates based on this for overall output, value add to GRP and local jobs which was converted to full time equivalent employees.

⁴ <https://economy.id.com.au/rda-barossa>

⁵ This analysis is informed by the economic modelling reports generated by RDA BGLAP and is provided for information purposes only.

⁶ SA Tourism Commission, South Australian Regional Visitor Strategy 2025

Gross Regional Product: The project anticipates a \$110 million construction investment over two years, almost matched through additional indirect output of \$94.96 million. This would provide an additional \$60.95 million to GRP (value added) during construction.

Job Creation: The SBWTAP anticipates approximately 350 FTE positions to be created overall. RDA BGLAP's economic modelling estimates 78 direct and 111 indirect local FTE positions per annum over the two years of construction. Note: this is based on Economic Profile .id Informed Decisions modelling and may produce a more conservative estimate than the estimate of 350FTE provided by SBWTAP.

Operational Phase

The Operational Phase was modelled on a specific breakdown of position types provided by SBWTAP across the following industries and professions, accommodation (including cleaning and maintenance), management, sales and marketing, finance, food and beverage, winery (sales and production) and retail.

Gross Regional Product: The modelling demonstrates a \$21.68 million output and increase to GRP of \$11.47 million annually, based on an expected 150 FTE jobs planned by SBWTAP.

Job Creation: Based on the planned 150 FTE positions directly employed through SBWTAP, there will be an additional 79 indirect FTE positions created in the region. These indirect jobs result from supply chains and supporting industries as well as increased employee consumption through the direct job creation. Of these 229 total jobs, 83.3% are expected to be filled by local residents.

Visitor Economy Growth: The SBWTAP as a new multipurpose luxury hotel with suitable accommodation and facilities to attract both overnight holiday goers and business visitors has the potential to expand the regions visitor economy in several ways:

- By providing an additional form of accommodation to the region, the SBWTAP could not only attract new visitors to the region but lengthen visitor stay, building on the region's night time economy and therefore increase spend of visitors generally. The average day trip visitor spend is \$100 per day for the region, whereas overnight visitor average spend is \$226.⁷ Therefore, an increase in visitor accommodation can lead to an increase in overnight visitation and greater overall visitor spend.
- Currently 94% of overnight visitors to the Barossa are overnight leisure visitors either on holiday or visiting friends and relatives.⁸ The SBWTAP forecasts 30% of its visitor market being conference and associate visitors, which allow growth in this market of visitation to the region, through its role as a conference venue with accommodation provision.

Multipliers

The modelling uses two types of multipliers to determine the economic impact of the SBWTAP developed by .id specifically for the RDABGLAP area (see table 1), in conjunction with the inputs (construction: \$110 million spend and operational: 150 FTE).

Type 1 Multiplier: Models direct and industrial increases in value in the supply chain based on inputs.

Type 2 Multiplier: Models the increased spending by workers and consumers in the economy due to the initial impact and in addition to the direct and industrial components of the Type 1 multiplier.

⁷ SATC Barossa Regional Profile 2023

⁸ SATC Barossa Regional Profile 2023

Table 2 Economic Impact Modelling Results (June 2025)⁹

Economic Impact Modelling					
Phase	Contribution	Output (\$m)	Value Added (Impact on GRP) (\$m)	Local Jobs (per year) (FTE)	Impact on GDP (\$m)
Construction Phase: Est. Cost = \$110m	Direct	110	27.34	350*	-
	Indirect	94.96	33.60	111	-
	Total	204.96	60.95	461¹⁰	123.15
Operational Phase: On-Going Jobs = 150 FTE	Direct	40.62	18.51	150*	-
	Indirect	20.01	9.41	79	-
	Total	61.62	27.92	229	55.93
Total Impact: Construction (2 years) + Operation (1 year)	Direct	150.62	45.85	500	-
	Indirect	114.97	43.01	190	-
	Total	265.59	88.86	690	179.08
Phase	Multiplier	Output (\$m)	Value Added (Impact on GRP) (\$m)	Local Jobs (per year) (FTE)	
Construction Phase:	Type 1 Multiplier (direct + industrial)	1.79	2.07	2.19	-
	Type 2 Multiplier (direct, industrial + consumption)	1.86	2.23	2.43	-
Operational Phase:	Type 1 Multiplier (direct + industrial)	1.38	1.35	1.31	-
	Type 2 Multiplier (direct, industrial + consumption)	1.52	1.51	1.45	-

⁹ This analysis is informed by the economic modelling reports generated by RDA BGLAP and is provided for information purposes only.

¹⁰ Note: this is based on Economic Profile .id Informed Decisions modelling and may produce a more conservative estimate than the estimate of 350FTE provided by SBWTAP.

Economic Assessment Criteria: Workforce

SBWTAP Workforce Profile

Construction phase:

- **FTE:** 350 FTE positions annually¹¹
- **Profile:** multi-disciplinary, trade and project-related roles

Operational phase:

- **FTE:** 150 direct ongoing FTEs
- **Profile:** roles likely span hospitality, management, cleaning, administration, maintenance
- **Local Workforce Engagement: 83.3%**

Jobs modelled on full-time equivalent (FTE) basis; majority assumed to be year-round, and employment numbers are consistent with other projects of similar size and sector composition. The **ABS 2023 Labour Force Survey – South Australia** provides comparative sector employment data, confirming that hospitality and accommodation remain major growth areas in regional employment.¹²

Local Workforce Demographics

Gender:

- 49.1% of the local workers (All industries) are males and 50.9% are female

Predominant median age of the local workforce:

- 59.3% of local workforce is 25-54 years old
- 16.8% of local workforce is 55-64 years old
- 15.9% of local workforce is 15-24 years old
- 8% of the local workforce is 65+ years old

Top three (3) local employment industries include:

1. Manufacturing (stagnant)
2. Health care and social assistance (growing)
3. Retail trade (growing)

Tourism Workforce

Tourism is a key industry in many parts of Australia, but it has not been well represented in economic profiles due to the difficulty in defining tourism. Tourism industries are defined by the ABS not as a stand-alone industry but as a set of occupation categories working across a number of industries.

Table 2 presents some key statistics for tourism workers in RDA BGLAP Region with comparisons to benchmark areas.

Table 3 Tourism and Hospitality Workforce in RDA BGLAP

Tourism and hospitality workforce				
RDA BGLAP Region	2021			
Measure	RDA BGLAP Region	% of total industry	South Australia %	% of total industry in RDA BGLAP Region
Tourism workforce				
Total workers	1,934	100.0	100.0	7.4
Males	621	32.1	41.9	4.8
Females	1,326	68.6	58.1	10.0
Age structure				
15 to 24 years	777	40.2	35.2	18.6

¹¹ Estimate provided by SBWTAP

¹² ABS, 2023 Catalogue 6291.0.55.003

25 to 44 years	603	31.2	38.0	6.1
45 to 54 Years	272	14.1	12.8	4.9
55 to 64 Years	221	11.4	10.8	4.6
65 years and over	74	3.8	3.1	4.4
Hours worked				
Worked full-time	531	27.5	30.6	3.7
Worked part-time	1,262	65.3	61.5	12.1
Away from work	146	7.5	7.9	9.4
Qualifications				
Bachelor or higher degree	139	7.2	16.5	2.6
Advanced diploma or diploma	135	7.0	9.4	5.3
Certificate level	528	27.3	22.2	6.8
No qualifications	1,104	57.1	49.9	11.0
Level of education inadequately described	8	0.4	0.5	6.0
Level of education not stated	40	2.1	1.5	9.4
Ethnicity				
Australian-born	1,684	87.1	66.8	7.7
Born overseas	255	13.2	33.2	5.8
Speaks a language other than English	134	6.9	27.2	5.9
Aboriginal and/or Torres Strait Islander ¹³	26	1.3	1.4	8.3
Individual income				
Less than \$500	813	42.0	35.8	17.7
\$500 -\$2,000	1,035	53.5	59.5	6.0
\$2,000 or more	70	3.6	4.0	1.7
<i>Source: Australian Bureau of Statistics, Census of Population and Housing 2021.</i>				

Potential Workforce

The jobs to resident ratio for RDA BGLAP Region in 2022-2023 was 0.73, meaning that there were less jobs than resident workers. Employment capacity is the number of local jobs in an industry, divided by the number of local residents employed (anywhere) in that industry. A figure over 1.0 means there are more jobs available than residents employed in that industry. Under 1.0 means there are more residents employed than jobs available in that sector. Although a theoretical exercise as, even if there are enough jobs provided locally, RDA BGLAP acknowledges there will always be some people who choose to commute out of the area.

A goal of economic development is often to maximise the employment opportunities locally, leading to a more socially and environmentally sustainable community. Employment capacity is a simple way of looking at whether RDA BGLAP Region could theoretically provide jobs for all its residents if they were to choose to work locally.

In the RDA BGLAP region, 4.2% of the resident workforce of RDA BGLAP Region were unemployed in 2021, compared to 5.4% in South Australia.¹⁴ The local unemployed resident demographic includes all people who are residents in the local area who are looking for part-time or full-time work. This is an important resource for the local economy, their characteristics inform us about the skills that are available locally, even if they are not currently employed in the local economy.

¹³ Individuals who identify as Aboriginal or Torres Strait Islander, in BGLAP region, in the Tourism & Hospitality sector

¹⁴ Australian Bureau of Statistics (ABS) – Census 2021 and 2016 – by usual residence

Economic Assessment Criteria: Existing Industries

Positive Impacts

- Anticipated uplift in demand for local services (e.g., food and beverage, maintenance, cleaning)
- Enhanced tourism drawcard may benefit nearby attractions and businesses

Potential Negative Impacts

While the modelling clearly indicates net positive economic effects, it does not examine whether the influx of construction or tourism labour might:

- Compete with local wine, food, and manufacturing sectors for skilled labour
- Influence wage expectations or input costs.

Jobs and Skills Australia's 2024 Core Skills Occupations List (CSOL) identifies hospitality workers, chefs, and construction trades as in high demand, implying the need for complementary training programs.¹⁵

The Jobs and Skills Australia's Skills Shortage Quarterly – March 2023 report and the Skills SA's Jobs and Skills Outlook 2024 report both highlight a growing shortage of skilled labour in South Australia, particularly in the construction and hospitality sectors. This shortage could lead to increased competition for existing workers among local employers. Factors contributing to this include a low unemployment rate, an aging workforce, and reduced labour force participation. Given regional shortages identified, large-scale recruitment could increase competition for labour.¹⁶

The Barossa Local Economic Development Plan 2022 – 2027 highlights vulnerability to cross-sector labour displacement and cost inflation under rapid development conditions.¹⁷

RDA BGLAP's initial, high-level assessment indicated collaborative training and development pathways available through IHG Hotels and Resort's IHG Academy and the Barossa Regional University Campus (BRUC).

Addressing current and emerging skills shortages remains a priority for the Australian Government is seeking to address through the Federally funded Service and Creative Skills Australia Council, which works directly with the impacted industries including the arts, personal services, retail, tourism and hospitality.¹⁸

Economic Assessment Criteria: Supply Chains Relevant to the Development

Local Procurement Strategy

Limited information and or direction regarding SBWTAP's local procurement strategy has been provided, however comparable projects (e.g., The Bend Motorsport Park) and international benchmarks have shown that local procurement plans can increase local job creation and retention, which directly impacts local procurement and local expenditure.¹⁹

The South Australian Industry Participation Policy (2023) mandates consideration of local suppliers and workforce development in public-funded or state-supported developments.²⁰

In the absence of a procurement plan, the project's potential to build regional supplier capability remains untapped and is a significant opportunity.

¹⁵ Jobs and Skills Australia's 2024 Core Skills Occupations List (CSOL)

¹⁶ Jobs and Skills Australia's Skills Shortage Quarterly – March 2023, and, Skills SA's Jobs and Skills Outlook 2024

¹⁷ Barossa Local Economic Development Plan 2022 – 2027

¹⁸ Service and Creative Skills Australia Council

¹⁹ <https://www.thebend.com.au/post/the-bend-motorsport-park-announces-construction-of-racing-circuit>

²⁰ Department for Industry, Innovation and Science, 2023 SAIPP Guide

References

Source and Report		Date	Relevance
ABS National Accounts (5206.0)	Australian National Accounts: National Income, Expenditure and Product	2023	Validates GRP/GDP calculations
ABS Labour Force Data (6291.0.55.003)	Labour Force, Australia, Detailed	2023	Supports workforce and employment profiles
SA Tourism Commission	South Australian Regional Visitor Strategy 2025	2025	Informs alternative case analysis
	SATC Barossa Regional Profile 2023	2023	Regional Tourism data
Jobs and Skills Australia	2024 Core Skills Occupations List (CSOL)	2024	Supports workforce demand and skill gap analysis
Jobs and Skills Australia's	Skills Shortage Quarterly – March 2023	2023	Labour supply risks and regional skills strategy
Skills SA	Jobs and Skills Outlook 2024	2024	
SaCSA	Service and Creative Skills Australia Council	2025	Service and Creative Skills Australia (SaCSA) is a not-for-profit, industry-led Jobs and Skills Council representing the Arts, Personal Services, Retail, Tourism and Hospitality sectors.
The Barossa Council	Barossa Local Economic Development Plan 2022 – 2027	2022	Contextualises local industry vulnerabilities
The Bend Motorsport Park	The Bend Motorsport Park Announces Construction of Racing Circuit	2020	Local employment and procurement uplift
SA Industry Participation Policy	South Australian Industry Participation Policy (SAIPP)	2023	Benchmark for procurement planning
National Institute of Economic & Industry Research (NIEIR)	Construction - \$110M over 2yrs	2025	Economic modelling of construction opportunity
	Operational - 150 FTE jobs		Economic modelling of operational opportunity
.id Informed Decisions – Economic Profile	Economic Profile: Barossa Gawler Light Adelaide Plains - https://economy.id.com.au/rda-barossa	2025	Provides key economic figures including GRP, industries and employment.
.id Informed Decisions – Economic Profile	Economic Value – Output by Industry: Barossa Gawler Light Adelaide Plains	2025	Local industry summary
.id Informed Decisions – Economic Profile	Local Employment – Employment by Industry (Total): Barossa Gawler Light Adelaide Plains	2025	Identifies current workforce size to assess local capacity

Source and Report		Date	Relevance
.id Informed Decisions – Economic Profile	Resident Workers – Industry Summary: Barossa Gawler Light Adelaide Plains	2025	Insight into whether jobs can be filled locally or will need to be from outside the region and provides an indication of the skills exist locally
.id Informed Decisions – Economic Profile	Journey to Work – Workers by place of residence by industry - construction: Barossa Gawler Light Adelaide Plains	2025	Journey to work data which shows commuting patterns relevant to construction phase. Helps to assess whether construction will bring in new workforce or rely on locals.
	Journey to Work – Place of work by industry - construction: Barossa Gawler Light Adelaide Plains	2025	
.id Informed Decisions – Economic Profile	Journey to Work – Workers by place of residence by industry – Accommodation & Food Services: Barossa Gawler Light Adelaide Plains	2025	Journey to work data which shows commuting patterns relevant to operational phase. Helps to assess whether ongoing operations will bring in new workforce or rely on locals.
	Journey to Work – Place of work by industry - Accommodation & Food Services: Barossa Gawler Light Adelaide Plains	2025	
.id Informed Decisions – Economic Profile	Local workers - Occupations: Barossa Gawler Light Adelaide Plains	2025	Helps describe the type of jobs prevalent in the region and the professions likely available to support the project
.id Informed Decisions – Economic Profile	Local workers – Level of qualifications: Barossa Gawler Light Adelaide Plains	2025	Identifies the level of qualification of local residents
.id Informed Decisions – Economic Profile	Local workers – Field of qualification: Barossa Gawler Light Adelaide Plains	2025	Identifies the area of qualification of local residents
.id Informed Decisions – Economic Profile	Jobs to workers ratio: Barossa Gawler Light Adelaide Plains	2025	Identifies the availability of local jobs to local residents
.id Informed Decisions – Economic Profile	Tourism and hospitality workforce characteristics: Barossa Gawler Light Adelaide Plains	2025	Identifies characteristics of a key employment sector and workforce for the BGALP region and this Project
.id Informed Decisions – Economic Profile	Value of tourism in BGLAP: Barossa Gawler Light Adelaide Plains	2025	Identifies the value of a key sector for the BGLAP region, and as the core nature of this Project

Assumptions and Limitation of Analysis

Assumptions

RDA BGLAP's analysis has assumed no changes to the following details as at preparation of this report:

- **Construction Phase:** \$110M
- **Operational Phase:** 150 FTE jobs ongoing

We have assumed the following:

- "Local" and "Regional" = data relating to a Regional Development Australia area (RDA), unless a specific local government area is named.
- "State" = data relating to the state of South Australia

Limitation of Analysis

Data: Economy.id

A predominant data source for Economy.id modelling is the Australian Bureau of Statistics (ABS) Census 2016 and 2021 data – therefore the recency of this data limited due to the frequency of data collection by the ABS.

Data: "Local" v "Regional" v "State"

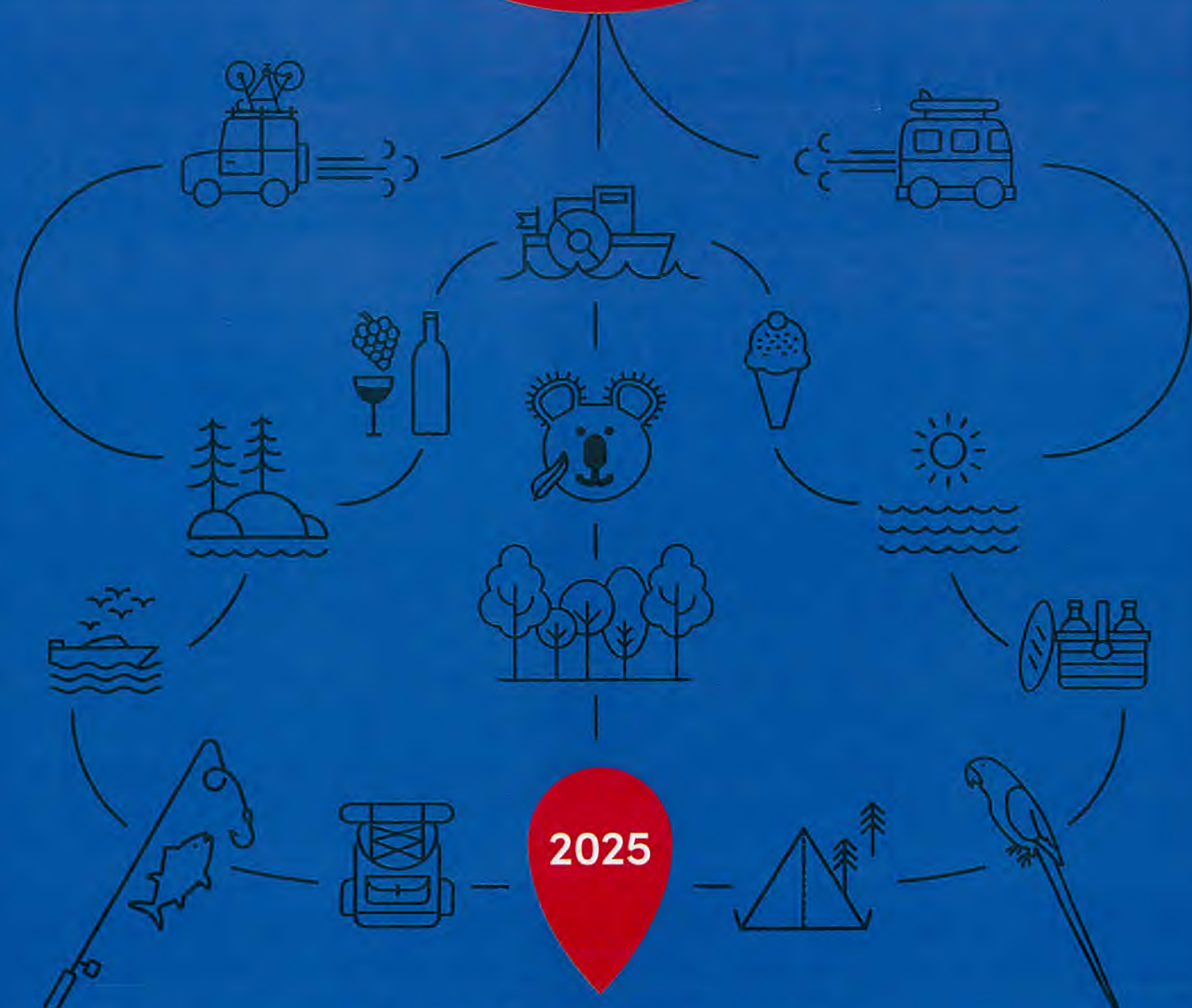
The data contained in this analysis is provided at the BGLAP regional level only – RDABGLAP data is currently unable to layer down into the LGA level (Local), nor aggregate up to a State level.

Further, the multipliers used in RDA BGLAP's economic modelling tool may differ slightly to the multipliers used by Local and or State economic modelling tools and systems.

Data: Employment

RDABGLAP employment data provides data on *current* employment numbers per sector, however RDA BGLAP's modelling cannot provide projections.

SOUTH AUSTRALIAN REGIONAL VISITOR STRATEGY



Realising the potential of the
regional visitor economy by 2025



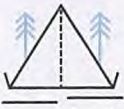
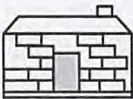
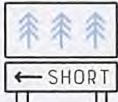
ACKNOWLEDGEMENT OF COUNTRY

South Australia's Regional Tourism Organisation's, the South Australian Tourism Commission, and their collective stakeholders acknowledge Aboriginal people as the First People and Nations of the lands and waters we live and work upon.

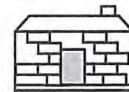
We pay our respects to their Elders past, present and emerging. We acknowledge and respect the deep spiritual connection and relationship Aboriginal and Torres Strait Islander people have to Country.

Regional response priorities

Each region has a selection of experiences which reflect the strengths and priorities of that region.

				
Aquatic adventures	Beach / coastal	Camping	Caravanning	Cycling
				
Domestic visitors	Family	Fishing	Food, wine and beverages	Hiking
				
Historic	International visitors	Aboriginal experiences	Local produce	Nature / wildlife
				
Short drive (close to Adelaide)	Long drive (touring route)	Regional airport	Regional transport	Water experiences
				
				Wellness

Barossa



VISITOR SPEND

\$235 million

EMPLOYMENT IN REGION

900 direct + 500 indirect =

1400 jobs

1 in 21
jobs
supported
by the
tourism
industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day trips	927,000	\$89m
Overnight	260,000	\$146m
OVERNIGHT SPLIT		
International	14,000	\$8m
Interstate	96,000	\$84m
Intrastate	150,000	\$54m

OCCUPANCY AND RATES

	BAROSSA	REGIONAL AVERAGE
Occupancy	59%	51%
RevPAR (average yield of a hotel room)	\$105	\$76

359 tourism businesses

502 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2019, STR Global, Australian Tourism Data Warehouse, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2018-19

Barossa priorities

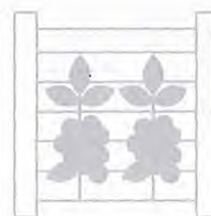
The main priority for driving future growth to the Barossa is to continue to increase overnight visitation from intrastate, interstate, and overseas markets focusing on refreshed and new unique accommodation offerings and visitor experiences. While the region receives 3.5 day trip visitors for every overnight visitor, overnight visitors deliver nearly two thirds of total visitor spend.

Marketing

- Leverage the Barossa's strong brand position as a global wine, culinary and culture destination and grow messaging around wine experiences, provenance dining, regional food, art, history, nature, family, and wellness experiences.
- Adapt marketing towards the most relevant post COVID-19 international visitor markets in alignment with South Australian Tourism Commission's and Tourism Australia's priorities.
- Leverage intrastate, interstate, and trans-Tasman promotion of the Barossa's distinctive European cultural connections and appeal.
- Leverage global marketing platforms such as Ultimate Winery Experiences and Great Wine Capitals of the World for promotion of the region's unique offering.
- Position Barossa as a great base for exploring wine, food, and leisure experiences across the southern part of the State.

Experience and supply development

- Increase the Barossa's bookable tourism experiences available via key distribution channels.
- Leverage the region's global wine and wine tourism reputation and develop new wine experiences that include education, digital technologies, enhanced storytelling, and visitor immersion.
- Expand tourism experience offerings with digital technologies that engage and inform.
- As a boutique region with strong accommodation yields and high weekend occupancy, there is an opportunity to expand the region's experiential offerings across nature and wellness.
- Foster the development of an iconic 4 to 5-star accommodation product of scale that could meet unmet demand during major events and for conferences.
- Aim to develop 45 new and 41 upgraded rooms (from 3 to 4-star) by 2025 that complement Barossa's culture and heritage.
- Review and simplify visitor wayfaring including signage to and around the Barossa.
- Leverage the region's cycling and walking infrastructure and intersection of key trails for investment and activation.



The Barossa is home to some of the world's oldest shiraz grapes.



Collaboration

- Continue collaboration with the state's key tourism, business, event organisations and community to ensure a cohesive approach to promotion and visitor attraction.
- Leverage the Epicurean Way touring route with investment, experience development and linkages with cycle and walking paths as a cross-regional marketing platform to attract self-drive food and wine travellers.
- Support the Visitor Information Servicing model to meet changing visitor needs in person and online.
- Build collaboration around a cross-regional event strategy to build scale, impact, resilience, and capability.
- Prioritise the Adelaide Wine Capital Cycle Trail Project as a cross regional globally significant tourism asset.
- Build tourism links across and between regions to encourage extended visitor nights.

Industry capability

- Increase the industry's capabilities related to domestic and international marketing and distribution.

- Prioritise hospitality, events and tourism careers and incentives to build a sustainable regional workforce for the future.

Leisure and business events

- Work towards greater overnight stays from events by positioning the Barossa as Australia's premium regional events destination with great accessibility from Adelaide.
- Increase overnight visitors coming for business events and mini-festivals to fill mid-week occupancy and drive visitor spend.
- Build on the region's two largest food and wine festivals (Barossa Vintage Festival and Barossa Food Festival) to grow length of stay and visitor spend.
- Work with the Adelaide Convention Bureau to build the funding, resources, and capabilities of businesses in Barossa to attract meetings, events, conferences, and incentive trips.
- Support sporting and recreational events for community and visitor economy benefits, including ongoing activation of cycle tourism.



The Barossa is less than an hour's drive from Adelaide and home to more than 80 cellar doors.

PARTNERS



Tourism Barossa Inc, The Barossa Council, Light Regional Council, Regional Development Australia Barossa Gawler Light Adelaide Plains, Barossa Grape and Wine Association, and South Australian Tourism Commission.



**LET'S BUILD A GREAT
FUTURE TOGETHER**

