

CLARE VALLEY

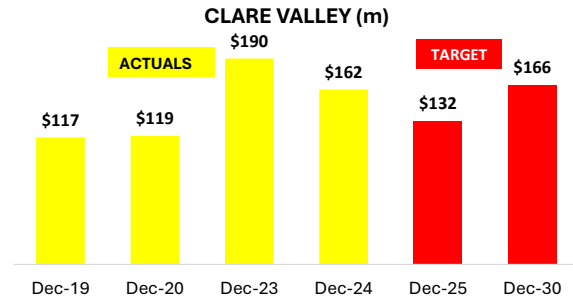
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2024

- Currently, the Clare Valley contributes \$162 million to the year end December 2024 South Australian expenditure of \$9.8 billion.
- The Clare Valley has achieved 100 per cent of their 2025 target of \$132 million and 98 per cent of their 2030 target of \$166 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2024

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	175,000	43,000	218,000	5,000	222,000
% of visits	79%	19%	98%	2%	100%
Share of Regional SA	5%	4%	5%	4%	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	337,000	110,000	446,000	18,000	465,000
% of nights	72%	24%	96%	4%	100%
Share of Regional SA	4%	2%	3%	1%	3%
% 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	1.9	2.6	2.0	3.6	2.1
ALOS Regional SA	2.9	4.2	3.2	19.8	3.7
Total Expenditure					\$162,000,000
Overnight Expenditure	\$76,000,000	\$33,000,000	\$109,000,000	\$3,000,000	\$112,000,000
Day Trip Expenditure					\$50,000,000
Domestic Day Trips					356,000

- The Clare Valley saw 222,000 overnight visitors for the year end December 2024.
- 79 per cent of overnight visitors were from intrastate, 19 per cent from interstate and 2 per cent from overseas.
- The 175,000 intrastate overnight visitors stayed 337,000 nights with an average length of stay of 1.9 nights.
- There were 43,000 interstate overnight visitors who stayed 110,000 nights with an average length of stay of 2.6 nights
- The region saw 5,000 international visitors with an average length of stay of 3.6 nights and spend of \$3 million.
- 356,000 day trips were taken to the Clare Valley for the year with spend of \$50 million.

ALOS = Average Length of Stay

CLARE VALLEY

REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	117,000	79,000	19,000	7,000	222,000
% of visits	53%	36%	9%	3%	100%
Share of Regional SA	5%	7%	2%	2%	5%
% Across all regions	53%	24%	19%	7%	100%

Nights	273,000	118,000	64,000	9,000	465,000
% of nights	59%	25%	14%	2%	100%
Share of Regional SA	3%	3%	2%	1%	3%
% Across all regions	49%	25%	17%	9%	100%

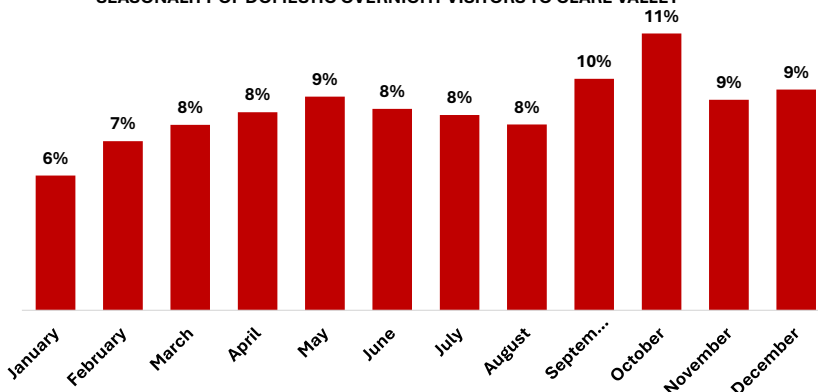
Average Length of Stay	2.3	1.5	3.4	1.3	2.1
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Expenditure					
Annual Overnight Exp	\$63,000,000	\$22,000,000	\$24,000,000	\$2,000,000	\$112,000,000
Expenditure 2019	\$51,000,000	\$20,000,000	\$11,000,000	\$4,000,000	\$85,000,000
Av spend per night	\$231	\$186	\$375	\$222	\$241
Av spend per night Reg SA	\$190	\$103	\$176	\$218	\$169
Share of Regional SA	3%	5%	1.3%	2%	3%

- 93 per cent of overnight visitors to the Clare Valley are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$231 per night compared to VFR visitors who spend \$186 per night.
- Leisure overnight visitors spent \$85 million for the year, making up 76 per cent of all overnight expenditure.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO CLARE VALLEY



- National Visitor Survey data shows us that May and October are the strongest months for visitation in the Clare Valley.

- April and October are busy on the back of the school holidays, Easter and the October long weekend.

Source: NVS year end December 2024

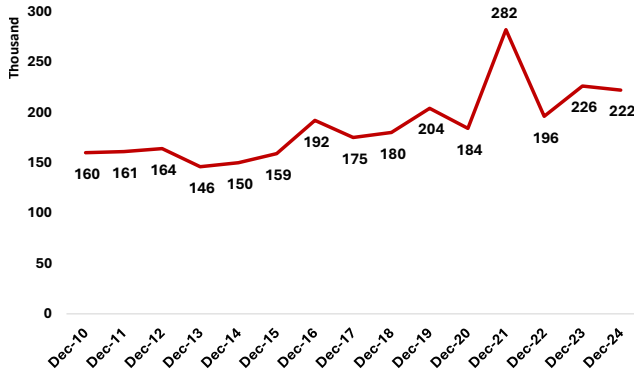
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REGIONAL PROFILE

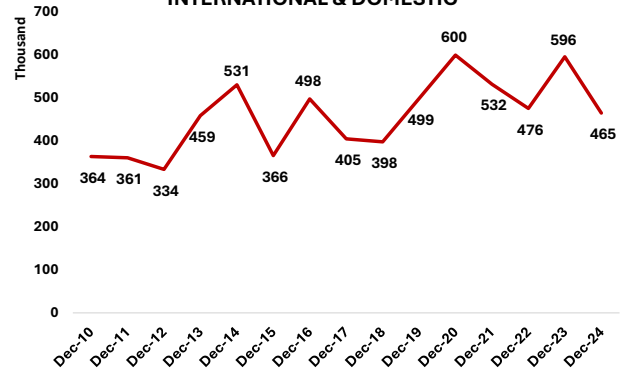


TOTAL OVERNIGHT VISITATION 2010 - 2024

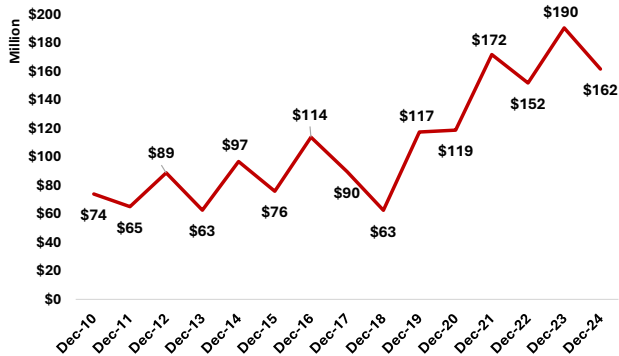
VISITORS CLARE VALLEY 2010 - 2024 - INTERNATIONAL & DOMESTIC



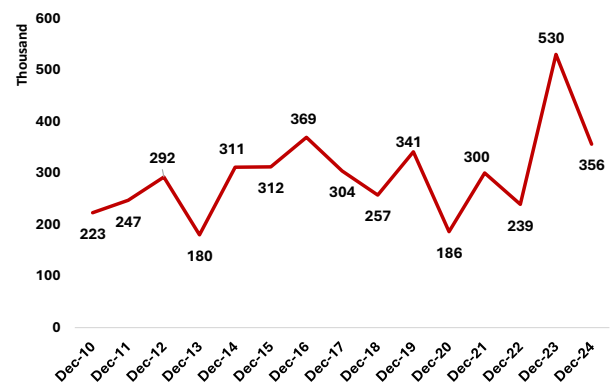
NIGHTS CLARE VALLEY 2010 - 2024 - INTERNATIONAL & DOMESTIC



TOTAL EXPENDITURE CLARE VALLEY 2010 - 2024 - INTERNATIONAL & DOMESTIC



DAY TRIPS CLARE VALLEY 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%

CLARE VALLEY

REGIONAL PROFILE



CLARE VALLEY TOURISM LISTINGS

Category	# Listings
ACCOMM	95
EVENT	89
RESTAURANT	70
ATTRACTION	67
DESTINFO	22
TOUR	19
HIRE	6
INFO	2
TRANSPORT	2
GENSERVICE	2
Grand Total	374

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

121,000
YEAR END DECEMBER 2024

ACCOMMODATION LEADS

62,000
51%

FOOD & DRINK LEADS

17,000
14%

TOUR LEADS

3,000
3%

*OTHER LEADS

39,000
32%

TOP 5

- BUKIRK GLAMPING CLARE VALLEY
- TRESTRAIL COTTAGE
- BUNGAREE STATION
- BURRA CARAVAN AND CAMPING PARK
- THE PINK LAKE TINY HOUSE

TOP 5

- WATERVALE HOTEL
- SKILLOGALEE WINERY RESTAURANT
- MR MICK CELLAR DOOR AND KITCHEN
- PIKES WINES
- SEED CLARE VALLEY

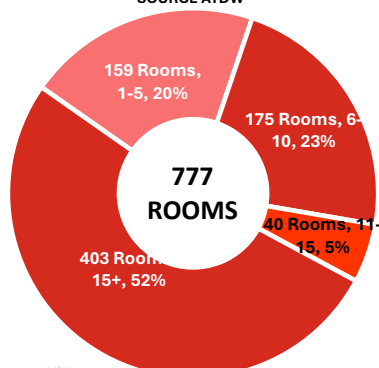
TOP 5

- CLARE VALLEY WINE TOURS
- ETHICAL, EPICUREAN, EXPERIENCES AT THE WATERVALE HOTEL
- CLARE VALLEY TOURS
- CLARE BOUTIQUE WINE TOURS

* 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 96 establishments in the Clare Valley that accommodate guests.
- These 96 establishments account for 777 rooms across the region.
- 52 per cent of rooms fall into establishment with 15 or more rooms.
- 23 per cent of rooms fall into the 6-10 room establishments.

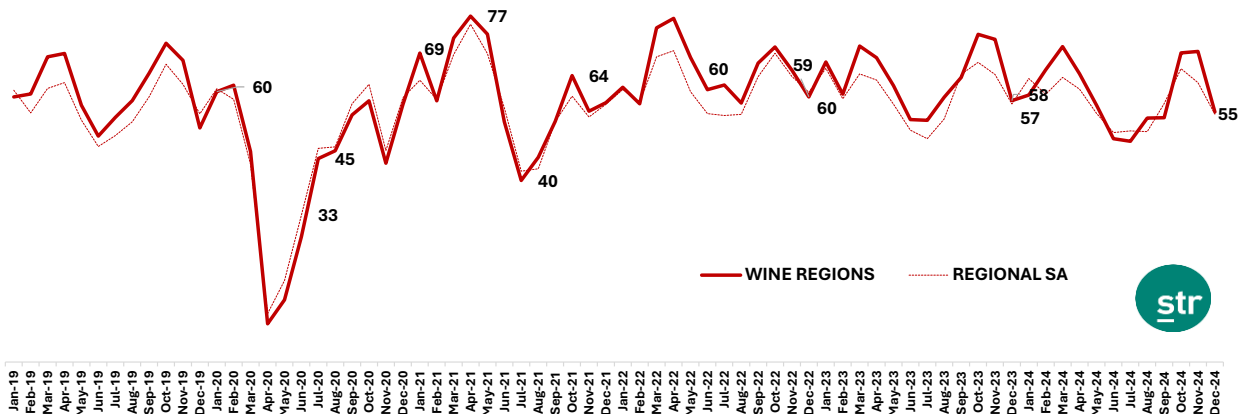
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ACCOMMODATION STR

ACCOMMODATION OCCUPANCY WINE REGIONS

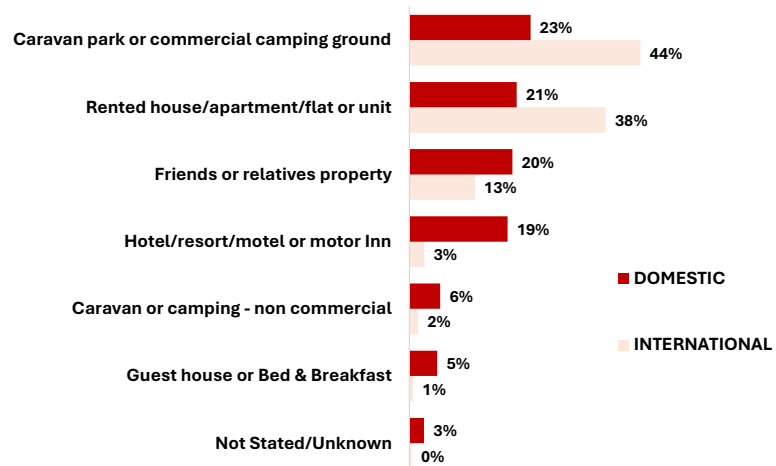


- The wine regions include accommodation data for the Adelaide Hills, the Clare Valley and the Barossa. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Wine Regions was 61%, this fell to 44% in 2020, rose to 65% in 2022, 63% in 2023 and fell in 2024 to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

VISITOR USE OF ACCOMMODATION

- 29 per cent of domestic overnight visitor nights in the Clare Valley are spent in a Caravan Park or Camping Ground. This compares to 46 per cent for international visitors.
- 21 per cent of nights are spent in a rented house/apartment/flats. This compares to 38 per cent for International Visitors
- 19 per cent of domestic visitors stay in a hotel/resort/motel. This compares to 3 per cent of international visitors who chose the same accommodation.

ACCOMMODATION USED IN CLARE VALLEY FOR DOMESTIC VISITORS



TRANSPORT - DOMESTIC OVERNIGHT



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

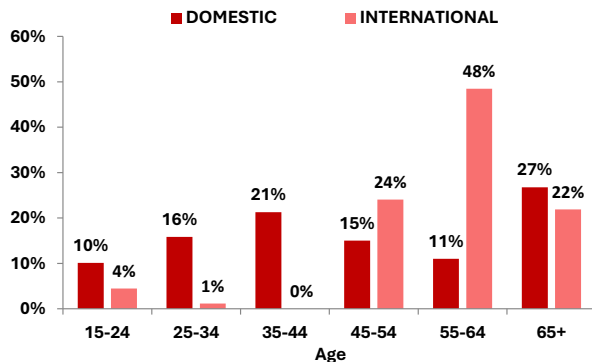
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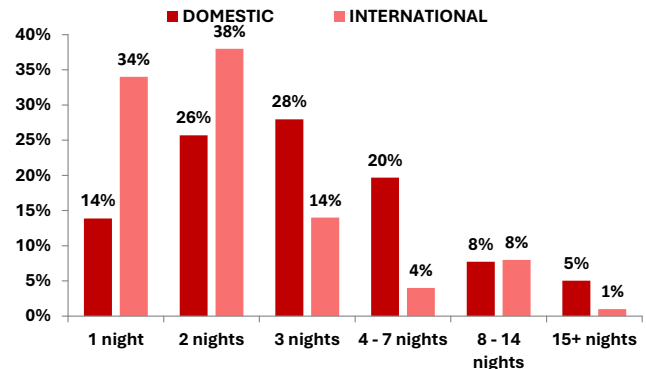
VISITOR PROFILE

AGE OF VISITORS TO CLARE VALLEY



- Overnight domestically peak in the 35-44 and the 65+ age group with 21 per cent and 27 per cent of visits.
- 70 per cent of international visitors are aged 55+.

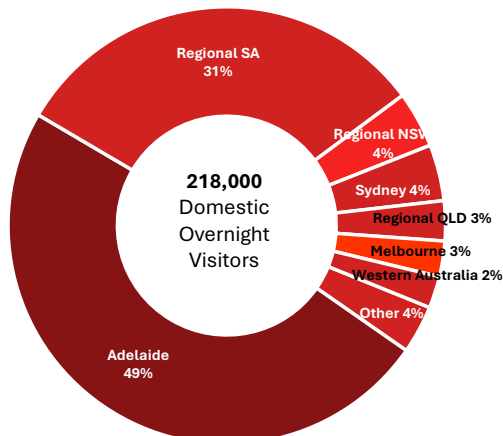
LENGTH OF VISIT TO CLARE VALLEY



- 40 per cent of domestic overnight visitors like to stay 1 to 2 nights.
- 28 per cent of domestic visitors stayed 3 nights.
- 72 per cent of international visitors stayed 1-2 nights.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO CLARE VALLEY

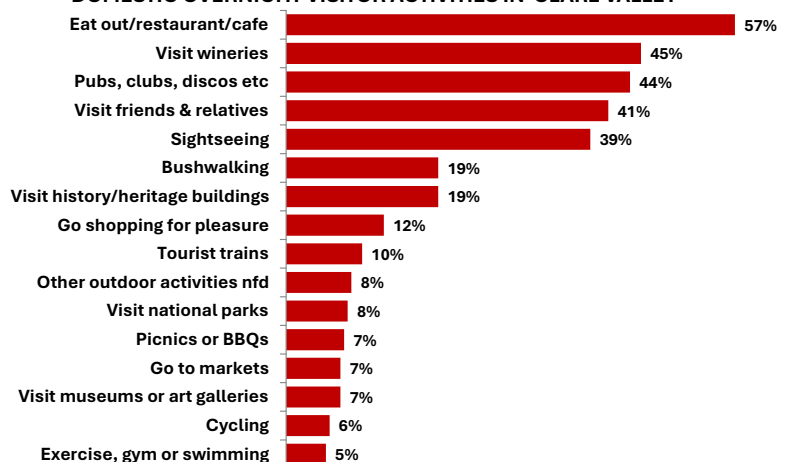


- NSW at 8 per cent and Regional Queensland at 3 per cent are the Clare Valley's biggest interstate overnight domestic markets.
- Regional South Australia contributes 31 per cent of visitors to the Clare Valley.
- 49 per cent of visitors come from Adelaide.

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 2023-24, the tourism industry contributed an estimated \$230 million to the Clare Valley regional economy and directly employed approximately 700 people.

Employment

- 700 jobs for people employed directly by the tourism industry, 300 indirect jobs and a total employment impact of 1,000 people.

Gross Value Added (GVA)

- \$39 million and \$46 million in direct and indirect tourism GVA, and \$86 million in total tourism GVA.

Gross Regional Product (GRP)

- \$46 million and \$56 million in direct and indirect tourism GRP and \$103 million in total tourism GRP.

Tourism Consumption

2023-24

Tourism products - directly consumed

- Takeaway and restaurant meals 19%
- Long distance passenger transportation 17%
- Fuel (petrol, diesel) 15%
- Shopping (including gifts and souvenirs) 12%
- Accommodation services 9%
- Food products 6%
- Alcoholic beverages and other beverages 6%

Tourism Employment

2023-24

Tourism Industries - 700 directly employed

- Cafes, restaurants and takeaway food services 39%
- Accommodation 25%
- Retail trade 18%
- Clubs, pubs, taverns and bars 7%
- Road transport and transport equipment rental 3%
- Education and training 2%
- Travel agency and tour operator services 2%
- All other industries 1%

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 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 purely 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 its 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 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