

CLARE VALLEY

REGIONAL PROFILE

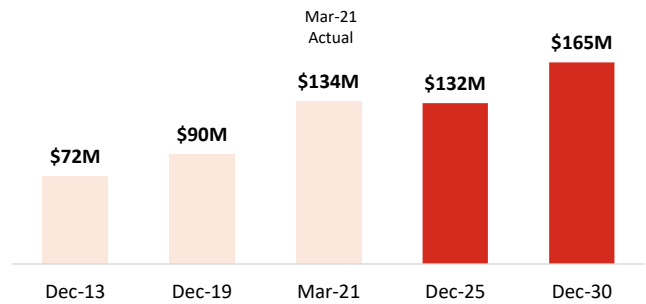


OVERVIEW

ALL DATA BASED ON THE YEAR END MARCH 2021 - FULL YEARS WORTH OF COVID AFFECTED DATA

CLARE VALLEY

- Currently the Clare Valley contributes \$134 million to the year end March 2021 South Australian expenditure of \$4.4 billion.
- The Clare Valley has achieved their 2025 target of \$132 million and 81 per cent of their 2030 target of \$165 million.



ANNUAL VISITOR SUMMARY YEAR END MARCH 2021

ORIGIN						
	Intrastate	Interstate	Total Domestic	International	Total	
Overnight Visits	166,000	44,000	210,000	-	210,000	
%	79%	21%	100%	0%	100%	
% Across all regions	90%	10%	100%	0%	100%	
Share of Regional SA	4%	10%	5%	0%	5%	
Nights	470,000	170,000	640,000	0%	640,000	
%	73%	27%	100%	0%	100%	
% Across all regions	82%	18%	100%	0%	100%	
Share of Regional SA	4%	7%	4%	0%	4%	
ALOS	2.8	3.9	3.0	-	3.0	
ALOS Regional SA	3.2	6.0	3.5	-	3.5	
Total Expenditure					\$134,000,000	
Overnight Expenditure	\$76,000,000	\$37,000,000	\$113,000,000	\$0	\$113,000,000	
Day Trip Expenditure					\$21,000,000	
Domestic Day Trips					171,000	

- The Clare Valley saw 210,000 domestic overnight visitors for the year end March 2021.
- 79 per cent of overnight visitors were from intrastate and 21 per cent from interstate.
- The 166,000 intrastate overnight visitors stayed 470,000 nights with an average length of stay of 2.8 nights.
- There were 44,000 interstate overnight visitors who stayed 170,000 nights with an average length of stay of 3.9 nights
- There have been no international arrivals with borders closed.
- 171,000 day trips were taken to the Clare Valley for the year with spend of \$21 million.

ALOS = Average Length of Stay

CLARE VALLEY

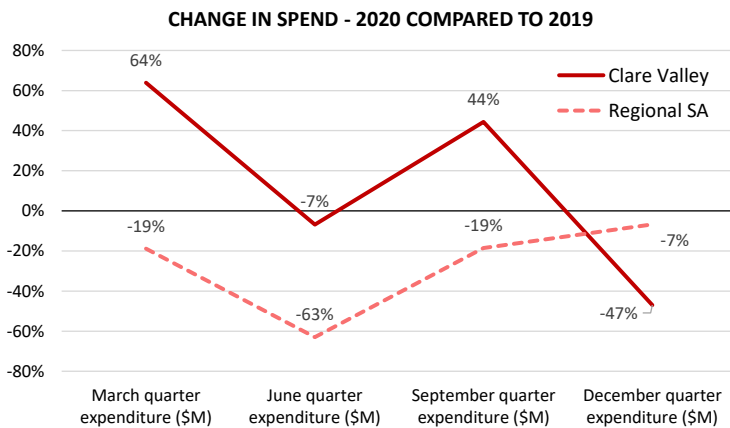
REGIONAL PROFILE



PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	115,000	40,000	35,000	20,000	210,000
%	55%	19%	17%	10%	100%
% Across all regions	56%	22%	18%	5%	100%
Share of Regional SA	4%	10%	5%	0%	5%
Nights	259,000	119,000	228,000	35,000	640,000
%	40%	19%	36%	5%	100%
% Across all regions	58%	18%	20%	3%	100%
Share of Regional SA	3%	4%	8%	7%	4%
Average Length of Stay	2.3	3.0	6.5	1.8	3.0
Expenditure					
Annual Expenditure	\$74,000,000	\$11,000,000	\$22,000,000	\$6,000,000	\$113,000,000
Av spend per night	\$286	\$92	\$96	\$171	\$177
Av spend per night Regional SA	\$213	\$126	\$132	\$511	\$191
Share of Regional SA	5%	4%	7%	2%	5%

- 74 per cent of overnight visitors to the Clare Valley are leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$286 per night compared to VFR visitors who spend \$92 per night.
- Leisure overnight visitors spent \$85 million for the year, making up 75 per cent of all overnight expenditure.

SPEND 2020 VERSUS 2019



- March quarter 2020 prior to COVID-19 was up 64 per cent on the March quarter in 2019.
- The Clare Valley saw expenditure fall 7 per cent for the June quarter in 2020 compared to June quarter in 2019.
- The September quarter saw excellent recovery, up 44 per cent on 2019.
- The December 2020 quarter was down 47 per cent compared to the December quarter in 2019.

CLARE VALLEY

REGIONAL PROFILE



CLARE VALLEY TOURISM LISTINGS

CATEGORY	# Listings
ACCOMMODATION	102
RESTAURANT	77
ATTRACTION	64
EVENT	59
DESTINATION INFORMATION	21
TOUR	13
HIRE	4
INFORMATION	2
GENERAL SERVICE	2
TRANSPORT	2
Grand Total	346

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)

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

CLARE VALLEY AUSTRALIAN TOURISM DATA WAREHOUSE LEADS

108,000

YEAR END MARCH 2021

ACCOMMODATION LEADS

76,000
70%

FOOD & DRINK LEADS

11,000
11%

TOUR LEADS

1,200
1%

*OTHER LEADS

19,000
18%

TOP 5

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

TOP 5

- SKILLOGALEE WINERY RESTAURANT
- MR MICK CELLAR DOOR AND KITCHEN
- PIKES WINES
- SEVENHILL CELLARS
- UMBRIA RUSTIC ITALIAN

TOP 5

- CLARE VALLEY TOURS
- CLARE VALLEY EXPERIENCES
- CLARE VALLEY WINE TOURS
- WATERVALE HOTEL ETHICAL EPICUREAN EXPERIENCES
- KILIKANOON WINES

* Other refers to leads for events, destination information, attractions, general services, hire and transport

CLARE VALLEY

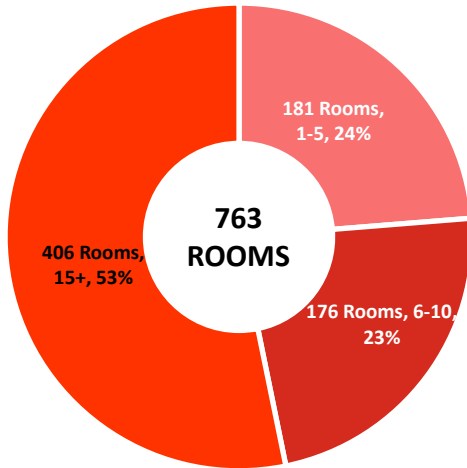
REGIONAL PROFILE



ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS IN THE CLARE VALLEY

SOURCE ATDW



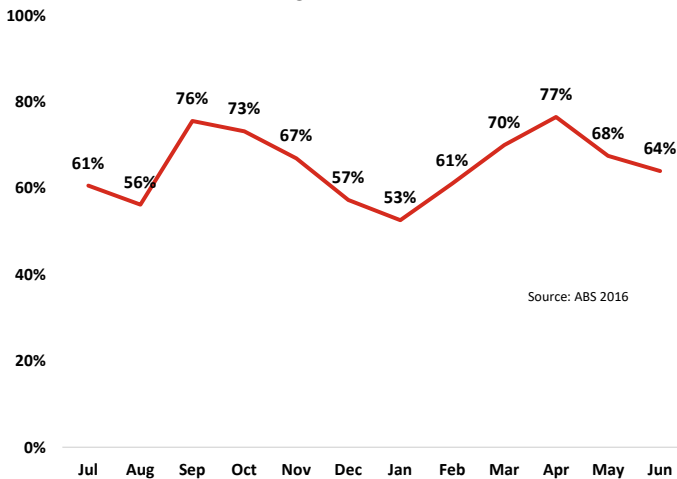
- Currently there are 102 establishments in the Clare Valley that accommodate guests.
- These 102 establishments account for 763 rooms ranging from 1 room to over 50.
- 53 per cent of rooms fall into establishment with 15 or more rooms.
- 24 per cent of rooms fall into the 1-5 room establishments.

ACCOMMODATION SUPPLY

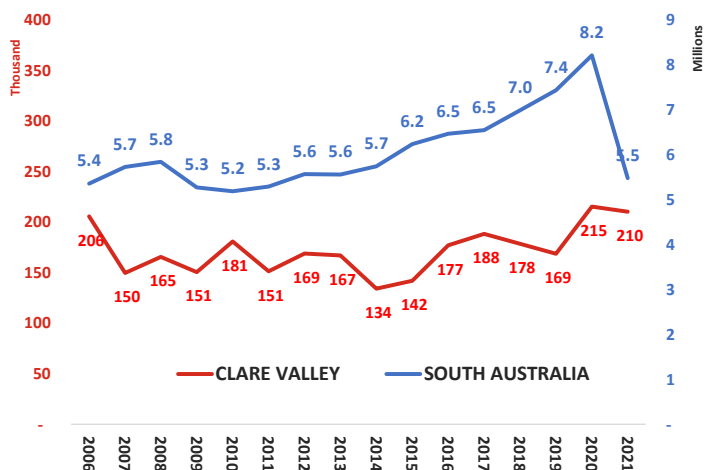
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	4
Rooms	147
Occupancy	65%
Takings	\$4,500,000

- 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



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.

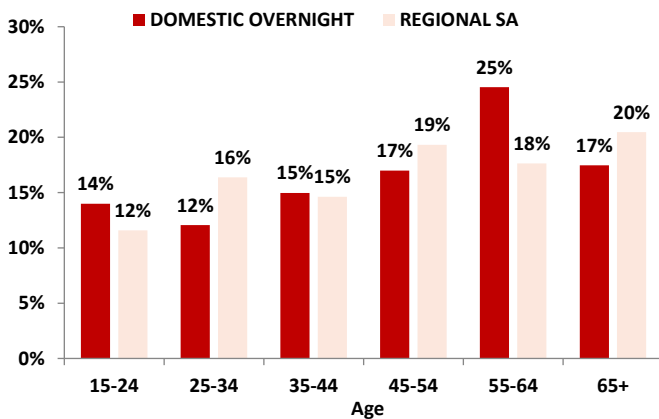
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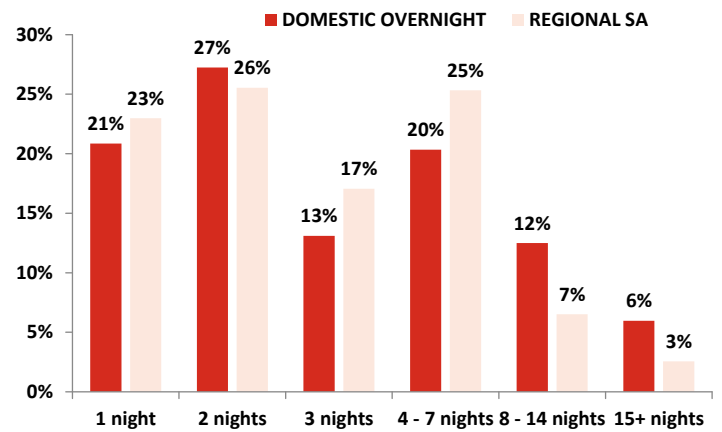
VISITOR PROFILE

AGE OF VISITORS TO CLARE VALLEY



- Domestically there is a peak in 55-64 age group at 25 per cent.
- This is well above the average of 18 per cent for the 65+ age group for regional SA.
- 55+ age groups account for 42 per cent of all visitors.

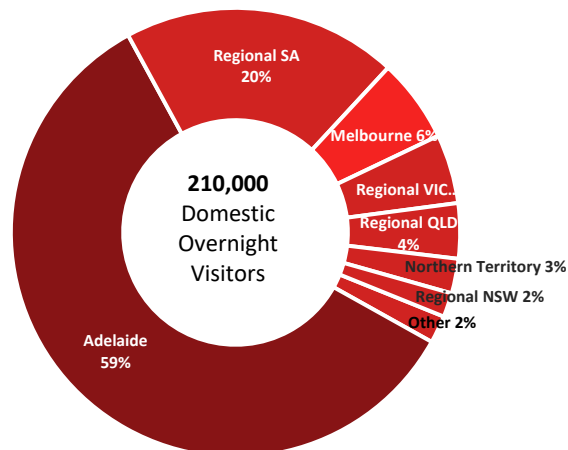
LENGTH OF VISIT TO CLARE VALLEY



- 48 per cent of Domestic visitors like to stay 1 to 2 nights.
- 8+ night stays also popular in the region, both above the regional SA average.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO CLARE VALLEY



- Victoria and Regional Queensland each accounted for 11 per cent and 4 per cent of visitors to the Clare Valley. Pre COVID New South Wales contributed 10 per cent of visitors to the Clare Valley.
- Regional South Australia contributes 20 per cent of visitors to the Clare Valley.
- 59 per cent of visitors come from Adelaide, however prior to COVID this was 47 per cent.

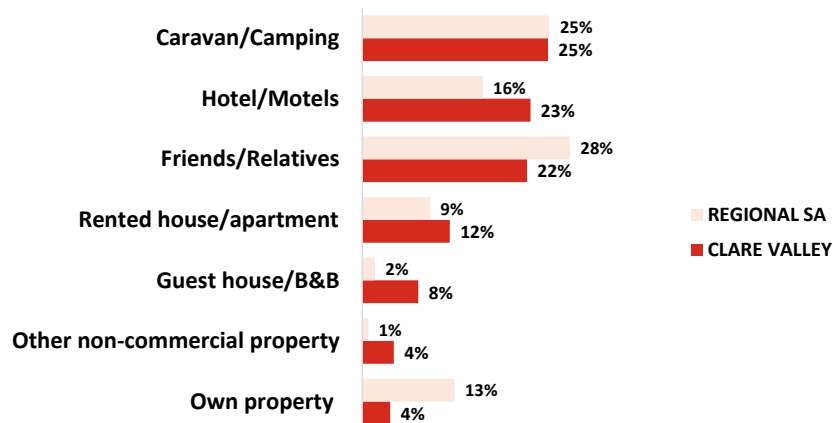
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VISITOR USE OF ACCOMMODATION

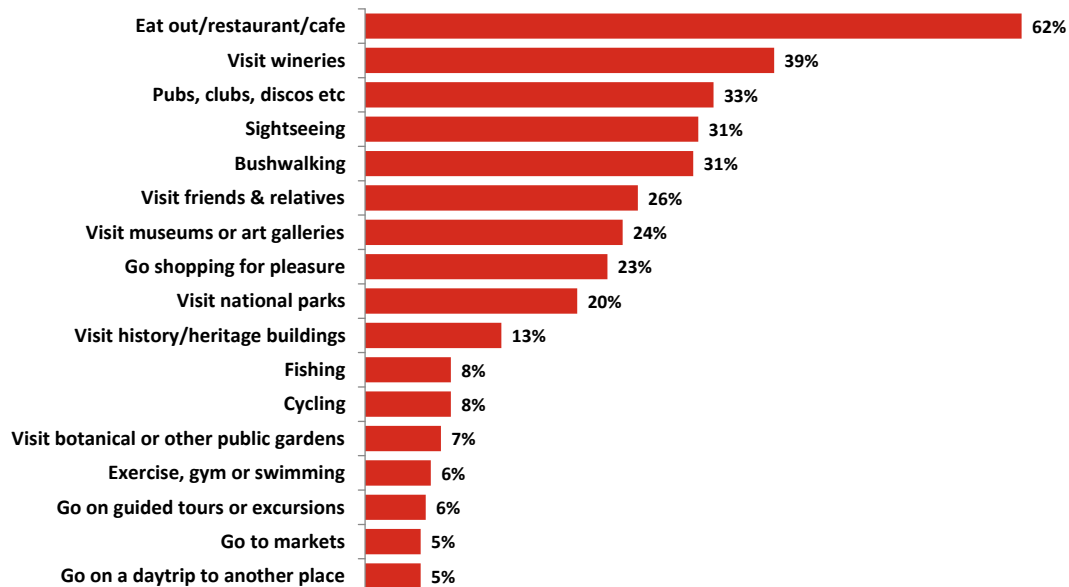
ACCOMMODATION USED IN CLARE VALLEY FOR DOMESTIC VISITORS



- 45 per cent of domestic visitor nights in the Clare Valley are spent either with Friends or Relatives or in Hotels and similar accommodation.
- The Clare Valley over indexes for Guest house, B&B's and rented houses when compared to regional South Australia.

VISITOR ACTIVITIES

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN CLARE VALLEY



- The most popular activity when coming to the Clare Valley is eating out at a restaurant or cafe.
- Other popular activities include visiting wineries, sight seeing, bush walking, visiting friends and relatives and visiting museums and art galleries.

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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

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

Prepared by the South Australian Tourism Commission, March 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 March 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. 865455001
Consumer Demand Product Testing Phase 1 - BDA Marketing