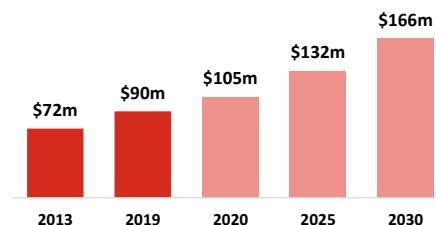




OVERVIEW

ALL DATA BASED ON THE ANNUAL AVERAGE FOR THE 3 YEARS TO THE YEAR END DECEMBER 2019 AND RELATES TO DATA PRIOR TO COVID-19 RESTRICTIONS

- Currently the Clare Valley contributes \$90 million to the December 2019 South Australian expenditure of \$8.1 billion.
- The Clare Valley has achieved 86 per cent of their 2020 target of \$99 million and 54 per cent of the 2030 target of \$166 million.



Annual Visitor Summary December 2017 - December 2019

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	125,000	57,000	182,000	4,000	186,000
%	69%	31%	98%	2%	100%
Nights	258,000	139,000	396,000	38,000	434,000
%	65%	35%	91%	9%	100%
Average Length of Stay	2	2	2	10	2
Domestic Day Trips					
Average Annual Day Trips to Clare Valley					303,000

PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	108,000	48,000	24,000	6,000	186,000
%	58%	26%	13%	3%	100%
Nights	242,000	130,000	53,000	10,000	434,000
%	56%	30%	12%	2%	100%
Average Length of Stay	2	3	2	2	2
Expenditure					
Average Annual Expenditure	\$ 58,000,000	\$ 17,000,000	\$ 9,000,000	\$ 6,000,000	\$ 90,000,000

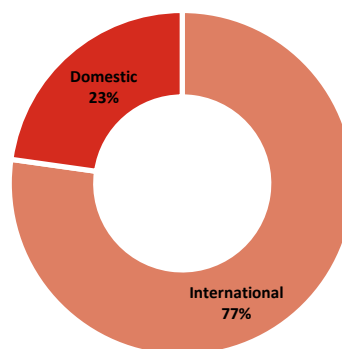
- 98 per cent of Clare Valley visitors are **Domestic** visitors and 2 per cent are **International** visitors.
- Domestically**, 69 per cent are from within the state compared to 31 per cent from Interstate.
- 84 per cent of visitors to the Clare Valley are Leisure visitors (Holiday + VFR).

ITEMS TOURISM LISTINGS

Category	Items
Accommodation	84
Food and Drink	62
Attraction	40
Event	18
Destination Information	15
Tour	7
Hire	5
General Services	3
Information Services	2
Transport	1
Grand Total	237

Note: some listings have multiple categories of accommodation

ITEMS MEDIA COVERAGE



Source: Advertising Space Rate - 2018



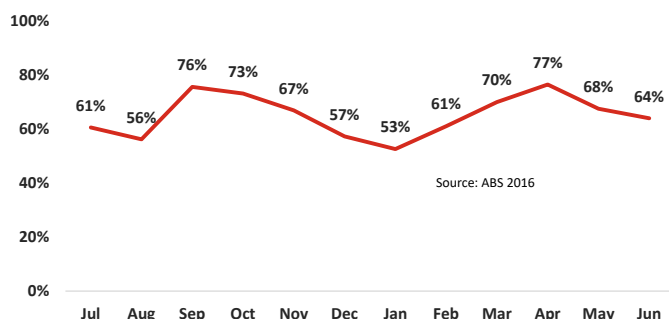
ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms

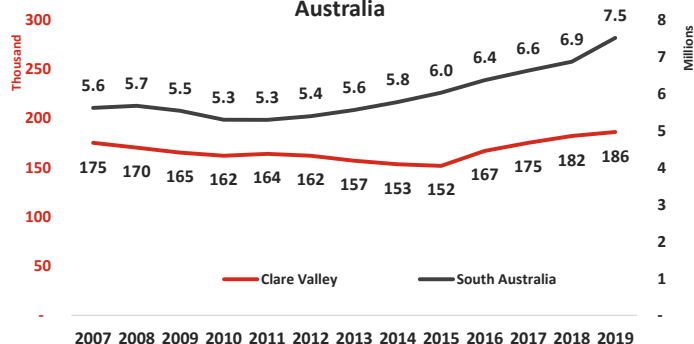
Establishments	4
Rooms	147
Occupancy	65%
Takings	\$4,500,000

- 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

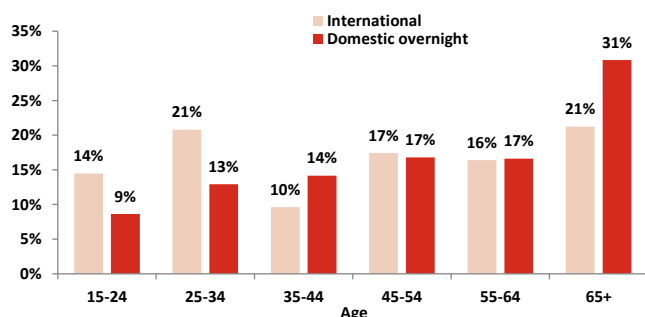


Total Overnight Visitation to Clare Valley & South Australia



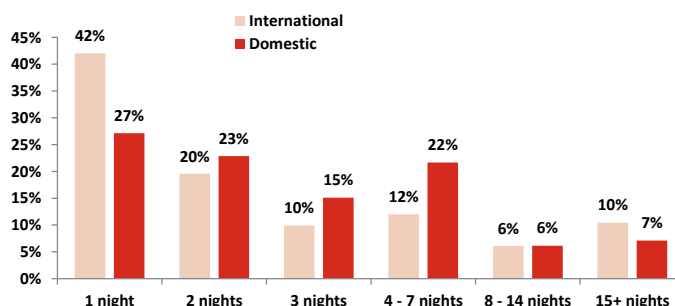
VISITOR PROFILE

Age of Visitors to Clare Valley



- **International** visitors peak in the 65+ age group at 31 per cent.
- **Domestically** there is a peak in the 25-34 and the 65+ age group at 21 per cent.

Length of Visit to Clare Valley



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



DOMESTIC VISITOR PROFILE

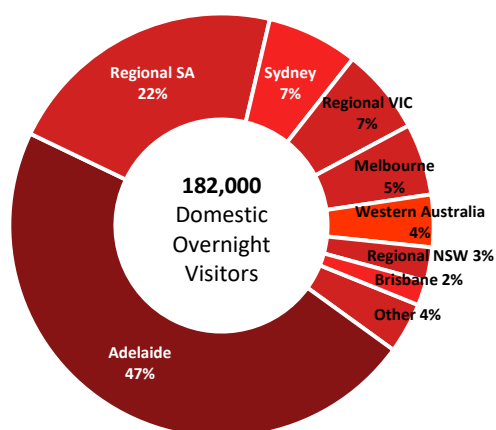
Purpose	Holiday	VFR	Other	Total
Visits	106,000	47,000	30,000	182,000
%	58%	26%	16%	100%
Nights	228,000	107,000	61,000	396,000
%	58%	27%	15%	100%
ALOS	2	2	2	2

INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	3,000	1,000	np	4,000
%	75%	25%	np	100%
Nights	14,000	23,000	np	38,000
%	37%	61%	np	100%
ALOS	5	23	np	10

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Clare Valley



Origin of International Visitors to Clare Valley



- New South Wales 10 per cent and Victoria 12 per cent are the Clare Valley's biggest Interstate Markets.
- Regional South Australia contributes 22 per cent of visitors to the Clare Valley.
- Adelaide visitors contribute 47 per cent of the visitors to the Clare Valley.
- **Internationally**, Europeans contribute 54 per cent of the visits to the Clare Valley with the United Kingdom contributing 15 per cent.
- 19 per cent of visitors to the Clare Valley are from New Zealand.

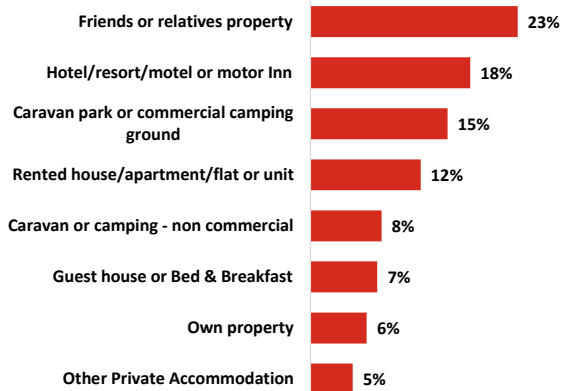
CLARE VALLEY

REGIONAL PROFILE

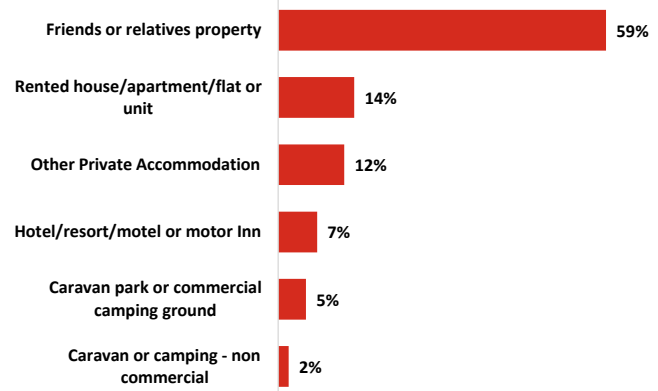


VISITOR USE OF ACCOMMODATION

Accommodation used in Clare Valley for Domestic Visitors



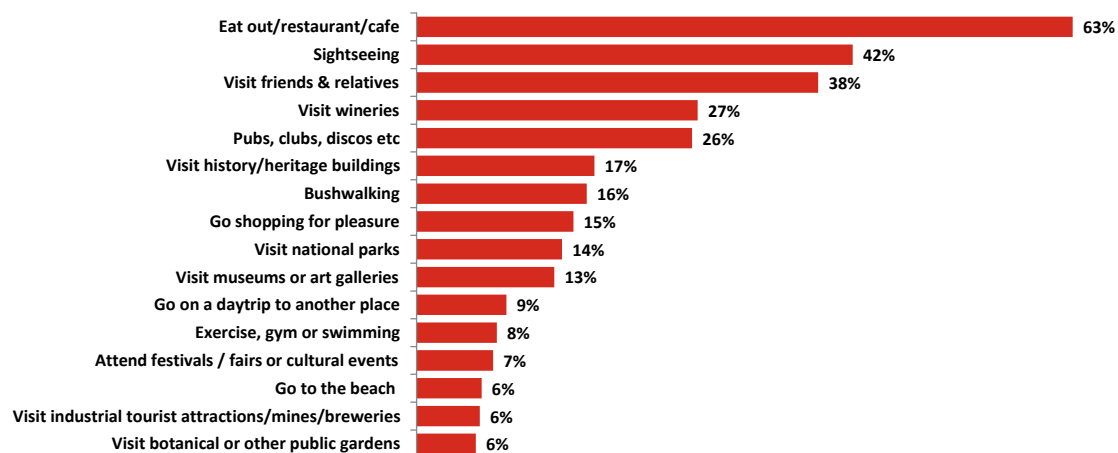
Accommodation used in Clare Valley for International Visitors



- 41 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 66 per cent of visitors staying with Friends or Relatives or in Hotels and similar accommodation.
- 14 per cent of **International** visitors and 12 per cent of **Domestic** visitors also like to stay in a Rented house, apartment or flat.
- Caravan and camping contribute 8 per cent of **Domestic** nights and 5 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.



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2017-18, the tourism industry contributed an estimated \$116 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

- \$53 million and \$63 million in direct and indirect tourism output, and \$116 million in total tourism output.

Gross Value Added (GVA)

- \$27 million and \$28 million in direct and indirect tourism GVA, and \$55 million in total tourism GVA.

Gross Regional Product (GRP)

- \$29 million and \$32 million in direct and indirect tourism GRP and \$61 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.

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 2019

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 2017 to December 2019.
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



BUNGAREE STATION

BUNGAREE, CLARE VALLEY

ABOUT BUNGAREE STATION

- Established in 1841 by George Hawker as a sheep station, the property diversified to include tourism in 1985.
- Bungaree Station offers self-contained accommodation, tours and unique function venues alongside the working farm. It celebrated its 175th anniversary in 2017.
- Vicky Stewart (George Hawker's Great, Great Granddaughter) and her husband Mark run the accommodation and tourism side of the business.

BUSINESS GROWTH

- Over 32 years, the tourism offering has evolved and now includes self-contained accommodation, camping facilities, guided and self-guided tours and function facilities.
- Around 6,000 visitors come to Bungaree Station each year including day visitors, international guests, families, couples, conference delegates and wedding guests.
- Employs five full-time staff and additional casuals/contractors to meet demands during peak times.
- Has won national and state tourism awards and was recognised in 2014 with a UNESCO Achievement Award for culture and heritage.

CHALLENGES

- Lack of fast, reliable internet for the business and guests. To overcome this, Bungaree Station is investing in infrastructure to meet customer expectations.
- Increasing visitation to the Clare Valley. Bungaree Station proactively promotes the region at trade shows while Mark played a key role on various tourism boards to establish the Clare Valley Wine, Food and Tourism Centre.
- Training and retaining staff in a regional area. Bungaree Station

implemented an induction program and provides staff with targeted training to equip them for success.

THE FUTURE

- Bungaree Station is repurposing its old station store into a farm shop to showcase produce from the property and the region, due for completion during 2017-18.
- Conversion of additional heritage buildings to increase accommodation capacity from 35 to 60 guests.

COMMUNITY IMPACT

- Spends around \$200,000 each year in the region, buying supplies such as food and wine for catering, equipment and hardware and also uses local trades and services.
- Promotes local wineries, restaurants, businesses and places of interest to guests and function coordinators.
- Bungaree Station is the oldest business in the Clare Valley. Has worked hard to preserve the heritage of the property for future generations to enjoy.

SOUTH AUSTRALIAN TOURISM COMMISSION COLLABORATION

- Received advice and support from the SATC for funding applications for accommodation upgrades and self-guided tour infrastructure.
- Has been featured in the SATC's global ad campaign which is promoted to local, domestic and international audiences.
- Learnings from SATC workshops, along with participation in trade shows and global marketing forums have helped Bungaree Station grow its international bookings from 5 per cent to 15 per cent.

WWW.BUNGAREESTATION.COM.AU

"My advice to anyone entering the tourism industry: it's not a 9 to 5 business. You need to be enthusiastic, customer orientated, and flexible so you can ensure your customer has the best experience."

"I love living in the Clare Valley; it's an amazing region with a great range of wineries, food producers, good climate, beautiful landscapes and a rich history. It's a privilege to share all of these things with our visitors."

Vicky Stewart, Manager, Bungaree Station



WWW.TOURISM.SA.GOV.AU