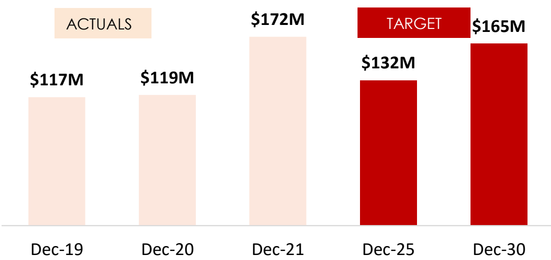
OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2021

- Currently the Clare Valley contributes $172 million to the year end December 2021 South Australian expenditure of $6.2 billion.
- The Clare Valley has achieved their 2025 target of $132 and their 2030 target of $165 million.

CLARE VALLEY



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2021

ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	228,000	53,000	**281,000**	-	**282,000**
%	81%	19%	**100%**	0%	**100%**
Share of Regional SA	5%	4%	**5%**	0%	**5%**
% Across Regional SA	*76%*	*23%*	***100%***	*0%*	***100%***
Nights	417,000	115,000	**532,000**	-	**532,000**
%	78%	22%	**100%**	0%	**100%**
Share of Regional SA	3%	1%	**2%**	0%	**2%**
% Across Regional SA	*60%*	*38%*	***98%***	*2%*	***100%***
Average Length of Stay	1.8	2.2	**1.9**	-	**1.9**
ALOS Regional SA	3.0	6.2	**3.7**	-	**3.8**
Total Expenditure					**$172,000,000**
Overnight Expenditure	$92,000,000	$37,000,000	**$129,000,000**	$0	**$129,000,000**
Day Trip Expenditure					**$43,000,000**
Domestic Day Trips					**300,000**

- The Clare Valley saw 281,000 domestic overnight visitors for the year end December 2021.
- 81 per cent of overnight visitors were from intrastate and 19 per cent from interstate.
- The 228,000 intrastate overnight visitors stayed 417,000 nights with an average length of stay of 1.8 nights.
- There were 53,000 interstate overnight visitors who stayed 115,000 nights with an average length of stay of 2.2 nights
- There have been limited international arrivals with borders closed.
- 300,000 day trips were taken to the Clare Valley for the year with spend of $43 million.

ALOS = Average Length of Stay

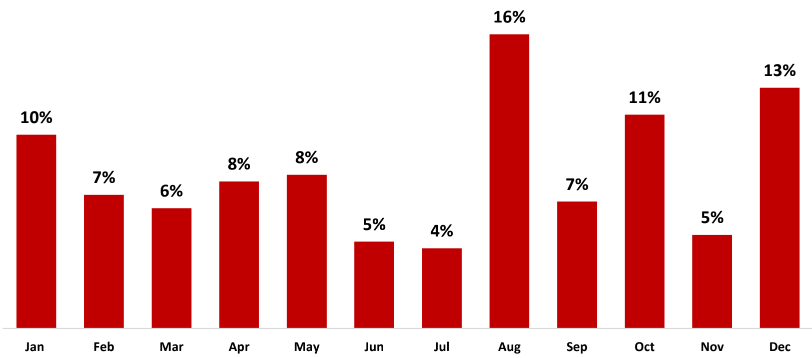
PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	156,000	57,000	49,000	20,000	**282,000**
%	55%	20%	17%	7%	**100%**
Share of Regional SA	5%	3%	5%	4%	**5%**
% Across all regions	*49%*	*28%*	*18%*	*8%*	***100%***
Nights	352,000	84,000	57,000	39,000	**532,000**
%	66%	16%	11%	7%	**100%**
Share of Regional SA	3%	1%	1%	2%	**2%**
% Across all regions	*50%*	*26%*	*17%*	*8%*	***100%***
Average Length of Stay	2.3	1.5	1.2	2.0	**1.9**
Expenditure					
Annual Expenditure	$100,000,000	$14,000,000	$11,000,000	$4,000,000	**$129,000,000**
Expenditure 2019	$51,000,000	$20,000,000	$11,000,000	$4,000,000	**$85,000,000**
Av spend per night	$284	$167	$193	$103	**$242**
Av spend per night Reg SA	$154	$58	$84	$80	**$112**
Share of Regional SA	4%	2%	2%	1%	**3%**

- 76 per cent of overnight visitors to the Clare Valley are either on holiday or visiting friends and relatives.
- Overnight holiday visitors on average spend $284 per night compared to VFR visitors who spend $167 per night.
- Leisure overnight visitors spent $114 million for the year, making up 88 per cent of all overnight expenditure.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO CLARE VALLEY

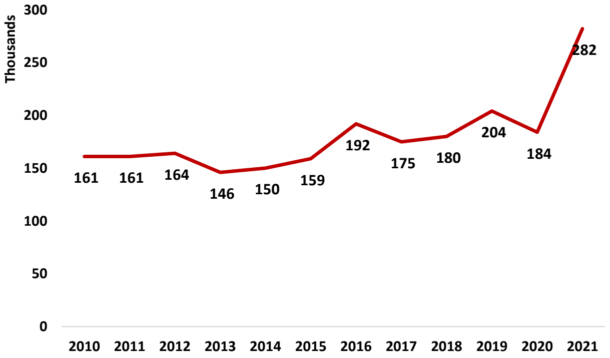


Source: NVS year end December 2021

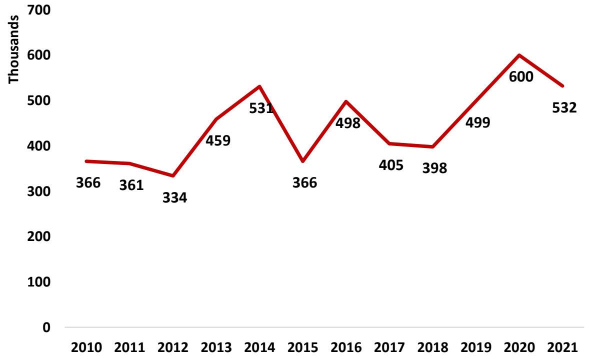
- National Visitor Survey data shows us that January, August, October and December are the strongest months for visitation in the Clare Valley.
- January, October and December are busy with the school holidays.
- In 2021 August saw strong occupancy.

TOTAL OVERNIGHT VISITATION 2010 - 2021

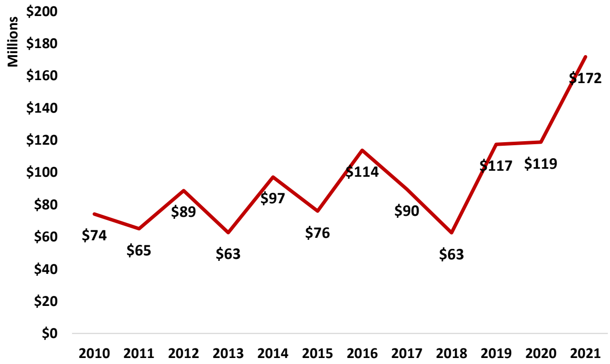
VISITORS CLARE VALLEY 2010 - 2021 - INTERNATIONAL AND DOMESTIC



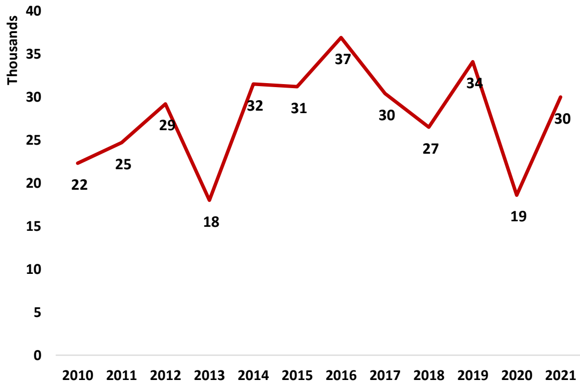
NIGHTS CLARE VALLEY 2010 - 2021 - INTERNATIONAL AND DOMESTIC



TOTAL EXPENDITURE CLARE VALLEY 2010 - 2021 - INTERNATIONAL AND DOMESTIC



DAY TRIPS CLARE VALLEY 2010 - 2021 - 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-21	Change on Dec-19	Dec-21	Change on Dec-19
Adelaide	1,982,000	-49%	2,549,700,000	-44%
Adelaide Hills	184,000	-18%	204,500,000	-1%
Barossa	230,000	-28%	291,600,000	29%
Clare Valley	282,000	38%	171,700,000	46%
Eyre Peninsula	482,000	-17%	488,400,000	-11%
Fleurieu Peninsula	894,000	-1%	662,900,000	19%
Flinders Ranges and Outback	638,000	-31%	359,700,000	-30%
Kangaroo Island	189,000	-9%	238,500,000	25%
Limestone Coast	610,000	-21%	438,600,000	4%
Murray River, Lakes and Coorong	391,000	-13%	211,200,000	-25%
Riverland	345,000	-20%	231,600,000	19%
Yorke Peninsula	620,000	4%	279,500,000	16%
Regional SA	4,424,000	-14%	3,601,600,000	1%
South Australia	**6,077,000**	**-29%**	**6,151,300,000**	**-24%**

CLARE VALLEY TOURISM LISTINGS

Category	# Listings
Event	131
Accommodation	97
Food and Drink	78
Attraction	67
Destination Information	21
Tour	12
Hire	5
General Services	4
Transport	4
Information Services	2
Grand Total	421

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

100,000

YEAR END DECEMBER 2021

ACCOMMODATION LEADS
66,000
66%

TOP 5

- BUKIRK GLAMPING CLARE VALLEY
- DISCOVERY PARKS CLARE
- TRESTRAIL COTTAGE
- BUNGAREE STATION CLARE
- COUNTRY CLUB

FOOD & DRINK LEADS
11,000
11%

TOP 5

- SKILLOGALEE WINERY RESTAURANT
- MR MICK CELLAR DOOR AND KITCHEN
- PIKES WINES
- SEVENHILL CELLARS
- SEED CLARE VALLEY

TOUR LEADS
1,500
2%

TOP 5

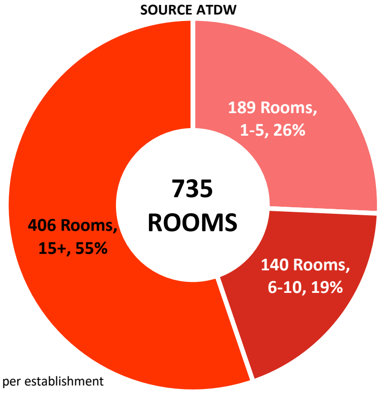
- CLARE VALLEY WINE TOURS
- CLARE VALLEY TOURS
- CLARE VALLEY EXPERIENCES
- WATERVALE HOTEL
- ETHICAL EPICUREAN EXPERIENCES
- CLARE VALLEY LUXURY TOURS

***OTHER LEADS**
22,000
22%

* 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

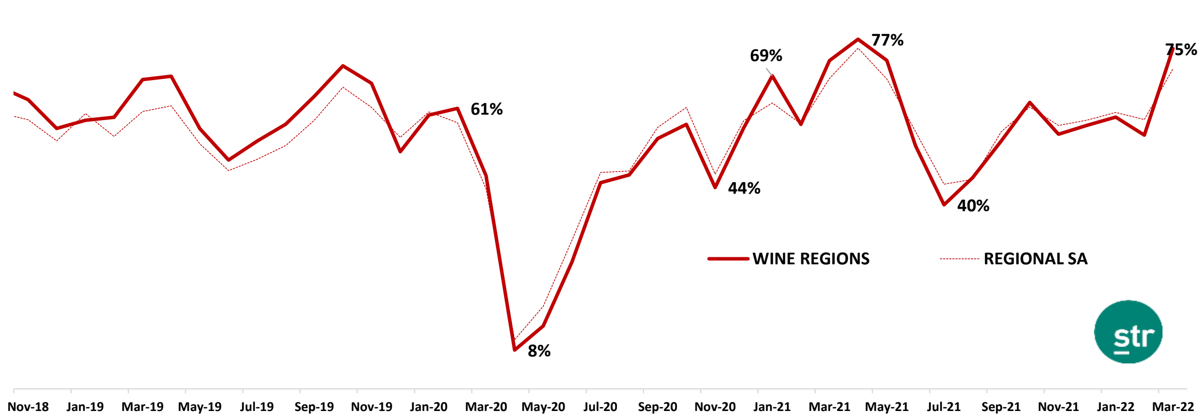


Rooms refers to rooms per establishment

- Currently there are 98 establishments in the Clare Valley that accommodate guests.
- These 98 establishments account for 735 rooms across the region.
- 55 per cent of rooms fall into establishment with 15 or more rooms.
- 26 per cent of rooms fall into the 1-5 room establishments.

ACCOMMODATION STR

ACCOMMODATION OCCUPANCY WINE REGIONS

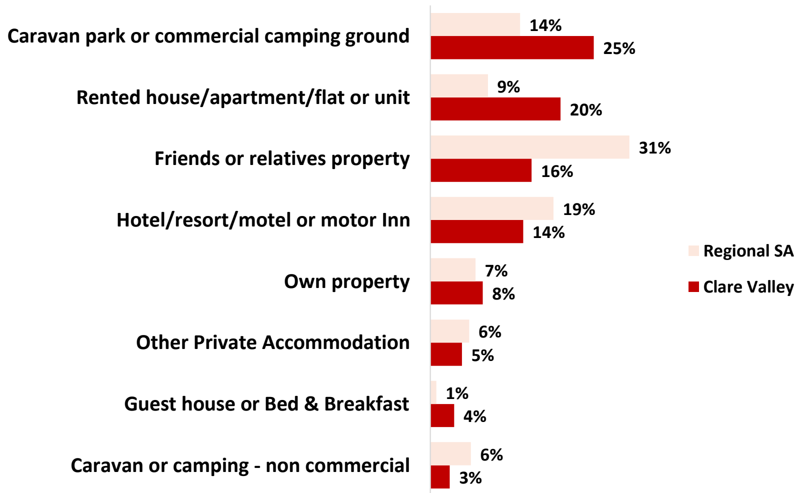


- The wine regions include accommodation data for the Adelaide Hills, the Clare Valley and the Barossa. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the wine Regions was 61%, this fell to 44% in 2020, rose to 60% in 2021 and for the first 3 month of 2022 the average is 63%.

VISITOR USE OF ACCOMMODATION

- 36 per cent of domestic overnight visitor nights in the Clare Valley are spent either with Friends or Relatives or in a rented house or similar accommodation.
- 28 per cent of visitor nights are spent caravan or camping.

ACCOMMODATION USED IN CLARE VALLEY FOR DOMESTIC VISITORS



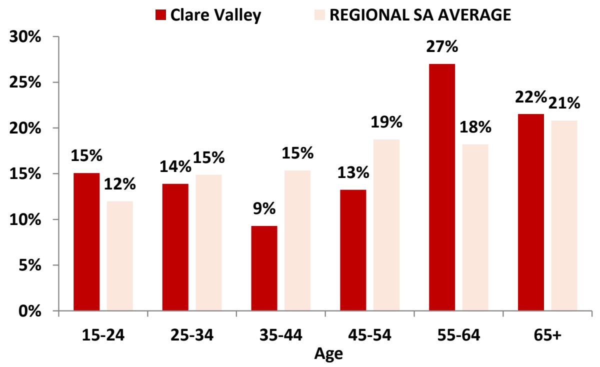
TRANSPORT

TRANSPORT CLARE VALLEY DECEMBER 2021

- The main method of transport used on your trips to the Clare Valley was a self drive vehicle.
- 96% of visitors used this type of transport.
- 4% of people used another form of transport, this included planes, helicopters, buses etc.

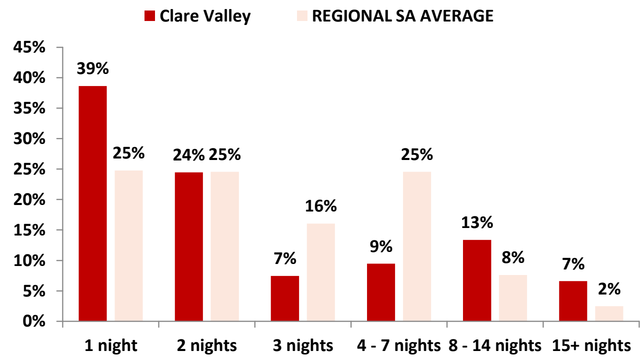
VISITOR PROFILE

AGE OF VISITORS TO CLARE VALLEY



- Overnight domestically there is a peak in the 55+ age group at 49 per cent.
- This is well above the average of 39 per cent for the 55+ age group for regional SA.
- 45+ age groups account for 62 per cent of all visitors.

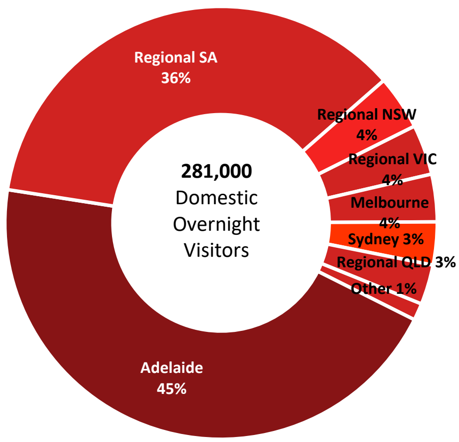
LENGTH OF VISIT TO CLARE VALLEY



- 39 per cent of domestic overnight visitors like to stay 1 night.
- The 20 per cent who stay longer than 8 nights are predominantly staying with friends and relatives or working in the region.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO CLARE VALLEY

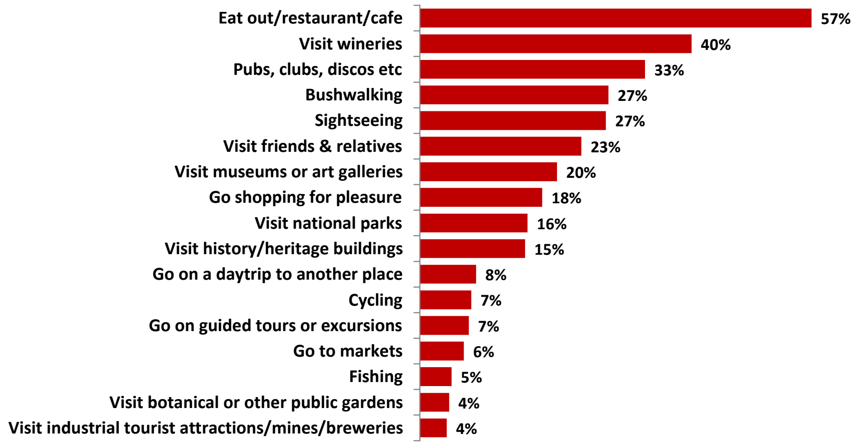


- Victoria at 7 per cent and New South Wales at 7 per cent are the Clare Valleys biggest interstate overnight domestic markets.
- Regional South Australia contributes 36 per cent of visitors to the Clare Valley.
- 45 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

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

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN CLARE VALLEY



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2019-20, the tourism industry contributed an estimated $150 million to the Clare Valley regional economy and directly employed approximately 600 people.

Employment
600 jobs for people employed directly by the tourism industry, 200 indirect jobs and a total employment impact of 800 people.

Gross Value Added (GVA)
$32 million and $29 million in direct and indirect tourism GVA, and $61 million in total tourism GVA.

Gross Regional Product (GRP)
$33 million and $37 million in direct and indirect tourism GRP and $70 million in total tourism GRP.

Tourism Consumption

2019–20
Tourism products - directly consumed

- 17% Long distance passenger transportation
- 16% Takeaway and restaurant meals
- 13% Shopping (including gifts and souvenirs)
- 11% Fuel (petrol, diesel)
- 11% Travel agency and tour operator services
- 8% Accommodation services
- 6% Food products
- 6% Alcoholic beverages and other beverages

Tourism Employment

2019–20
Tourism Industries - 600 directly employed

- 33% - 192 - Cafes, restaurants and takeaway food services
- 19% - 108 - Accommodation
- 18% - 104 - Retail trade
- 9% - 52 - Travel agency and tour operator services
- 6% - 37 - Clubs, pubs, taverns and bars
- 5% - 30 - Road transport and transport equipment rental
- 3% - 20 - All other industries

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2020

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 has been 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 r egion.
- Develop new and commissionable nature-based, heritage and epicurean visitor experiences and additional quality accommodation will be key.

Prepared by the South Australian Tourism Commission, December 2021

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 2021.

Consumer Demand Product Testing Phase 1 - BDA Marketing - 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.

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