

CLARE VALLEY

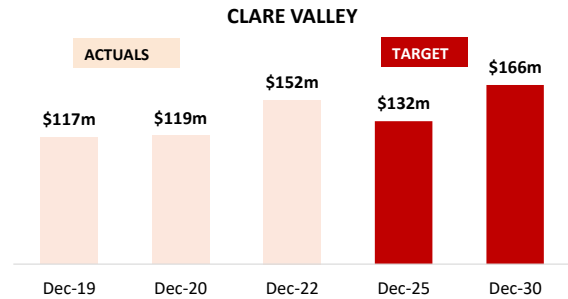
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2022

- Currently the Clare Valley contributes \$152 million to the year end December 2022 South Australian expenditure of \$8.3 billion.
- The Clare Valley has achieved 100 per cent of their 2025 target of \$132 million and 92 per cent of their 2030 target of \$166 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2022

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	124,000	68,000	192,000	4,000	196,000
%	65%	35%	98%	2%	100%
<i>Share of Regional SA</i>	4%	7%	4%	8%	4%
<hr/>					
% Across Regional SA	76%	22%	99%	1%	100%
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>					
Nights	265,000	186,000	451,000	25,000	476,000
%	59%	41%	95%	5%	100%
<i>Share of Regional SA</i>	3%	4%	3%	3%	3%
<hr/>					
% Across Regional SA	63%	32%	95%	5%	100%
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>					
Average Length of Stay	2.1	2.7	2.3	6.3	2.4
ALOS Regional SA	3.0	5.1	3.5	16.1	3.7
<hr/>					
Total Expenditure					\$152,000,000
Overnight Expenditure	\$64,000,000	\$59,000,000	\$123,000,000	\$3,000,000	\$126,000,000
Day Trip Expenditure					\$26,000,000
<hr/>					
Domestic Day Trips					239,000

- The Clare Valley saw 192,000 domestic overnight visitors for the year end December 2022.
- 65 per cent of overnight visitors were from intrastate and 35 per cent from interstate.
- The 124,000 intrastate overnight visitors stayed 265,000 nights with an average length of stay of 2.1 nights.
- There were 68,000 interstate overnight visitors who stayed 186,000 nights with an average length of stay of 2.7 nights
- The region saw 4,000 international visitors with an average length of stay of 6.3 nights and spend of \$3 million.
- 239,000 day trips were taken to the Clare Valley for the year with spend of \$26 million.

ALOS = Average Length of Stay

CLARE VALLEY

REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	109,000	71,000	10,000	9,000	196,000
%	56%	36%	5%	5%	100%
<i>Share of Regional SA</i>	4%	6%	1%	6%	4%
<i>% Across all regions</i>	53%	25%	19%	3%	100%

Nights	256,000	186,000	16,000	18,000	476,000
%	54%	39%	3%	4%	100%
<i>Share of Regional SA</i>	3%	5%	0%	3%	3%
<i>% Across all regions</i>	54%	21%	20%	4%	100%

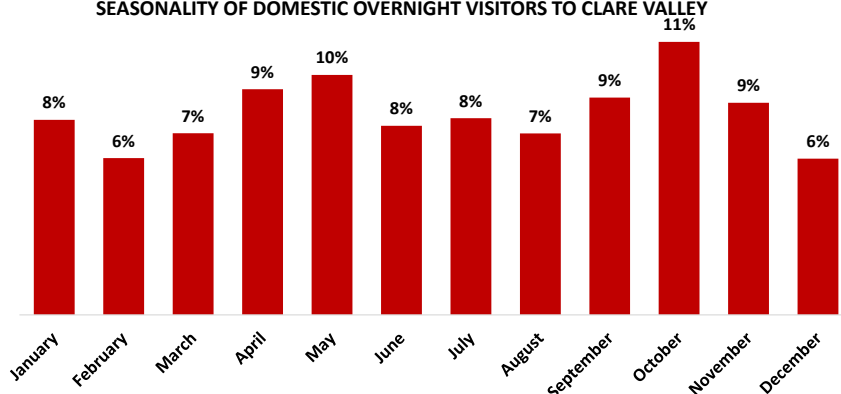
Average Length of Stay	2.3	2.6	1.6	2.0	2.4
-------------------------------	-----	-----	-----	-----	------------

Expenditure					
Annual Expenditure	\$88,000,000	\$32,000,000	\$2,000,000	\$4,000,000	\$126,000,000
Expenditure 2019	\$51,000,000	\$20,000,000	\$11,000,000	\$4,000,000	\$85,000,000
Av spend per night	\$344	\$172	\$125	\$222	\$265
Av spend per night Reg SA	\$204	\$112	\$142	\$279	\$175
Share of Regional SA	3%	4%	0%	2%	3%

- 91 per cent of overnight visitors to the Clare Valley are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$344 per night compared to VFR visitors who spend \$172 per night.
- Leisure overnight visitors spent \$120 million for the year, making up 95 per cent of all overnight expenditure.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO CLARE VALLEY



- National Visitor Survey data shows us that in 2022 May and October are the strongest months for visitation in the Clare Valley.
- October is busy with the school holidays and the long weekend.
- April and May were strong on the back of the school holidays and the Great State Voucher 7.

Source: NVS year end December 2022

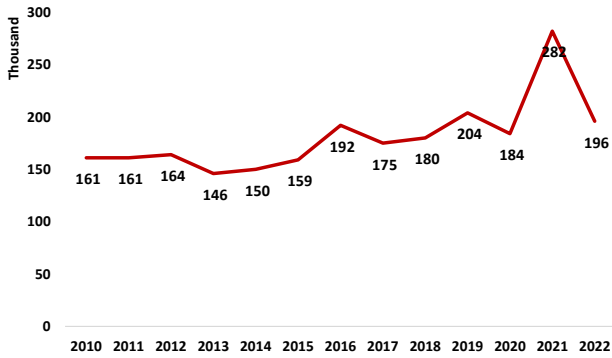
CLARE VALLEY

REGIONAL PROFILE

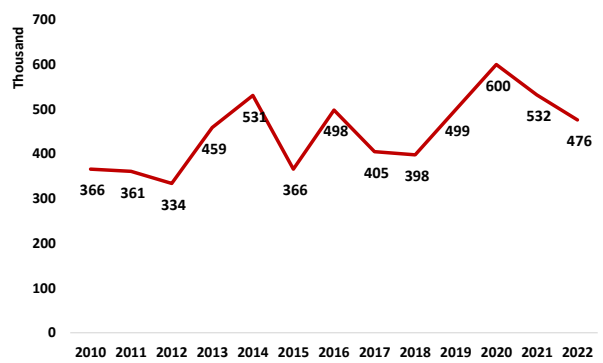


TOTAL OVERNIGHT VISITATION 2010 - 2022

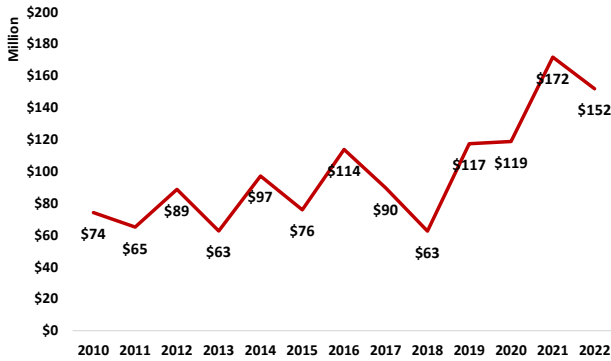
VISITORS CLARE VALLEY 2010 - 2022 - International and Domestic



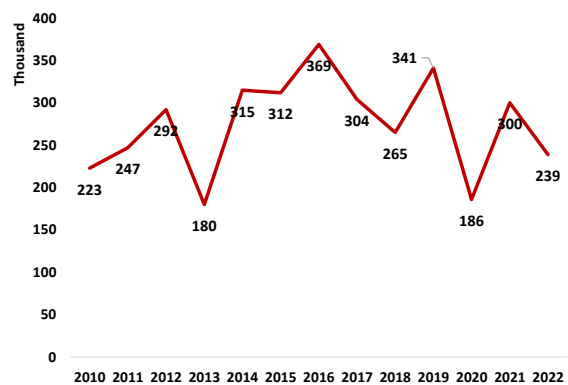
NIGHTS CLARE VALLEY 2010 - 2022 - International and Domestic



TOTAL EXPENDITURE CLARE VALLEY 2010 - 2022 - International and Domestic



DAY TRIPS CLARE VALLEY 2010 - 2022 - 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-22	Change on Dec-19	Dec-22	Change on Dec-19
Adelaide	3,084,000	-21%	\$4,400,000,000	-3%
Adelaide Hills	155,000	-31%	\$225,000,000	9%
Barossa	319,000	1%	\$326,000,000	45%
Clare Valley	196,000	-4%	\$152,000,000	29%
Eyre Peninsula	500,000	-14%	\$503,000,000	-8%
Fleurieu Peninsula	783,000	-13%	\$665,000,000	19%
Flinders Ranges and Outback	835,000	-10%	\$576,000,000	12%
Kangaroo Island	171,000	-18%	\$187,000,000	-2%
Limestone Coast	622,000	-20%	\$441,000,000	5%
Murray River, Lakes and Coorong	381,000	-16%	\$201,000,000	-28%
Riverland	412,000	-4%	\$240,000,000	23%
Yorke Peninsula	602,000	1%	\$354,000,000	47%
Regional SA	4,568,000	-12%	\$3,980,000,000	12%
South Australia	7,291,000	-15%	\$8,340,000,000	3%

CLARE VALLEY

REGIONAL PROFILE



CLARE VALLEY TOURISM LISTINGS

Category	# Listings
EVENT	105
ACCOMM	99
RESTAURANT	75
ATTRACTION	67
TOUR	22
DESTINFO	19
HIRE	5
GENSERVICE	3
TRANSPORT	3
INFO	2
Grand Total	400

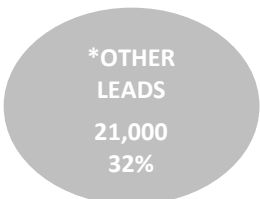
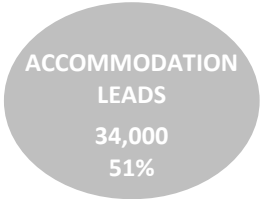
Note: some listings have multiple categories of accommodation
 Source: Australian Tourism Data Warehouse
 Categories above defined at - <https://tourism.sa.gov.au/support/atdw>

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
65,000
 YEAR END DECEMBER 2022



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

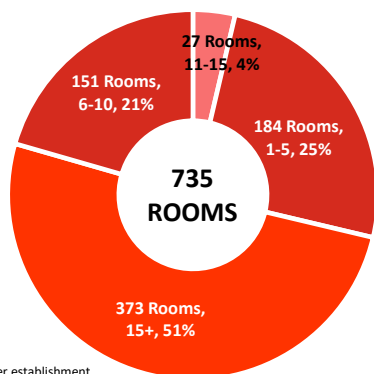
TOP 4

- 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



- Currently there are 99 establishments in the Clare Valley that accommodate guests.
- These 99 establishments account for 735 rooms across the region.
- 51 per cent of rooms fall into establishment with 15 or more rooms.
- 25 per cent of rooms fall into the 1-5 room establishments.

Rooms refers to rooms per establishment

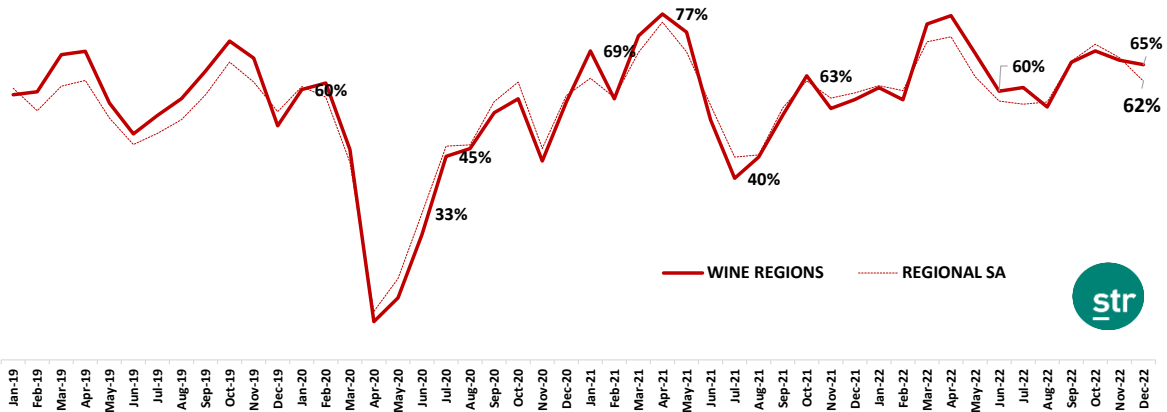
CLARE VALLEY

REGIONAL PROFILE



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY WINE REGIONS

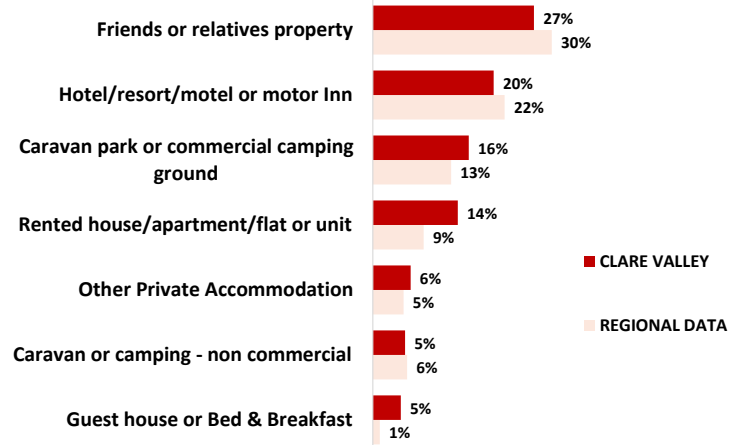


- The wine regions include accommodation data for the Adelaide Hills, the Clare Valley and the Barossa. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Wine Regions was 61%, this fell to 44% in 2020, rose to 60% in 2021 and grew again in 2022 to 65%.

VISITOR USE OF ACCOMMODATION

- 27 per cent of domestic overnight visitor nights in the Clare Valley are spent with Friends or Relatives compared to the SA regional average of 30 per cent.
- 20 per cent stayed in a Hotel/resort/motel or motor inn. This compares to the regional average of 22 per cent.
- The region over indexes for Caravan and Camping and staying in a rented house, apartment or flat.

ACCOMMODATION USED IN CLARE VALLEY FOR DOMESTIC VISITORS



TRANSPORT



- The main method of transport used on trips to the Clare Valley was a self drive vehicle.
- 89% of visitors used this type of transport.
- 11% of people used another form of transport, this included planes, helicopters, buses etc.

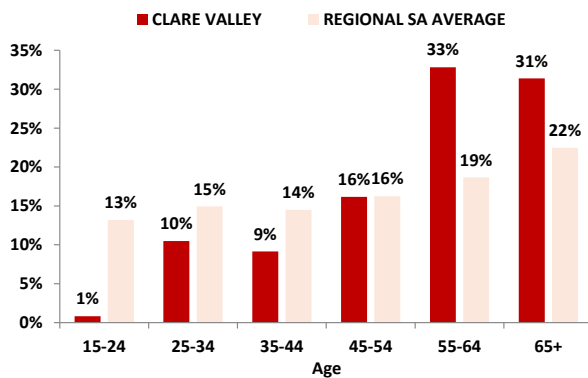
CLARE VALLEY

REGIONAL PROFILE



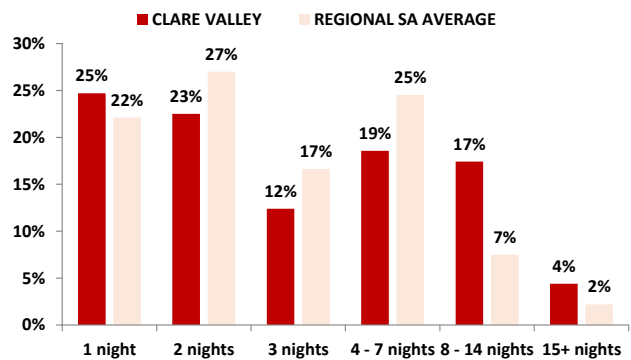
VISITOR PROFILE

AGE OF VISITORS TO CLARE VALLEY



- Overnight domestically there is a peak in the 55-64 and the 65+ age group of 33 per cent and 31 per cent.
- Both age groups are well above the regional average.

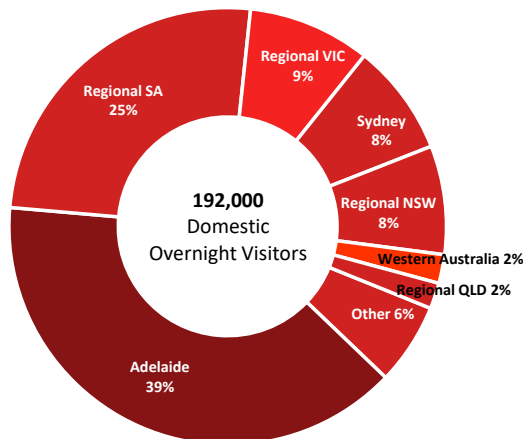
LENGTH OF VISIT TO CLARE VALLEY



- 48 per cent of domestic overnight visitors like to stay 1 to 2 nights.
- The 21 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

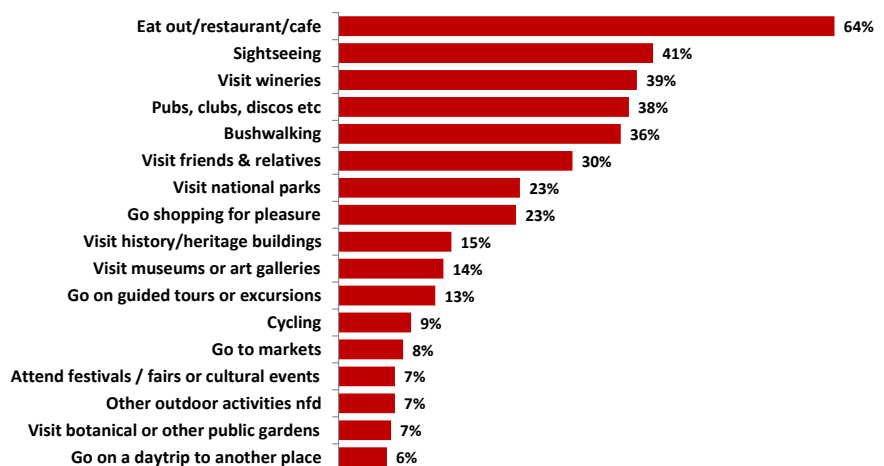


- Victoria at 11 per cent and New South Wales at 16 per cent are the Clare Valley's biggest interstate overnight domestic markets.
- Regional South Australia contributes 25 per cent of visitors to the Clare Valley.
- 39 per cent of visitors come from Adelaide.

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 2020-21, the tourism industry contributed an estimated \$137 million to the Clare Valley regional economy and directly employed approximately 600 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)

- \$33 million and \$28 million in direct and indirect tourism GVA, and \$61 million in total tourism GVA.

Gross Regional Product (GRP)

- \$36 million and \$36 million in direct and indirect tourism GRP and \$72 million in total tourism GRP.

Tourism Consumption

2020–21

Tourism products - directly consumed

- Takeaway and restaurant meals 19%
- Shopping (including gifts and souvenirs) 16%
- Travel agency and tour operator services 11%
- Fuel (petrol, diesel) 11%
- Accommodation services 9%
- Food products 8%
- Long distance passenger transportation 7%
- Alcoholic beverages and other beverages 7%

Tourism Employment

2020–21

Tourism Industries - 600 directly employed

- Cafes, restaurants and takeaway food services 30%
- Retail trade 22%
- Accommodation 19%
- Travel agency and tour operator services 9%
- Clubs, pubs, taverns and bars 6%
- All other industries 5%
- Road transport and transport equipment rental 5%
- 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 2021

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 2022

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. Un less otherwise stated, all data refers to the year end December 2022.

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 Intra-state 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