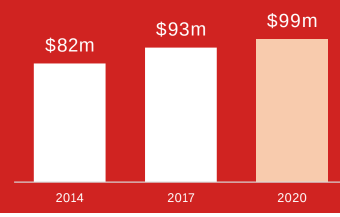
OVERVIEW

- Currently the Clare Valley contributes $93 million to the December 2017 South Australian expenditure of $6.6 billion.
- The Clare Valley has achieved 94 per cent of their 2020 target of $99 million.



Annual Visitor Summary December 2015 - December 2017

ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	105,000	66,000	**171,000**	4,000	**175,000**
%	**61%**	**39%**	**98%**	**2%**	**100%**
Nights	216,000	165,000	**381,000**	34,000	**416,000**
%	**57%**	**43%**	**92%**	**8%**	**100%**
Average Length of Stay	2	3	**2**	9	**2**
Domestic Day Trips					
Average Annual Day Trips to Clare Valley					**326,000**

PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	99,000	46,000	25,000	6,000	**175,000**
%	**57%**	**26%**	**14%**	**3%**	**100%**
Nights	211,000	101,000	93,000	10,000	**416,000**
%	**51%**	**24%**	**22%**	**2%**	**100%**
Average Length of Stay	2	2	4	2	**2**
Expenditure					
Average Annual Expenditure					**93,000,000**

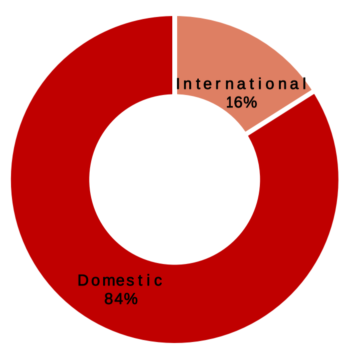
- 98 per cent of Clare Valley visitors are Domestic visitors and 2 per cent are International visitors.
- Domestically, 61 per cent are from within the state compared to 39 per cent from Interstate.
- 83 per cent of visitors to the Clare Valley are Leisure visitors (Holiday + VFR).

CLARE VALLEY TOURISM LISTINGS

Category	Clare Valley
Accommodation	53
Attraction	14
Destination Information	1
Event	27
Food and Drink	11
Hire	2
Tour	3
Grand Total	111

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

CLARE VALLEY MEDIA COVERAGE

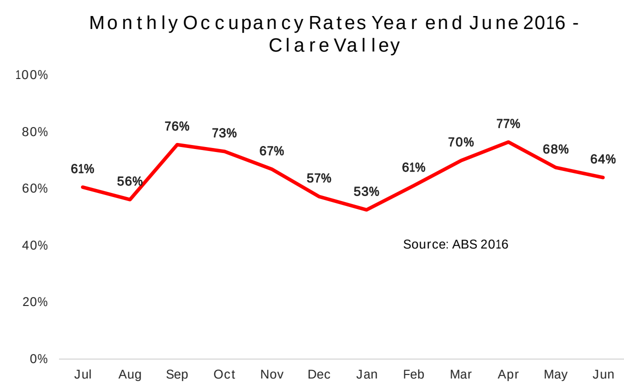


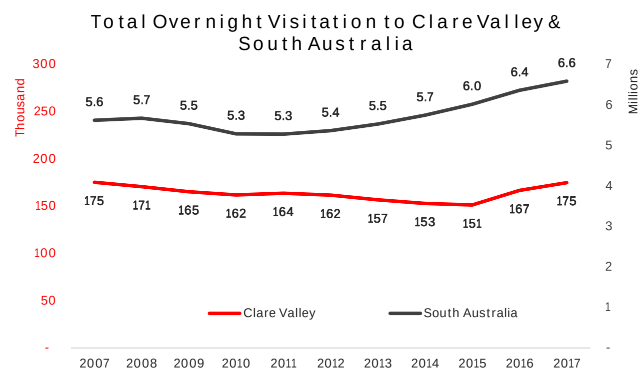
Source: Item Count - SATC Internal - 2017

ACCOMMODATION SUPPLY

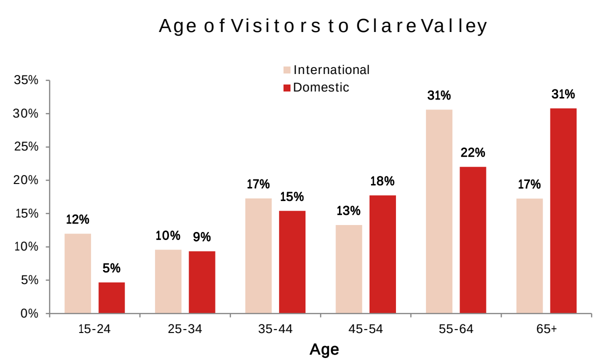
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	4
Rooms	147
Occupancy	65%
Takings	$4,500,000

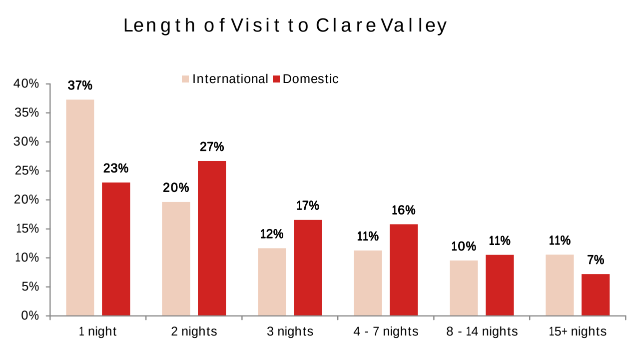
- Average occupancy for the year is 65 per cent over 4 establishments and 147 rooms.
- The peak months are September and April with occupancy of 76 per cent and 77 per cent respectively.
- Low point of the year comes in January with occupancy falling to 53 per cent.





VISITOR PROFILE





- International visitors peak in the 55-64 age group at 31 per cent.
- Domestically there is a peak in the 65+ age group at 31 per cent.

- 57 per cent of International visitors prefer to stay 1 or 2 night in the Clare Valley.
- 50 per cent of Domestic visitors stay either 1 or 2 nights.

DOMESTIC VISITOR PROFILE

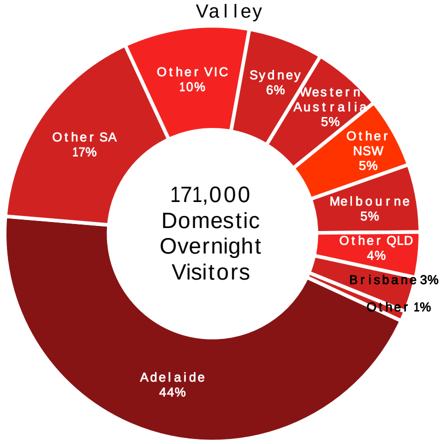
Purpose	Holiday	VFR	Other	Total
Visits	96,000	45,000	31,000	171,000
%	**56%**	**26%**	**18%**	**100%**
Nights	192,000	87,000	103,000	381,000
%	**50%**	**23%**	**27%**	**100%**
ALOS	2	2	3	2

INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	3,000	1,000	np	4,000
%	**75%**	**25%**	**np**	**100%**
Nights	19,000	15,000	np	34,000
%	**56%**	**44%**	**np**	**100%**
ALOS	6	15	np	9

VISITOR ORIGIN

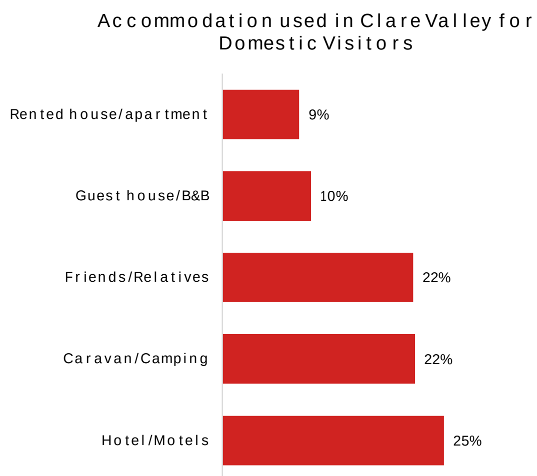
Origin of Domestic Overnight Visitors to Clare Valley

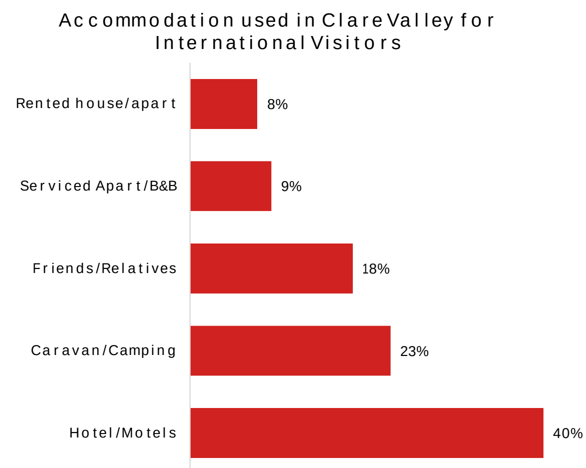


Origin of International Visitors to Clare Valley

- New South Wales 11 per cent and Victoria 15 per cent are the Clare Valley's biggest Interstate Markets.
- Regional South Australia contributes 17 per cent of visitors to the Clare Valley.
- Adelaide visitors contribute 44 per cent of the visitors to the Clare Valley.
- Internationally Europeans contribute 53 per cent of the visits to the Clare Valley with the United Kingdom contributing 15 per cent.
- 19 per cent of visitors to the Clare Valley are from New Zealand.

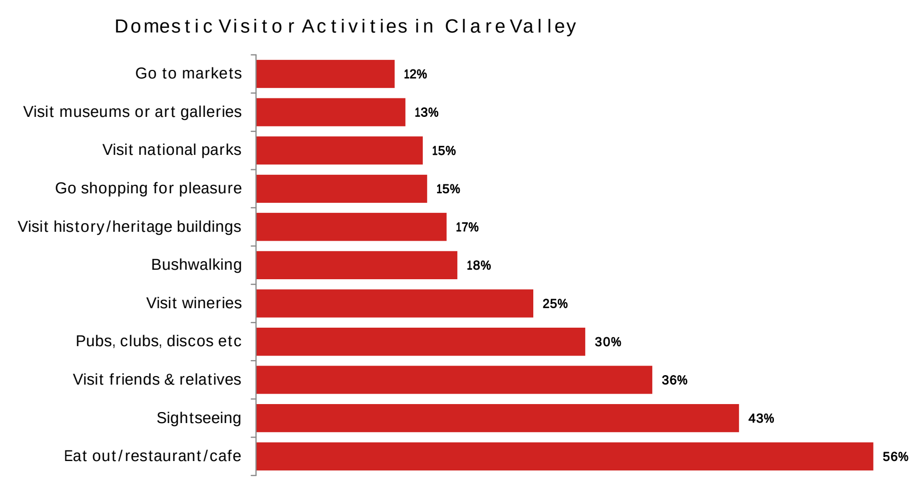
VISITOR USE OF ACCOMMODATION





- 47 per cent of Domestic visitor nights in the Clare Valley spent either with Friends or Relatives or in Hotels and similar accommodation.
- International similar to Domestic with 63 per cent of visitors staying with Friends or Relatives or in Hotels and similar accommodation.
- 9 per cent of International visitors and 10 per cent of Domestic visitors also like to Stay in a serviced apartment or B&B.
- Caravan and camping contribute 22 per cent of Domestic nights and 23 per cent of International nights.

VISITOR ACTIVITIES



- The most popular activity when coming to the Clare Valley is to Eat out or Dine at a restaurant and or cafe.
- Other popular activities visiting wineries, friends or relative and visit history/ heritage buildings.

REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2016-17, the tourism industry contributed an estimated $63 million to the Clare Valley regional and directly employed approximately 500 people.

Employment
- 500 jobs for people employed directly by the tourism industry, 200 indirect jobs and a total employment impact of 700 people.

Tourism output
- $56 million and $66 million in direct and indirect tourism output, and $122 million in total tourism output.

Gross Value Added (GVA)
- $29 million and $29 million in direct and indirect tourism GVA, and $58 million in total tourism GVA.

Gross Regional Product (GRP)
- $31 million and $32 million in direct and indirect tourism GRP and $63 million in total tourism GRP.

REGIONAL INSIGHTS

Interstate
- Wine (particularly the compactness of vineyards) and scenery provides the appeal.
- Perceived to be targeted to an older audience.

Intrastate
- More knowledge provides some further appeals e.g. history, antiques, proximity to outback.
- Smaller compact feel also provides appeal.

International
- International visitation to the Clare Valley is low.
- Current offering, predominantly defined by the epicurean and cellar door experiences, strong with the International audiences.

Regional Visitor Strategy Priorities
- The focus for the Clare Valley is to encourage high spending international and interstate visitors to stay overnight in the region.
- Develop new and commissionable nature-based, heritage and epicurean visitor experiences and additional quality accommodation will be key.

Appeal data is from the consumer surveying conducted for the SATC by BDA Marketing Planning. Sample of 800 interstate travellers and 400 interstate travellers, followed by eight focus groups in Adelaide, Sydney and Melbourne. Comments relating to International appeal are sourced from the Consumer Demand Project run by Tourism Australia in 11 priority markets, with a sample of 1,600 per market.

Prepared by the South Australian Tourism Commission, December 2017

Sources Unless otherwise stated, all data in this report is from the International Visitor and National Visitor Surveys (IVS and NVS) Conducted by Tourism Research Australia. These Sources are based on sample surveys and as with all sample surveys, are subject to sampling errors. Caution is required in interpreting some estimates, in particular, regional estimates can be affected by small sample sizes and can be subject to a high level of sampling error. Regional data should accordingly be used with a high level of caution and treated as being for indicative purposes only. Data refers to visitors 15 years and over. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from December 2015 to December 2017.
Consumer Demand Product Testing Phase 1 - BDA Marketing

Notes and Abbreviations Totals may not add to 100% due to rounding. VFR: Visiting Friends and Relatives. np: Not Published due to small sample size.ALOS: Average Length of Stay
ABS: Survey of Tourism Accommodation. Hotels, Motels, Guest houses and Serviced Apartments with 15 or more rooms. Cat. No. 8635455001
Consumer Demand Product Testing Phase 1 - BDA Marketing