

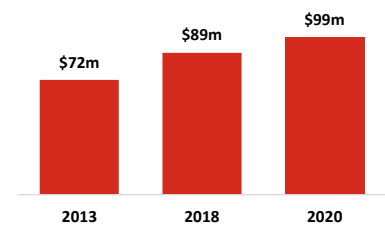
CLARE VALLEY

REGIONAL PROFILE



OVERVIEW

- Currently the Clare Valley contributes \$89 million to the December 2018 South Australian expenditure of \$6.8 billion.
- The Clare Valley has achieved 90 per cent of their 2020 target of \$99 million.



Annual Visitor Summary December 2016 - December 2018

ORIGIN						
	Intrastate	Interstate	Total Domestic	International	Total visits	
Overnight Visits	114,000	64,000	178,000	4,000	182,000	
%	64%	36%	98%	2%	100%	
Nights	233,000	162,000	395,000	39,000	434,000	
%	59%	41%	91%	9%	100%	
Average Length of Stay	2	3	2	10	2	
Domestic Day Trips						
Average Annual Day Trips to Clare Valley					312,000	
PURPOSE						
	Holiday	VFR	Business	Other	Total	
Overnight Visits	102,000	49,000	26,000	5,000	182,000	
%	56%	27%	14%	3%	100%	
Nights	221,000	114,000	89,000	10,000	434,000	
%	51%	26%	21%	2%	100%	
Average Length of Stay	2	2	3	2	2	
Expenditure						
Average Annual Expenditure				\$	89,000,000	

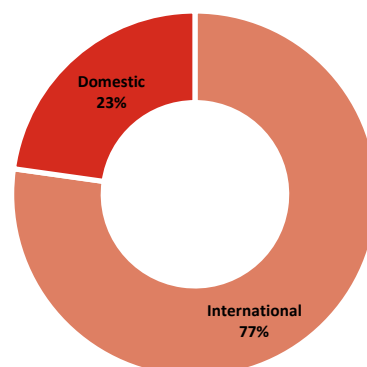
- 98 per cent of Clare Valley visitors are Domestic visitors and 2 per cent are International visitors.
- Domestically, 64 per cent are from within the state compared to 36 per cent from Interstate.
- 83 per cent of visitors to the Clare Valley are Leisure visitors (Holiday + VFR).

CLARE VALLEY TOURISM LISTINGS

Category	Clare Valley
Accommodation	27
Event	21
Food and Drink	18
Attraction	11
Tour	2
Grand Total	79

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

CLARE VALLEY MEDIA COVERAGE



Source: Advertising Space Rate - 2018

CLARE VALLEY

REGIONAL PROFILE



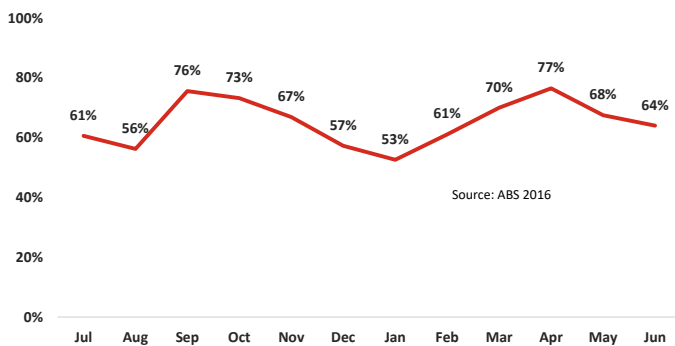
ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms

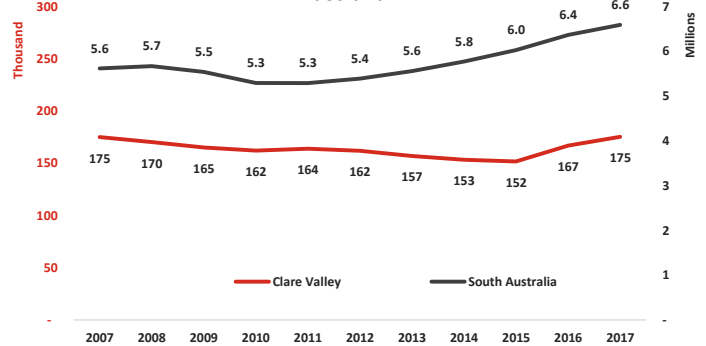
Establishments	4
Rooms	147
Occupancy	65%
Takings	\$4,500,000

- Average occupancy for the year is 65 per cent over 4 establishments 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.

Monthly Occupancy Rates Year end June 2016 - Clare Valley

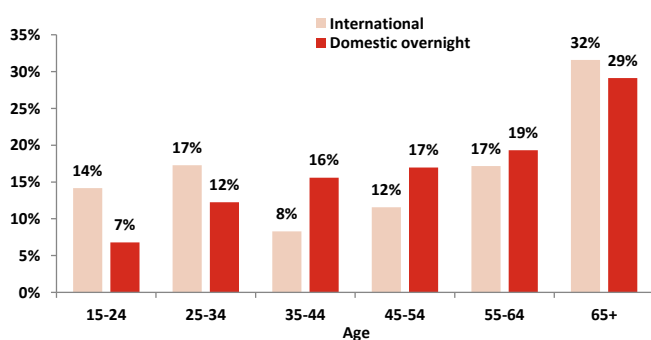


Total Overnight Visitation to Clare Valley & South Australia

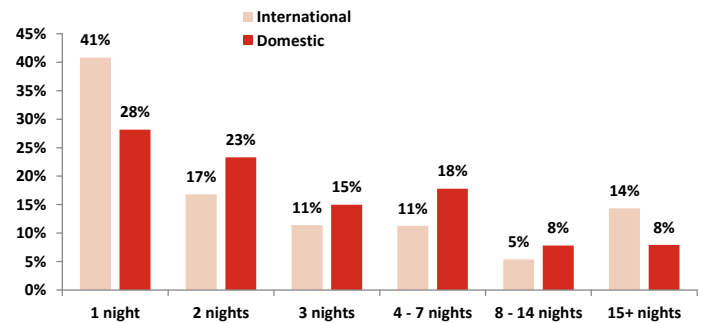


VISITOR PROFILE

Age of Visitors to Clare Valley



Length of Visit to Clare Valley



- International visitors peak in the 65+ age group at 32 per cent.
- Domestically there is a peak in the 65+ age group at 29 per cent.

- 58 per cent of International visitors prefer to stay 1 or 2 night in the Clare Valley.
- 51 per cent of Domestic visitors stay either 1 or 2 nights.

CLARE VALLEY

REGIONAL PROFILE



DOMESTIC VISITOR PROFILE

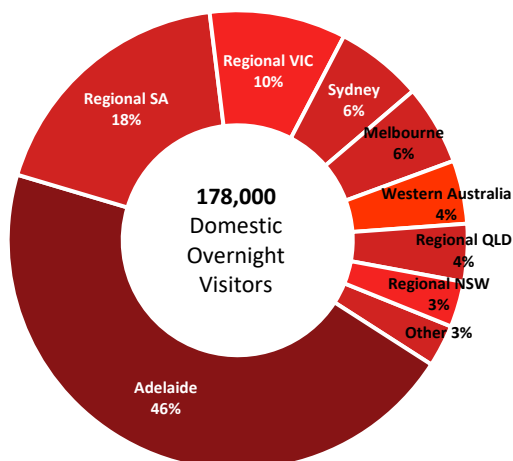
Purpose	Holiday	VFR	Other	Total
Visits	99,000	48,000	31,000	178,000
%	56%	27%	17%	100%
Nights	201,000	95,000	97,000	395,000
%	51%	24%	25%	100%
ALOS	2	2	3	2

INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	3,000	1,000	np	4,000
%	75%	25%	np	100%
Nights	20,000	19,000	np	39,000
%	51%	49%	np	100%
ALOS	7	19	np	10

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Clare Valley



Origin of International Visitors to Clare Valley



- New South Wales 9 per cent and Victoria 16 per cent are the Clare Valley's biggest Interstate Markets.
- Regional South Australia contributes 18 per cent of visitors to the Clare Valley.
- Adelaide visitors contribute 46 per cent of the visitors to the Clare Valley.
- Internationally Europeans contribute 53 per cent of the visits to the Clare Valley with the United Kingdom contributing 16 per cent.
- 20 per cent of visitors to the Clare Valley are from New Zealand.

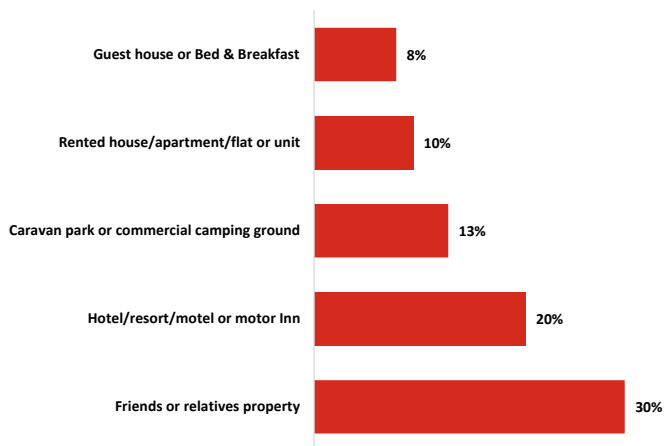
CLARE VALLEY

REGIONAL PROFILE

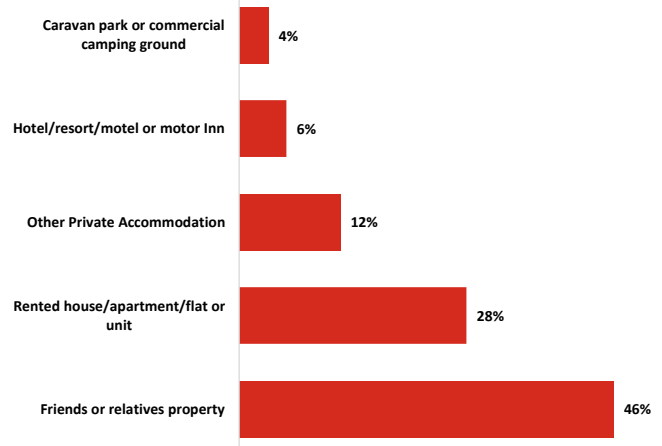


VISITOR USE OF ACCOMMODATION

Accommodation used in Clare Valley for Domestic Visitors



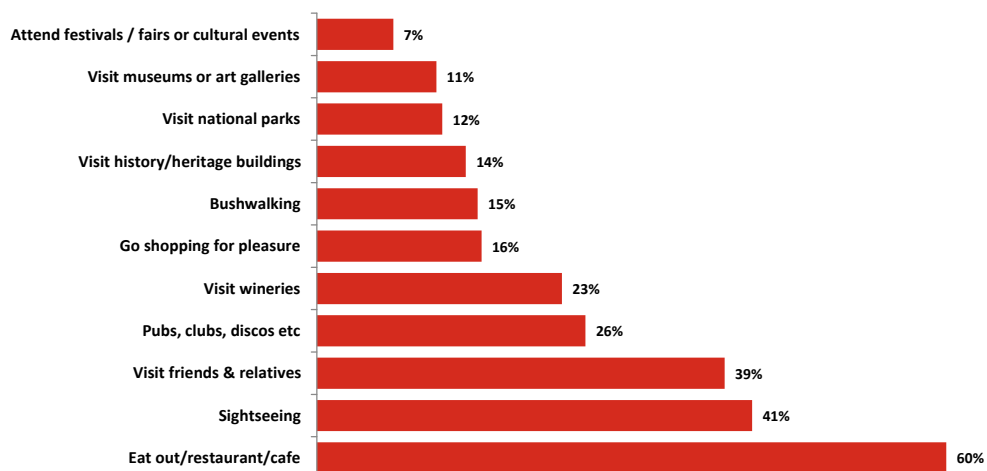
Accommodation used in Clare Valley for International Visitors



- 50 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 52 per cent of visitors staying with Friends or Relatives or in Hotels and similar accommodation.
- 28 per cent of International visitors and 10 per cent of Domestic visitors also like to stay in a Rented house, apartment or flat.
- Caravan and camping contribute 13 per cent of Domestic nights and 4 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.

CLARE VALLEY

REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2016-17, the tourism industry contributed an estimated \$63 million to the Clare Valley regional and directly employed approximately 500 people.

Employment

- 500 jobs for people employed directly by the tourism industry, 200 indirect jobs and a total employment impact of 700 people.

Tourism output

- \$56 million and \$66 million in direct and indirect tourism output, and \$122 million in total tourism output.

Gross Value Added (GVA)

- \$29 million and \$29 million in direct and indirect tourism GVA, and \$58 million in total tourism GVA.

Gross Regional Product (GRP)

- \$31 million and \$32 million in direct and indirect tourism GRP and \$63 million in total tourism GRP.

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 is 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 region.
- Develop new and commissionable nature-based, heritage and epicurean visitor experiences and additional quality accommodation will be key.

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.

Prepared by the South Australian Tourism Commission, December 2018

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 Annual Average results for the 3 years from December 2016 to December 2018.
Consumer Demand Product Testing Phase 1 - 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
Consumer Demand Product Testing Phase 1 - BDA Marketing

SKILLOGALEE, SEVENHILL, CLARE VALLEY

TOURISM CHAMPIONS CASE STUDY



ABOUT SKILLOGALEE

Bought by Diana and David Palmer in 1989, Skillogalee is a boutique family-owned and operated winery.

Today the business includes a cellar door and an award winning winery and restaurant. Skillogalee took out the Cellar Door with Best Food, Clare Valley category in Australia's Best Cellar Door Awards 2017 for the third year in a row.

The business was also recognised with a Great Wine Capitals, Best of Wine Tourism Award for 2017 (Regional Winner, Wine Tourism Restaurant).

BUSINESS GROWTH

In 1990 the Skillogalee restaurant opened, becoming the first winery/restaurant in the Clare Valley.

The accommodation offering began in 2003 with the renovation of Skillogalee House and two cottages.

The business now employs 30 staff across its restaurant/cellar door, winemaking/vineyard and accommodation operations and welcomes up to 31,200 visitors each year.

CHALLENGES

Training and retaining staff in a regional area as well as the long hours in hospitality can be a challenge.

Diana and Davis overcome these challenges by training staff on the job and ensuring Skillogalee is an attractive place to work with a Staff Social Club, generous food discounts and flexible working hours.

THE FUTURE

Skillogalee will continue to build on its strengths and keep the focus on service excellence.

Diana and David plan for their daughter to take over the running of the business so they can enjoy retirement.

COMMUNITY IMPACT

All Skillogalee employees live locally in the Clare Valley.

Skillogalee uses local Clare Valley suppliers where they can such as Mathie's Meat Shoppe which supplies all the meat for the restaurant and Pangkarra which supplies lavosh for guests staying in the accommodation.

They also buy South Australian for supplies that can't be sourced in Clare such as Coffin Bay oysters and Spencer Gulf prawns.

"The South Australian Tourism Commission have been great supporters of Skillogalee over the years. We've hosted media famils and are in the global ad campaign which not only promotes our business, but the Clare Valley as well.

Skillogalee is our little piece of paradise and I love that it gives us the opportunity to meet new people and make people happy."

Diana Palmer, co-owner, Skillogalee

SOUTH AUSTRALIAN TOURISM COMMISSION COLLABORATION

Skillogalee features in the SATC's global ad campaign which is used to promote South Australia to local, national and international audiences.

Journalists and media regularly visit Skillogalee as part of the SATC's familiarisations program.

CONTACT US
TOURISM.SA.GOV.AU



Government
of South Australia
South Australian
Tourism Commission