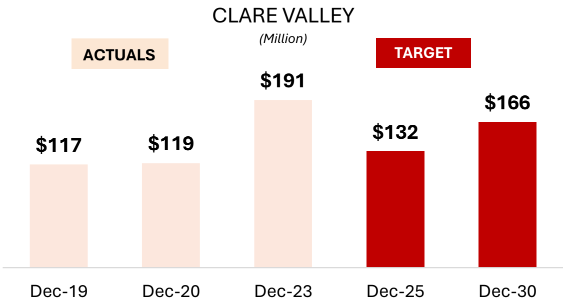
CLARE VALLEY

REGIONAL PROFILE

OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2023

- Currently, the Clare Valley contributes $191 million to the year end December 2023 South Australian expenditure of $10.1 billion.
- The Clare Valley has achieved 100 per cent of their 2025 target of $132 million and their 2030 target of $166 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2023

ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	180,000	42,000	**221,000**	4,000	**226,000**
% of visits	80%	19%	**98%**	2%	**100%**
Share of Regional SA	4%	2%	**3%**	1%	**3%**
% Across Regional SA	*60%*	*35%*	***94%***	*6%*	***100%***
% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international					
Nights	356,000	191,000	**547,000**	61,000	**608,000**
% of nights	59%	31%	**90%**	10%	**100%**
Share of Regional SA	3%	2%	**2%**	0%	**2%**
% Across Regional SA	*33%*	*31%*	***65%***	*35%*	***100%***
% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international					
Average Length of Stay	2.0	4.5	**2.5**	15.3	**2.7**
ALOS Regional SA	2.8	4.6	**3.5**	32.0	**5.1**
Total Expenditure					**$191,000,000**
Overnight Expenditure	$19,000,000	$94,000,000	**$113,000,000**	$3,000,000	**$116,000,000**
Day Trip Expenditure					**$74,000,000**
Domestic Day Trips					**530,000**

- The Clare Valley saw 226,000 overnight visitors for the year end December 2023.
- 80 per cent of overnight visitors were from intrastate, 19 per cent from interstate and 2 per cent from overseas.
- The 180,000 intrastate overnight visitors stayed 356,000 nights with an average length of stay of 2.0 nights.
- There were 42,000 interstate overnight visitors who stayed 191,000 nights with an average length of stay of 4.5 nights
- The region saw 4,000 international visitors with an average length of stay of 15.3 nights and spend of $3 million.
- 530,000 day trips were taken to the Clare Valley for the year with spend of $74 million.

ALOS = Average Length of Stay

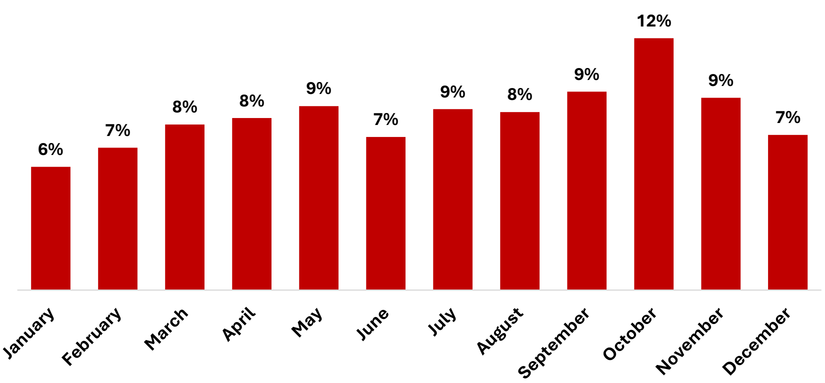
PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	113,000	92,000	19,000	2,000	**226,000**
% of visits	50%	41%	8%	1%	**100%**
Share of Regional SA	4%	4%	1%	0%	**3%**
% Across all regions	*41%*	*33%*	*21%*	*6%*	***100%***
Nights	258,000	257,000	91,000	2,000	**608,000**
% of nights	42%	42%	15%	0%	**100%**
Share of Regional SA	2%	2%	1%	0%	**2%**
% Across all regions	*31%*	*39%*	*15%*	*14%*	***100%***
Average Length of Stay	2.3	2.8	4.8	1.0	**2.7**
Expenditure					
Annual Expenditure	$75,000,000	$31,000,000	$8,000,000	$3,000,000	**$116,000,000**
Expenditure 2019	$51,000,000	$20,000,000	$11,000,000	$4,000,000	**$85,000,000**
Av spend per night	$291	$121	$88	$1,500	$191
Av spend per night Reg SA	$224	$109	$155	$297	$181
Share of Regional SA	3%	5%	1.3%	2%	**3%**

- 91 per cent of overnight visitors to the Clare Valley are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend $291 per night compared to VFR visitors who spend $121 per night.
- Leisure overnight visitors spent $106 million for the year, making up 91 per cent of all overnight expenditure.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO CLARE VALLEY



Source: NVS year end December 2022

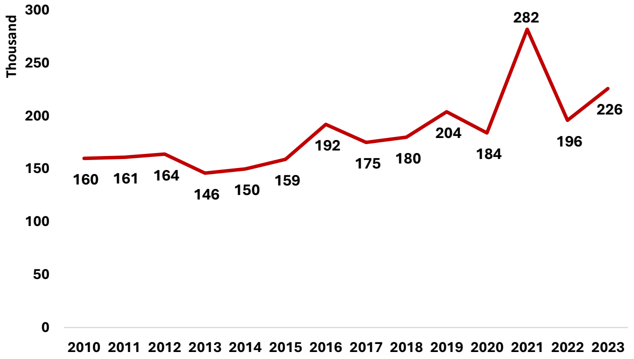
National Visitor Survey data shows us that in 2023 November was the strongest month for visitation in the Clare Valley.

October is busy with the school holidays and the long weekend.

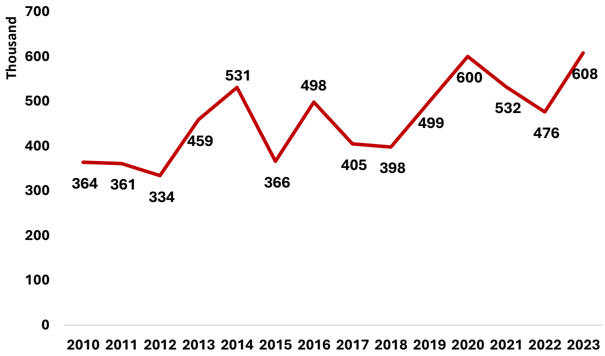
In prior years March and April have been strong on the back of the long weekend, Easter and the school holidays.

TOTAL OVERNIGHT VISITATION 2010 - 2022

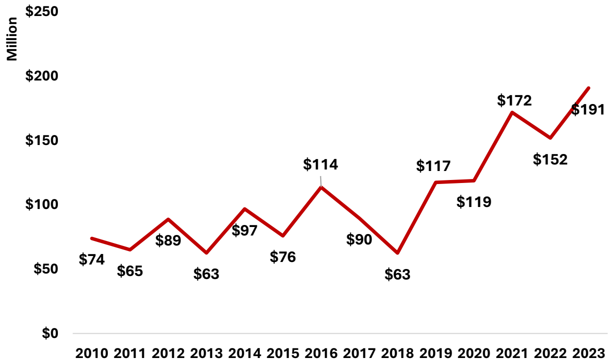
VISITORS CLARE VALLEY 2010 - 2023 - International and Domestic



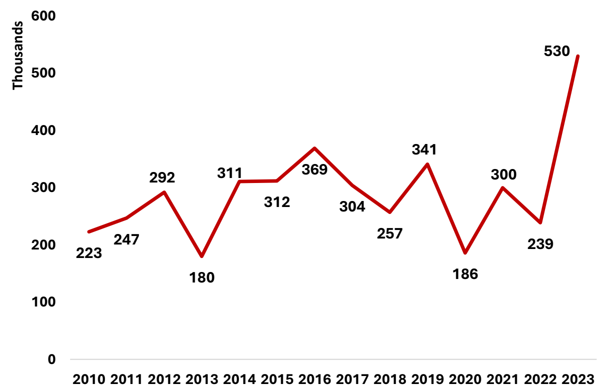
NIGHTS CLARE VALLEY 2010 - 2023 - International and Domestic



TOTAL EXPENDITURE CLARE VALLEY 2010 - 2023 - International and Domestic



DAY TRIPS CLARE VALLEY 2010 - 2023 - 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.

	Visits		Expenditure	
Regions	**Dec-23**	**Change on Dec-19**	**Dec-23**	**Change on Dec-19**
Adelaide	3,422,000	-13%	$5,500,000,000	22%
Adelaide Hills	233,000	3%	$293,000,000	42%
Barossa	343,000	8%	$261,000,000	16%
Clare Valley	226,000	11%	$191,000,000	62%
Eyre Peninsula	537,000	-8%	$591,000,000	7%
Fleurieu Peninsula	868,000	-4%	$837,000,000	50%
Flinders Ranges and Outback	761,000	-18%	$610,000,000	19%
Kangaroo Island	205,000	-1%	$280,000,000	47%
Limestone Coast	763,000	-2%	$520,000,000	24%
Murray River, Lakes and Cooror	363,000	-20%	$373,000,000	33%
Riverland	322,000	-25%	$239,000,000	22%
Yorke Peninsula	530,000	-11%	$384,000,000	60%
Regional SA	4,830,000	-7%	$4,630,000,000	30%
South Australia	**7,835,000**	**-9%**	**$10,140,000,000**	**25%**

CLARE VALLEY REGIONAL PROFILE

CLARE VALLEY TOURISM LISTINGS

Category	# Listings
Accommodation	97
Food & Drink	73
Event	72
Attraction	66
Tour	23
Destination Information	20
Hire	5
Transport	3
General Services	3
Information Services	2
Grand Total	364

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)

CLARE VALLEY
AUSTRALIAN TOURISM DATA WAREHOUSE LEADS
51,000
YEAR END DECEMBER 2023

ACCOMMODATION LEADS
23,000
45%

TOP 5
- BUKIRK GLAMPING CLARE VALLEY
- SLOW CABIN
- BURRA CARAVAN AND CAMPING PARK
- DISCOVERY PARKS CLARE
- BUKIRK GLAMPING & FANCY COOPS CLARE VALLEY

FOOD & DRINK LEADS
8,000
16%

TOP 5
- WATERVALE HOTEL
- MR. MICK CELLAR DOOR AND KITCHEN
- SKILLOGALEE RESTAURANT & CELLAR DOOR
- SEVENHILL CELLARS
- TAYLORS WINES

TOUR LEADS
2,000
3%

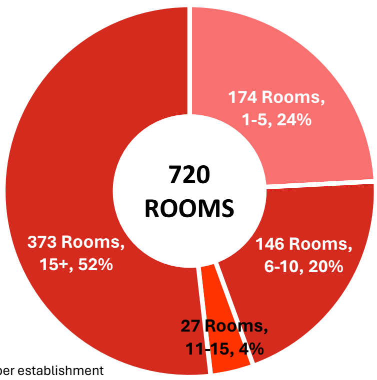
TOP 5
- CLARE VALLEY WINE TOURS
- ETHICAL, EPICUREAN, EXPERIENCES AT THE WATERVALE HOTEL
- KNAPPSTEIN WINES EXPERIENCES
- CLARE BOUTIQUE WINE TOURS
- TIM ADAMS EXPERIENCES

***OTHER LEADS**
18,000
37%

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

ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS IN THE CLARE VALLEY
SOURCE ATDW

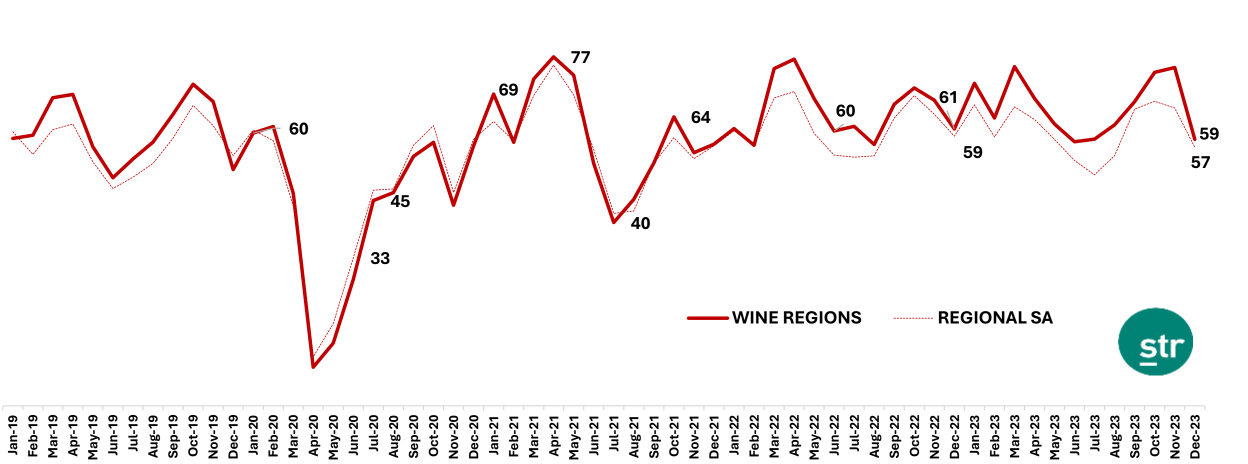


Rooms refers to rooms per establishment

- Currently there are 94 establishments in the Clare Valley that accommodate guests.
- These 94 establishments account for 720 rooms across the region.
- 52 per cent of rooms fall into establishment with 15 or more rooms.
- 24 per cent of rooms fall into the 1-5 room establishments.

ACCOMMODATION STR

ACCOMMODATION OCCUPANCY WINE REGIONS

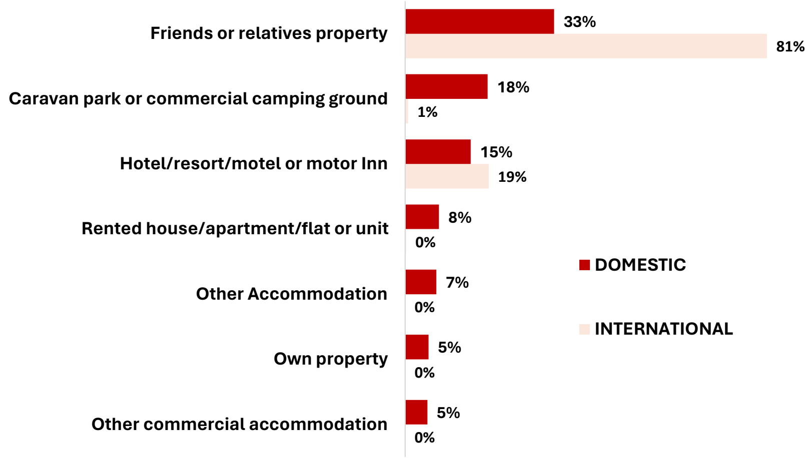


- The wine regions include accommodation data for the Adelaide Hills, the Clare Valley and the Barossa. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Wine Regions was 61%, this fell to 44% in 2020, rose to 65% in 2022 and grew again in 2023 to 66%.

VISITOR USE OF ACCOMMODATION

- 33 per cent of domestic overnight visitor nights in the Clare Valley are spent with Friends or Relatives compared to the international average of 81 per cent.
- 15 per cent of domestic visitors stayed in a Hotel/resort/motel or motor inn. This compares to the international average of 19 per cent.
- 18% of domestic visitors to the Clare Valley stay in a caravan park.

ACCOMMODATION USED IN CLARE VALLEY FOR DOMESTIC AND INTERNATIONAL VISITORS

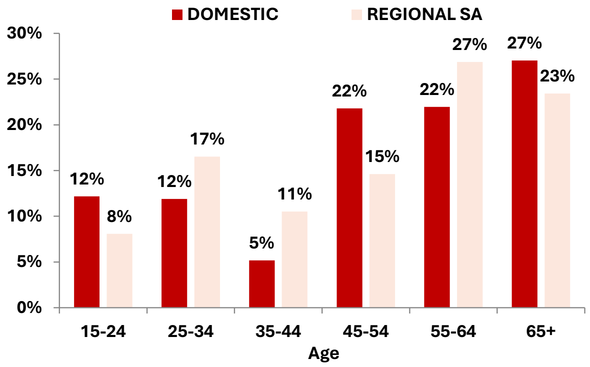


TRANSPORT

- The main method of transport used on trips to the Clare Valley was a self drive vehicle.
- 93% of visitors used this type of transport.
- 5% of people used another form of transport, this included planes, helicopters, buses etc.

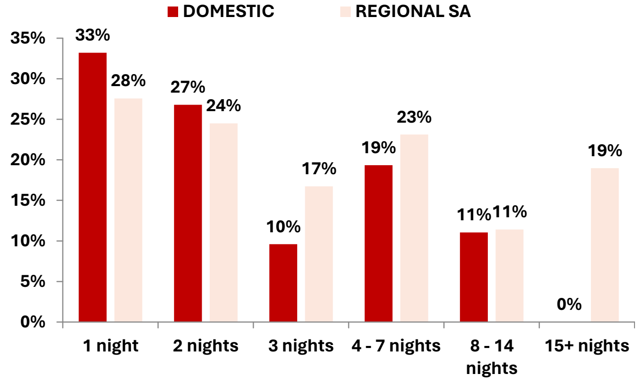
VISITOR PROFILE

AGE OF VISITORS TO CLARE VALLEY



- In the domestic market the 45-54 and the 65+ age groups over index.
- The region is below the regional average for 25-34 age group and 55-64 age group.

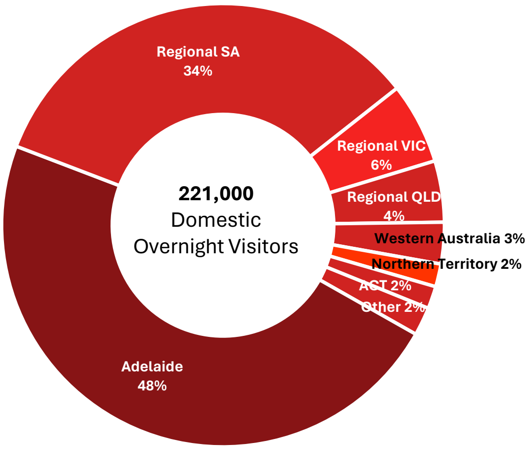
LENGTH OF VISIT TO CLARE VALLEY



- 60 per cent of domestic overnight visitors like to stay 1 to 2 nights.
- 19 per cent of visitors stayed 4-7 nights.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO CLARE VALLEY

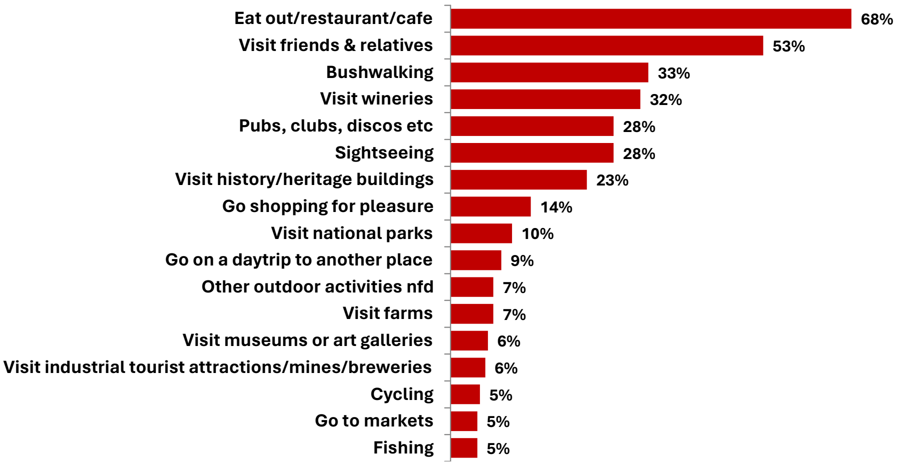


- Regional Victoria at 6 per cent and Regional Queensland at 4 per cent are the Clare Valley's biggest interstate overnight domestic markets.
- Regional South Australia contributes 34 per cent of visitors to the Clare Valley.
- 48 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

- The most popular activity when coming to the Clare Valley is to eat out at a restaurant or cafe.
- Other popular activities include visiting a friend or relative, visiting wineries, bushwalking, visiting national parks, going to markets and seeing the sights.

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN CLARE VALLEY



CLARE VALLEY

REGIONAL PROFILE

REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2021-22, the tourism industry contributed an estimated $172 million to the Clare Valley regional economy and directly employed approximately 500 people.

Employment

- 600 jobs for people employed directly by the tourism industry, 300 indirect jobs and a total employment impact of 900 people.

Gross Value Added (GVA)

- $34 million and $36 million in direct and indirect tourism GVA, and $70 million in total tourism GVA.

Gross Regional Product (GRP)

- $37 million and $47 million in direct and indirect tourism GRP and $84 million in total tourism GRP.

Tourism Consumption

2021–22
Tourism products - directly consumed

• Takeaway and restaurant meals	19%
• Shopping (including gifts and souvenirs)	14%
• Fuel (petrol, diesel)	11%
• Long distance passenger transportation	10%
• Accommodation services	10%
• Actual and imputed rent on dwellings	7%
• Food products	7%
• Alcoholic beverages and other beverages	6%

Tourism Employment

2021–22
Tourism Industries - 600 directly employed

• Cafes, restaurants and takeaway food services	40%
• Accommodation	24%
• Retail trade 17% Clubs, pubs, taverns and bars	8%
• Travel agency and tour operator services	4%
• All other industries	2%
• Other sports and recreation services	1%
• Air, water and other transport	2%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2022

REGIONAL PERCEPTIONS REPORTING

- The Clare Valley is known for its wineries, gourmet food and the Riesling trail that links the region
- Increasing the awareness of events and other family friendly attractions in the region will help to entice those who aren't p urely focused on a visit based around wine to the region.
- The more potential visitors are aware of in the area, the more likely they will be to stay longer, and/or come back

To drive increased visitation and expenditure, we recommend the Clare Valley:

Position the Clare Valley as being wine +	People already know the Clare Valley based on the strength of it's food and wine offering. The focus should now be on drawing attention to what else the region has to offer.
Show the variety on offer to entice people back or encourage longer stays	Exposing people to activities or destinations within the region that they aren't aware of will give them a reason to stay longer or return.
Highlight what's available for the whole family	Highlight the family friendly events, businesses and activities to help attract this group.
Region appeals to…	– Relaxation seekers – Those seeking an 'adults only' experience – Lovers of food and wine – Those looking for a short break

Prepared by the South Australian Tourism Commission, December 2023

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 e stimates 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 vis itors 15 years and over. Unless otherwise stated, all data refers to the year end December 2023.

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