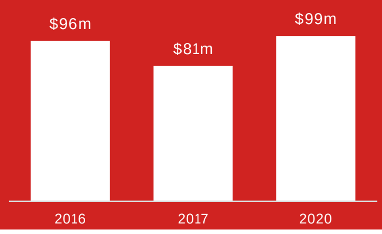
OVERVIEW

- Currently the Clare Valley contributes $96 million to the December 2016 South Australian expenditure of $5.8 billion.
- The Clare Valley has achieved 97 per cent of their $99 million 2020 target.



Annual Visitor Summary December 2014 - December 2016

ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Visits	100,000	63,000	**163,000**	4,000	**167,000**
%	**61%**	**39%**	**98%**	**2%**	**100%**
Nights	219,000	185,000	**404,000**	61,000	**466,000**
%	**54%**	**46%**	**87%**	**13%**	**100%**
Average Length of Stay	2.2	2.9	**2.5**	15.3	**2.8**

Day Trips
Average Annual Day Trips to Clare Valley 332,000

PURPOSE

	Holiday	VFR	Business	Other	Total
Visits	87,000	49,000	18,000	14,000	**167,000**
%	**52%**	**29%**	**11%**	**8%**	**100%**
Nights	217,000	106,000	82,000	60,000	**466,000**
%	**47%**	**23%**	**18%**	**13%**	**100%**
Average Length of Stay	2.5	2.2	4.6	4.3	**2.8**

Expenditure
Average Annual Expenditure $ 96,000,000

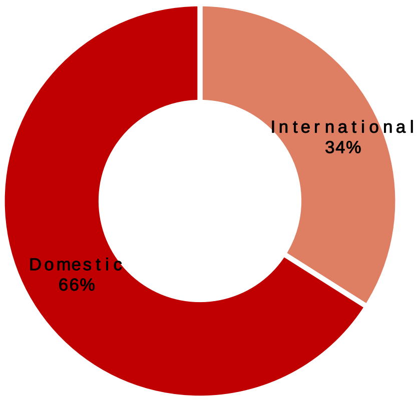
- 98 per cent of visitors are Domestic Visitors and 2 per cent International Visitor.
- Domestically 61 per cent are from within the state compared to 39 per cent from Interstate.
- 85 per cent of visitors to the Clare Valley are Leisure visitors (Holiday + VFR).

CLARE VALLEY TOURISM LISTINGS

Category	Clare Valley
Accommodation	92
Attraction	50
Event	41
Food and Drink	34
Tour	3
Information Services	2
Destination Information	2
Hire	2
Grand Total	226

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

CLARE VALLEY MEDIA COVERAGE

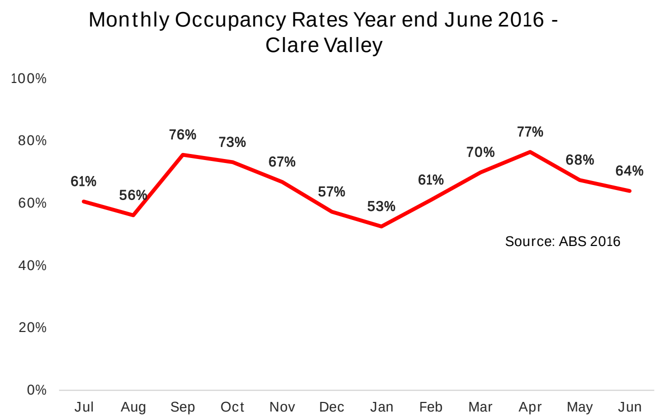


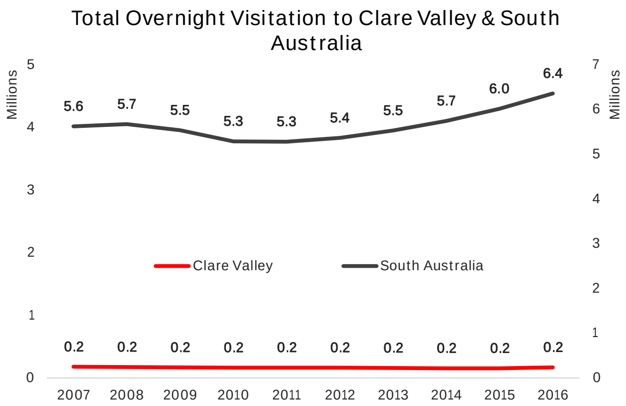
Source: Item Count - SATC Internal - 2016

ACCOMMODATION SUPPLY

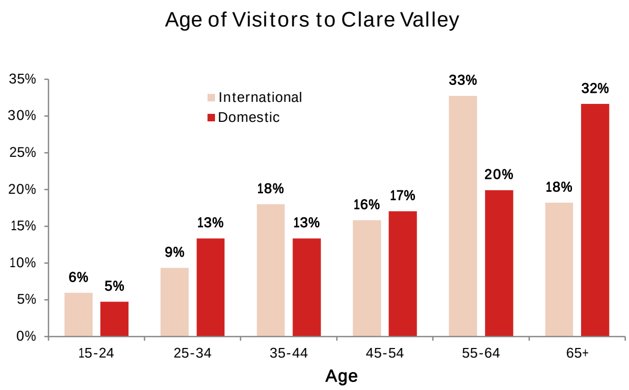
Hotels, Motels and Service Apartments with 15+ rooms		
Establishments		4
Rooms		147
Occupancy		65%
Takings	$	4,500,000

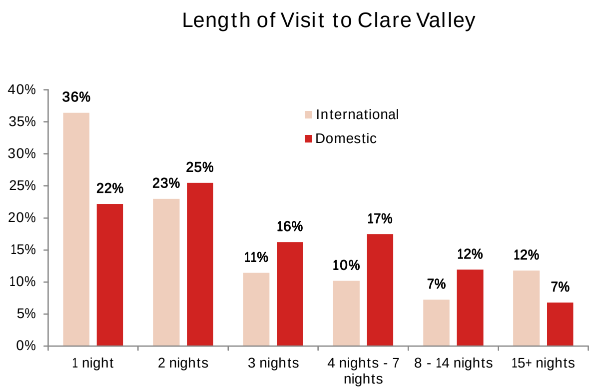
- Average occupancy for the year is 65 per cent over 4 establishment and 147 rooms.
- The peak months are September and April with occupancy of 76 per cent and 77 per cent respectively.
- Low point of the year comes in January with occupancy falling to 53 per cent.





VISITOR PROFILE





- International Visitors peak in the 55-64 age group at 33 per cent.
- Domestically there is a peak in the 65+ age group at 32 per cent.

- 59 per cent of International Visitors prefer to stay 1 or 2 night in the Clare Valley.
- 47 per cent of Domestic Visitors stay either 1 or 2 nights.

DOMESTIC VISITOR PROFILE

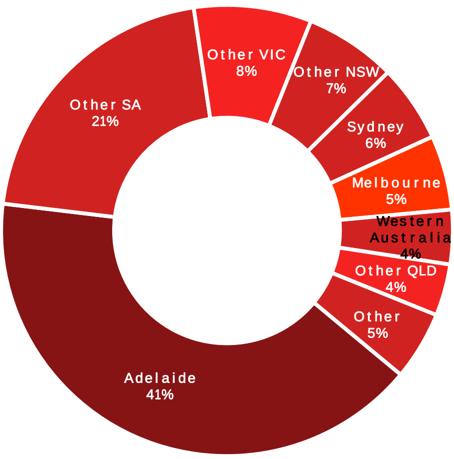
Purpose	Holiday	VFR	Other	Total
Visits	83,000	48,000	32,000	163,000
%	**51%**	**29%**	**20%**	**100%**
Nights	204,000	95,000	106,000	404,000
%	**50%**	**24%**	**26%**	**100%**
ALOS	2.5	2.0	3.3	2.5

INTERNATIONAL VISITOR PROFILE

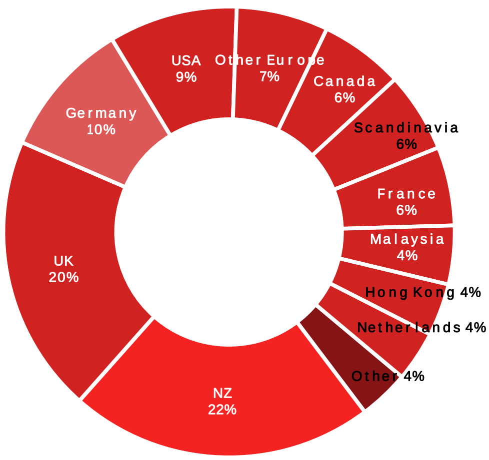
Purpose	Holiday	VFR	Other	Total
Visits	3,000	1,000	np	4,000
%	**75%**	**25%**	**np**	**100%**
Nights	13,000	11,000	38,000	61,000
%	**21%**	**18%**	**62%**	**100%**
ALOS	4.3	11.0	np	15.3

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Clare Valley



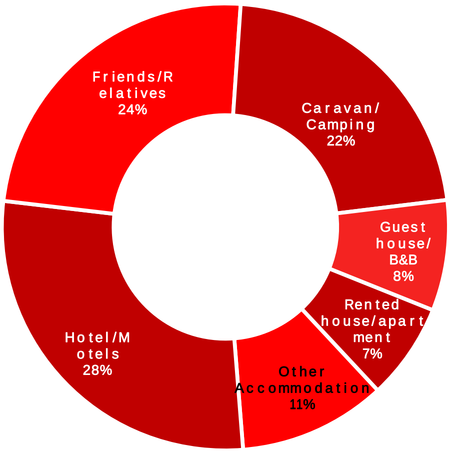
Origin of International Visitors to Clare Valley



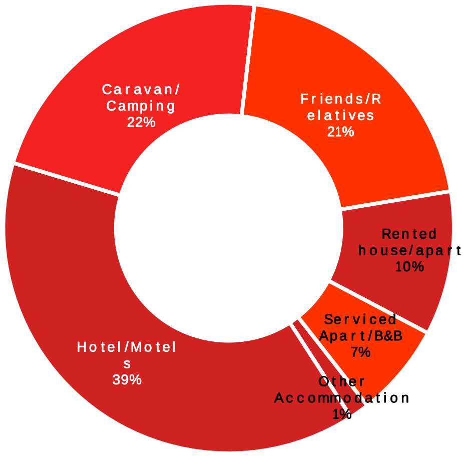
- New South Wales 13 per cent and Victoria 13 per cent are the Clare Valley's biggest Interstate Markets.
- Regional South Australia contributes 21 per cent of visitors to the Clare Valley.
- Adelaide visitors contribute 41 per cent of the visitors to the Clare Valley.
- Internationally Europeans contribute 52 per cent of the visits to the Clare Valley with the United Kingdom contributing 20 per cent.
- 22 per cent of visitors to the Clare Valley are from New Zealand.

VISITOR USE OF ACCOMMODATION

Accommodation used in Clare Valley for Domestic Visitors



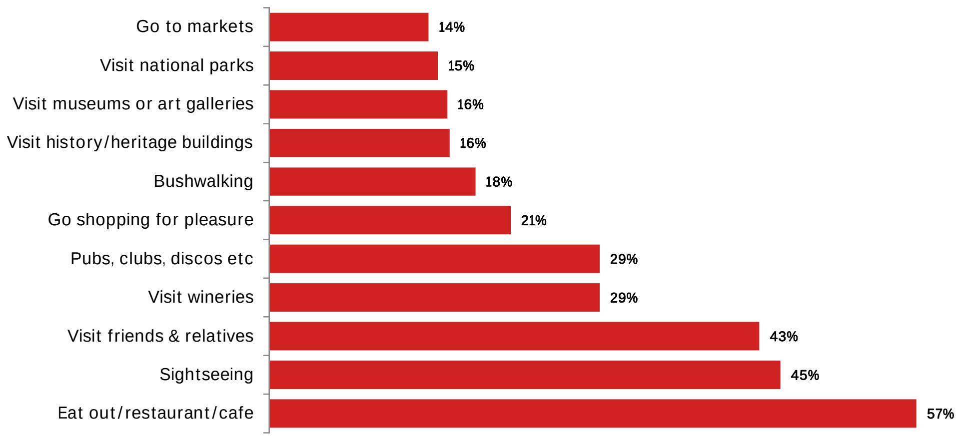
Accommodation used in Clare Valley for International Visitors



- 52 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 60 per cent of visitors staying with Friends or Relatives or in Hotels and similar accommodation.
- 10 per cent of International visitors also like to Stay in a rented House or Apartment.
- Caravan and camping contribute 22 per cent of Domestic nights and 22 per cent of International nights.

VISITOR ACTIVITIES

Domestic Visitor Activities in Clare Valley



- 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 2013-14, the tourism industry contributed an estimated $122 million to the Clare Valley regional economy (16.9 per cent of gross regional product) and employed approximately 300 people (5.4 per cent of regional employment).

In 2013-14, the tourism activity in the Clare Valley generated:

- $32 million and $209 million in direct and indirect tourism output, and $241 million in total tourism output;
- $17 million and $89 million in direct and indirect tourism GVA, and $106 million in total tourism GVA;
- $18 million and $104 million in direct and indirect tourism GRP and $122 million in total tourism GRP; and
- 300 jobs for people employed directly by the tourism industry, 900 indirect jobs and a total employment impact of 1,200 people.

REGIONAL INSIGHTS

Self contained, but lacks uniqueness.

Interstate

- Wine (particularly the compactness of vineyards) and scenery provides the appeal.
- But lacking uniqueness and variety; nothing substantial to differentiate from other wine regions in South Australia and other states.
- Also 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 some appeal.
- No real negatives, just other regions that are closer and perceived to do it just as well.

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.

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 9 priority markets, with a sample of 500 per market.

Prepared by the South Australian Tourism Commission, December 2016

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 s ome 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 y ears from December 2014 to December 2016
Consumer Demand Product Testing - BDA Marketing
Notes and Abbreviations Totals may not add to 100% due to rounding. VFR: Visiting Friends and Relatives. np: Not Published due to small sample size. ALOS: Average Length of Stay
ABS: Survey of Tourism Accommodation. Hotels, Motels, Guest houses and Serviced Apartments with 15 or more rooms. Cat. No. 86 35455001