Clare Valley Tourism Region

Destination Situation Analysis

As at July 2019

This Plan has been prepared by Tourism eSchool between March – July 2019

Tourism eSchool

Paige Rowett + Rebecca White

55 Light River Road, Marrabel, SA 5413

+61 408 085262

tourismeschool.com

© Copyright, Tourism eSchool, 2019

This work is copyright. Apart from any uses permitted under Copyright Act 1963, no part may be reproduced without written permission of Tourism eSchool

Disclaimer

The information contained in this report is intended only to inform and it is expected that all recommendations should be analysed, and appropriate due diligence undertaken prior to making any investment decisions.

In the course of our preparation of the document, recommendations have been made on the basis of assumptions, methodology and information provided by many sources through the consultation process (See Acknowledgements). Whilst every effort was made to report on the most accurate data and information available, Tourism eSchool accept no responsibility or liability for any changes in operation/regional circumstance, errors, omissions, or resultant consequences including any loss or damage arising from reliance on the information contained in this report.

Contents

Index of Figures

Index of Tables

Glossary

ABS – Australian Bureau of Statistics

APC – Adelaide Plains Councils

ATDW – Australian Tourism Data Warehouse

CGVC - Clare and Gilbert Valley Council

CVA - Clare Valley Alliance

CVBTA - Clare Valley Business + Tourism Association

CVWFTC - Clare Valley Wine, Food and Tourism Centre

CVWGA - Clare Valley Wine and Grape Growers Association

CVWR - Clare Valley Wine Region

DPTEI – Department of Planning, Transport and Infrastructure

RCG - Regional Council of Goyder

LGA – Local Government Association

NHTSAB – National History Trust of SA Burra Branch

RDAYMN – Regional Development Australia Yorke and Mid North

RT – Riesling Trail

RTO – Regional Tourism Organisation

SATC – South Australian Tourism Commission

TA – Tourism Australia

TDU – Tour Down Under

The Region – Clare Valley Tourism Region

TiCSA – Tourism Industry Councils SAC

TRA – Tourism Research Australia

VAPAA – Mid North Visual and Performing Arts Association

VFR – Visiting Friends and Relatives

VIC – Visitor Information Centre (accredited)

WRC - Wakefield Regional Council

About this Document

The Clare Valley Tourism Region (The Region) has a vision to be recognised as:

> ***"An authentic and quintessential Australian destination renowned for its rich and immersive wine and food, heritage, cultural and outback experiences."***

To achieve this vision, the Region uncovered the potential for the visitor economy through a thorough consultation with all industry stakeholders to develop a comprehensive **Destination Situation Analysis, July 2019**. From this Analysis, a **Destination Marketing + Management Plan 2019-2024** has been developed which outlines the strategic direction and actions to implement to achieve the vision.

Where to start…

Destination Situation Analysis, July 2019 – YOU ARE HERE!

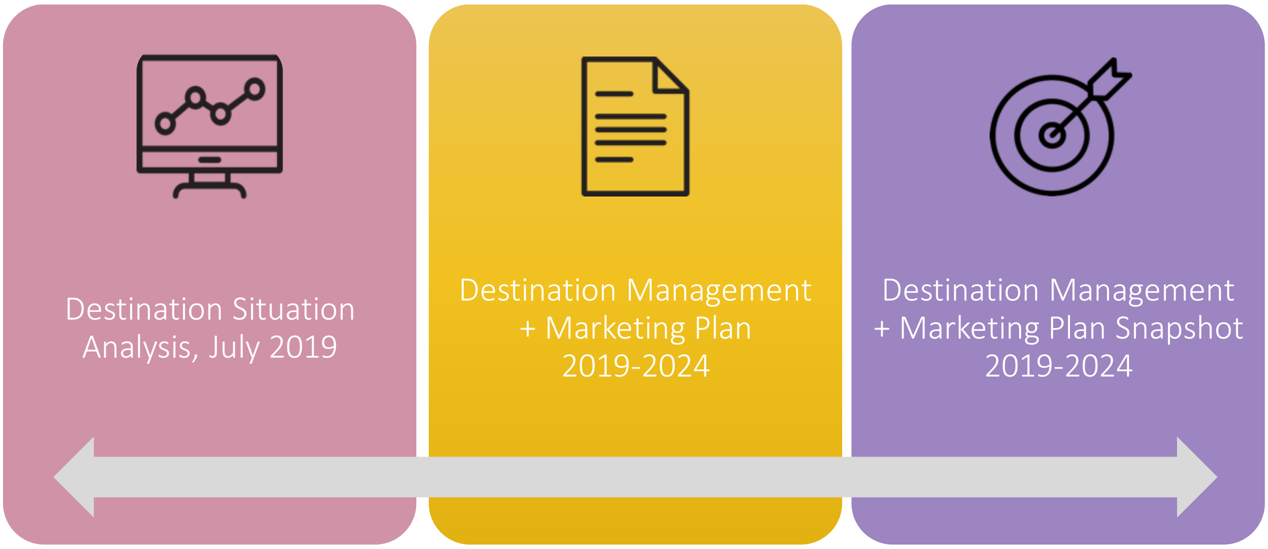
This document offers an in-depth analysis of the Visitor Economy for the Region as at July 2019. This is a must-read for those who are interested in gaining a deep understanding of the state of play for the tourism sector for the Region.

Destination Management + Marketing Plan 2019-2024

This document sets the priorities to boost the visitor economy in the Region over the next 5 years. It includes the Actions to be implemented and KPIs to be measured to achieve the opportunities that were identified in the *Destination Situation Analysis, July 2019.*

Destination Management + Marketing Plan Snapshot 2019-2024

This document offers a bird's eye view of the Destination Management + Marketing Plan 2019-2024



Introduction

As nation-wide environmental, economic and social trends continue to impact on regional Australia, a sustainable visitor economy will continue to be an important economic and social driver for communities and businesses across the Clare Valley Tourism Region (the Region).

The Region, which encapsulates the Clare Valley Wine Region, Burra and the agricultural districts surrounding those key centres, boasts some of Australia's most coveted wine brands, cellar doors, regional dining experiences, events, and food producers, making it an exciting melting pot of epicurean delights.

In addition to the gastronomic experiences are some of South Australia's most prominent copper mining and agricultural heritage assets including the historical Burra Mine Site and Passport Heritage Trail, Bungaree Station, and Mintaro State Heritage Centre which are complemented by historical walking trails, drives, museums, churches and cemeteries dotted across the Region.

The Region is also home to an eclectic range of artisans and creatives, which has seen the organic growth of a diverse range of art and cultural experiences for locals and visitors to enjoy, including art galleries, trails, public art, expressive art and increasing indigenous cultural experiences.

All of these assets are perfectly nestled in a quintessentially Australian landscape, with rolling vineyards surrounding by majestic gum trees, broad acre cropping, and dramatic bare-rolling hills, all within a stones-throw from South Australia's outback. This natural setting is the perfect backdrop for outdoor and soft adventure experiences, including cycling, walking and touring for all ages.

With such a diverse and exciting range of tourism experiences, the visitor economy is increasingly becoming one of the Region's economic beacons, contributing $89million at the December 2018 quarter. Forecast data also indicates positive growth for the sector with potential to reach $166million by September 2030.

Overnight visitation to the Region is also steadily growing (from 160,000 in FY2010 to 182,000 FY2018), and currently attracts an average of 4% share of total overnight visitation to South Australian regions, which is fair considering it's a relatively small tourism region with two central tourism hubs (in Clare and Burra) in comparison to other tourism regions in the State.

Forecast data available from Tourism Research Australia have highlighted steady growth for overnight visitation to Regions, which coupled with a great number of opportunities identified in the Situation Analysis to drive demand through strategic marketing and experience development, suggest there is certainly potential to grow visitor yield, numbers and length of stay for the Region.

To capitalise on the great potential of the Region, Regional Development Australia Yorke and Mid North (RDAYMN) engaged Tourism eSchool, a tourism consultancy based within the Region, to work with key stakeholders to collaboratively develop a Destination Management and Marketing Plan (The Plan) for the Region.

The first step in this process was to develop this 'Destination Situation Analysis', which involved consultation with all levels of industry, to ensure all available information was considered to draw realistic conclusions. Consultation included one on one meetings with various stakeholders (all levels of industry and government), community workshops, and an online survey with industry (see Section Acknowledgements).

Through this consultation, Tourism eSchool identified all the key internal and external stakeholders' roles and responsibilities, analysed the current visitor data insights, tourism market segments, product, access, infrastructure, marketing, branding, resourcing and visitor servicing within the Region, and from this, have formulated the Region's strengths, weaknesses, threats as it relates to growing the visitor economy.

From this analysis, major opportunities have been identified for effective and sustainable visitor economy growth which were considered in the development of the Destination Management + Marketing Plan 2019-2024 (separate document).

1. Setting the Scene

1.1 What is the Visitor Economy?

The concept of the visitor economy is increasingly being adopted by the global tourism industry. The visitor economy is broader than the traditional view of the 'tourism sector', which focuses on the leisure market of visitors that travel for a variety of reasons. The visitor economy includes all visitors that travel outside their usual home to take part in activities including leisure, business, events, employment, education or to visit friends and relatives.

These visitors, which include international, interstate, intrastate and day trip visitors, provide benefits to the economy through the direct contributions of their tourism activities, as well as the indirect contributions via the value chain, such as the impacts of capital investment and Government expenditure. The visitor economy encompasses the contribution tourism makes to employment, investment, infrastructure development, exports, provision of temporary labour and social vibrancy.

When it comes to calculating the return on marketing investment of investment in the Visitor Economy, it can be challenging to calculate a direct return on investment as there are often multiple stakeholders investing in projects and often results that are difficult to quantify.

However, as a guide for organisations investing in a Visitor Economy, the 2015 Productivity Commission Report[1] found that for every $1 invested in a Visitor Economy, the return on investment was $15, while Tourism Accommodation Australia[2] found the return as high as $22 for every $1 invested.

1.2 Global Tourism Trends

There are several key global tourism trends that destinations need to address to grow a sustainable visitor economy. These trends should be used as a lens to help prioritise resourcing of investment in Tourism.

The following trends are covered in detail in Trekk Soft's "Travel Trends Report 2019"[3], Trekk Soft's "9 Travel Trends to Drive Tourism in 2018"[4] and the World Travel and Tourism Council's "Travel and Tourism: Global Economic Impact and Issues 2017"[5].

---

[1] https://www.pc.gov.au/research/completed/international-tourism
[2] https://www.tourismaccommodation.com.au/wp-content/uploads/2012/08/RETURN-ON-MARKETING-INVESTMENT-FOR-AUSTRALIAN-TOURISM-vrp2-16_7_14.pdf
[3] Travel Trends Report 2019 > https://www.trekksoft.com/en/academy/ebooks/travel-trends-report-2019
[4] 9 Travel Trends to Drive Tourism in 2018 > https://www.trekksoft.com/en/blog/9-travel-trends-that-will-drive-the-tourism-industry-in-2018
[5] Travel + Tourism: Global Economic Impact + Issues 2017 > https://www.wttc.org/-/media/files/reports/economic-impact-research/2017-documents/global-economic-impact-and-issues-2017.pdf

1.2.1 Experiences are at the heart of why people travel

Visitor travel for authentic experiences and when they have a positive experience, there is a high chance they will spread the word and advocate for a tourism product or region who delivers on their promise both on and offline. Therefore, maintaining a high level of visitor experience in a destination (across both local government and private tourism experiences) is a key consideration when looking to grow their visitor economy.

Some of the top experiences for 2019 will be:

- *A request for unique experiences* - Tour operators are now receiving requests for unique experiences from travellers who want to do something that is a once-in-a-lifetime. This is becoming more common amongst Millennials who want to explore the world and share their stories with others.
- *Ecological tours are in demand* - Ecological tours are the most popular tours offered by many tour & activity operators who responded to 2018 TrekkSoft Tourism Survey. These are usually rare experiences that educate and share inside information on the area, and how to protect it for the future. Tours that use proceeds to fund ecological projects such as forest or animal habitat restoration are chosen above alternatives without a cause.
- *More Adventure* - Adrenaline pumping activities continue to grow with two new generations who are keen to push their limits. Adventure destinations such as Area 47 in Austria, Queenstown New Zealand, and Interlaken Switzerland are booked for the variety of action-packed activities on offer.
- *Multi-day Tours and Activities* - There is a shift with multi-day tours and activities being booked further in advance and being a preferred option for travellers. Convenience is a key selling point as travellers no longer need to spend time planning various activities.
- *Local Experiences* - Travellers are choosing to become more immersed in the local culture when visiting a destination. They want to do what the locals do and eat where locals eat. Airbnb Experiences are offering a solution where travellers can book a local experience with destination experts.
- *History + Culture* - Walking tours are still one of the leading experiences for anyone visiting a new location. They are a great opportunity to find your bearing, meet other travellers and have all their questions answered by a destination expert.

1.2.2 Mobile bookings will be the new default

The majority of travellers have smartphones (there is a 102% mobile penetration rate in the Asia Pacific Region[6]), and consumers are increasingly comfortable planning and booking experiences via their mobile devices. Therefore, any marketing and visitor servicing undertake by destinations must have a strong focus on mobile and in particular mobile responsive websites.

1.2.3 Invest in new Technologies with care

While new technologies, such as augmented and virtual reality and connected digital devices, become mainstream, and can offer exciting new ways to engage visitors, tourism brands need to ensure they invest in them with care. They first need to be clear on the type of visitor experience they want to deliver, before then exploring the best type of technology to support that experience. They should not just invest in the technology because is cool and new.

---

[6] Hootsuite Digital in 2018, Essential Insights into Internet, Social Media, Mobile and eCommerce use around the world. > https://hootsuite.com/pages/digital-in-2018

1.2.4 Online reviews are the most trusted form of advertising for a destination

What visitors say about a tourism experience to their family and friends via online reviews or via word of mouth are the #1 and #2 most trusted forms of advertising[7]. Therefore, any destination marketing needs to focus on ensuring their region's visitor experience is high, which will then encourage positive advocacy of their destination by visitors and locals. All other investments in marketing should also be considered in this context, with a reduction in investment in less trusted advertising, and increase in investment in experience development and capacity building with individuals to deliver the on-ground visitor experience in a region and exceed expectations.

1.2.5 Gen Xers are important travellers

While not the biggest consumer group compared to Baby Boomers or Millennials, they often spend the most money on travel. They are often working full time and spend the most on travel compared to younger and older counterparts. They often have kids, and therefore travel during school holidays. Travelling with the extended family is also increasingly common. Therefore, they are key visitor segment destinations should look to grow[8].

1.2.6 Chinese travellers mature

As Chinese outbound visitors continue to grow globally, destinations will see more repeat visitors and growth in independent travellers who explore a country more widely from the traditional gateway destinations in their countries. Tourism brands who want to grow their Chinese visitor numbers need to ensure they are delivery unique and authentic experiences, that provide these visitors with a unique story to tell about their travels and meet specific cultural needs of these travellers. Work also needs to be done to ensure businesses in regions understand and leverage the mobile payment options preferred by Chinese guests to better capture their expenditure during their visits.

1.2.7 Sustainability is about more than protecting the environment; it's about the local communities.

As people become more aware of issues of over-tourism in locations around the world (such as New Zealand, Venice, Iceland and Barcelona), they will look to travel to more out of the way tourism destinations that satisfy their travel aspirations. Tourism destinations need to ensure they focus on ensuring the sustainability of their local communities and landscapes (which is the reason people travel in the first place), and focus attracting more of the right visitors. Not profitless volume visitors, but those who stay the longest, spend the most and advocate for what the Region offers.

---

[7] 2015 Nielsons Trust in Advertising Report – Australia > http://www.nielsen.com/au/en/insights/news/2015/its-a-trust-thing.html
[8] 9 Travel Trends to Drive Tourism in 2018 > https://www.trekksoft.com/en/blog/9-travel-trends-that-will-drive-the-tourism-industry-in-2018

1.3 National Tourism Priorities

The visitor economy is now recognised at all levels of government in Australia as an intrinsic, sustainable and driving part of economic development. It creates long term improvements in the liveability of cities, towns and rural life and significantly improves the prosperity of Australian communities.

Tourism has been identified in Australia's 'next wave of prosperity' as one of the top five sectors of economic growth and has the potential to become Australia's fastest growing industry.[9]

Tourism Australia (TA) is committed to an ambitious 2020 target of increasing the value of the visitor economy to the nation from $70billion to $115-140billion, driven by growth in inbound travel (particularly from Asia) and supported by continued growth in the domestic market.[10]

TA are on track to achieve their goal of more than A$115 billion in overnight spend by 2020. At 30 March 2018, overnight visitor expenditure reached $107.4 billion, up 6 per cent on the previous year. Recent forecasts indicate that overnight visitor spend will reach $131 billion by 2020.[11]

According to Tourism Research Australia, the Australian tourism industry is forecast to grow to $151 billion in overnight spend and 15 million international visitors by 2026-27.[12]

1.4 State Tourism Priorities

In South Australia, tourism continues as a key driver of the state's economy. The South Australian Tourism Commission (SATC) is currently working toward their 2020 strategy, which is focussed on achieving the South Australian tourism industry's full potential of $8.0b of visitor expenditure and an additional 10,000 jobs by 2020[13].

As at the year ending December 2018[14] the state has seen a rise in expenditure of 3% to a record $6.8 billion. In 2016/2017, the Tourism industry has supported 36,000 jobs directly, which has increased by 15% since the targets were set in 2012/13, and continues toward the progress of the goal towards an additional 10,000 jobs by 2020[15]

With regard to visitation, the state has experienced the following growth (December 2018 quarter)[16]:

- Visits to South Australia grew 4% to a record high $7.1million
- Nights in South Australia reached 34 million, flat for the year
- International expenditure has risen 4% to $1.15billion
- Interstate expenditure rose 12% to a record high $2.2billion
- Intrastate expenditure in South Australia also rose, up 2% to a record high $1.9billion
- Interstate visitation grew strongly, up 11% reaching a record high of 2.6 million; and

---

[9] Deloittes, Positioning for Prosperity? Catching the next wave. Building the Lucky Country #3, 2014, p3
[10] Tourism 2020 Overview > http://www.tourism.australia.com/documents/Tourism_2020_overview.pdf
[11] Tourism Australia – 2020 Performance Update > http://www.tourism.australia.com/en/about/our-organisation/our-performance-and-reporting/tourism-2020.html
[12] Tourism Research Australia, Tourism Forecasts 2017, p1
[13] South Australian Tourism Commission 2020 Strategy >https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={F839DCB0-ACEC-43D6-A16F-E0A0EA409A08}&B=False
[14] SATC 2020 Progress Report > https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={50E81AE7-F9B1-4C26-AC29-64799BCB6F06}&B=False
[15] State Tourism Satellite Account 2016-2017 > https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={BEAF1F20-C78C-4262-9D1C-438A084656AF}&B=False
[16] SATC 2020 Progress Report - https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={50E81AE7-F9B1-4C26-AC29-64799BCB6F06}&B=False

- Domestic expenditure growth of 4% was driven by expenditure in regional South Australia, up 6% to 2.7billion.

Regional tourism plays a key role in the South Australian visitor economy, with 40% of the State’s total visitor expenditure being spent in the 11 tourism regions. In May 2018, the South Australian Regional Visitor Strategy was launched highlighting key strengths, future potential priority areas for each of the State’s tourism regions, which are all focused on achieving the state’s 2020 target.[17] The implementation will be led by the Regional Visitor Strategy Steering Committee and has the potential to grow the state’s regional visitor expenditure from $2.6 billion to $3.55 billion by 2020.

In early 2019, the SATC developed a new draft South Australian Tourism Plan 2030 in consultation with industry, which outlines an ambitious target of $12.8b and 16,000 jobs by 2030.[18]

The Draft Plan 2030 suggests that while the Visitor Economy for South Australia in 2030 may look vastly different to today, much of the core proposition for travel will likely remain the same. Travellers will still be seeking out high quality immersive or relaxing experiences with friendly customer service that represents good value for their tourism dollar. Core draw-cards for South Australia are likely to remain the state’s established strengths across key areas such as food and wine, nature-based tourism and cultural experiences.

1.5 Clare Valley Tourism Region Priorities

1.5.1 Regional Tourism Background

The Clare Valley Tourism Region is recognised as one of the 11 regional tourism destinations in South Australia by the South Australian Tourism Commission (SATC).

Prior to a Regional Tourism Review conducted by SATC in 2010/2011 (which resulted in the reduction of funding to support human resources and project budget for all tourism regions in SA), the Clare Valley Tourism Region were supported by SATC with a funded FTE resource (Regional Tourism Manager) and some budget to implement projects. This resource was governed by an incorporated body, Clare Valley Tourism Marketing Inc, who were supported with other project based seed funding from some of the Region’s stakeholders (Light Regional Council, Clare and Gilbert Valley Council and Regional Council of Goyder).

Once the Regional Tourism Review was implemented, Clare Valley Tourism Marketing disbanded (without a direct replacement for the Clare Valley Tourism Region as defined by the SATC). In order to maintain lines of communication and a ‘regional link’ to the Clare Valley Tourism Region, SATC provided annual funding to support a resource in Region, which is currently administered by Regional Development Australia Yorke and Mid North (RDAYMN). Since then, this part-time resource has been tasked to govern the destination management and marketing for the Region (in conjunction with other Regional tourism stakeholders).

At the same/similar timeframe, the Clare Valley Alliance (a strategic reference group) was formed, which initially focussed on information sharing at a strategic level. Most recently, the Alliance has had a more operational focus.

---

[17] SA Regional Visitor Strategy - http://tourism.sa.gov.au/research-and-statistics/strategies/south-australian-regional-visitor-strategy
[18] SATC Draft Tourism Plan 2030 > https://tourism.sa.gov.au/research-and-statistics/strategies/tourism-plan-2030)

In 2014, the Clare Valley Alliance worked with SATC to develop a Destination Action Plan 2015-2017, which was the only strategic destination management and marketing document for the Region. The focus for this document was aligned with the current day State tourism plan, with limited actions.

Upon the appointment of a new Tourism Manager for Regional Council of Goyder, a 2018-2019 Regional Tourism Strategic Plan was developed which was an initiative driven by the Regional Council of Goyder and the Clare and Gilbert Valley Council. This document lacked thorough regional consultation and measurement strategy, and anecdotally, has not been adopted by the Region for implementation.

The visitor economy is increasingly becoming one of the Region's economic beacons, contributing $89million at the December 2018 quarter. Forecast data also indicates positive growth for the sector with potential to reach $166million by September 2030.

Overnight visitation to the Region is also steadily growing (from 160,000 in FY2010 to 182,000 FY2018), and currently attracts an average of 4% share of total overnight visitation to South Australian regions, which is fair considering it's a relatively small tourism region with two central tourism hubs (in Clare and Burra) in comparison to other tourism regions in the State.

1.5.2 Geographic Location

The Region is located to the north of Adelaide and is defined by SATC as the area encompassing the Clare and Gilbert Valleys Council, Regional Council of Goyder, Wakefield Regional Council and the northern half of the Adelaide Plains Council.

Figure 1 - Clare Valley Tourism Region Boundary Map (identified by SATC)

1.5.3 Regional Towns

While this Plan takes a sub-regional approach (Section 4), it's helpful to understand which towns fall into the whole region via Council Area as progressing through this document.

Table 1 - Towns within the Clare Valley Tourism Region Boundary by Council Area

COUNCIL AREA	COMMERCIAL CENTRE	LARGER TOWNS	VILLAGES/HAMLETS
Clare and Gilbert Valley Council	Clare	Auburn, Riverton, Saddleworth	Mintaro, Penwortham, Leasingham, Watervale, Sevenhill, Stockport, Tarlee, Rhynie, Manoora, Marrabel, Waterloo,
Regional Council of Goyder	Burra	Eudunda	Robertstown, Terowie Hallett, Mt Bryan, Booborowie, Farrell Flat
Wakefield Regional Council	Balaklava	Port Wakefield, Owen, Hamley Bridge, Blyth, Brinkworth, Snowtown	Lochiel
Adelaide Plains Council	Mallala Two Wells	Dublin	Middle Beach, Thompson Beach and Parham.

2. Visitor Insights

Visitation data for the Clare Valley Tourism Region is available through Tourism Research Australia's (TRA) Satellite Accounts, National Visitor Survey (NVS), and the International Visitor Survey (IVS).

The TRA and the South Australian Tourism Commission (SATC) have curated visitor data and insights for the Region in their respective Tourism Profiles (TRA 2015, SATC 2016-2018, accessed in June 2019) which have also both been used throughout this analysis to get a comprehensive understanding of the economic contribution of tourism to the Region's economy.

IMPORTANT NOTE: The overnight visitation data, particularly from the NVS, is not completely representative of the current visitation to the Region, as overnight stays in Bed and Breakfast properties are not captured in these statistics. Whilst this is consistent across all Regions in South Australia (and nationally), it is particularly relevant for the Region as there is a large proportion of accommodation supply in the Region.

Key Findings

The Region's visitor economy is increasingly becoming one of its major economic beacons, contributing $89million at the December 2018 quarter, which has been trending positively for the past 10 years (albeit slow growth). Forecast data also indicates positive growth for the sector with potential to reach $166million by September 2030.

In 2016-2017, the Region's visitor economy supported 698 jobs (486 full and part time jobs, and 212 Indirect full and part time jobs) which is 8% of total regional employment, another economic indicator which is seeing slow, but steady positive growth.

Overnight visitation to the Region is also steadily growing (from 160,000 in FY2010 to 182,000 FY2018), and currently attracts an average of 4% share of total overnight visitation to South Australian regions, which is fair considering it's a relatively small tourism region with two central tourism hubs (in Clare and Burra) in comparison to other tourism regions in the State.

Forecast data available from Tourism Research Australia have highlighted steady growth for overnight visitation to Regions, which coupled with a great number of opportunities identified in this Situation Analysis to drive demand through strategic marketing and experience development, suggest there is certainly potential to grow visitor yield, numbers and length of stay for the Region.

2.1 Visitation

2.1.1 Total Regional Visitation

The Region attracts 494,000 visitors per annum. Of that total, 312,000 are day trippers (63%) and 182,000 overnight visitors (37%) annually. 98% of visitors to the Region are from within Australia, with only 2% from International markets. Domestically, 64% are from within the state compared to 36% from Interstate.

Majority of people visit for holiday 56%, and visiting friends and relatives (27%) (Table 3)

The Region's overnight visitation has grown slightly, with a dip at the end of 2014, and steady growth from there through to YE December 2018. (Figure 2)

Majority of domestic overnight visitors to the Region state will stay 1-2 nights with an average of 2.5 nights, whilst inbound visitors either have a short stay (1-7 nights) or longer stays (15+ nights), averaging 10 nights. (Table 2 and Figure 4)

Table 2 – Clare Valley Tourism Region, Total Regional Visitation (2016-2018 Annual Average)

	Intrastate	Interstate	Total Domestic	International	Total Visits
Overnight Visits	114,000	64,000	178,000	4,000	182,000
%	64	36	98	2	
Nights	233,000	162,000	395,000	39,000	434,000
%	59	41	91	9	
Average Length of Stay	2	3	2	10	2

Data Source: SATC Clare Valley Regional Tourism Profile 2016-2018

Figure 2 - Clare Valley Tourism Region, Total Overnight Visitors (YE DEC 2007-YE DEC 2018)

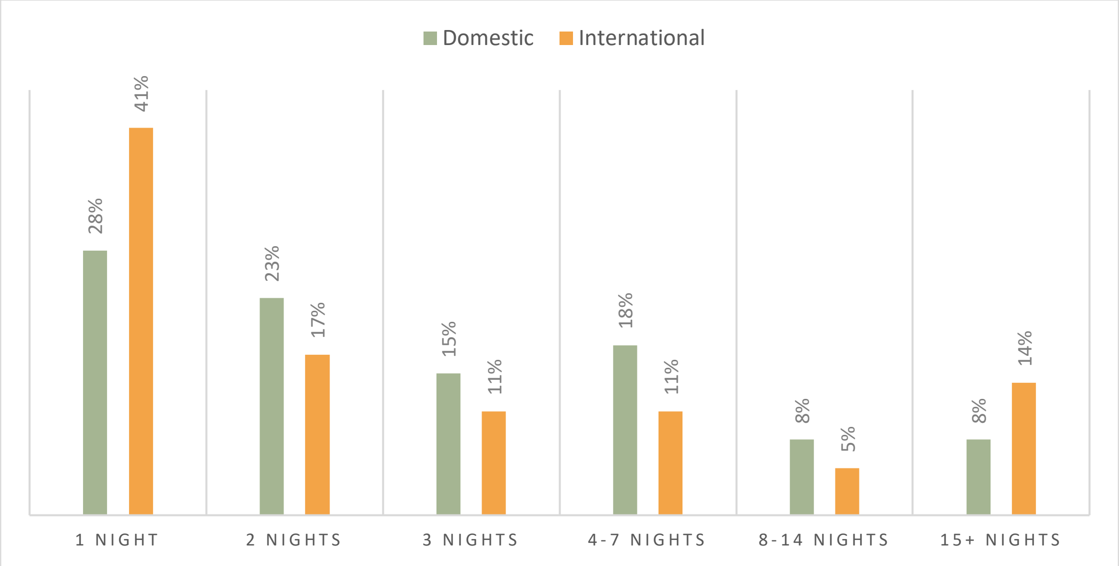
Data Source – Supplied by the South Australian Tourism Commission, Research + Insights Department, July 2019

Table 3 - Clare Valley Tourism Region, Purpose of Travel (2016-2018 Annual Average)

	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

Data Source: SATC Clare Valley Regional Tourism Profile 2016-2018

Figure 3 - Clare Valley Tourism Region, Length of Visit, Domestic + International Visitors (2016-2018 Average)



Data Source: SATC Clare Valley Regional Tourism Profile 2016-2018

2.1.2 Visitor Sentiment

Sentiment analysis from the latest NVS and IVS data has identified the following insights from relevant markets:

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

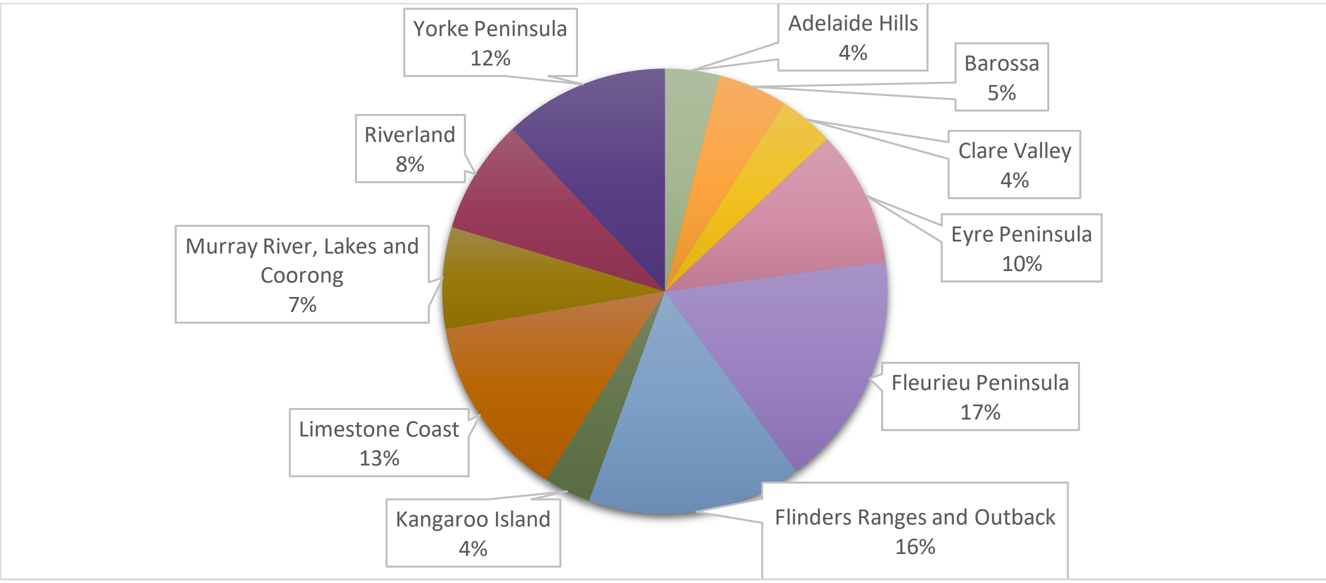
- International visitation to the Clare Valley is low.
- Current offering, predominantly defined by the epicurean and cellar door experiences, strong with the International

2.1.3 South Australian Regional Visitation

From YE December 2014 – YE December 2018, South Australian Regions attracted a total of 20,735,000 overnight visitors across the State. Of that total, Fleurieu Peninsula received the highest proportion of overnight visitors (17%), followed by Flinders Ranges (16%), and Limestone Coast (13%). The Clare Valley Tourism Region attracts 4% overnight visitors, in front of Kangaroo Island (3%). (Figure 4)

In terms of Clare Valley Tourism Region's neighbouring regions, between 2016-2018, the Flinders Ranges and Outback region attracted 717,000 overnight visitors, with an average length of stay of 5 nights. In the same timeframe, Yorke Peninsula region attracted an annual average of 536,000 overnight visitors, with an average length of stay of 3 nights. (Figure 5)

Figure 4 - Average Annual % Share of Overnight Visitation to Regional South Australia (YE December 2014- YE December 2018)



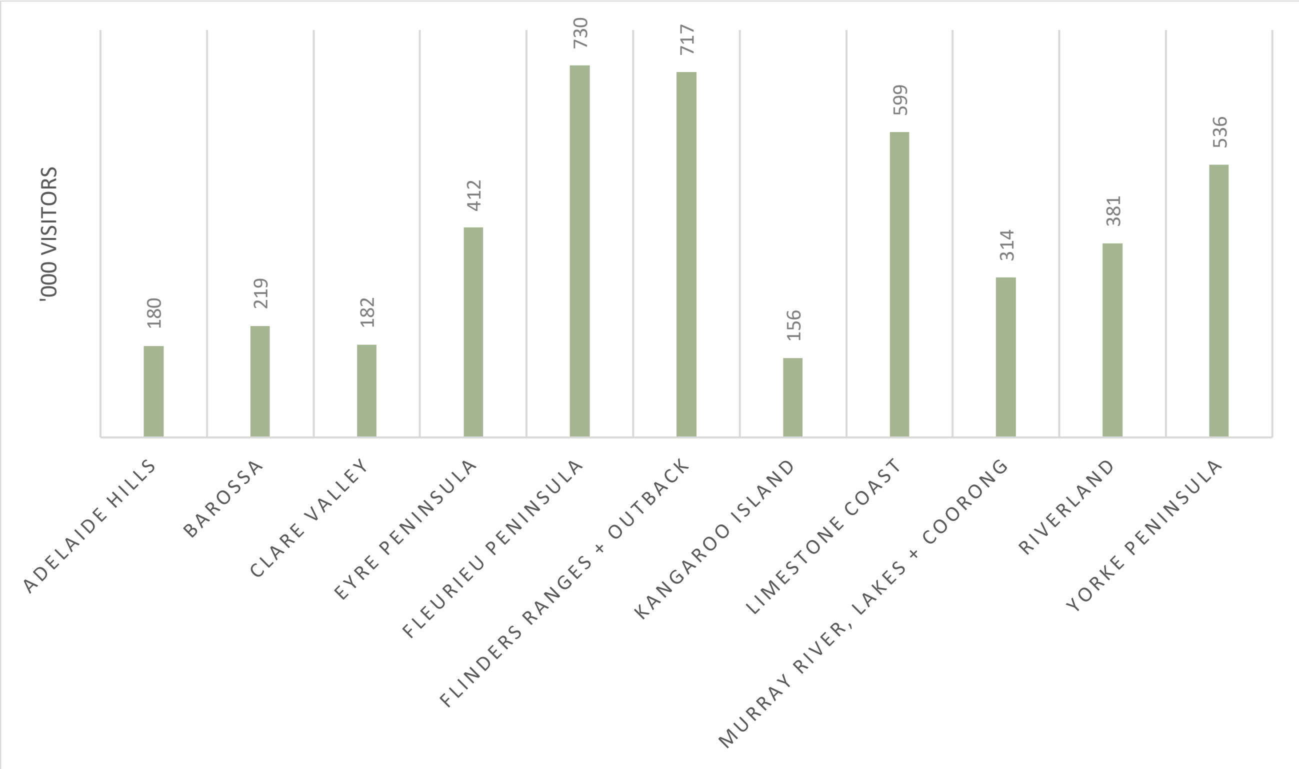
Data Source – Supplied by the South Australian Tourism Commission, Research + Insights Department, July 2019

Table 4 - Overnight Visitors ('000) to South Australian Regions + Total Average % Share to each region (YE December 2014 - YE December 2018)

	YE DEC 2014	YE DEC 2015	YE DEC 2016	YE DEC 2017	YE DEC 2018	TOTAL	Average % Share
Adelaide Hills	137	145	169	186	181	818,000	4
Barossa	209	201	204	207	223	1,044,000	5
Clare Valley	153	158	167	175	182	835,000	4
Eyre Peninsula	384	402	415	422	420	2,043,000	10
Fleurieu Peninsula	684	685	721	730	726	3,546,000	17
Flinders Ranges	542	609	665	690	724	3,230,000	16
Kangaroo Island	128	136	142	147	154	707,000	3
Limestone Coast	486	518	548	594	619	2,765,000	13
Murray, Lakes + Coorong	292	289	314	306	328	1,529,000	7
Riverland	298	311	345	385	389	1,728,000	8
Yorke Peninsula	470	470	485	529	536	2,490,000	12

Data Source – Curated data from Tourism Res385earch Australia (TRA) South Australia Regional Tourism Profiles. Average % Share calculated from FY2010-FY2015 overnight visitation data.

Figure 5 - Total Overnight Visitors for SA Regions (2016-2018 Annual Average)



Data Source: SATC Regional Tourism Profiles 2016-2018

2.2 Economic Contribution

Analysing the economic benefit of the Visitor Economy for the Region can be analysed using two different data sources.

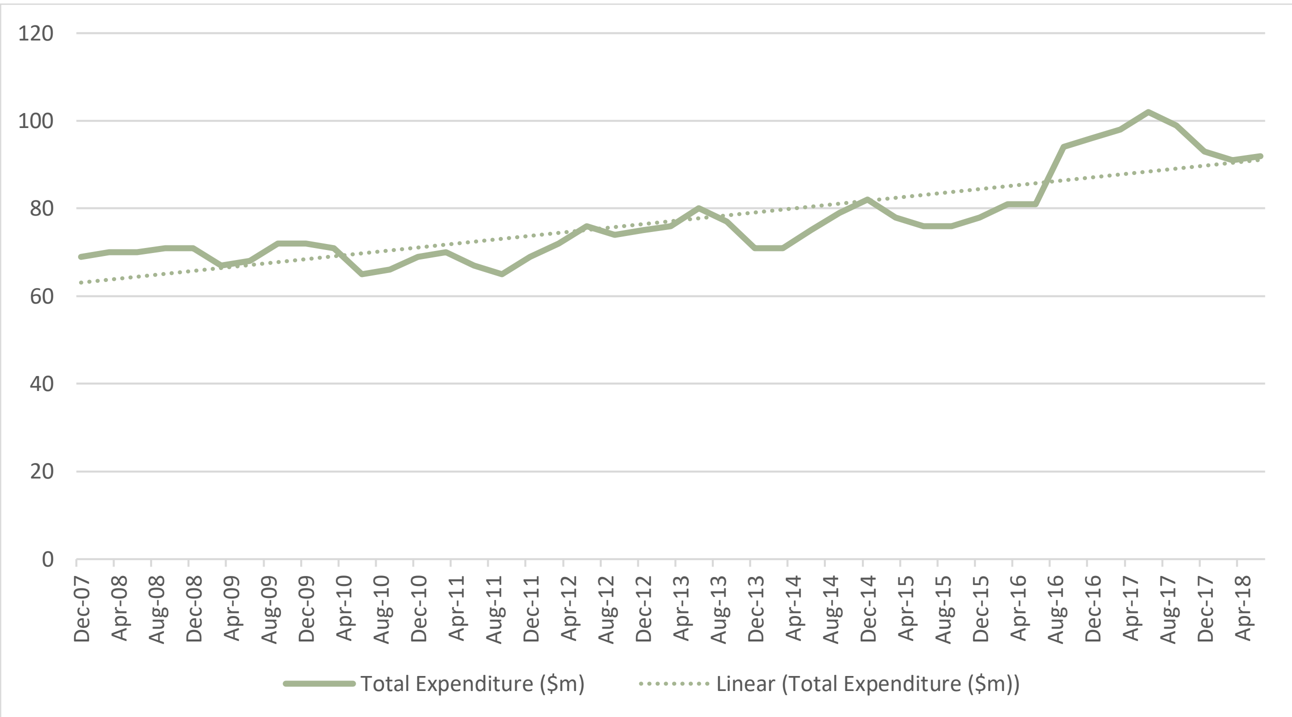
Firstly, SATC undertake ongoing analysis of the State's performance in terms of Tourism Expenditure. This data is the most relevant for the Region to consider in its planning process, as it is a 3-year rolling average of data curated from the most recent International Visitor Survey and National Visitor Survey, and it's regularly updated and communicated to industry.

Secondly, the TRA develop Regional Satellite Accounts for each Tourism Region in Australia. These accounts utilise data from the IVS and NVS, and also the Australian Bureau of Statistics. This data can be used more broadly as indicators by the Region to see the breakdown of where visitor monies are spent across all traditional and non-traditional tourism businesses.

2.2.1 Tourism Expenditure

The most recent data available via SATC indicates that the Region currently (YE December 2018) contributes $89 million to South Australia's expenditure of $6.8 billion (which is 90% of their 2020 target of $99 million).[19] (Figure 6)

Figure 6 - Clare Valley Tourism Region, Total Expenditure Timeseries (December 2007-June 2018)

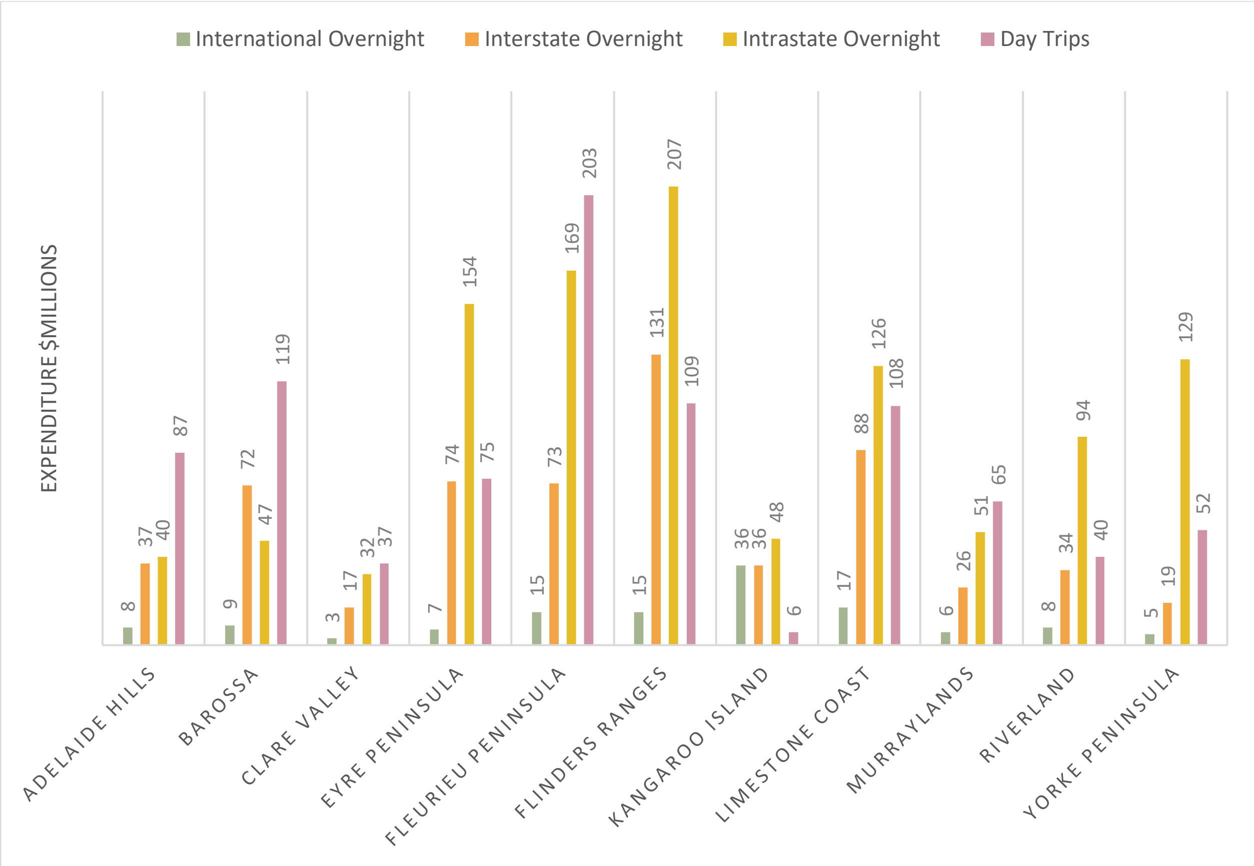


Data Source – Supplied by the South Australian Tourism Commission, Research + Insights Department, June 2019.

[19] South Australian Tourism Commission Regional Tourism Profile, Clare Valley, 2016-2018

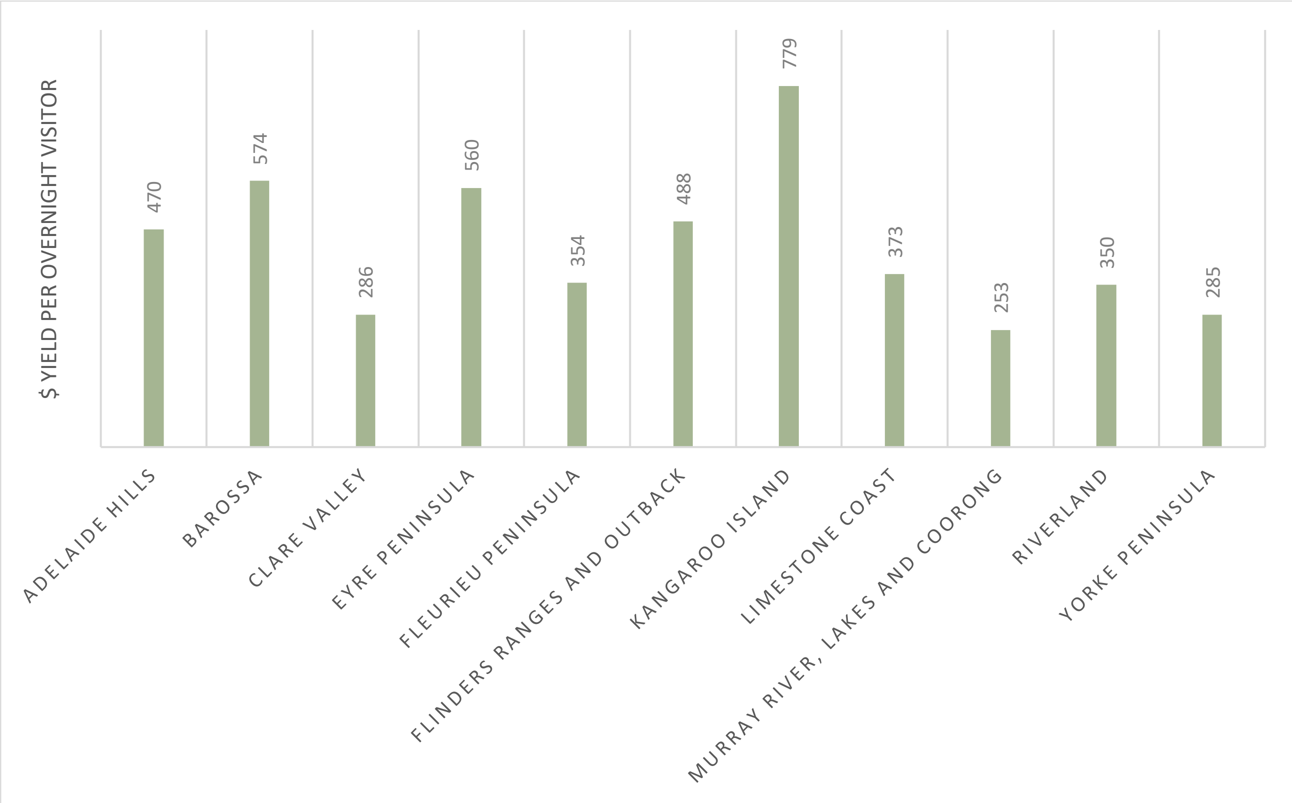
The Region has the lowest tourism expenditure of all the tourism regions within South Australia. (Figure 7) However, the Yield Per Overnight Visitor (as at YE December 2018) sits 3rd to last in comparison to other tourism regions in South Australia. (Figure 8)

Figure 7 - South Australian Regions, Total Expenditure (December 2018)



Data Source: SATC Visit To Regions, Annual Average December 2016-December 2018 >
https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={7B62E0BB-9B57-4783-996F-84EB22C68A7C}&B=False

Figure 8 – SA Tourism Regions, Yield Per Total Overnight Visitors (YE December 2018)



Data Source: Expenditure data accessed from SATC Visit To Regions, Annual Average December 2016-December 2018 > [https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={7B62E0BB-9B57-4783-996F-84EB22C68A7C}&B=False,](https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={7B62E0BB-9B57-4783-996F-84EB22C68A7C}&B=False) Overnight Visitor data *from SATC Insights Team, July 2019*

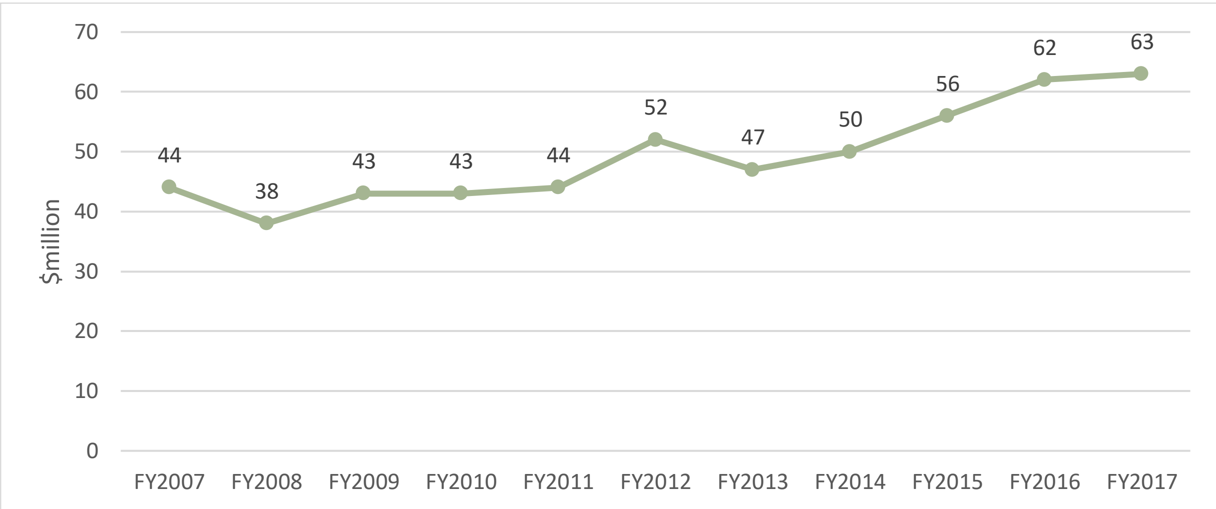
2.2.2 Tourism Output + Consumption

In terms of Information from TRA's Regional Satellite Accounts, in FY2017, the Region reached $143million in total regional tourism consumption, which is up 2.1% from the previous financial year. Of that total, the tourism industry generated $63million in gross regional product (GRP) (see Figure 9) ($31million direct, $32million indirect), up 1.4% from FY2016. The direct contribution of $31million accounted for 3.8% of the Region's GRP.[20]

In that same timeframe, the majority of visitor consumption in the Region was contributed by domestic overnight visitors ($99m), followed by daytrips ($41m) and International visitors ($4m). (Table 5)

Whilst numbers were significantly lower, the International visitor was the highest yielding ($1000 per visitor) which was nearly double that of the Intrastate and Interstate visitors, and nearly 7 times higher than the Day Trippers (see Figure 5).

Figure 9 - Clare Valley Tourism Region, Gross Regional Product (FY2007 - FY2017)



Data Source: Tourism Research Australia Regional Satellite Account, Clare Valley 2016-2017

Table 5 - Clare Valley Tourism Region, Share of Regional Tourism Consumption for Visitor Markets FY2017

	Share of Total Regional Tourism Consumption	Visitor Numbers	Yield
Day Trips	$41,000,000	312,000	$ 131.41
Intrastate Overnight	$65,000,000	114,000	$ 570.18
Interstate Overnight	$34,000,000	64,000	$ 531.25
International	$4,000,000	4,000	$ 1,000.00

Data Source: Tourism Research Australia Regional Satellite Account for Clare Valley 2016-2017, SATC Clare Valley Regional Profile, 2016-2018.

[20] Tourism Research Australia Regional Satellite Account, Clare Valley 2016-2017

2.2.3 Industry Share of Total Tourism Consumption + Gross Value Added (GVA)

As noted above, the total tourism consumption for 2016/2017 was $143m. However, non-tourism dedicated industries generated a significant proportion of this total consumption with the benefit largely enjoyed by general travel retail (Table 6):

- $26.7m on takeaway and restaurant meals
- $16.9m on fuel; and
- $23.7m on long distance transport.

This may be due to the fact that has been attracting majority day trips, and the touring baby boomer generation (see Section 3).

Table 6 – Clare Valley Tourism Region, ANZSIC Share of Total Tourism Consumption 2016/2017

Industry	$million
Accommodation services	11.8
Actual and imputed rent on dwellings	2.2
Takeaway and restaurant meals	26.7
Taxi fares	1.4
Local area passenger transportation	0.8
Long distance passenger transportation	23.7
Motor vehicle hire and lease	2.2
Travel agency and tour operator services	6.8
Recreational, cultural and sporting services	4.2
Gambling and betting services	1.1
Shopping (including gifts and souvenirs)	19.8
Food products	10.4
Alcoholic beverages and other beverages	7.1
Motor vehicles, caravans, boats, etc	0.0
Fuel (petrol, diesel)	16.9
Repair and maintenance of motor vehicles	1.4
Education services	0.7
Other tourism goods and services	6.2
Total Direct Tourism Consumption	143

With regard to traditional tourism industries that generated the highest economic benefit in 2016/2017 were (Table 7):

- Accommodation with $6.9 million in direct GVA and $6.9 million in direct GRP;
- Cafes, restaurants and takeaway food services with $5.2 million in direct GVA and $5.2 million in direct GRP.
- 'Other retail trade' with $5.4 million in direct GVA and $3 million in direct GRP.

Table 7 – Clare Valley Tourism Region, ANZSIC Tourism Output (Gross Value Added) 2016/2017

Gross value added	$million
Tourism characteristic industries	
Accommodation	6.9
Ownership of dwellings	0.7
Cafes, restaurants and takeaway food services	5.2
Clubs, pubs, taverns & bars	2.6
Rail transport	0.0
Taxi transport	0.4
Other road transport	0.6
Air, water and other transport	0.0
Motor vehicle hiring	1.3
Travel agency and tour operator services	1.2
Cultural services	0.3
Casinos and other gambling services	0.2
Other sports and recreation services	0.1
Total tourism characteristic industries	19.5
Tourism connected industries	
Automotive fuel retailing	0.3
Other retail trade	5.4
Education and training	0.6
Total tourism connected industries	6.3
All other industries	3.2
Direct tourism GVA	28.9

Data Source: Tourism Research Australia Regional Satellite Account for Clare Valley 2016-2017

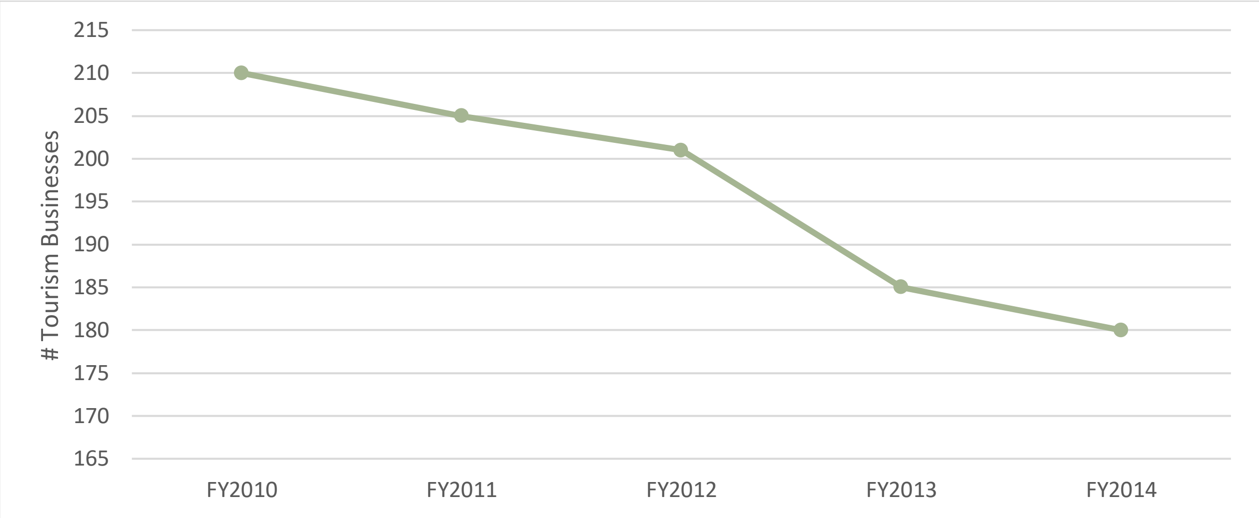
2.2.4 Tourism Businesses + Jobs

In 2013-2014, the Region supported 180 tourism related businesses in the Region.[21] (Figure 10)

In 2016-2017, the Region's visitor economy supported 698 jobs (486 full and part time jobs, and 212 Indirect full and part time jobs) which is 8% of total regional employment.[22] (Figure 11)

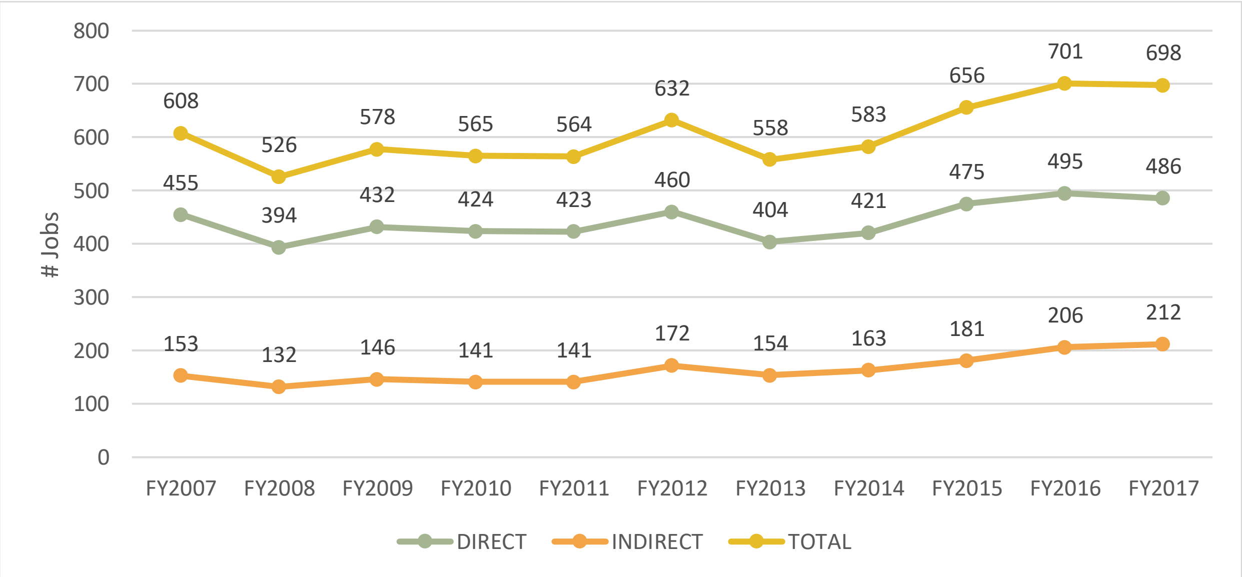
The total number of direct jobs are spread across numerous tourism related industries, with Food Services (33%), Retail (21%) and Accommodation (19%) accounting for the majority. (Figure 12, Table 8)

Figure 10 – Clare Valley Tourism Region, Total Number of Tourism Businesses (FY2010 - FY2014)



Data Source – TRA Regional Tourism Profile, Clare Valley, Supply 2014-2015

Figure 11 – Clare Valley Tourism Region, Total Tourism Employment (FY07 – FY2017)



Data Source: Tourism Research Australia Regional Satellite Account for Clare Valley 2016-2017

[21] Tourism Research Australia Clare Valley Tourism Profile, Supply 2014-2015
[22] TRA Clare Valley Region Tourism Satellite Account 2016-2017

Figure 12 – Clare Valley Tourism Region, ANZSIC Total Tourism Direct Jobs as a % (2016/2017)

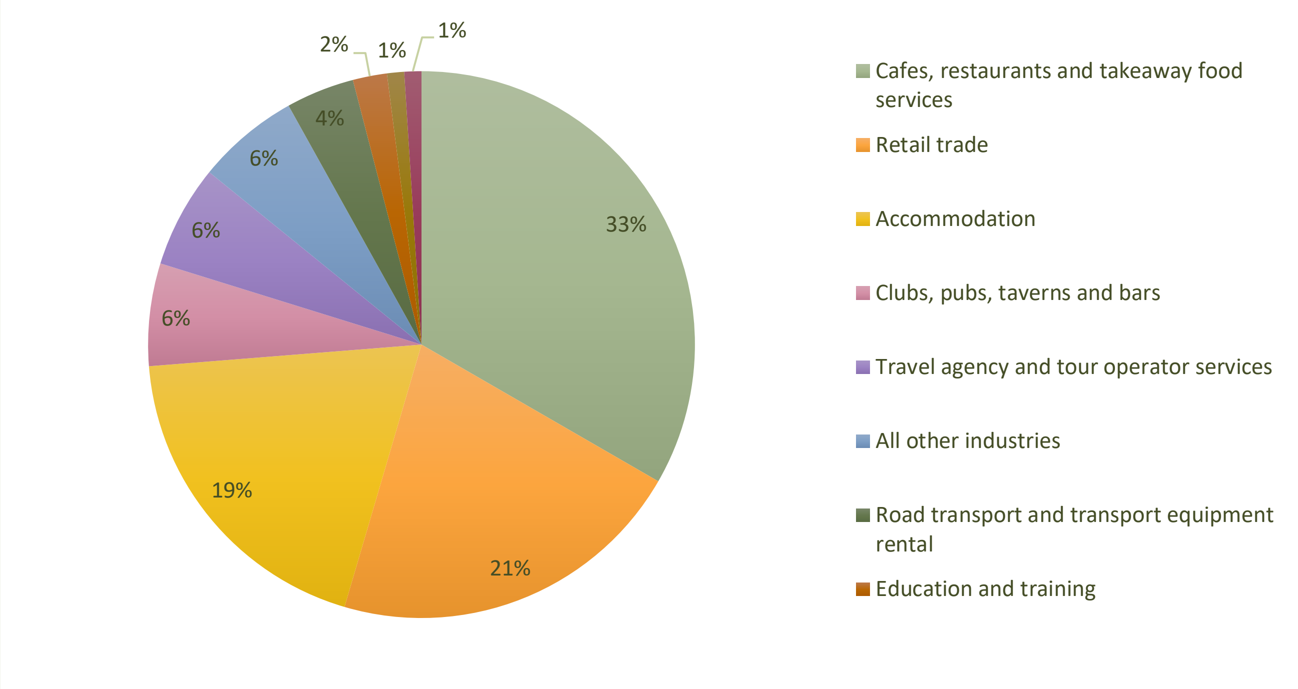


Table 8 – Clare Valley Tourism Region, ANZSIC Total Tourism Direct Jobs 2016/2017

Accommodation	94
Cafes, restaurants and takeaway food services	159
Clubs, pubs, taverns and bars	30
Rail transport	0
Road transport and transport equipment rental	18
Air, water and other transport	7
Travel agency and tour operator services	30
Cultural services	4
Casinos and other gambling services	1
Other sports and recreation services	2
Retail trade	100
Education and training	11
All other industries	29
Total	486

Data Source: Tourism Research Australia Regional Satellite Account for Clare Valley 2016-2017

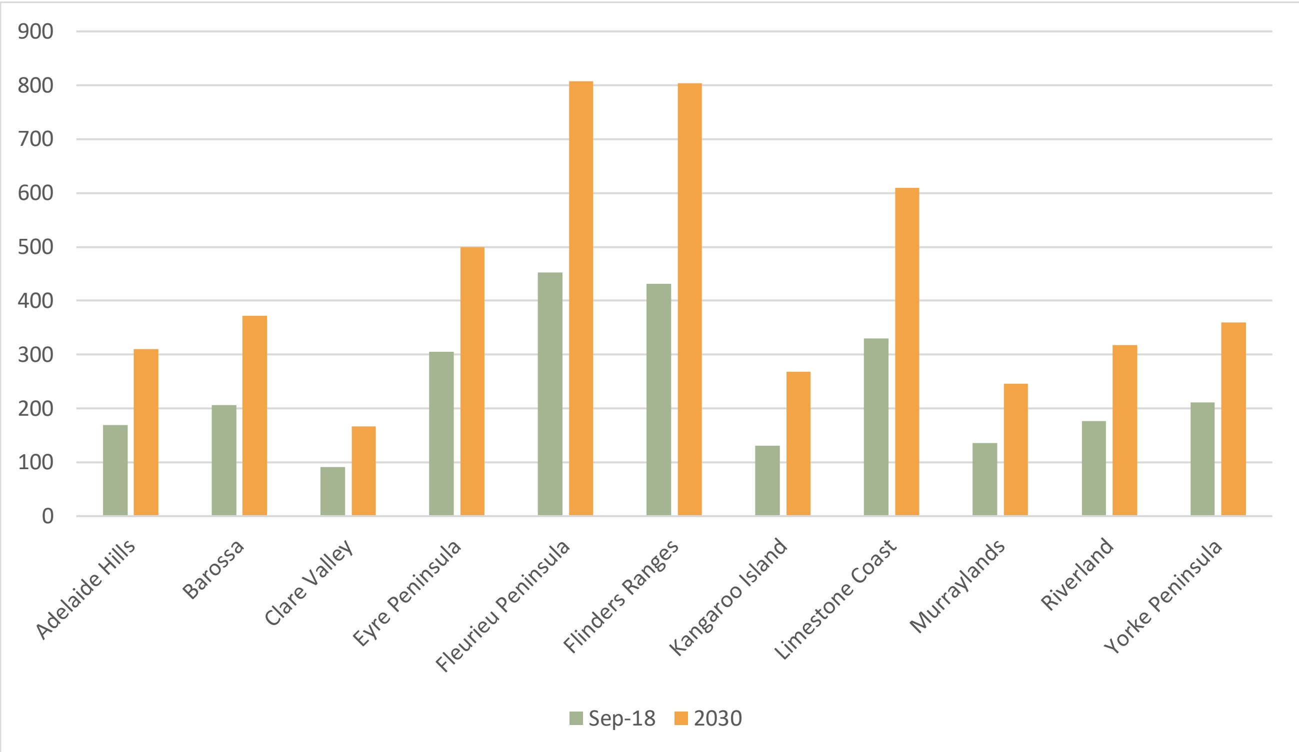
2.4 Visitation Forecasts

2.4.1 Economic Contribution

The SATC has reported that the Region is set to increase visitor expenditure by 82% from $91m in September 2018 to $166m in September 2030 (Figure 13). Although, the Region is forecast to record the least expenditure in comparison to other regions in South Australia. (Table 9)

Region specific forecast data indicates slow positive growth of tourism expenditure from June 2018 through to September 2030, reaching the forecasted $166m. (Figure 14)

Figure 13 - South Australian Tourism Regions, Expenditure Forecast (2018 vs 2030)



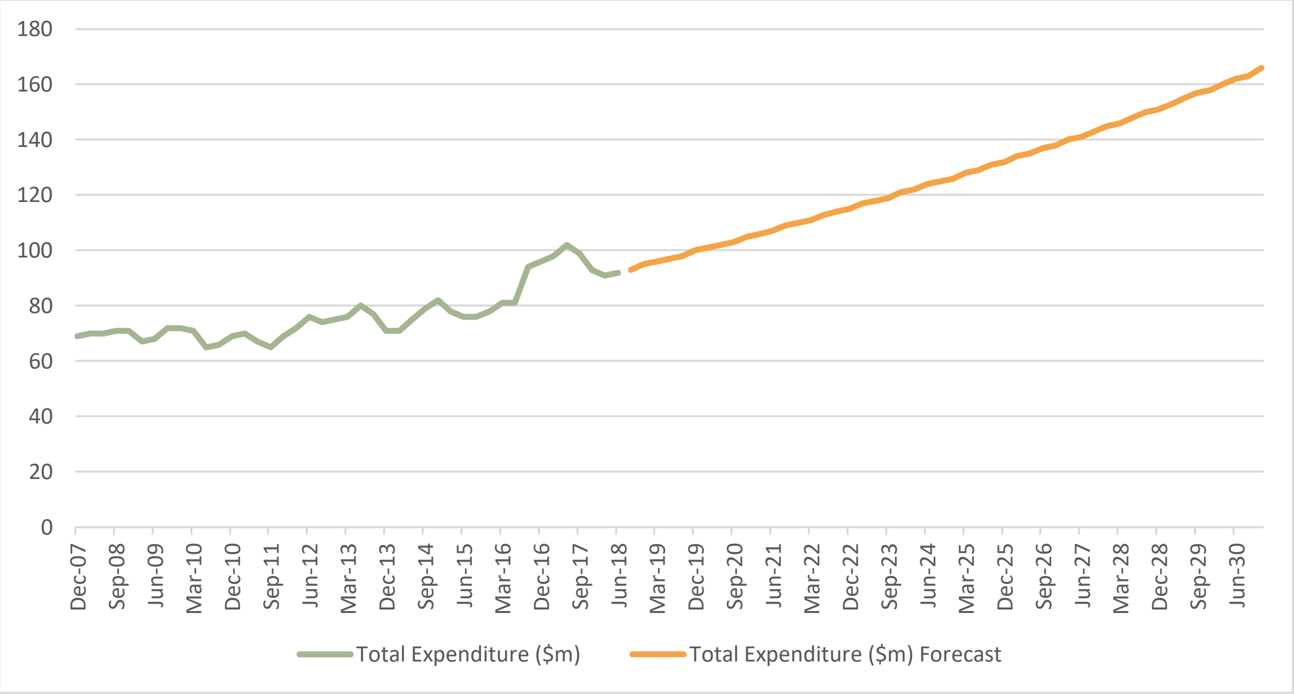
Data Source: South Australian Tourism Commission, Draft State Tourism Plan 2030

Table 9 - South Australian Tourism Regions, Expenditure Forecast (including % increase, 2018 vs 2030)

	Sep-18	2030	% Increase
Adelaide Hills	169	310	83
Barossa	206	372	81
Clare Valley	91	166	82
Eyre Peninsula	305	500	64
Fleurieu Peninsula	453	807	78
Flinders Ranges	431	804	87
Kangaroo Island	131	268	105
Limestone Coast	330	609	85
Murraylands	136	246	81
Riverland	177	317	79
Yorke Peninsula	211	359	70

Data Source: South Australian Tourism Commission, Draft State Tourism Plan 2030

Figure 14 - Clare Valley Tourism Region, Expenditure Actual + Forecast (December 2007 – September 2030)



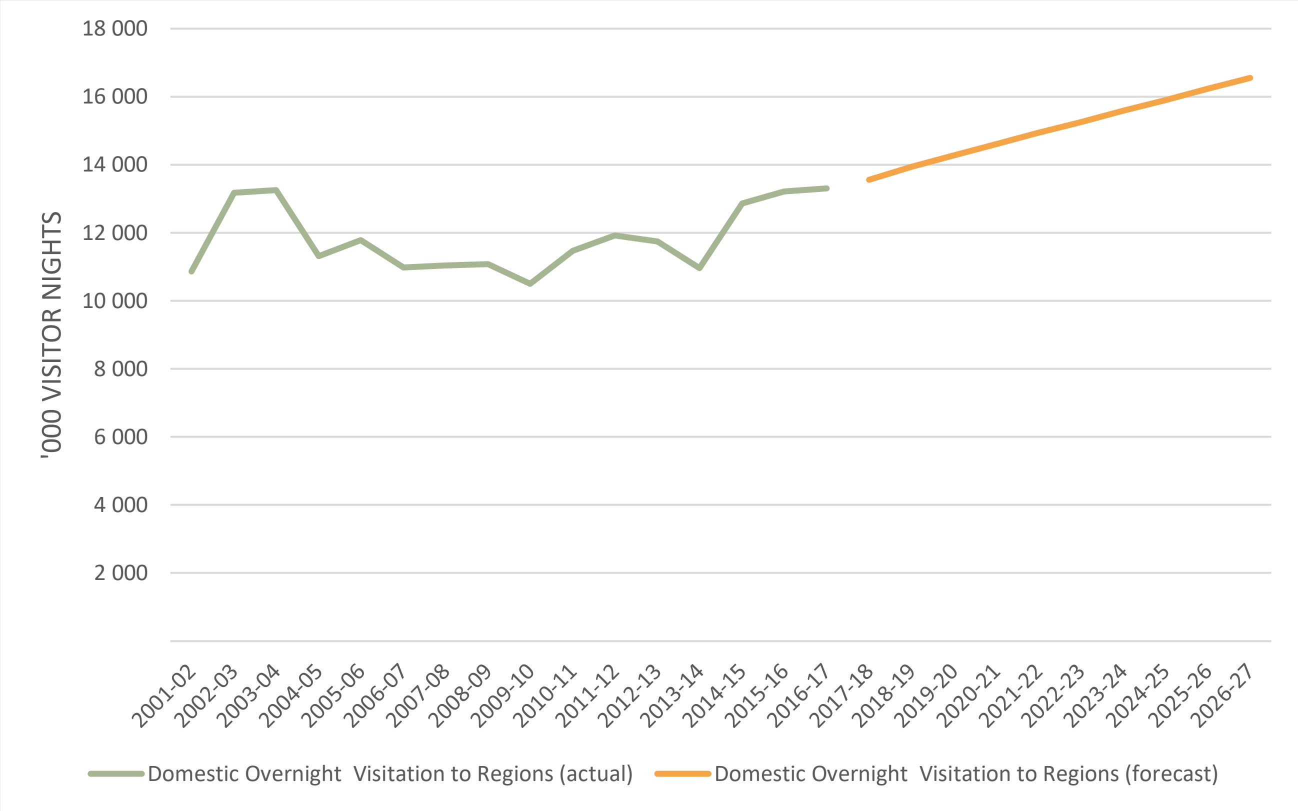
Data Source – Supplied by the South Australian Tourism Commission, Research department, June 2019.

2.4.2 Overnight Visitation

Overnight visitation to South Australian regions from both the domestic and inbound markets are due to increase from June 2018-2030, at 5-year annual average growth rates of 2.2% for domestic market, and 5.2% for the inbound market. (Figures 15 and 16)

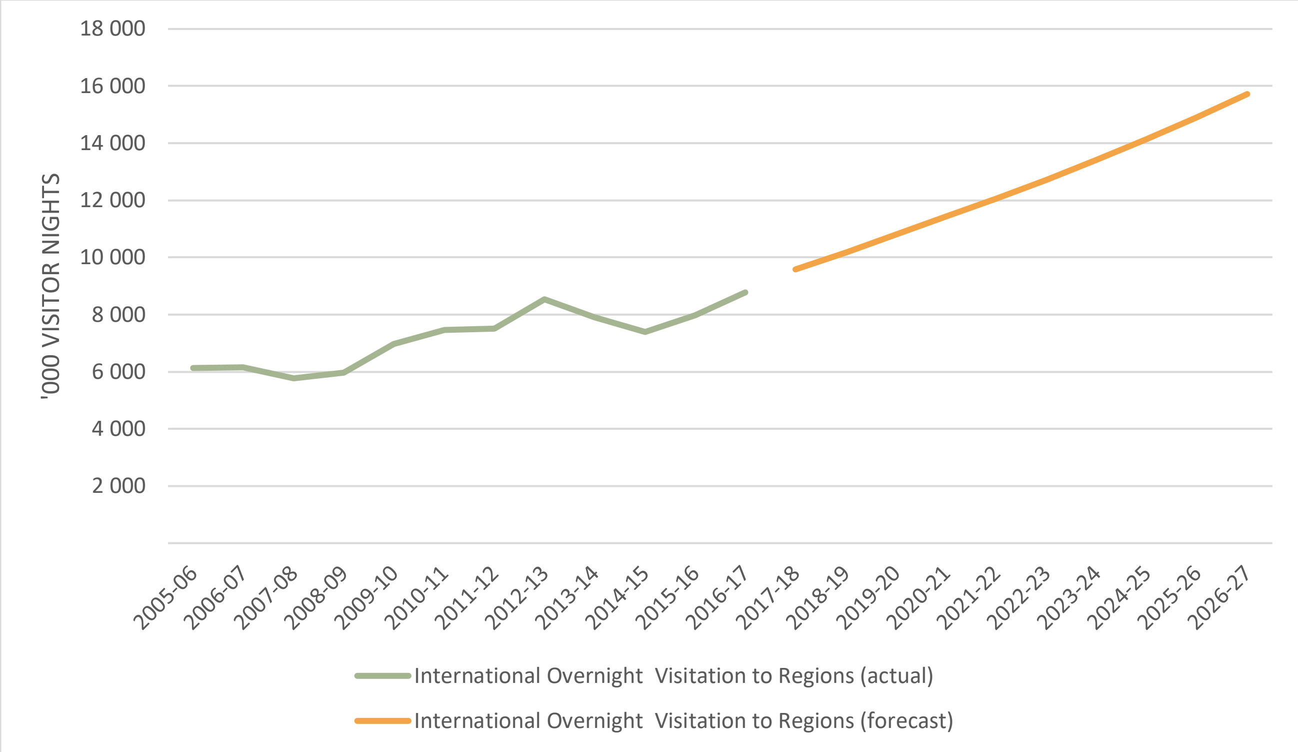
Based on these annual average growth rates, the Region can expect to increase overnight visitation by 23.4% (from 182,000 in June 2018 to 237,450) to September 2030. (Figure 17)

Figure 15 - Domestic Overnight Visitation to SA Regions, Actual + Forecast (2001-2027)



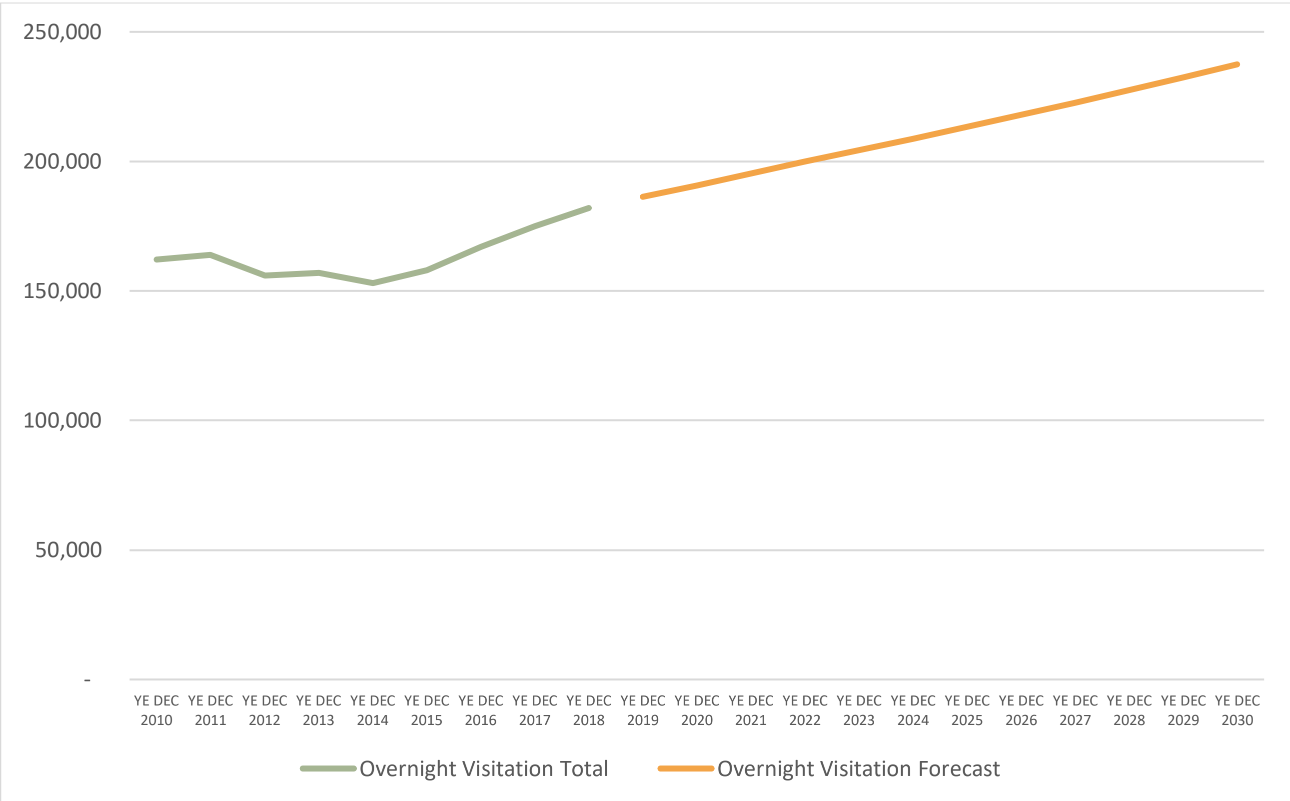
Data Source – Tourism Research Australia, State and Territory Forecast Tables 2017 (https://www.tra.gov.au/ArticleDocuments/257/State_and_Territory_Forecast_Tables_2017.xlsm.aspx)

Figure 16 - International Overnight Visitation to SA Regions, Actual + Forecast (2006-2027)



Data Source – Tourism Research Australia, State and Territory Forecast Tables 2017 (https://www.tra.gov.au/ArticleDocuments/257/State_and_Territory_Forecast_Tables_2017.xlsm.aspx)

Figure 17 - Clare Valley Tourism Region, Total Overnight Visitation, Actual + Forecast (YE December 2010 – YE December 2030)



Data Source – Data curated and cross analysed from Overnight Visitors data from SATC Research + Insights Department (July 2019) and Tourism Research Australia, State and Territory Forecast Tables 2017. Forecast data was calculated using TRA 5-year annual average growth rate percentages for relevant 5 year increments.

3. Market Segmentation

This section provides an overview of market segmentation for the Region; reviewing important current visitor markets, and potential growth markets for the Region. Information for this section has been drawn from background research and analysis, as well as industry consultation (see Acknowledgements).

Key Findings

Currently, the Region attracts majority of visitors from Adelaide and other regions in South Australia, supported by a number of visitors also from Interstate. In terms of generational segmentation, the Region ‘s visitors are over-represented by the 55+ segment, with fewer visitors from the Generation and X and Y cohorts.

When talking about generational growth markets, it’s important to note that differences between each cohort are blurring. People travel for different aspirations and interests, regardless of their age and gender. Therefore, the Region must focus on attracting customers with similar aspiration and interests, and not just define customers their age.

In saying this, the Region’s current experience themes and product base lend itself as an potentially attractive destination for the Generation Y (Millennial) families market, especially as they transition from being ‘Single and Double Income, No Kids’ to Young Families, and the affluent 55+ Baby Boomer cohort.

With regard to geographical location, the Region’s growth potential remains with the Interstate, multi-night visitor, however, focus will still need to be made on the reliable Intrastate Visitor, with, given more education, may be inspired to turn their planned day-trip into a multi-night holiday.

Whilst the Region’s international visitor profile has an impressive length of stay and yield per trip, the Region is still an emerging destination for many inbound markets. As such, less focus will be given to this visitor cohort within the Plan, however, there are still some key initiatives identified to ensure the destination’s awareness grows with this market, including advocating for the development of commissionable product, and where commissionable product exists, ensure they connect and collaborate to harness opportunities and provide economies of scale at trade events.

The Region’s experience profile also highlights opportunity to target visitors from Niche Interest Segments including Food + Wine, Art, Culture + Heritage, Nature Base, Cycle and Sport. In addition to Niche Markets including Caravan and Camping, Business, Cruise and Weddings.

3.1 Current Markets

3.1.1 Geographic

Domestic Market

Intrastate visitation is currently the most significant market for the Region with close to two-thirds of all overnight visitors to the Region originating from within South Australia (Figure 18). Intrastate visitation is dominated by visitation from people originating from Adelaide (46%) with visitors from Regional SA also a noteworthy market (18%).

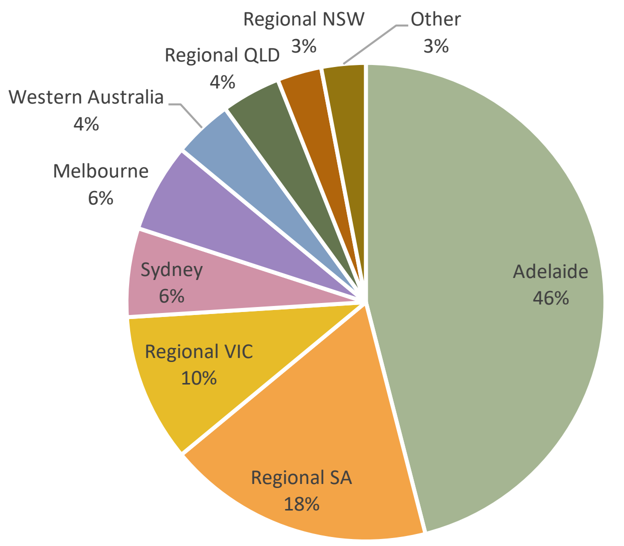
Just over a third of all overnight visitors to the Region are interstate visitors, with overnight visitors originating primarily from Victoria (16%) and New South Wales (9%) (Figure 18). Over half of domestic visitors to the Region are coming for a holiday (56%), with just over a quarter coming to visit family and friends. (Table 10)

Table 10 – Clare Valley Tourism Region, Domestic Overnight Visitor Profile (2016-2018 Annual Average)

	Holiday	VFR	Other	Total
Visits	99000	48000	31000	178000
%	56	27	17	100
Nights	201000	95000	97000	395000
%	51	24	25	100
Average Length of Stay	2	2	3	2

Data Source: SATC Clare Valley Regional Tourism Profile 2016-2018

Figure 18 - Clare Valley Tourism Region, Origin of Domestic Overnight Visitors (2016-2018 Annual Average)



Data Source: SATC Clare Valley Regional Tourism Profile 2016-2018

International Market

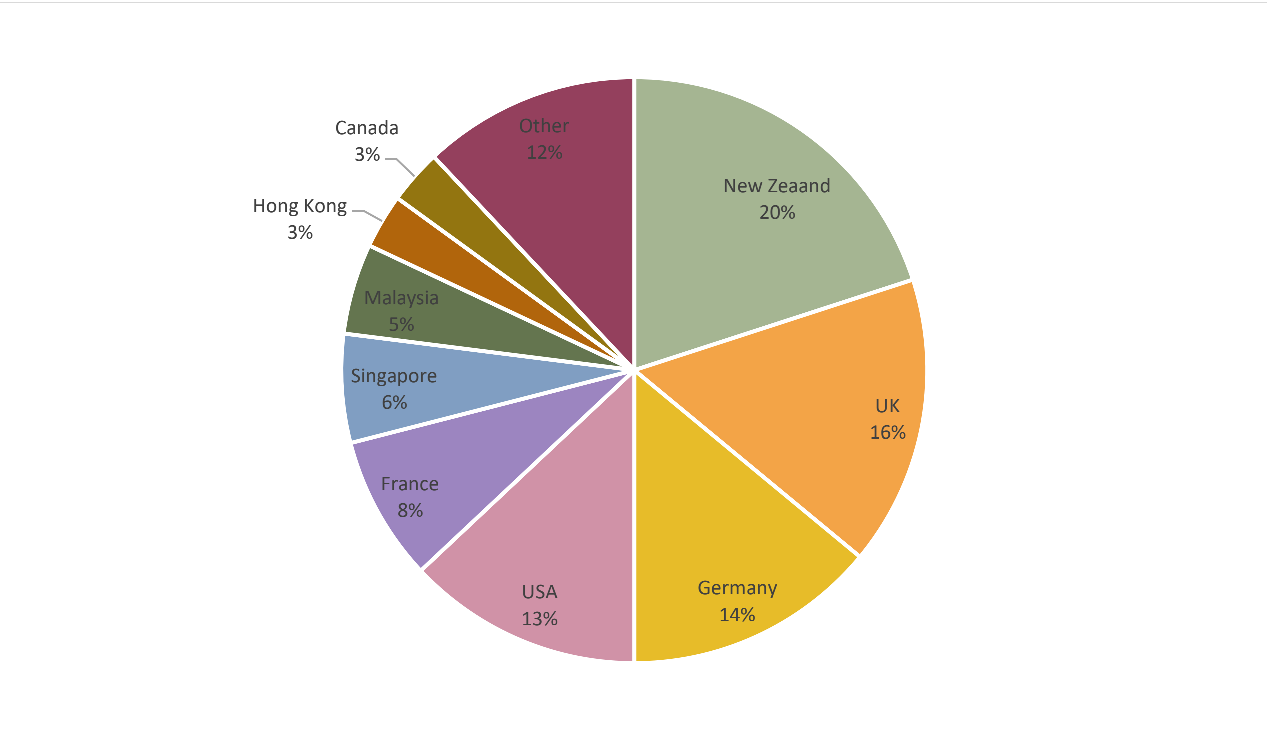
International visitors to Region currently comprise a low proportion of overall visitors (2%). Of international visitors, the majority (75%) come for a holiday, with the remaining 25% coming to visit friends and family (Table 11). Geographically, these visitors are from traditional Western markets, with 52% from Europe, 20% from New Zealand and 16% from UK (Figure 19).

Table 11 – Clare Valley Tourism Region, International Overnight Visitor Profile (2016-2018 Annual Average)

	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
Average Length of Stay	7	19	np	10

Data Source: SATC Clare Valley Regional Tourism Profile 2016-2018

Figure 19 – Clare Valley Tourism Region, Origin of International Overnight Visitors (2016-2018 Annual Average)



Data Source: SATC Clare Valley Regional Tourism Profile 2016-2018

3.1.2 Generational

Silent Generation (aged 76-96) + Baby Boomers (aged 55-75)

The Silent Generation (aged 76-96 in 2019) and Baby Boomers (aged 55-75 in 2019) are currently the largest generational market for the Region, with the majority of current visitors to the Region aged 55+ (48% Domestic, 49% International, see Figure 20).

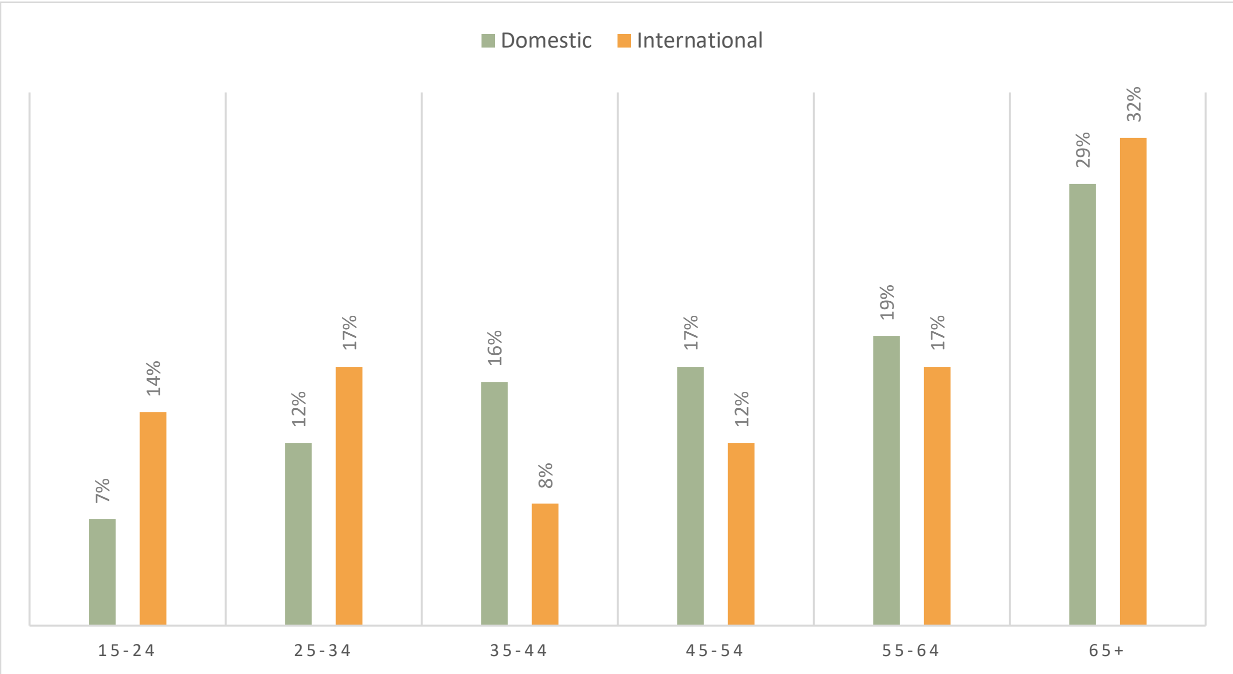
These groups were also identified as a key market during industry consultation (referred to as different personas including 'Explorers', 'Grey Nomads', 'Experience Seekers').

Visitors to the Region are overrepresented by this generational segment (majority 65+), they are more likely to be older couples without children in the household, retired, and have similar interests on holiday. They tend to have above average household income and stay even longer when on an Australian holiday. [23]

Generation X and Millennials

Generation X (aged 40-55 in 2019) and Y (aged 25-39 in 2019) also form an important part of the Region's current visitor profile. There is similar visitation to the Region from the 25-34, 35-44 and 45-54 age groups, with the majority visitors staying 1-2 nights. (Figure 3 and 20)

Figure 20 - Clare Valley Tourism Region, Age of Visitors (2016-2018 Average)



Data Source: SATC Clare Valley Regional Tourism Profile 2016-2018

[23] Celcius Research 2015/2016 Clare Valley + Burra Tourism Project

3.1.3 Psychographics

State Personas

Currently, the SATC has identified the high yielding global experience seeker, and nuances within this segment, as the customer segment in which they will be targeting.

The global experience seeker[24] are:

- A global target audience united by values, attitudes and motivations in life, far beyond travel;
- Well educated, interesting, open-minded, happy, positive people who actively enjoy their lives;
- Motivated by opportunities for personal growth and self-fulfilment;
- ‘Doers’ not just talkers;
- Opinion leaders and advocates within their social circle;
- Searching for new experiences they can ‘brag’ about; and
- Demanding and discerning about brands and communication.

Regional Personas

In 2015/2016 the Region (via the Clare Valley Alliance) invested in research which qualitatively and quantitatively calibrated the opportunity for the region amongst the visitor markets from SA, Eastern Seaboard Australia, NZ, Northern Europe and North America.

The research methodology consisted of presenting concepts designed to test appeal of attractions the Region *could potentially* offer as well as what is already available to offer direction on what investment is required in the Region to successfully target high yielding, sustainable markets.

The key finding is that the Australian and NZ target markets is roughly divided into quarters, although some segments are bigger spenders and offer a bigger potential profit pool. The International tourists can also be segmented into these same categories; but in different proportions.

Table 12 - Clare Valley + Burra Tourism Research (2016) Project Market Segmentation Snapshot

	THE EXPLORER	THE ARTSY	THE ACTIVE	THE INDULGEMT
Demographics	56% aged 50+, Average age 51 $120K approx. household Income Mostly Older couples with no kids	45% aged 50+, Average age 47 $122K approx. household Income Mostly Mid-Age, or Older Couples No Kids	49% aged between 20-34, Average age 38 $130K household Income Predominantly Male Mostly Young Singles / Couples with No Kids	Average Age 44 Predominantly Female $115K household Income

[24] Tourism Australia Definition of Experience Seeker > http://www.publicityship.com.au/wp-content/uploads/2007/06/australian_experiences_toolkit_2007.pdf

			Mostly Interstate	
Travel Preferences	Prefer to get "back-to-basics" and appreciate nature, wildlife and non-man-made; I like to learn and be educated on holiday	A personalised experience of being able to meet the winemaker, artisan, farmer, etc. is important to me; I enjoy travel at a fast pace, trying to see and experience as many things as possible within the time I have	Like to be physically active on holiday; Enjoy travel at a fast pace experiencing as many things as possible	Entertainment, shopping and night-life is very important to me when on holiday; A high standard of luxury whilst I am on holiday is very important to me (travel, accommodation, food / wine, amenities, tours, etc.); Where I eat and the quality of food is an important part of my holiday
Daily Budget	$335	$394	$418	$428
Share of Revenue Pool	21%	25%	27%	27%

All of the Domestic respondents irrespective of segment include the Wine and Epicurean pursuits as the primary attraction to the Region overall. Where they differ is their preference for 'side entertainment'.

- Explorers want a side of heritage, wildlife and outback experiences
- Artsy want a side of art, and culture
- Actives want a side of physical activity, including the outback
- The Indulgent want a side of exceptional food and wine, day spa and pampering.

Profit Potential for the Segments

- The research indicates that the Indulgent and Active travellers are likely to have a substantially higher budget for their holiday (both overall, and per-day) than the other two groups, and thus represent greater outright revenue potential. These groups are more likely to travel as a group of 3 or more. So despite having lower than average household income, Indulgent travellers have the highest overall budget as well as the highest per-day budget of all traveller segments.
- Explorers are likely to spend what is already the lowest expected overall budget, over the longest holiday time period, resulting in the lowest per-day budget of all traveller segments. While the Artsy traveller has a moderate per-day budget, they on average spend the least amount of time travelling, and their overall budget is not substantially higher than that of Explorers.

3.2 Growth Markets

3.2.1 Geographic

Intrastate

Whilst South Australia had a slight increase in growth from intrastate markets (1% overnight visitors and 2% in nights[25], which is low in comparison to National growth rates of 9% and 8% respectively) by the December 2018 Quarter, the outlook for all domestic overnight visitation is positive (see Figure 15).

Visitors from Adelaide and regional South Australia will continue to be in important market for the Region, with the objective of not only increasing this market share but converting more daytrip visitors into overnight visitors.

Strategic positioning of the Region as a multi-night destination for high yielding visitors and niche interest segments and markets, will be key to successfully converting this source market.

Interstate

South Australia saw a 11% increase in overnight visitor numbers by the December Quarter 2018, and a 7% increase in nights from the same segment in the same timeframe (with growth rates are higher than the national average of 8% and 6% respectively). [26]

In terms of the potential for visitation from current interstate markets:

- Approximately 3% of total interstate visitors to South Australia visit the Clare Valley
- 10% of visitors from NSW visiting the Flinders Ranges + Outback, and 7% will visit the Fleurieu Peninsula.[27]
- 8% of visitors from Victoria will visit the Flinders Ranges + Outback, and 6% will visit the Fleurieu Peninsula.[28]

Surprisingly, 5% of all visitors to South Australia from WA have visited the Clare Valley Tourism Region, which is higher than the average visitation from all interstate markets (3% as noted above). Additionally, visitors from WA will stay in South Australia the longest with an average length of stay of 5.8 nights, which together with the visitation opportunity, signals a growth opportunity. There is also noteworthy interest in visitation from this market to visiting the Flinders Ranges + Outback too.[29]

---

[25] SATC South Australian Visitor Economy Snapshot September 2018 > https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={50E81AE7-F9B1-4C26-AC29-64799BCB6F06}&B=False

[26] SATC South Australian Visitor Economy Snapshot September 2018 > https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={50E81AE7-F9B1-4C26-AC29-64799BCB6F06}&B=False

[27] SATC Domestic Visitor Profile for New South Wales, December 2015-December 2017> https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={11C09868-6163-416D-B441-32F158764B58}&B=False

[28] SATC Domestic Visitor Profile for Victoria, December 2015-December 2017> https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={DCAA6673-BE21-4123-8876-5E2C206E3D3A}&B=False

[29] SATC Domestic Visitor Profile for Western Australia, December 2015-December 2017> https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={37BEFB73-D273-4D20-96A4-FD9F218AC6A9}&B=False

The state growth, along with positive forecast growth for domestic overnight visitors to the state (see Figure 15) offers a significant opportunity for the Region to target more visitors from current interstate source markets where destination awareness and current visitation statistics are positive (Victoria, NSW and WA). There will also be opportunity to leverage those interstate visitors planning visits to neighbouring regions, targeting day-trip and / or additional overnight stays.

Working collaboratively with key stakeholders, particularly SATC, and strategically marketing the Region will be the key to driving increased visitation from this source market.

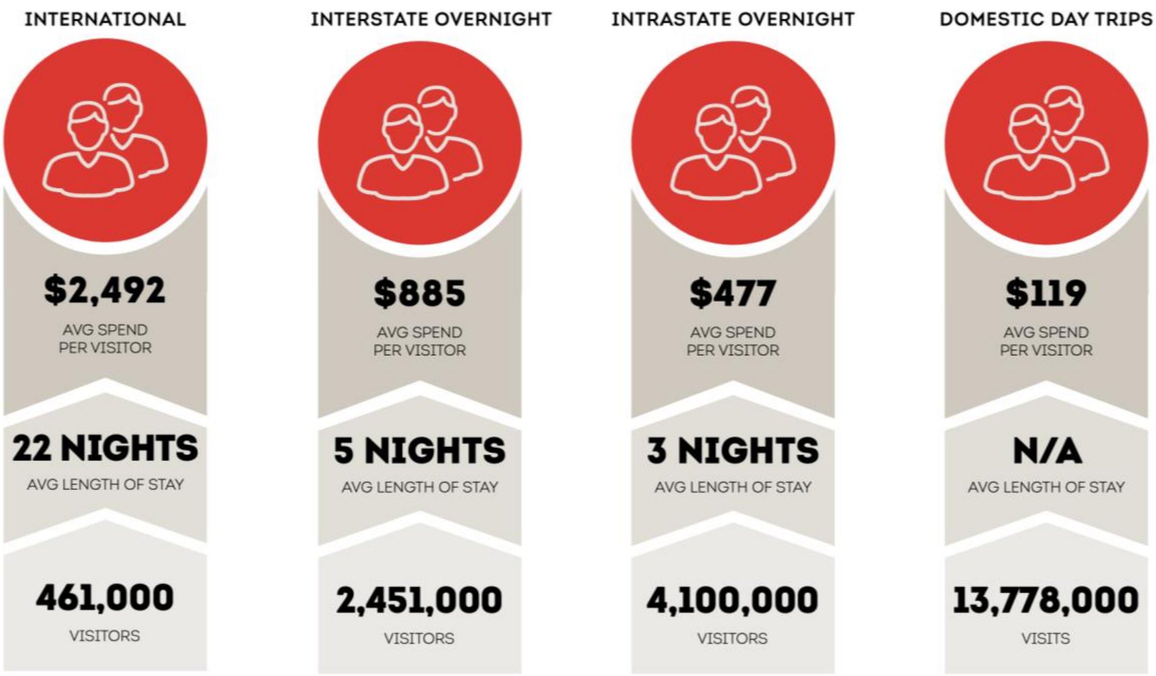
International

Whilst international visitors currently comprise an extremely small proportion of overall visitors to the Region, positively trending growth and forecasted positive growth (Figure 16) of this market at a state level[30], an impressive average length of stay and spend per visitor (Figure 21).

According to SATC, the region is established in New Zealand and UK/Northern EU, but is still developing or emerging in other markets (Eastern markets, including China).[31]

Working with key stakeholders across industry and government will be key to increasing demand from this market. Additionally, increasing destination awareness in the Adelaide market could present opportunities to capture international VFR visitors staying in Adelaide, in addition to working with stakeholders to leverage the increasing number of international visitors who are planning holidays in the Flinders Ranges + Outback.

Figure 21 - Differences in Visitor Behaviour by Origin September 2018



Data Source: South Australian Draft Tourism Plan 2030 (originally from Tourism Research Australia (IVS/NVS Sept 2018))

[30] Tourism Research Australia, International Visitor Survey, YE 2018

[31] Information provided by SATC Destination Development team, July 2019

The China Proposition

In 2016, China was the second largest inbound market for visitor arrivals, and the largest market for total spend and visitor nights, contributing a whopping $9.2 billion to the Nation's economy (11% growth from previous year).[32]

The Free and Independent (FIT) China traveller is fast becoming a boom market for the Australia mainly and key regions, with the market potential to be worth up to $13 billion by 2020.[33]

The China visitor market remains an attractive proposition for most South Australian tourism regions and is currently flagged as one of the South Australia's highest yielding inbound market spending approximately $7895 per trip[34].

For the Region, there are opportunities to leverage the relationships some wine brands have with this market (eg. Killikanoon) by ensuring the successful implementation of the Regional brand on product, and consistent messaging in their marketing to this market.

The Clare Valley Wine and Grape Growers Association are also actively working to enhance brand awareness of the Clare Valley Wine Region (Geographical Index) with this market, so opportunities exist to ensure brand alignment and regional storytelling is aligned.

Additionally, Tourism Australia, SATC and other Government agencies are currently investing significant funding into projects and strategies to attract this market, which means there will be, undoubtedly, many relevant opportunities made available to the Region to leverage.

[32] Tourism Australia China Market Profile 2016
[33] Tourism Australia China Market Profile 2016
[34] South Australian Tourism Commission – Activating China 2020

3.2.2 Generational

Baby Boomers

Research suggests that targeting Baby Boomers (aged 55-75 in 2019) is very much a lucrative opportunity for the Region, for the following reasons:

- They have more time available than any other demographic cohort
- Their average household net wealth is currently the highest of any generational segment[35]
- 40% of Australian travellers 55+ plan to spend between $10k – $50K per person per annum on travel.[36]
- The market size is growing, from 15% of total Australian population in 2017, to approximately 20% in 2037[37]

However, whilst they say that budget is not a primary factor, they:

- Look for the lowest price and looking for a deal / special promotion are key considerations.
- Allocate most to flight and hotel, rather than experiences.[38]

In terms of what experiences, they are interested in, they:

- Are the most destination decisive of the generations with 67 percent saying they had already decided on a destination when beginning to shop for travel.
- Prefer all-inclusive vacations like resorts and cruises, and taking a nap on the beach, spa treatments and all-day relaxation.
- Prefer activities like visiting museums, historical sites and arts and culture the least.[39]

With regard to what influences their travel purchase behaviour, this generation say that:

- They have already decided on their next destination, which makes it difficult for destinations to influence in the 'dreaming' phase of their travel purchase cycle
- Social media does not influence their travel purchase decisions, but;
- Review websites like TripAdvisor (72%) and content developed by destinations (77%) do.[40]

The Grey Nomad phenomenon is a 'type' of Baby Boomer traveller. They represent a cohort who independently travel around Australia by caravan or campervan for an extended period of time.

It's important to note that the original Grey Nomad market (Silent Generation, now in their 70s-90s) had very different attitudes and behaviours as it relates to travel, and whilst the Grey Nomad market remains a growth sector, it does so, because of the generation shift from the Silent Generation to the Baby Boomers, who represent a more tech savvy, cashed up, experience driven market - especially the younger Boomers.

[35] https://mccrindle.com.au/insights/blog/australias-generations-wealth-income/
[36] https://www.newyoungconsulting.com/seniors-travel-research-report/
[37] https://www.newyoungconsulting.com/seniors-travel-research-report/
[38] Australian Multi-Generational Travel Trends Report 2017 > https://info.advertising.expedia.com/hubfs/Content_Docs/Rebrand-2018/Australian%20Multi-Generational%20Travel%20Trends-Small.pdf?hsCtaTracking=dbc2fbbd-abe5-4c41-83c7-6af02261bca6%7Cb9a4eaed-4268-446b-a52d-b06e880ac1ad
[39] Australian Multi-Generational Travel Trends Report 2017 > https://info.advertising.expedia.com/hubfs/Content_Docs/Rebrand-2018/Australian%20Multi-Generational%20Travel%20Trends-Small.pdf?hsCtaTracking=dbc2fbbd-abe5-4c41-83c7-6af02261bca6%7Cb9a4eaed-4268-446b-a52d-b06e880ac1ad
[40] Australian Multi-Generational Travel Trends Report 2017 > https://info.advertising.expedia.com/hubfs/Content_Docs/Rebrand-2018/Australian%20Multi-Generational%20Travel%20Trends-Small.pdf?hsCtaTracking=dbc2fbbd-abe5-4c41-83c7-6af02261bca6%7Cb9a4eaed-4268-446b-a52d-b06e880ac1ad

Potential for Baby Boomers as a growth market:

- The interstate visitor profiles for South Australia suggest that visitors from NSW and Western Australia, in particular, could be an attractive proposition, with 41% of visitors from New South Wales in the 55+ age group, and 59% of visitors from WA in the 45+ age group.
- The Region already attracts a significant proportion of Senior travellers (48% Domestic, 49% International, see Figure 20), however, the key to leveraging this market will be to identify what personas will represent the high yielding visitors within this broader generational segment, as those at either end of the spectrum exhibit significantly different attitudes, behaviours, and spending patterns, which need to be taken into consideration when it comes to successfully marketing to them.

Millennials

Whilst the Baby Boomers are the low hanging fruit, it would be remiss to discount the potential of the younger markets, who, whilst they represent a smaller part of the current visitor profile to the Region in comparison to the 55+ market (28% Domestic, 25% International, see Figure 20), they will be the future visitor segments to target in the next 10 years as they mature, so it's important to whet their appetite for the destination now, and reap the benefits in the future.

In terms of what experiences, they are interested in:

- Relaxation, sightseeing, outdoor adventure, museums, historical sites, and arts and culture, and living by the YOLO (You Only Live Once) mantra when it comes to travel. [41]

With regard to what influences their travel purchase behaviour:

- Two-thirds of Millennials either do not have a destination in mind when beginning to plan a trip, or are considering two difference destinations, which means that this market has the opportunity to be influenced more than the Baby Boomers.
- This cohort agree that ads with appealing imagery can influence them, and;
- They consider Facebook and Instagram the most influential social platforms for travel inspiration. [42]

Generation Z travellers represent a very small proportion of current travellers to the Region (7% Domestic, 14% International, see Figure 20), have similar predispositions to travel as the Millennials, with the following differences:

- The go on just over 3 trips per year (second to Millennials on 4 trips per year)
- They are slightly prioritising international trips over travelling around Australia (where majority of Millennials prefer to travel domestically)
- They prioritise the YOLO mentality when it comes to experiences, take risks, and focus on crossing things off their travel wish list, as well as activities that take them off the beaten track.
- This cohort are also heavily influenced by Facebook and Instagram, and will look for recommendations on review websites TripAdvisor, by talking with people they know, and are less influenced by advertising.[43]

[41] Expedia's Australian Multi-Generational Travel Trends Report 2017 > https://info.advertising.expedia.com/hubfs/Content_Docs/Rebrand-2018/Australian%20Multi-Generational%20Travel%20Trends-Small.pdf?hsCtaTracking=dbc2fbbd-abe5-4c41-83c7-6af02261bca6%7Cb9a4eaed-4268-446b-a52d-b06e880ac1ad
[42] Expedia's Australian Multi-Generational Travel Trends Report 2017 > https://info.advertising.expedia.com/hubfs/Content_Docs/Rebrand-2018/Australian%20Multi-Generational%20Travel%20Trends-Small.pdf?hsCtaTracking=dbc2fbbd-abe5-4c41-83c7-6af02261bca6%7Cb9a4eaed-4268-446b-a52d-b06e880ac1ad
[43] Australian Multi-Generational Travel Trends Report 2017

Together, the Millennial and Generation Z markets are an attractive proposition for the Region to consider because:

- The take the most trips per year our of any generational segment (nearly 8 trips between them)
- The activities they want to experience align well to what the Region has to offer (outdoor adventure, museums, historical sites, and arts and culture.
- 65% of Millennials are intending to take a short holiday in the next 12 months. This is well above the average Australian at 56.4%.[44]
- The interstate visitor profiles for South Australia suggest that visitors from Victoria (42% from regional VIC), in particular, could be a specific market to target, with 47% of visitors from Victoria are between 15-44.[45]
- Michele Levine, CEO, Roy Morgan, says: "90% of Australians intending to make their next short holiday a domestic one, tourism bodies will need to ensure that they can cater to Millennials who will make up a large portion of these domestic travellers".[46]

When talking about generational growth markets, it's important to note that differences between each cohort are blurring. People travel for different aspirations and interests, regardless of their age and gender. Therefore, the Region must focus on attracting customers with similar aspiration and interests, and not just define customers their age.

[44] Roy Morgan Holiday Tracking Survey (Australia) April 2017 – March 2018 > http://www.roymorgan.com/findings/7603-millennials-plan-to-travel-more-than-other-australians-201805250640
[45] South Australian Interstate Market Profiles > https://tourism.sa.gov.au/research-and-statistics/south-australia/interstate-market-profiles
[46] Roy Morgan Holiday Tracking Survey (Australia) April 2017 – March 2018

3.2.3 Life Stages

Families

Families (and groups of families) were identified through the consultation survey and workshops as an important market for the Region, in particular linked to school holiday travel.

Family travel in Australia is dominated by domestic travel, despite growth in families travelling overseas. [47]

Families are quickly becoming an important segment of the caravan and camping industry, with 'Parents with children still living at home' being the largest segment by lifestyle group taking trips, making up 36% of the domestic caravan and camping market (accounting for the majority of nights of total nights at 31%).[48] Looking at the breakdown by age, the 30-54 year market makes up 47% of all trips. There has also been solid growth from the younger markets (under 30s) in recent years, which has been fuelled by the increasing demand for experiential and, especially nature-based travel.[49]

Research into the Family Market by Destination New South Wales[50], found that:

- Family holiday time is precious, and the needs of the entire travel party must be met. The provision of a wide range of accommodation options, a variety of family friendly social and outdoor activities, local attractions and offering all-inclusive travel packages will increase the appeal of domestic holidays.
- Families need to be motivated to travel especially with a sense of immediacy of travelling now. Boosting the appeal of local events and festivals, and food and wine experiences have the potential to generate excitement and interest to travel now and to travel during off-peak periods.

The Region is well positioned to cater for the families, and in particular the caravan and camping market, especially with Intrastate cohort (due to the already high regional awareness), given the Region's selection of outdoor and nature-based experiences, as well as local events and food and wine experiences.

SINKs and DINKs

Single Income No Kids (SINK) and Double Income No Kids (DINKS) are both attractive market segments for the whole region. The latest National Visitor Survey (December 2018) identified that while growth in overnight travel has been wide spread across all life cycle groups, the increase in trips has been more pronounced for singles (15%) than those who have a partner (6%) in 2018.[51]

The increase for singles has been evenly shared between young and midlife singles (16%), older working singles (15%) and older non-working singles (15%). Consistent with the stronger growth in travel by those from single life cycle groups, the number of overnight trips taken by those travelling alone increased 13% in 2018. [52]

The experience themes and events within the Region (identified in section 4) are conducive to attracting this life stage, particularly across the Baby Boomer-Millennial generational segments, and therefore represent a great opportunity for the Region.

---

[47] http://www.destinationnsw.com.au/wp-content/uploads/2013/05/nsw-family-market-snapshot.pdf?x15361
[48] Caravan Industry Association of Australia – State of the Industry Report 2018 > https://www.caravanqld.com.au/wp-content/uploads/2018/10/2018-State-of-Industry-Report.pdf
[49] Caravan Industry Association of Australia – State of the Industry Report 2019 > https://www.caravanindustry.com.au/research
[50] NSW Family Travel Market > http://www.destinationnsw.com.au/wp-content/uploads/2013/05/nsw-family-market-snapshot.pdf?x15361

[51] TRA National Visitor Survey Report (December 2018) > https://www.tra.gov.au/Domestic/Domestic-tourism-results/domestic-tourism-results
[52] TRA National Visitor Survey Report (December 2018)

3.2.4 Niche Interest Segments

Food and Wine Tourism

The enjoyment of food and wine is integral to the Australian tourism experience, which embodies quality ingredients, fresh produce and innovative cuisine. Food and wine tourism rely on visitors directly enjoying quality Australian food and wine. Activities include visiting wineries, breweries and distilleries, and eating out at restaurants.

Of all the key attractors in regional Australia, the enjoyment of food and wine is a significant one and one of the highest growth activities, seeing a 5.2% growth in the sector over the 5 years from 2011-2016.[53]

Interestingly, the majority of the Food and Wine visitors in Australia are domestic day trippers (57%), which makes sense when most wine regions in Australia are within a daytrip from most major cities (especially South Australia wine regions).[54]

Wine is a key draw card for South Australian international visitors, with 34% of all international visitors visiting wine regions while in South Australia.[55] South Australia, with its strong reputation for quality wine and easily accessible wine regions, has the highest instance of wine region visitation of any state, with more than a third (34%) of international visitors spending time in wine regions. This is more than double the national average and many times higher than Victoria (12%), New South Wales (7%) and Queensland (2%).[56]

Whilst there is no quantitative domestic data regarding the state of play for wine tourism in South Australia available for analysis[57], there is significant anecdotal evidence that wine tourism is continuing to evolve and grow, especially for those wine brands who push the envelope with regard to experience development.

The D'Aarenberg Cube is an aspirational example of how developing an experience greater than just wine tasting at a cellar door can have a profound effect on a business, in addition to a whole destination. So whilst the 'Cube' is for wineries, like Southern Ocean Lodge on Kangaroo Island is for accommodation providers, it proves that experiential development around the core wine offering has the ability to drive demand for regional visitation.

The Region has significant potential to drive increased demand for food and wine experiences, especially with new products such as The Watervale Hotel, Slate Restaurant, Seed Winehouse and Kitchen, Indii of Clare and Umbria – whom are sharing a local epicurean experience.

Art, Culture + Heritage Tourism

Australia's strong Indigenous culture and modern European history means there are opportunities to build visitation in Australia's cultural and heritage segment.

Cultural and heritage tourism rely on experiences which directly relate to the enjoyment of history and culture, with activities including visiting museums, art galleries, heritage buildings, sites and monuments, attending festivals, fairs or art and craft workshops as well as experiencing indigenous art and culture or visiting an indigenous site or community.

---

[53] Tourism investment in Regional Australia > https://www.ecotourism.org.au/assets/Resources-Hub-Ecotourism-Research/Tourism-Investment-In-Regional-Australia-2017.pdf
[54] Tourism investment in Regional Australia > https://www.ecotourism.org.au/assets/Resources-Hub-Ecotourism-Research/Tourism-Investment-In-Regional-Australia-2017.pdf
[55] South Australian International Wine Tourism Strategy 2020
[56] South Australian International Wine Tourism Strategy 2020
[57] As informed by Robin Shaw of Wine Tourism Australia, June 2019

Culture and Heritage Tourism in regional Australia has grown 7.9% in visitation per year from 2011-2016, with 49% of all visitors being domestic day trippers.[58]

From a Regional perspective, heritage tourism is a strength of the Region (identified in Section 4), and a key opportunity is to raise the awareness through strategic marketing activities. The development of the **SA Heritage Tourism Strategy** by the Department of Environment and Water (due for delivery 2020) also presents opportunities for the Region to grow new and activate existing heritage + cultural experiences.

The sharing of local indigenous culture and stories in all product marketing and export packaging is a major opportunity for the Region too.

Nature Based Tourism

Australia is a place of exceptional natural beauty where ancient rainforests and vast national parks, rugged mountain ranges and reefs, beaches, and waterways, provide sanctuary to Australia's wondrous wildlife. Nature and wildlife-based tourism relies on experiences directly related to natural attractions – with activities including visiting national parks, botanic gardens, farms and wildlife parks, as well as bushwalking and visiting zoos and aquariums.

In terms of Domestic performance, this sector has seen a 10.6% growth from 2011-2016, with the majority of visitors being domestic overnight (47%).[59]

The South Australian Government is focusing their investment in this area based on the '**Nature Like Nowhere else – activating nature-based tourism in South Australia'** strategy and action plan.

Focus areas of the Plan are:

- Standout walking journeys across the landscape
- Unrivalled native wildlife experiences in Adelaide
- Marine wildlife experiences without equal
- Cutting edge sensory experiences that leave a lasting impression

Opportunities exist within the Region to advocate for the further activation of Parks, such as Spring Bank CP and Redbanks Gorge CP, to improve walking trails and interpretation (such as around fossils at Redbank Gorge). Other opportunities exist to advocate for relevant events, businesses and tour operators to use the Trails and Parks in their tour or product offering.

Cycle Tourism

Cycle tourism has been identified globally, by the United Nations World Tourism Organisation[60], as a key growth adventure tourism activity due to its low-impact and high-spend nature. Not only is cycle tourism more sustainable environmentally, socially and economically but it also disperses visitors to areas that traditionally do not attract tourism and supports employment in local economies.

---

[58] Tourism investment in Regional Australia > https://www.ecotourism.org.au/assets/Resources-Hub-Ecotourism-Research/Tourism-Investment-In-Regional-Australia-2017.pdf
[59] Tourism investment in Regional Australia > https://www.ecotourism.org.au/assets/Resources-Hub-Ecotourism-Research/Tourism-Investment-In-Regional-Australia-2017.pdf
[60] UNWTO Global Report on Adventure Tourism (2013) > https://skift.com/wp-content/uploads/2014/11/unwto-global-report-on-adventure-tourism.pdf

Cycle tourists can be categorised under two main market segments;

- Those who travel to a destination to cycle – those who are cycle enthusiasts who regularly travel with cycling as a primary motivator, and;
- Those who undertake incidental bike riding whilst on holiday – typically leisure cyclists where cycling is an incidental activity and plays no part in influencing travel behaviour.[61]

Within those two main market segments, the cycle tourist can be categorised under seven different cycle types:

1. Road Cyclists
2. Track Cycling
3. Mountain Biking
4. BMX
5. Touring (On and Off Road)
6. Recreation
7. Event Participant

Cycle tourists typically stay longer, spend more and engage in a broader range of experiences than the average visitor, and as a result, can become a driver for increased economic prosperity for regional destinations. Studies have identified that whilst a cycle tourist's average daily spend is slightly higher than domestic visitors, their overall trip spend is nearly five times as high.[62]

Other key characteristics of cycle visitors include;

- They have a higher propensity to travel to regional areas, and high tendency to become repeat visitors to a destination
- They average daily spend is $124 per night, average length of stay is 16 nights (compared to 5 nights for the average overnight visitor in South Australia[63]), and total trip expenditure is approximately $2000 per domestic cycle tourist and $5,005 per international cycle tourist[64]
- Twice as many cyclists travel on a long trip (5-night stay or more) to interstate regional destinations as those travelling to intrastate destinations (18% vs 8%)[65]
- They love fine wine, good restaurants (68%) and outdoor activities in natural environments (82%)[66]
- Cycle tourists typically travel at least three times per year, which suggests that cycle tourism is a niche but high engagement activity[67]

In terms of motivations, the cycle tourism market is dominated by cyclists who travel to destinations primarily because of the routes, trails, the riding experience that the destination offers, and events are also a key driver of travel motivation, as well as destination and facility awareness.

Between 2009-2014 the percentage of tourists that cycled in Australia increase by 25% by visitor number and 16% by visitor nights. In 2014, more than 2.9 million tourists in Australia cycled. In 2014, 1.1% of all Australian visitors participated in a cycling activity during their trip, while 5% of international visitors cycled.[68]

[61] Western Australia Cycle Tourism Strategy > https://www.tourism.wa.gov.au/Publications%20Library/Research%20and%20reports/CDP%202017%20reports/180419_Westcycle%20Cycle%20Tourism%20Strategy.pdf
[62] Faulks, Ritchie & Fluker (2006), Cycle Tourism in Australia: An investigation into its size and scope, Sustainable Tourism CRC, available at http://atfiles.org/files/pdf/Faulks-Austraila-Cycle-Tourism.pdf
[63] SA Draft Tourism Strategy 2030
[64] Faulks, Ritchie & Fluker (2006), Cycle Tourism in Australia: An investigation into its size and scope, Sustainable Tourism CRC
[65] EY Sweeney (2015), Growing Cycling Tourism in Victoria – Report, Ernst and Young, available at https://www.tourismnortheast.com.au/wp-content/uploads/sites/54/24681-Cycling-Tourism-Full-Report-FINAL-16-NOV-2015.pdf
[66] EY Sweeney (2015), Growing Cycling Tourism in Victoria – Report, Ernst and Young
[67] EY Sweeney (2015), Growing Cycling Tourism in Victoria – Report, Ernst and Young.
[68] The South Australian Bike Economy (2016) > https://innovationandskills.sa.gov.au/upload/publications/bike-economy.pdf

For the year end September 2018, 46,000 international visitors to SA undertook cycling as an activity somewhere in Australia (10% of all international visitors to SA), and 112,000 domestic overnight visitors to SA cycled while here (approx.1.7% of domestic overnight visitors to SA).[69]

In South Australia, there are trails, tourism experiences and cycling events that bring thousands of visitors to the State. South Australia is a great place to ride as a commuter or for sport and South Australia has some of the most significant bike assets in Australia including Cycling Australia's High-Performance Network and the Tour Down Under – an iconic sporting event and the largest bike business event in Australia.[70]

In its 2015 survey of cycle tourism, Roy Morgan found that 5 of the top 9 areas for cycle tourism in Australia were in South Australia. These areas include the Adelaide Hills, the Riverland, Flinders Ranges, Clare and the McLaren Vale.[71]

Cycle tourism offers a significant growth opportunity for the Region, which is staring to be realised with events such as the Clare Classic. The Region is well-placed to capitalise on both cycling experiences, new and planned, across the broader region and as a central base for neighbouring regions (eg. Melrose).

The Region has significant cycle tourism potential, with the Riesling and Rattler Trails, Mawson Trail and Wakefield Trails traversing the Region. Plans to develop a new Adelaide Wine Capitals Trail, extending from the Clare Valley Tourism Region, through the Barossa to the Adelaide Hills, and also the mountain biking proposition established in neighbouring Melrose offer great regional potential.

Sport Tourism

Sport tourism refers to travel which involves either observing or participating in a sporting event, staying apart from their usual environment. This is a fast-growing sector of the global travel industry, as people increasingly travel to watch or participate in their favourite sport.

The Region is home to a number of recreational complexes and picturesque recreational trails and roads, which offers a promising opportunity to attract more events, participants and spectators to not just to the sub regions of Clare Valley Wine Region and Burra, but also to the surrounding towns in the Agricultural Districts.

The Action Plan outlines opportunities to work collaboratively with Office for Recreation & Sport and Events SA to enhance, identify and secure an increased number of major sporting events in the Region, especially during off peak season.

Sport types would be aligned with the sporting facilities and trails and roads in the Region, as well as and visitor's interests, as either participants or spectators. In addition to cycling specific events as per the previous section, these sports could include motorsport, motorbiking, swimming, tennis, cricket, football, bowls, golf, horse riding, aerial (gliding, planes), horse racing and running*.

**With the variety of sport venues and sporting associations, combined with the lack of a specific Sport Tourism Strategy for South Australia, further research is required to confirm the sport activities most likely to attract the Region's high yielding customers.*

[69] South Australian Tourism Commission, Research Team, (3 year average to September 2018) data received March 2019
[70] Growing the South Australian Bike Economy (2017) > https://innovationandskills.sa.gov.au/upload/industry/bikeecon/SAGOV_BikeEconomy_FACTSHEET_LR.pdf
[71] The South Australian Bike Economy (2016) > https://innovationandskills.sa.gov.au/upload/publications/bike-economy.pdf

Wellbeing Tourism

Wellness tourism is a $639 billion global market, growing twice as fast as general tourism, with Australia is in the top five wellness tourism markets in the Asia Pacific. Australia's clean, green environment; Indigenous plants with health properties; and an emphasis on cultural traditions create a competitive advantage for Australia as a destination for wellness tourism.[72]

Tourism Australia says the country has seen 14.3% growth in this segment over the past 5 years (to 2018) with 840,000 travellers involved in wellness tourism in 2018.

About a third of their travel involved day trips. But overnight stays in domestic destinations such as Byron Bay in NSW or Daylesford in Victoria are also becoming much more popular.

Whilst there are no 'Wellbeing' experiences in the Region, it is a niche interest segment that was identified in the *Clare Valley + Burra Tourism Research Project 2016*, as an experience theme that would drive demand from the survey respondents if experiences were infact available in the Region. Therefore, the Region should keep this potential experience theme on the table for consideration with regard to Product + Experience Development.

[72] The Global Wellness Tourism Ecnomy 2018 > http://www.tourisminvestment.com.au/content/dam/assets/document/1/7/3/x/8/2011292.pdf#

3.2.5 Niche Market Segments

Caravan and Camping

Australia's domestic caravan and camping visitor economy continues to break records, with total nights spent caravan and camping increasing by 9% to reach a record 54.8 million for the year ending September 2018.[73]

12.6 million overnight trips were recorded for the year ending September 2018, marking a 7.4% increase from the previous year.

All age sectors experienced growth for the same period:

- 20 to 29 year segment that performed the strongest, increasing by 16% on the previous year
- The 30 to 54 segments also increased by 5%
- The 55+ market continues to represent the second largest cohort, increasing by 6% on the previous year.

In 2017, the South Australian Caravan and Camping Industry injected $237 million dollars into the state's economy, and accounted for 1,513 FTE equivalent jobs.[74]

The research also examined popular activities and found that over 6.5 million caravan and camping domestic visitors ate out at a restaurant or cafe, making it the most preferred activity. Other popular activities included going to the beach (4.4m) and sightseeing (4.2m). These choices of activity not only highlight the interests of many caravan and campers, but also demonstrates the value that caravan and camping has in connecting Australians to nature-based experiences.[75]

The Region is well positioned to attract more of this market (across all generational segments), with its numerous caravan and camping parks (identified in Table 15), the recent proposal from Clare and Gilbert Valley Council (shared publicly June 2019) to invest in the enhancement of the Discovery Parks in Clare, and the well-established epicurean and nature-based experiences.

Weddings

Weddings are big business in Australia. In 2017, 112,954 marriages registered were registered in Australia in 2017, of which there were 7,265 Marriages in South Australia. Peak months are March, April, September, October, November[76]. 90% of couples marry in their home state, and on average cost of Wedding Venue in South Australia is $14,936[77].

The Clare Valley Tourism Region is already a popular destination wedding location with is picturesque rural + vineyard settings and many boutique wedding venues (historic buildings + cellar doors). Anecdotally the Region host around 180 – 200 per year[78].

---

[73] 2018 Caravan and Camping State of the Industry Report 2018 > https://www.caravanqld.com.au/wp-content/uploads/2018/10/2018-State-of-Industry-Report.pdf
[74] Australian Caravan Industry Economic value Report > https://vicparks.com.au/wp-content/uploads/2018/11/Australia-Caravan-Industry-Economic-Value-2018.pdf
[75] 2018 Caravan and Camping State of the Industry Report 2018 > https://www.caravanqld.com.au/wp-content/uploads/2018/10/2018-State-of-Industry-Report.pdf
[76] https://www.abs.gov.au/ausstats/abs@.nsf/Latestproducts/3310.0Main%20Features32017?opendocument&tabname=Summary&prodno=3310.0&issue=2017&num=&view=
[77] https://www.easyweddings.com.au/business/wp-content/uploads/sites/11/2018/04/Easy-Weddings-2018-Survey.pdf
[78] Ashley Schultz, www.clarevalleyweddings.com.au, June 2019

In addition to the economic investment of a wedding reception in the Region, the flow on effect of a destination wedding is significant, including accommodation, party hire, dining venues, hire cars, local services (hair + make up, cake, photographer), food suppliers and attractions for both the bridal party and their guests.

Clare Valley Weddings is a key marketer of weddings in the Region. Run by Clare Valley local Ashley Shultz, she manages the website www.clarevalleyweddings.com.au, which features wedding venues and suppliers around the Region, has engaged social media communities and also runs the annual Clare Valley Bridal Fair. The 2019 event (Jun 19), saw numbers of around 200 attendees at the event. This was slightly down on previous years, but quality of enquiry and bookings received by vendors on the day were higher than previous years..

Opportunities existing to attract more of weddings of the identified high yield customers through strategic marketing + partnerships.

Cruise

In 2018/2019, the Cruise sector super charged South Australia's visitor economy with a record 84 cruise ship visits planned, a 23% growth on the previous year, injecting a record breaking $118 million into the South Australia economy[79], well exceeding the State Government's 2020 target[80] of 100 cruise ship visits vessels (and $200m contribution to the State economy).

The Cruise Market provides a longer-term opportunity for the Region, due to the opening up of Wallaroo to Cruise Ships from the 2020 cruise season. While mining heritage of Burra is less likely an attraction due to Wallaroo's close proximity of Moonta Mines State Heritage Area, the wine and food offering of the Clare Valley Wine Region is a 1 hour 15-minute drive from Wallaroo and a feasible distance for shore excursions. Opportunities also exist for pre/post cruise touring as Adelaide grows as a home port for Cruise Ships, including an already proposed day trip to Bungaree Station, Seed Restaurant and Martindale Hall.

Business Events

Business event visitors deliver high yields for the Australian tourism industry with an average overnight spend of $238 per night, compared to an average $161 per night spend by all overnight visitors to Australia. This high delegate spend has created an increasingly competitive environment for the business events industry in Australia.[81]

For the Region, business travel accounts for 14% of total overnight (26,000), 21 % of nights (domestic + international) and have the longest average length of stay of 3 days[82].

The Region is home to medium sized business events venues including the Clare Valley Country Club and the Valley's Function Centre. Smaller function spaces are also available at many of the Wineries, Restaurants, Sports Clubs and Town Halls. These venues provide the Region with the opportunity to attract small-medium sized business events.

Due to proximity to Adelaide, the Region also has potential leverage pre and post touring options for the Meetings, Incentives, Conference and Exhibition (MICE) events in Adelaide through focused product development and marketing efforts.

---

[79] https://www.thehotelconversation.com.au/news/2019/02/04/south-australias-record-month-cruise-ships-begins/1549255513
[80] SATC Cruise Ship Strategy > https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={E8B0A5BD-7C3D-42B1-9F9B-06FFC96C8C17}&B=False

[81] Tourism Australia, Business Events http://www.tourism.australia.com/business-events.aspx
[82] SATC Regional Tourism Profile Clare Valley (December 2016 – December 2018)

4. Tourism Experiences

This section outlines the tourism experiences in the Clare Valley Tourism Region and highlights the emerging and potential product development opportunities for the Region.

Key Findings

The Region, which encapsulates the Clare Valley Wine Region, Burra and the agricultural districts surrounding those key tourism centres, boasts some of Australia's most coveted wine brands, cellar doors, regional dining experiences, events, and food producers, making it an exciting melting pot of epicurean delights.

In addition to the gastronomic experiences are some of South Australia's most prominent copper mining and agricultural heritage assets including the historical Burra Mine Site and Passport Heritage Trail, Bungaree Station, and Mintaro State Heritage Centre which are complemented by historical walking trails, drives, museums, churches and cemeteries dotted across the Region.

The Region is also home to an eclectic range of artisans and creatives, which has seen the organic growth of a diverse range of art and cultural experiences for locals and visitors to enjoy, including art galleries, trails, public art, expressive art and increasing indigenous cultural experiences.

All of these assets are perfectly nestled in a quintessentially Australian landscape, with rolling vineyards surrounding by majestic gum trees, broad acre cropping, and dramatic bare-rolling hills, all within a stones-throw from South Australia's outback. This natural setting is the perfect backdrop for outdoor and soft adventure experiences, including cycling, walking and touring for all ages.

Whilst the Region already has a number of established and reputable tourism experiences, there is still room for improvement, in terms of developing experiences that are aligned with attracting high yield, overnight visitors to the destination. Some key opportunities include:

- **Accommodation** – attracting investment in new experiential accommodation, in the form of high-end accommodation (6 star) and larger quality property including function space (large groups). In addition to activating Discovery Holiday Parks upgrade in Clare, and refurbishment of existing accommodation.
- **Food, Wine + Beverages** – Enhancing the paddock to plate / provenance culture within current experiences, and development of new, unique experiences, addressing skills shortage, activate product development of Regional food producers
- **History + Heritage** – Enhancing current experiences using digital technologies, activating aboriginal heritage and storytelling across the Region's experiences, and develop outback experiences
- **Outdoor + Adventure** – Activate the Riesling Trail and the intra-inter-regional cycle, walking and horse-riding trails networks, through collaborative development and marketing initiatives
- **Arts + Culture + Retail –** Address opening hours, activate current experiences with interpretation, activate Burra Art Precinct, and conduct game changer feasibility projects (eg. Art Gallery in Clare and Gilbert Valley Council Region)
- **Events –** Develop and market events to combat seasonality, attract new major tourism events, and participatory sporting events.
- **Tours –** Attract new tour companies to host Regional Day Trips / Overnight Trips, including those on the way to Flinders Ranges, attract new high-end tour companies via Clare Aerodrome (eg. Helicopters)

4.1 Sub Region Overview

Due to the concentration of visitor experiences at certain parts of the Region (Clare and Burra are the central tourism precincts within the Region), a Sub-Region approach has been taken when looking at the product and experiences on offer within the Region.

4.1.1 Clare Valley Wine Region

The Clare Valley Wine Region (CVWR), as identified by Wine Australia's Geographical Indication system) is considered one of the most picturesque wine regions in South Australia, while renowned wine critic James Halliday has described the Clare Valley as one of Australia's most beautiful wine-producing regions.

The CVWR is a well-established visitor destination in South Australia's mid north and has a winemaking history dating back 150 years that is dominated by small growers and winemakers. It's food and wine offerings are the primary driver of visitation to the CVWR.

The geographical advantages that make the CVWR such a lucrative farming and agricultural region also provide the basis for fine wine production.

Figure 22 - Clare Valley Wine Region (GI)

Accessed from https://www.wineaustralia.com/labelling/register-of-protected-gis-and-other-terms/geographical-indications/clare-valley

The CVWR is situated approximately 100km north of Adelaide and made up of a tapestry of villages, vineyards and farms around Auburn, Leasingham, Watervale, Penwortham, Sevenhill and Mintaro, with the larger township of Clare the hub of the sub-region.

There are more than 40 wineries and vineyards in the sub-region, most of which are small, boutique, family-run enterprises. Sevenhill Cellars is the sub-region's first and most historic cellar door experience. Restaurants, cafes, galleries, museums, historic properties, iconic landmarks, boutique food producers and attractions are scattered in rolling vineyards surrounding by majestic gum trees and agricultural farmland.

The 35km Clare Valley Riesling Trail is a key cycle and walking trail that links many of the experiences in the CVWR. The annual Clare Valley Gourmet Weekend was Australia's first food and wine events, and still an important event on the South Australian food and wine event calendar. In addition to wine and food, visitors can immerse themselves in the sub-region's rich heritage, such as at Bungaree Station and the historic village of Mintaro.

4.1.2 Burra

Burra is a national heritage-listed town that is recognised for its outstanding national heritage significance as one of only two places in Australia where Cornish mining technology, skills and culture are still on display. It is South Australia's most accessible and engaging historic mining town and is an important regional asset in being able attract visitors not just seeking food and wine experiences.

This rich heritage can be explored through the Passport Heritage Trail, which offers insider access and interpretation to many buildings and localities in-tact from the 1840's, including the Monster Mine, Redruth Goal, Unicorn Brewery and Miners Dugouts.

The town's Market Square is an engaging hub of retail, attractions and food outlets housed in historic buildings. Events also attract visitors year round, such as via the annual Burra Picnic Races, Burra Districts Open Gardens and Spring Expo, Burra Vintage and Antique Fair, AGL SA Rally of the Heartlands and Burra AGL Country Music Festival.

Paxton Square cottages offers visitors the opportunity to stay in historic miner's cottages. The bare, rolling hills surrounding the town are dramatically different landscape to the nearby Clare Valley Wine Region and are still photographed widely at locations such as the Midnight Oil House which is located north of the town.

4.1.3 Agricultural Districts

The wider region surrounding the Clare Valley Wine Region and Burra are home to broadacre farming, primary food producers, intensive food production (south east) and outback station grazing country (east boundary). Towns such as Balaklava, Eudunda, Riverton, Tarlee, Owen, Hamley Bridge, Saddleworth, Hallett, Snowtown, Mallala and Port Wakefield service their local communities and also support visitors within the Region.

The western boundary of the Region is traversed by Highway One, which connects Adelaide with the Yorke Peninsula, Eyre Peninsula and Flinders Ranges and Outback regions of South Australia. Port Wakefield, located 100km north of Adelaide, is a major visitor service centre for travellers to these regions, and also offers entry to the Clare Valley Wine Region via Balaklava. Further north at Lochiel, alongside the highway, Lake Bumbunga is attracting global advocacy on social media for its unique pink colour, and as yet it's potential to drive visitation into the Region itself is yet to be leveraged.

The south west boundary of the Region are the waters of the upper St Vincent Gulf. While geographically it falls in the Region, its coastal areas are marketed as part of Adelaide[83] and also Yorke Peninsula[84] due to its alignment of their product offering and proximity to these destinations.

While tourism experiences are limited these parts of the Region (in comparison to Clare Valley Wine Sub-Region and Burra Sub-Region), many of the towns support visitors through the provision of visitor information, public toilets, parks, historic trails, museums/galleries, RV camping and caravan parks. Their local communities also benefit from the spend of visitors in their towns at their pubs, food and petrol outlets.

Long distance trails and niche interest events attract visitors to this part of the Region. The Heysen + Lavender (Walking) and Mawson (Cycling) trails traverse parts of this region, while events such as Motorbiking, Car Rallys, Sporting Carnivals and Horse Racing bring visitors to different rural communities at certain times of the year.

The continued global interest in food provenance and food production is a growth opportunity for the Clare Valley Tourism Region, and in particular this part of the sub-region. The sub-region also offers the closest access to the Australian Outback from a capital city in Australia (only 2 hours from Adelaide just north of Eudunda) and is a unique opportunity that has potential to be leveraged to attract more visitors to the whole Region via product development.

[83] https://www.parks.sa.gov.au/find-a-park/Browse_by_region/Adelaide/adelaide-international-bird-sanctuary-national-park#see-and-do

[84] https://yorkepeninsula.com.au/samphire-coast

4.2 Experience Themes + Product Alignment

After undertaking extensive stakeholder consultation and review of relevant strategic documents (see Acknowledgements), the Region's tourism experiences can be categorised into five themes:

- Wine, Beverages + Food
- History + Heritage
- Outdoor + Adventure
- Arts + Culture
- Events

These tourism experiences appeal to a variety of customer groups. These experiences have been categorised by their strengths and their ability to grow the visitor experience in the Region and used as a lens to prioritise investment and activities.

- **Primary Strengths** refers to key visitor experiences that are considered to be the Region's competitive advantages. Primary strengths include draw-card attractions and activities.
- **Secondary strengths** refer to tourism experiences that have a smaller presence in the sub-region but provide an important supporting role in visitors overall experience in the Region.
- **Emerging strengths** refer to tourism experiences that are limited in the Region but have the opportunity to develop over time

Table 13 - Experience Theme Strength Summary

	CLARE VALLEY WINE REGION	BURRA	AGRICULTURAL DISTRICTS
Wine, Beverages and Food *Home to some of Australia's most famous boutique wine brands and many award-winning cellar doors, as well as food producers, boutique breweries and regional dining experiences.*	Primary	Emerging	Emerging
History + Heritage *South Australia's rich Cornish copper mining and agriculture heritage can be experienced through historic trails, towns, walks, drives, museums, churches, cemeteries and agricultural properties.*	Secondary	Primary	Emerging
Outdoor + Adventure *From cycle and walking trails, touring adventures, parks, reserves and attractions, there is an adventure waiting for all ages. The Region is also on Njadjuri Country, and visitors can learn about local landscapes via indigenous custodians.*	Secondary	Secondary	Emerging
Events *People are drawn to the Region for major events such as the Clare Valley Gourmet Weekend. Community and niche interest events around the year make the Region a vibrant place to live, work and play.*	Secondary	Secondary	Emerging + Niche Interest (eg Motorsport)
Arts, Culture + Retail *The Region is home many creative people, with opportunities to meet and interactive with artists or view their works are galleries and retail outlets.*	Secondary	Secondary	Emerging

The following is a snapshot of the experience themes and related product within the 3 sub-regions in the Council.

Table 14 - Experience Themes + Product Alignment

EXPERIENCE THEME	CLARE VALLEY WINE REGION	BURRA	AGRICULTURAL DISTRICTS
Food, Beverage and Produce *Home to some of Australia's most awarded boutique wine brands, and cellar doors, regional dining experiences and food producers*	• **Wineries + Cellar Doors** (50+ Wineries and cellar doors, with icons including Sevenhill Cellars, Pikes, Jim Barry, Knappstein, Killakanoon, Mitchell Wines, Eldredge Vineyards). • **Breweries** (Clare Valley Brewing, Pikes Beer Company, Pauletts) • **Restaurants + Cafes** (inc include Skillogalee, Slate Restaurant, Umbria and Seed, Velvet + Willow) • **Pubs + Hotels** (including Sevenhill Hotel, Rising Sun, Magpie and Stump and Watervale Hotel • **Food Producers + Wholesale Product** (Mathies Meat Shop, Pankarra Foods, Warndu, Corumbeena Orchard, Evilo Estate, Emu Rock Olive Oil) • **Bakeries (**Little Red Grape Sevenhill, Clare Rise)	• **Cafes / Restaurants** (La Pecora Nera (The Black Sheep), St Justs Café, Jumbuck Restaurant, Gaslight Cafe) • **Pubs + Hotels** (Burra Hotel, Royal Exchange Hotel, Commercial Hotel) • **Producers + Wholesale Product** (Co-Abundance, Galley's Produce Farm)	• **Bakeries + Cafes** - (Tarlee Bakehouse, Emporium Café Riverton, Lehmanns Store Robertown, Port Wakefield, Two Wells, Balaklava, Eudunda) • **Pubs + Hotels** (Tarlee, Riverton, Saddleworth, Eudunda, Booborowie, Farrell Flat, Balakava, Brinkworth, Two Wells, Mallala, Port Wakefield, Port Parham Social Club) • **Producers + Wholesale Product** (Four Leaf Milling, Rhodes Free Range Eggs, Wunderbar Lamb, Greenslade Chickens)
History + Heritage *South Australia's rich Cornish copper mining and agriculture heritage can be experienced through historic trails, towns, walks, drives, museums, churches, cemeteries and agricultural properties.*	• Bungaree Station Self-Guided Tour • Mintaro State Heritage Centre • Sevenhill Cellars + St Alyoisus Church • Martindale Hall • Museums (Polish Hill River Church, Clare Old Police Station + Courthouse, John Horrocks Cottage Penwortham) • Heritage Walks (Mintaro, Penwortham, Watervale, Auburn, , Clare)	• Burra Heritage Passport Trail – including Monstor Mine, Redruth Goal, Unicorn Brewery Cellars, Miners Dugout, Bon Accord Museum, Morphetts Engine House • Burra Railway Station (fossil display) • Sir Hubert Wilkins Home • St Mary's Church • Market Square • Midnight Oil House • Heritage Walks (Burra Mine, Burra Smelting Works)	• Churches (inc Robertstown Lutheran), • Eudunda Family Heritage Gallery • Colin Thiele Driving trail • Eudunda Gardens • Museums (Scholz Park Riverton, Saddleworth + Districts Historical Society Museum, Balaklava, Mallala, Brinkworth, Port Wakefield) • Terowie - 5 museums + historical buildings. • Heritage Walks (Port Wakefield, Riverton, Saddleworth, Booborowie)
Outdoor + Adventure *From cycle and walking trails, touring adventures, parks,*	• Riesling Trail – 35km cycling trail linking many of the Wine Region's cellar doors + villages. • Mintaro Maze	• Redbanks Conservation Park – significant fossil deposits (Tours with Aboriginal Cultural Tours) • Burra Creek Gorge	• Lake Bumbunga (Lochiel) • Coorona Creek Conservation Park • Adelaide Tandem Skydiving (Lower Light)

reserves and attractions, there is an adventure waiting for all ages. The Region is also on Njadjuri Country, and visitors can learn about local landscapes via indigenous custodians.	• Spring Gully Conservation Park walking trails • Neagles Rock Lookout + Walk • Brookes Lookout • Bike Hire (Auburn + Clare) • Trails (Mawson (cycle), Heysen (walk), Lavender (walking), Lomandra (walking) • Clare Valley Model Engineers Railway • Mini Golf (Simpson Creek Wines) • Clare Golf Club • Richardson Play Space Sevenhill • The Valley's Lifestyle Centre • Breakout Adventure Room Blyth • Mintaro Garden Room	• Worlds End Driving Trail • Dares Hill Circuit Driving Trail • Trails (Mawson (cycle), Heysen (walk)) • Burra Golf Club • Sports Facilities (Burra Pool, Burra Golf Club) • Burra Creek (town centre) - Playgrounds + duck feeding)	• Stockport Observatory • Cycle Trails - Rattler and Riverton Trails, Copper Trail (Leasingham – Halbury), Shamus Liptrot Cycling Trail (Halbury – Balaklava) • Mallala Motorsport Park – racing experiences. • Golf Clubs (Balaklava, Riverton, Pt Wakefield, Eudunda) • Recreation Grounds/Ovals/Pools (eg Riverton, Eudunda, Balaklava) • Parks + Reserves (The Rocks Balaklava) • Playgrounds (Riverton, Balaklava) • Port Wakefield Fishing + Tidal Swimming Hole • Snowtown Big Blade • International Bird Sanctuary* • Boating, Crabbing and Fishing – upper St Vincent Gulf (Port Parham, Middle Beach, Thompson Beach)†
Events *People are drawn to the Region for major events such as the Clare Valley Gourmet Weekend. Community and niche interest events around the year make the Region a vibrant place to live, work and play.*	• Clare Valley Gourmet Weekend (May) + Clare Wine Show • Clare Show • Markets (Auburn, Clare Show, Clare Valley Cuisine Gourmet Market, Sevenhill Producers) • Clare Racing Club Events – inc. Easter Races + Country Cup • South Australian Autumn Garden Festival • Blenheim Music + Camping Festival, Leasingham • Clare Classic • Clare Valley Running Festival • Clare Valley Food Wine + Tourism Centre (Friday night wine events) • Clare Valley Bridal Fair • Clare Rodeo • Winery Specific Events (eg. Clare with Fresh Eyre) • Local Sporting Events (Football, Netball)	• Burra Picnic Races (Oct) • Burra Districts Open Gardens and Spring Garden Show (Oct) • Burra Show (Oct) • Burra AGL Country Music Festival (Nov) • Burra Vintage and Antique Fair (May) • Burra Fun Run (Oct) • Local Sporting Events (Football, Netball, Tennis) • Community Events (Christmas, Anzac Day, Australia Day)	• Mallala Motorsport Events • Balaklava Races • Marrabel Bullride • Stockport Observatory Star Parties • Walky 100 Rally, Eudunda • Markets (Tarlee Country, Saddleworth Country Market, Manoora, Riverton Markets) • Country Shows (Eudunda, Balaklava) • Local Sporting Events (Football, Netball, Tennis) • Community Events (Christmas, Anzac Day, Australia Day) • Balaklava Arts Prize

* *Product Marketed and Aligned with SATC Adelaide Tourism Region*

† *Product Marketed and Aligned with SATC Yorke Peninsula Tourism Region*

	• Community Events (Christmas, Anzac Day, Australia Day) • Open Gardens (Avalon, The Heritage Rose Garden) • SALA • History Festival		
Arts, Culture + Retail *The Region is home many creative people, with opportunities to meet and interactive with artists or view their works are galleries and retail outlets.*	• **Galleries** - Clare Valley Regional Art Gallery, Medika, Blackman, Jen McDonald, Art @ Auburn) • **Clare Valley Art Trail** – in addition to above Galleries, other outlets for local artists • Blyth Cinemas • Hats Courthouse Auburn • **Retail Shops** (Clare) • SALA Festival Events • SA History Festival Events	• **Galleries –** Burra Regional Art Gallery, Old School Gallery Hallett • SALA Festival Events • SA History Festival Events • **Retail Shops** (Burra)	• **Galleries** - Riverton Light Gallery Robert Hannaford, Balaklava Courthouse Gallery • **Retail Shops** (Riverton, Balaklava, Eudunda) • Balaklava Art Prize Exhibition • SALA Festival Events • SA History Festival Events • Snowtown Water Tower Art • Dublin Anti-Dump Protest Statues • Public Art – Snowtown, Owen Silos (proposed)

4.3 Accommodation

The Region offers various accommodation types, including motels, farm stays, bed and breakfasts, self-contained cottages and caravan parks. As of June 2019, there were 68 accommodation listings for the three Sub Regions on the Australian Tourism Data Warehouse (ATDW).

The Clare Country Club is the only large-scale accommodation and the major business/corporate event venue in the Region, while smaller motels support visitors in Clare, Burra and Auburn. The remaining accommodation providers in the Region are classified as small, with under 15 rooms, and are located in the two sub regions of CVWR and Burra.

The Clare Caravan Park (Council Owned Land) located on the southern entry of Clare is leased to the Discovery Holiday Park Group and is the hero Caravan Park in the Region. The strong brand awareness, investment and marketing of the brand around Australia means the Park is a strong brand ambassador and driver of visitation to the Region, especially the families market. It's location next door to the Clare Valley Food Wine and Tourism Centre is a benefit for guests, many of which enjoy the Friday night drinks, food, wine, retail and visitor information at the Centre.

Smaller Council-run Caravan Parks and volunteer run camping grounds at many of the smaller towns ovals in the Agricultural Districts are providing accommodation for a growing number of self-contained RV Travellers in the Region, who are looking for low cost camping with limited facilities.

Holiday homes and sharing accommodation are a potential growth prospect to expand the accommodation product in the Region. As of June 2019, there were over 120 *AirBnB* providers and over 60 *Stayz.com* holiday home listings in the Region. However, it's important to note, many of these listings are traditional self-contained accommodation providers already accounted for in the audit below. Other sharing accommodation platforms such as *Couchsurfing* and *Home Exchange* offer a limited number of listings in the Region.

Table 15 - Accommodation Product across Clare Valley Tourism Region

	CLARE VALLEY WINE REGION	BURRA	AGRICULTURAL DISTRICTS
Hotels, Motels + Resorts	• Clare Country Club • Clare Valley Motel • The Mill Apartments Clare • Auburn Shiraz Motel	• Burra Motor Inn • Paxton Square Cottages	• Port Wakefield Motel + Holiday Homes
Smaller Scale (Under 15 rooms) - Cottages, Farm Stays, Bed + Breakfasts	40+ Properties, including: • Thorn Park by the Vines • Brice Hill Country Lodge • Bungaree Station • Skillogalee Cottages + House • Stanley Grammar Country House • Bukirk Glamping	25+ Cottages in Burra, including • Bon Accord Cottage and Hotel • Butterworth Mill • Burra Bakehouse • Burra Railway Station • Emma Tiver Heritage Cottage • Lavendar Cottage • Ivy Cottage • Pig + Whistle • Morse Cottage • The Burra Hotel	• Hummocks Station Snowtown • Ryelands Farm Retreat Tarlee • Eudunda Hotel Motel • Tarlee Motel • Audrey's Accommodation (Mallala) • Two Wells Tavern + Motel

Caravan Parks	• Clare Discovery Holiday Park • Leasingham Village Cabins	• Burra Caravan and Camping Park	• Eudunda Caravan Park • Stockport Caravan + Tourist Park • Saddleworth Recreation Grounds Caravan Park • Riverton Caravan Park • Balaklava Caravan Park
Bunkhouse + Groups	• Sevenhill Cellars		• Emmaus Campsite Halbury • Glenhaven Park Stockport
Camping + RV Friendly Destinations	• Community Run Ovals (Auburn Community Caravan Park)	• Redbanks Conservation Park • Worlds End Reserve/Burra Creek Gorge • Burra Showgrounds	• Hummocks Station Snowtown • Ryelands Farm Retreat Tarlee • Hallett Railway Station (hikers) • Community Run Camping/RV Grounds (Tarlee, Saddleworth, Blyth, Brinkworth, Farrell Flat, Lochiel, Owen, Hamley Bridge, Robertstown, Snowtown, Hallett, Terowie, Port Parham, Middle Beach)

4.4 Events

Festivals and Events are important economic and community development drivers in the Region, as they provide an opportunity to attract and engage visitors and the community in many diverse interest areas. The Region has a strong and proud history of hosting events, and today enjoys both a range of long established and newer events.

4.4.1 Major Events

As outlined in Table 14, the Region is home to a number of major events which are key drivers of visitation, such as the Clare Gourmet Weekends, Clare Classic, Burra AGL Country Music Festival, Picnic Races (Burra, Clare and Balaklava), Burra Vintage & Antique Fair Burra Districts Open Gardens and Spring Expo and AGL SA Rally of the Heartlands. Following is a brief overview of three recent events, attracting very different, yet high-yielding visitors to the Region at different times of the year.

Clare Valley Gourmet Weekend

- The event the oldest of its kind in Australia, and was first held in 1985
- It celebrates the end of vintage, and focuses on regional cuisine and award-winning wines. Visitors can enjoy local cuisine, degustation lunches and dinners, competitions, masterclasses, and educational activities
- In 2018, 36 wineries, two breweries and a number of regional restaurants took part, and offered a n range of various special events[87].
- Approximately 4810 people attended and injected $1,288, 054 into the local economy during the 2018 event[88].

Clare Classic

- First run in 2018, the inaugural event attracted 900 riders from around Australia.
- Running again in April 2020 (after having a year off), it offers cyclists the choice of 3 differing length rides around the Region.
- It provided significant media coverage for the Region, as well as engaging with a high yielding cycling community.

Burra AGL Country Music Festival

- First run in 2014, each year the event continues to build from the inaugural event with expanded program
- Running again in October 2019, it brings people to the Region for 3 days of country music entertainment

---

[87] Clare Valley Gourmet Weekend 2018 Media and Marketing Report, via Lightbulb Media
[88] Clare Valley Gourmet Weekend 2018 Report, via Clare Wine Grape Growers Association

- The event is looking to grow to become a leading Music event for Country Musicians, and provides a pathway to the Tamworth Music Festival.

4.4.2 Event + Function Venues

The Region is also home to various sporting facilities and community run event spaces. Destination weddings and smaller meetings and business events are important users of functions and event space. The Region's event facilities could be further activated to support major or niche interest events and functions with the identified customers for the Region.

Table 16 - Function, Sport + Community Event Venues

	CLARE VALLEY WINE REGION	BURRA	AGRICULTURAL DISTRICTS
Function Venues	• Clare Country Clubs • Clare Town Hall • Clare Showgrounds • The Valley Function Centre • Bungaree Station • The Heritage Garden • Clare Golf Club • The Curley Goose • Hillsview Estate • Hughes Park • Martindale Hall • Mintaro Maze • Wineries (eg Eldredge, OLeary Walker, Paulette, Taylors, PIkes) • Community Halls (Most towns) • Clare Art House	• The Barn, Wombat Flat • The Black Sheep • Mokota Station • Collinsville Station • Princess Royal Station • Galleys Meeting House • Unicorn Brewery and Cellars • Burra Regional Art Gallery • Redruth Gaol • Burra Monster Mine • Burra Railway Station • Burra Town Hall • Burra Bible Christian Chapel (Paxton Square Cottages)	• Riverton Railway Station • Community Halls + Institutes (Most country towns in region) • Ryelands Farm Retreat Shearing Shed (Tarlee) • Galley's Meeting House (Farrell Flat)
Recreational, Sport + Community Event Venues	• Clare Valley Racing Club • Clare Aerodrome • The Valleys Lifestyle Centre (Pool, Courts) • Clare Oval • Smaller towns community Institutes + Halls • Auburn Recreation Ground • Watervale Recreation Ground • Riesling Trail	• Burra Picnic Race Club • Burra Sports Complex • Burra Golf Club • Burra Bowling Club • Monster Mine	• Cycle Trails – Rattler, Wakefiled Trails • Emmaus Campsite Halbury • Hallett Community Club • Eudunda Golf Club • Glenhaven Park Stockport • Balaklava Race Club • Balaklava Golf Club + smaller town clubs (Riverton, Stockport) • Showgrounds (Balaklava, Eudunda, Riverton) • Mallala Motorsport Track • Riverton Tennis Club • Community Ovals/Rec Grounds + Pools • Bowling Clubs (most towns). • Balakava Gliding Club

4.5 Touring Routes + Trails

Touring routes and trails are key experiences that encourage the dispersal and increased spend of visitors in the Region.

4.5.1 Riesling Trail + Rattler Trail

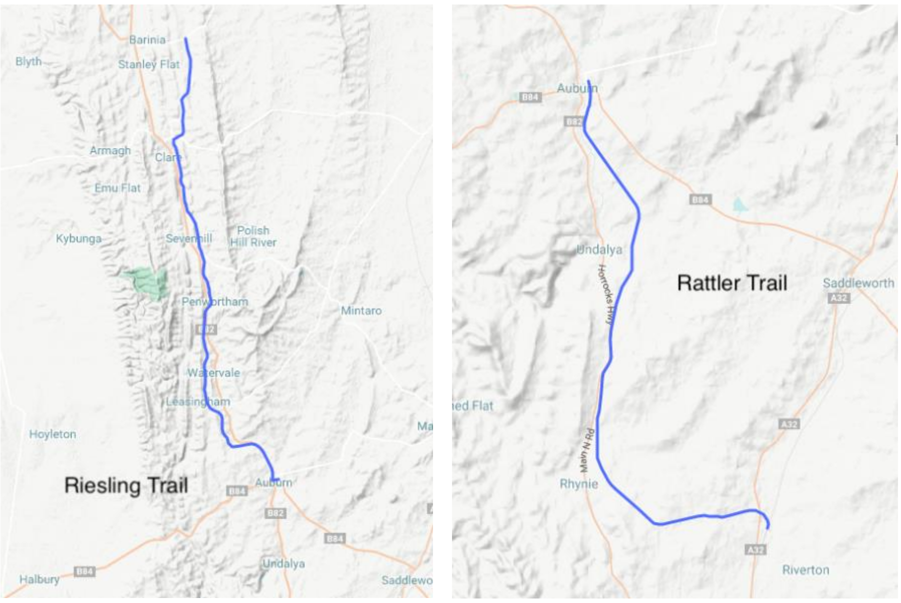
The Riesling Trail is the iconic 35km scenic walking/cycling trail following the old rail corridor from Auburn to north of Clare at Birinia that passes through vineyard and farming country within the Clare Valley Wine Region. There are various side loops as well as access to cellar doors, cafes, galleries, bakeries and quaint country pubs.

Bike hire is available at several locations including Auburn, Clare and the Clare Caravan Park, and one-way hire can be organised. The use of the trail by locals and visitors is continuing to increase – at a rate of 7 per cent each year[89]. The trail is also used for major events, such as the Half Marathons, Clare Classic and the Railway Centenary in 2018.

South of Auburn, the Rattler Trail extends a further 19 kilometres south to Riverton. This trail is named as such as the name "Riesling Trail" is only to be used on the trail from Auburn to Clare. While there are limited visitor experiences along the Rattler Trails, it is an important trail as it provides opportunity for further cycling and walking in the Region and has the potential to connect the Region to trails across in the Barossa (proposed).

Both Trails are managed by Management Committees, however the Riesling Trail Management Committee undertakes the development and distribution of the brochure for both trails (refer section 7.2.12).

Figure 23 - Riesling + Rattler Trail Maps



89 http://rieslingtrail.com.au/wp-content/uploads/2018/10/RT-AGM-Chairmans-report-2018.pdf

4.5.2 Heysen, Mawson + Lavender Federation Trails

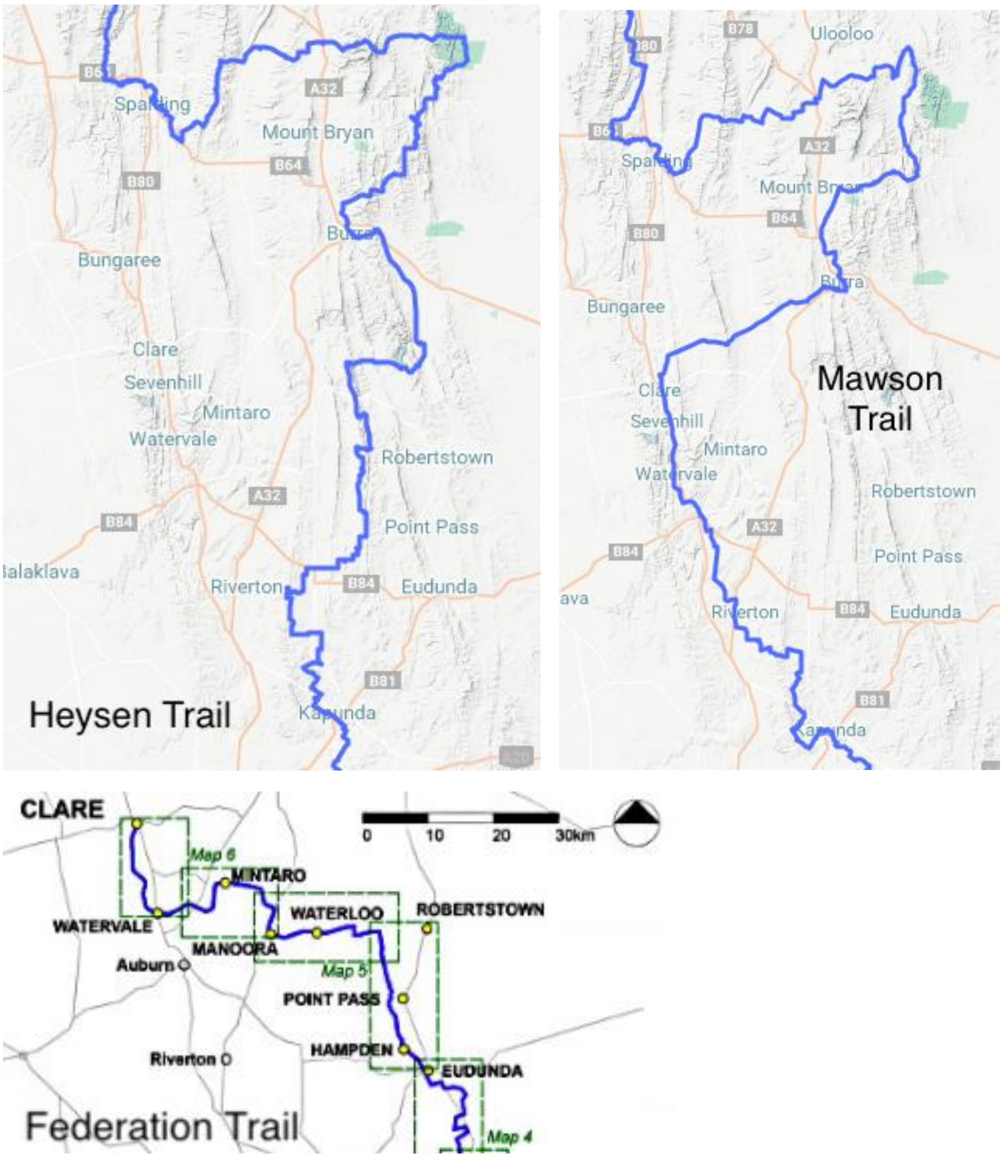
Three of South Australia's most iconic walking and cycling riding trails traverse the Region's boundaries. All three trails the Heysen[90], Mawson[91] and Lavender Federation[92] Trail offer significant tourism opportunity.

The Mawson Trail is a cycle trail and encompasses the Riesling and Rattler Trails, before extending south from Riverton and north from Clare to Burra.

The Heysen Trail is a walking trail and navigates through the east of region via Riverton, Marrabel, Tothill Ranges, north to Burra and Mt Bryan.

The Lavender Federation Trail is a walking trail, and it's Trailhead was recently completed in Clare, after winding through towns of Eudunda, Manoora, Mintaro, Mt Horrocks, Watervale, Spring Gully Conservation Park and Clare.

Figure 24 - Heysen, Mawson and Lavender Federation Trail Maps



[90] Heysen Trail > http://www.southaustraliantrails.com/trails/heysen-trail/
[91] Mawson Trail > http://www.southaustraliantrails.com/trails/mawson-trail/
[92] Federation Trail > https://lavenderfederationtrail.org.au/new/

4.5.3 SATC Touring Routes

At a state level, the SATC has a state-wide tourism strategy promoting key drive routes that link the state's best tourism experiences (see southaustralia.com[93]). Of the Touring Routes developed and marketed by the SATC, the *Epicurean Way* and *Explorers Way* traverse through the Clare Valley Tourism Region and have the potential to offer visitation growth opportunities for the Region with enhanced marketing.

Epicurean Way

The Epicurean Way[94] links together the iconic food and wine experiences of McLaren Vale, Adelaide Hills, Barossa and Clare Valley. Three key tourism experiences are promoted on the route, including Skillogalee, Sevenhill Cellars and St Aloysius Church and Pike Wines.

Explorer's Way

Similarly, the Explorers Way[95] is a journey through the heart of Australia's landscapes and outback and extends beyond the South Australian Borders into the Northern Territory's top end. The Journey starts in Adelaide and the first itinerary recommendations are to explore wineries around Clare, and then exploring Burra via the Passport Heritage Trail

[93] Epicurean and Explorer's Way > http://southaustralia.com/things-to-do/road-trips
[94] Epicurean Trail > http://southaustralia.com/things-to-do/road-trips/epicurean-way
[95] Epicurean Trail > http://southaustralia.com/things-to-do/road-trips/explorers-way

4.6 Tour Operators

The Region is serviced by tour operators within and also outside the Region.

Within the Region, *Clare Valley Tours* and *Clare Valley Grape Express* offers a variety of interest-based tours. They are also the leading Tour Company investing in trade marketing and partnerships with SATC. Clare Valley Experiences focuses on wine and food tours. Whilst various Adelaide-based food and wine tour operators such as *Rich and Lingering*, *A Taste of SA* and *Shiraz and Co* include the Clare Valley Wine Region in their itineraries on demand via bespoke food and wine tours into the Region, while *Tour de Vines*[96] offer set date and on demand gourmet cycling tours.

Aboriginal Cultural Tours run one, two and three day “Outbush” Tours into the Region. Led by Aboriginal guides they share with visitors significant Ngadjuri Country sites, such as Redbanks Conservation Park, as well as the wineries in the Clare Valley Wine Region.

Tour operators based in Adelaide heading to the Flinders Ranges also traverse the Region, such as Flinders Ranges Odysseys, Australian Iconic Tours and Auswalk. However most only include short stops, such as a winery or restaurant lunch. The Flinders Ranges has the highest number of international visitor nights of all South Australian Regions[97] and therefore presents an opportunity for CVTG to capitalise on this market as they traverse the Region.

4.7 Food Producers

Consumers are increasingly concerned with food provenance and have a focus on sourcing locally based product. As outlined in Table 14, the Region is fortunate to have a rising number of boutique food growers and makers with a strong focus on food provenance and provide quality, locally grown/produced foods for local dining venues and cellar doors.

While many don’t offer visitor experiences on their farms or production venues, their marketing, national PR and retail products helps tell and sell the Regional food provenance story. Many of the products are available at the local markets (Sevenhill), cellar doors, Clare Valley Wine, Food and Tourism Centre, local cafes, restaurants, supermarkets and are also used by many accommodation and tour operators in the Region to strengthen the Region’s food story.

Opportunities are outlined to increase awareness of the Region’s food producers among local Tourism Operators and supporting Businesses, to help deliver a more authentic local visitor experience.

---

[96] https://tourdevines.com.au/tour/cycling-tour-riesling-rail-trail/
[97] SA Visit to Regions > http://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={530D7E3A-D1C8-4762-BAE8-5FF7898622EB}&B=True

4.8 Retail, Petrol Stations + Supermarkets

Retail, Petrol Stations and Supermarkets are traditionally not seen as tourism specific businesses, they inadvertently provide important services to visitors staying or travelling through the Region. Opportunities have been identified in this document (ref. Priority Area 3, Part C) to leverage these businesses and their staff to deliver visitor servicing and support with positive development policies and infrastructure as it relates to the delivery of their businesses.

Table 17 - Major Petrol Stations + Supermarkets in Clare Valley Region

Petrol/Service Stations	• OTR Clare • BP Auburn • Shell Burra • BP Burra • Various @ Port Wakefield
Supermarkets	• Woolworths Clare • Foodland Clare • IGA Auburn • IGA Riverton • Foodland Eudunda • Foodland Burra • Foodland Balaklava

5. Tourism Access

How visitors travel to and around the Region is a key factor to consider when planning to grow the visitor economy. The Region is typically a self-drive destination, but potential exists to improve visitor access infrastructure at a Local Government level, in addition to leveraging key access points to increase visitation.

Key Findings

The Region is principally a self-drive destination, with very few public transport options to access the Region. Given the breadth of the destination, it is recommended to have use of a private vehicle to be able to experience all that the destination has to offer.

This therefore means the experience visitors have with the road, and to a lesser degree, the cycle network, will have bearing on their overall experience in the destination. Opportunities exist for Local Governments to advocate for quality state road infrastructure, in addition to maintaining key visitor route roads in an around the Region.

With the recent sealing of the Clare Aerodrome comes opportunity also to attract fly in/fly out tour groups and events, and new, high-end tour operators (eg. Helivista Helicopters, based in Flinders Ranges), which could be supported by the Clare Valley Taxi Service, in addition to the Region's tour operators.

5.1 Roads

Roads are the key connectors that allow visitors to explore the Region, connect tourism attractions and towns and allow visitors to safely travel around.

The Region has multiple road entry points, however the most direct access from Adelaide is via the Horrocks Highway to the Clare Valley Wine Region and the Barrier Highways to Burra, via Gawler and Tarlee.

Consultation with the local tourism industry highlighted frustration with the condition of the Horrocks Highway, citing safety as the main concern. In June 2019, the South Australian government[98] announced the Horrocks Highway and Barrier Highway set to receive a combined $117 million. The Horrocks Highway will gain $55m from a $330m 'Improving our Roads' initiative over eight years while $62.5m will be spent on upgrading the Barrier Highway from Cockburn to Burra as part of 'Roads of Strategic' Importance.

All Councils in the Region receive funding via the Federal Funding of Roads to Recovery Program. Opportunities exist to consider key visitor routes when prioritising the roads to invest in and funding applications.

The Region will also be impacted positively by the completion of the Northern Connector project, which will join the Southern Expressway with the Northern Expressway (due for completion in December 2019). This will reduce the travel time from the City to the Region.

[98] https://www.transcontinental.com.au/story/6207756/big-roads-boost-in-budget/

Consultation with the local tourism industry also highlighted concerns visitor safety when pulling over to photograph Lake Bumbunga and the Midnight Oil House.

To address these concerns and also help drive social media advocacy for the Region, and opportunity is for local stakeholders to provide 'pull over' bay areas for visitors to photograph the landscapes + views. Implementation of this is already underway for Lake Bumbunga via Wakefield Regional Council's recent grant funding success with the Building Better Regions Fund[99].

5.2 Cycle

5.2.1 Cycle Infrastructure

Cycle Infrastructure supports visitors have a safe and enjoyable cycle experience in the Region, via the provision of such as well-maintained cycle tracks, bike racks, water points, cycle repair stations, shelters, bridges, road crossings, seating and car parking.

As identified in Section 4.7, the Riesling Trail is key Cycle Trail within the Region, of which the Riesling Trail Management Committee are responsible for the ongoing maintenance and management to the Riesling Trail facilities via support from Office of Recreation, Sport and Racing, Clare + Gilbert Valley Council and local business partners. The Clare and Gilbert Valley Councils support wider provision of cycle infrastructure via town facilities, such as the recent installation of bike racks in Clare Town Centre.

Burra is also a desirable cycling destination, attracting visitors to its landscape, history and cultural heritage. The Burra Bike Track provides a wonderful link between Kooringa and Burra North. While you can walk from the St Just Street Ford via the creek or walking paths to the Railway Station, it would be a great addition to the town's trail infrastructure for a purpose built and properly defined bike path to be established for community and visitors to the region.

Opportunities have been identified in the Goyder Masterplan to create, extend, upgrade and enhance the existing bike track with the inclusion of historical information strategically and specifically placed at points of interest along the trail to educate and inform community and visitors to the region.

Wakefield Regional Council is also investing in cycle infrastructure, with the proposed Wakefield Trails.

5.2.2 Cycle Hire

Cycle hire accessibility is important for activation and dispersal of visitors along the Region's cycle trails. Private operators currently fill the market demand and provide cycle hire along the Riesling + Rattler Trails. *Riesling Trail Bike Hire*[100] offers a variety of adult and children's bike hire for hire. They are located on Riesling Trail in the town of Clare. Pick up and drop off can also be arranged for guest's accommodation.

[99] https://www.yorkeandmidnorth.com.au/2019/03/15/yorke-and-mid-norths-funding-success/

[100] http://www.rieslingtrailbikehire.com.au/

Clare Valley Bike Hire[101] also offer a range of mountain bikes for hire, as well as eBikes and family friendly bikes with Tow-behinds, baby-seats and buggies.

In Auburn, *Auburn Cogwebs Hub Café*[102] offers Bike Hire and has direct access to the Southern start of the Riesling and Northern part of the Rattler Trails.

Various accommodation properties near the Riesling Trail also offer bikes for their guests to use during their stay.

5.3 Air

5.3.1 Clare Valley Aerodrome

The Region has an aerial gateway for small aircraft via the *Clare Valley Aerodrome*. The community developed Aerodrome was opened in 2014 and is located 14kms north of the township of Clare. The Aerodrome was developed and is managed by the Clare Valley Flying Group Inc, a community focused, not for profit incorporated association.

All Weather Runway and Lighting Update was completed in for the Clare Valley Aerodrome has recently been completed. This will provide greater access for helicopter tour operators (eg. Helivista helicopters based in the Flinders Ranges), emergency services, and allow the aerodrome to be used 24-hours a day for the entire year.

5.3.2 Adelaide Airport

The SATC works closely with domestic and international airline partners and the Adelaide Airport to attract new airlines and grow seat capacity of existing airlines, making it easier for visitors to get to the State.

Increasing direct air access to Adelaide is key to attracting increased visitor numbers to regional South Australia, as nearly half of all visitors to South Australia visit regions.[103]

There are opportunities for the Region to leverage growth of visitors through Adelaide Airport is to keep lines of communication open between SATC around relevant aviation related projects.

---

[101] https://clarevalleycyclehire.com.au/hire/
[102] https://www.facebook.com/CogwebsBicycleHireandHubCafe/

[103] South Australia Visits to Regions > http://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={530D7E3A-D1C8-4762-BAE8-5FF7898622EB}&B=True

5.4 Public Transport

5.4.1 Taxis

Taxis are important at providing transport around the Region for visitors looking to be able to leave their cars at their accommodation and enjoy have a few drinks when dining out. *Clare Valley Taxis*[104] are the local taxi service within the Region and service Clare and Burra.

5.4.2 Coach

Yorke Peninsula Coaches[105] services the Region via the Mid North Passenger Service. 5 departures a week connect the Adelaide Central Bus Station and stopping at the all towns in the Clare Valley Wine Region, of which one of these services also continues through to Burra. Their Balaklava Passenger Service runs twice a week.

Buses R Us[106] passenger transport services had offered 4 weekly services Burra on their Broken Hill service, stopping at the Burra Goyder Visitor Information Centre, however in June 2019 announced the cessation of these services.

Genesis Transport[107] coach services also services Balaklava and Blyth via their twice weekly Flinders Bus Service.

[104] https://www.131008.com/cgi-bin/cart/custom/services.cgi?display=2381
[105] YP Coaches > http://ypcoaches.com.au/services/
[106] https://busesrus.com.au/broken-hill-service/
[107] http://genesistransport.com.au/flinders-bus-service/

6. Community Tourism Infrastructure

The majority of community tourism infrastructure across the Region is managed at a Local Government level.

Key Findings

As with all destinations, the visitor experience extends well beyond the traditional tourism operators, into the realm of the community, so initiatives have also been identified in the Plan for Councils to ensure key access and infrastructure including roads, trails, signage, parking, public convenience, bins, and connectivity are maintained to a standard which meets visitor needs and expectations.

In particular, some of the key opportunities include:

- Improved WIFI and mobile coverage in/around major placemaking hotspots
- Improve visitor signage around the region, including wayfinding, interpretive, directional, placemaking and tourist trails.
- Activation of Clare Main Street as visitor experience
- Develop and implement placemaking plans for supporting villages around the region which are key visitor experiences or service towns (eg. Mintaro, Sevenhill, Auburn and Tarlee)
- Improved parking options for RV and Caravan travellers
- Improve parking for key tourism assets of Lake Bumbunga and Midnight Oil House
- Support for volunteer community groups looking after caravan and RV travellers in their towns (toilets/parks/rubbish maintenance)
- Support smaller villages across the region to ensure meet needs of visitors (public toilets, interpretation, parking etc).
- Councils to work with their local Progress and Community Groups to prioritise Information Bay Upgrades, support in the management of RV Campgrounds, management of rubbish and cleanliness and maintenance of public toilets.

6.1 Urban Design + Placemaking

The development of public realms opens up opportunities for the community to use these spaces to host community events. Opportunities also exist for Councils to work with town committees / progress committees to develop and implement placemaking initiatives.

6.1.1 Current Projects

Clare Main Street Streetscape Plan

The Clare and Gilbert Valley Council (CGVC), Regional Council of Goyder (RCG), Wakefield Regional Council (WRC) and Adelaide Plains Council (APC) are responsible for the planning, design and management of public spaces, of which will impact the visitor's experiences in the Region.

After receiving state government funding, along with council generated funds, throughout May-July 2019 the CGVC implemented Stage 1 of the *Clare Main Street Streetscape Plan*, which covers the east side of the street from the southern roundabout to Mill Place and the entirety of the western side of the street, from roundabout to roundabout.

Stage 1 saw the implementation of new bins, wayfinding interactive and directional signage, solar powered touchscreens, bike arcs (parking), privacy screens for public toilets, shelter and sheltered overflow, trees, and seating.

Implementation of Stage 2 of the Clare Main Street streetscape plan will include street art, sculptural planters and outdoor dining, which should come to fruition during in the next financial year, with additional funds allocated in the 2019/2020 Draft Budget.

Burra Skate Park

In 2019 Council submitted a grant application to the Open Spaces and Places for People 2019 Grants to complete the development of the Burra Skate Park and Western side of the Burra Creek. The total capital cost of the project is estimated at $465,000 with the grant application by Council seeking 50%. It is anticipated that a decision will be made regarding the grant funding success in June 2019. If successful, Council will be required to fund the remaining $232,500 in the 2019/20 and 2020/21 financial years.

6.2 Signage

During stakeholder consultation, signage was indicated as a challenge by many stakeholders, with various stakeholders responsible for different signs.

Tourism signs for the Region are as follows:

- *Interpretive Signs* – Deliver interpretation of key visitor assets in locations, such as Burra Passport Trail and Riesling Trail (some Council Responsible, some Management Committees responsible)
- *Tourism Signs (brown signs)* – Directs visitors to a specific Tourism Businesses (Council responsible)

- *Town Welcome Signs* – Names and welcomes visitors to a town (Community Group responsible)
- *Tourism Trail Signs* – Directs visitors around a drive trail (Council responsible)
- *Wayfinding Signs* – to public toilets, RV Dump points, points of interest (lookouts) etc. (Council Responsible)
- *Highway Directional Signs* – Signs that provide a list of Tourism Experiences at each exit (eg Gawler, Pt Wakefield). (DPTI Responsible)
- *Digital Signage/Maps* – Optimisation of online maps and directional signage (Google Maps)

Opportunities have been identified to further address challenges of wayfinding and directional signage to and from, and around the Region.

6.3 Public Amenities + Recreational Vehicle Dump Points

Councils are responsible for the provision and maintenance of rubbish bins, public toilets and some public RV dump points in the Region, which are important services for visitors.

During the stakeholder engagement, the following opportunities were identified:

- *Public Toilets* - Stakeholders identified the importance of council providing clear wayfinding signage to public toilets, maintaining them to a very clean standard and a working order. Opportunities also exist to activate toilet blocks through public art[108]
- *RV Dump Points* - Stakeholders identified the provision of dump points for RV Travellers in the Region are important. Some communities are happy to have them, others less so.
- *Rubbish Bins* - Stakeholders identified the importance of councils providing regular rubbish removal at high traffic visitor spots, such as near public toilets and at community run RV Campgrounds. As an explicit example, the Bins located at the Tarlee Public Toilets and Oval Toilets are often overflowing in lead up to the weekly scheduled rubbish collection, which provides a negative impression on the Region for visitors. Unsightly bins were also identified as an issue in Clare Main Street, of which the CGVC is planning to address in the implementation of the Clare Main Street streetscaping plan.

6.4 Mobile Network Coverage + Community WIFI

Mobile Network Coverage and WIFI is critical infrastructure for communities to be able to encourage advocacy of experiences and towns by visitors.

Stakeholder engagement identified the need for identified mobile coverage blackspots (eg. Rhynie) that require immediate improvement.

Councils have already identified the need to install community WIFI networks throughout key placemaking assets around the Region, including:

- The CGVC are planning to implement WIFI for the community in the Clare Main Street, in addition to working with SATC to roll out free WiFi in smaller villages across their council municipality including

[108] https://www.portlincolntimes.com.au/story/5465789/toilet-block-earns-distinction/

Sevenhill, Auburn and Mintaro. Council have no additional plans to install additional WiFi points, apart from the Clare Main Street.

- Regional Council of Goyder are also in the planning stages of installing free WIFI throughout the Burra Main Street.

6.4.1 Burra WiFi Usage

SATC have confirmed the following insights from the WiFi installed in Burra Main Street(100m radius, installed July 2018):

- 214 users total to Jul 2019. The most users in one day was 5 log-ins.
- Between 2 Dec – 30 Dec and months of Jan and April, there were no log ins.
- Users are mostly 18-24 and most common places of origin are Mintaro, Victoria & Bendigo, Adelaide, Brisbane, NZ, Singapore and Norway.

6.5 Information Bays

Information bays provide a welcome point to sub-regions of the Region, provide some local interpretation and deliver offline visitor servicing to people travelling around the region.

During Stakeholder Engagement, some local communities identified their Information Bays were dated and need upgrading. As an example, Tarlee is a key gateway town into the region, and it has a very dated information board next to their Main Street Public Toilets which receive the highest level of us public toilets in all of the CGVC municipality.

6.6 Parking

Car, RV, Cycle and Caravan parking options throughout the region were a common challenge during stakeholder consultation, particularly, options close to Clare Main Street and safe pull over bays for visitors at Lake Bumbunga and Midnight Oil House.

Regional Council of Goyder have identified in their MasterPlan that the town centre of Burra doesn't provide adequate parking options for caravans and camper trailers, and planning to complete a traffic management review to identify areas within the town centre that could potentially cater for larger vehicles on a temporary basis without compromising businesses or parking options for general vehicles and the community.

The Midnight Oil House, immortalised on the cover of their Gold album "Diesel and Dust", released in 1987 is famed to be one of Australia's most photographed structures. RCG have also identified in their MasterPlan the need to develop a stopping area (wayside stop) to photograph the building is required to offer safety and accessibility to the public, and will be looking to consult with owners and seek funding to develop the scope to upgrade the parking area.

Wakefield Regional Council have been successful with an application to the Federal Building Better Regions Funding program to develop the access in and around Lake Bumbunga, which includes safe parking options for visitors.

CGVC are currently implementing new cycle parking arcs along the Clare Main Street as part of Stage 1 implementation of the Clare Main Street streetscaping plan.

6.7 RV Camping

As outlined in Table 15, many of the smaller towns around the region provide facilities for self-contained travellers at their local ovals. Councils play an important role in providing and maintain the infrastructure for local town communities to provide adequate facilities of power, toilets, dump points (if relevant) and water for these travellers.

Stakeholders outlined the continued support of provision and maintenance of RV Camping facilities by council were important.

7. Governance + Resources

This section provides an overview of governance and resources dedicated to tourism management and marketing in the Region, based on background analysis undertaken.

Key Findings

It was identified through consultation that the destination management and marketing framework for the Clare Valley Tourism Region is quite fragmented.

There is currently no collaborative strategy that the regional and local level organisations are working towards, even though they are all implementing activities to attempt to grow the visitor economy for the Region.

This presents significant challenges as it relates to effective and efficient use of stakeholder funds, unclear reporting mechanisms, siloed and random long term strategic planning efforts, lack of engagement and unification from industry, and lack of understanding of the value of tourism from the communities within the Region.

Therefore, a key action of this Plan is for stakeholders to collaborate effectively to apply effective governance to allow the successful implementation of the actions to achieve the growth of the Region's visitor economy.

7.1 Structure

It was identified through consultation that the destination management and marketing framework for the Clare Valley Tourism Region is quite fragmented.

There is currently no collaborative strategy that the regional and local level organisations are working towards, even though they are all implementing activities to attempt to grow the visitor economy for the Region.

The information in Table 18 is an outline of the current delivery of tourism management and marketing activity for the Clare Valley Tourism Region. There is notable cross over at a regional level as it relates to consumer marketing and visitor servicing which will be discussed in Section 8.

Table 18 - Overview of Tourism Management and Marketing delivery in Clare Valley Tourism Region

	MARKET RESEARCH	CAPITAL INVESTMENT IN TOURISM PRODUCT AND INFRASTRUCTURE	PROVISION OF FUNDING FOR TOURISM PROJECTS	MARKETING INTRASTATE	MARKETING INTERSTATE	MARKETING INTERNATIONALLY	PHYSICAL VISITOR INFORMATION SERVICES	DIGITAL VISITOR INFORMATION SERVICES	EVENT MANAGEMENT	MANAGE TOURISM PRODUCT	INDUSTRY DEVELOPMENT
Tourism Australia	Y					Y		Y			
Department for Tourism, Trade and Investment (DTTI)		Y	Y								
South Australian Tourism Commission	Y			Y	Y	Y		Y			Y
Tourism Industry Council of South Australia											Y
Regional Development Australia Yorke and Mid North			Y	Y	Y	Y					Y
Clare and Gilbert Valley Council	Y	Y	Y								
Regional Council of Goyder	Y	Y	Y	Y	Y	Y	Y			Y	Y
Wakefield Regional Council		Y								Y	
Adelaide Plains Council		Y	Y				Y				
Clare Valley Business and Tourism Association	Y			Y	Y			Y	Y		Y
Clare Valley Grape + Wine Association	Y			Y	Y	Y		Y	Y		Y
Clare Valley Wine, Food and Tourism Centre	Y			Y	Y	Y	Y			Y	
Local Business / Progress Associations and/or Town Committees				Y	Y		Y		Y	Y	Y

Tourism Businesses + Product Management Committees (Riesling Trail + Burra Passport Trail)		Y		Y	Y		Y	Y	Y	Y	

7.1.1 Clare Valley Alliance

The Clare Valley Alliance (CVA) is an industry reference group developed in response to the need for tourism sector industry groups to effectively communicate the status of tourism related activities and to discuss potential growth opportunities.

The CVA comprises of representatives from each of the following stakeholders:

- Regional Council of Goyder
- Clare + Gilbert Valley Council
- Wakefield Regional Council
- Clare Grape and Winemakers association
- Clare Business and Tourism Association
- Clare Valley Wine, Food and Tourism Centre

The initial mandate for the group was more strategic in nature, however in recent years, the group has become more operational with the agenda content.

The Chairperson on the CVA represents the Clare Valley Tourism Region on the state Regional Chairpersons meetings and other SATC initiated meetings and events.

Recent Tourism Projects

- Clare Valley and Burra Tourism Research Project 2015/2016
- Clare Valley Brand 2016

7.1.2 Regional Development Australia Yorke and Mid North (RDAYMN)

RDAYMN a regionally based, not for profit organisation that, in collaboration with industry, community and governments, facilitates and supports regional economic development and jobs growth. RDAYMN is a partnership between the Federal, State Government and Local Governments to develop and strengthen the Yorke and Mid North regional community. These three levels of government have invested in RDAYMN to deliver economic development services in the Region.

Specifically, RDAYMN supports the region by offering:

- Investment Attraction and Regional Information
- Industry Development and Investor assistance
- Access to business services and growth strategies
- Career development and human resource planning

- Skills training access
- Workforce planning and development
- Advocacy and business case development for regional infrastructure and investment
- Community consultation and facilitation

RDAYMN are a key stakeholder for the visitor economy in the Clare Valley Tourism Region, as they co-fund a .6 FTE Regional Tourism Manager position in conjunction with SATC. Accoding to the Position Description of the Regional Tourism Manager (via RDAYMN) the mandate of this position is to:

- To implement, facilitate, promote and co-ordinate tourism development initiatives as identified in RDAYMN's strategic plan;
- To provide management for RDAYMN programs/projects relating to tourism development; and
- To strive to maximise economic benefits to the region by engaging with existing business, potential investors and linking with wider regional or State wide economic development initiatives.

This role is also the primary contact for the SATC, for the Visitor Guide production company, SATC-referred trade and media familiarisations, and assists to coordinate any SATC functions, workshops or meetings in region.

Current Tourism Projects

- Monthly Tourism enewsletter
- Clare Valley Regional Tourism Forum 2019
- Clare Valley Tourism Region Destination Management and Marketing Strategy 2019
- Clare Valley Visitor Guide
- Australian Tourism Exchange 2019
- Chinese Incentive Group (Itinerary Development)

7.1.3 Local Government

The Councils within the Region play a significant and diverse role in developing the region's visitor economy. The base infrastructure and core amenities that are enjoyed in communities by visitors are largely the product of the work of local government, whether it is through placemaking assets, accessibility, natural and cultural environment, or the provision of visitor services.

There are four Local Government Organisations that sit within the boundaries of the Clare Valley Tourism Region, including:

- Regional Council of Goyder
- Clare + Gilbert Valley Council
- Wakefield Regional Council
- Adelaide Plains Council

Each of these organisations play a slightly different role in their local visitor economies.

- The **Regional Council of Goyder** play a very active role in the visitor economy as a product owner and manager, whilst also implementing marketing, servicing and product development initiatives. The Council employs 3.5 FTEs to support their visitor economy portfolio. This is in addition to their role as a community asset custodian, regulator, advocator and enabler for the private sector.

- The **Clare + Gilbert Valley Council** is also very supportive of the visitor economy too, activating initiatives on a project by project basis. They currently do not have a tourism resource, with tourism sitting generally with the Economic Development team. Whilst they don't have a tourism strategy currently, their current strategy highlights the opportunities for Council to enhance the tourism experience in their role as a community asset custodian, regulator, advocator and enabler.
- The visitor economy for **Wakefield Regional Council** is definitely on the radar and will play an increasingly important role in the future. What this looks like will become clearer once this strategy is developed. Currently baseline dual-purpose infrastructure will continue to be maintained to support the visitor economy that currently exists.
- **Adelaide Plains Council** is in a similar situation to Wakefield, whereby, not traditionally relying on the visitor economy to stimulate their local economies. They are certainly aware of the potential of the visitor economy, support the industry through the provision of base dual-purpose infrastructure, and will look at opportunities to enhance their visitor experiences as opportunities arise.

The table below (Table 19) offers a snapshot of the commitment and investment each Council has in the Region's visitor economy.

Table 19 - Snapshot of Local Government investment in their local visitor economies

	VISITOR ECONOMY STRATEGIC PLANS	MARKET RESEARCH PROJECTS	RECENT/CURRENT MAJOR TOURISM PROJECTS/EVENTS	PROVISION OF FUNDING FOR TOURISM PROJECTS	CONSUMER MARKETING	TOURISM RESOURCE	VISITOR INFOMRATION SERVICING	MANAGE TOURISM PRODUCT / EXPERIENCE	INDUSTRY DEVELOPMENT
Clare and Gilbert Valley Council	Reference to the visitor economy throughout all priority areas in 2020 Strategic Plan.	Invested in Consumer Research in 2015/2016	• Main Street Masterplan • Riesling Trail Activation – Sculptures + Financial/In-kind maintenance support • Discovery Parks Lease Agreement – Consultation • Prospectus for High End Investment in Accommodation • New Clare Valley Tourism Experiences Roadmap Project • Clare Classic Event	Events Budget Economic Development Budget for identified projects	Nil	Nil – Potential for Arts + Cultural Coordinator	Capital funding for Clare Valley Wine, Food and Tourism Centre	Nil	Nil
Regional Council of Goyder	2017 Tourism Strategic Plan Arts Development Strategy 2018 – 2023 Goyder Masterplan 2018-2033	Invested in Consumer Research in 2015/2016 Ongoing consumer research re: Passport Product	• Burra Cultural Tourism Precinct (VIC, Gallery, Town Hall) • Burra Passport Trail Upgrades • Burra Regional Art Gallery • Arts Strategy • New Burra Tourism Website • Digitisation of Burra History • Burra Skate Park + Creek Development • Paxton Square Cottages Australian Heritage Grant • Conservation Management Plan Australian Cornish Mining Sites: Burra • National Trust Joint Venture	Events Budget	Trade Shows Website Social Media	FTE Tourism Manager 1 x FTE for VIC 1 x Part Time for VIC Potential for FTE Arts + Cultural Facilitator *(As per Masterplan)*	Own and Manage Burra Goyder Visitor Information Centre (since 2017)	Burra Heritage Passport Trail Paxton Square Cottages/Precinct Burra Caravan Park	Advocacy Role
Wakefield Regional Council	Reference to the visitor economy in Strategy Area 1.3 in the 2017-2022 Strategic Plan	Nil	• Activation of Lake Bumbunga • Wakefield Trails – connection of Riesling + Lavender Trails	Community Funds Budget	Nil	Nil	Nil	Port Wakefield Caravan Park	Nil

Adelaide Plains Council		Nil	• Adelaide International Bird Sanctuary activation • Food Bowl Producers Tourism Potential activation		Nil	Economic Development Manager (Part Time)	VIO in Two Wells	Caravan Parks?	Nil? Advocacy Role?

7.1.4 Primary Industries and Regions SA

Primary Industries and Regions SA (PIRSA) is a key economic development agency in the government of South Australia. Their purpose is to grow primary industries and drive regional development, by:

- Increasing productivity of primary industries (food, wine, forestry) and agribusinesses.
- Securing production through biosecurity, food safety standards and efficient and sustainable use of resources.
- Enabling market access by working with primary industries to respond to evolving requirements of domestic and global markets and consumers.
- Growing regions by driving new economic opportunities and building and strengthening communities.
- Managing adverse events effectively and help primary industries and communities improve preparedness, resilience and recover well.
- Reforming our legislative framework and programs to drive efficiency, effectiveness and unlock potential.
- Building partnerships with industry, stakeholders, research organisations and regional communities.
- Performing well as a modern, flexible and responsive organisation that values and develops its people.

With regard to the visitor economy In the Clare Valley Tourism Region, PIRSA administers funds established under the Primary Industries Funding Schemes Act (SA) 1989 and makes payment to Clare Valley Grape and Wine Association to develop and market the wine industry for the region.

They also work collaboratively with regional stakeholders, including RDAYMN, Local Government, and private enterprise on various projects as it relates to their objectives, of which some are relating to the visitor economy.

7.1.5 Clare Valley Business + Tourism Association

The Clare Valley Business and Tourism Association (CVBTA) is an incorporated, not for profit, non-government organisation funded by industry (via membership). The organisation is governed by a board of industry and stakeholder representatives from across the Clare Valley sub region.

The objective of the CVBTA is to enhance the profile and sustainability of their members through support in compliance, sustainability, collaboration and marketing.

The CVBTA employs a casual secretary (4 hours per week) to manage the membership arm of the association and has approximately 150 members.

It doesn't have any linkages with the SATC, in terms of projects or funding, and never has.

In June 2019, the CVBTA has amalgamated of fees with CVWFTC[109]. Traditional members of CVBTA paid $165, and then also had to pay membership of $110 to CVWFTC. The amalgamation of fees see brings membership down to $165 for both organisations (saving $110). Of this new fee, CVBTA collects $55

[109] CVBTA Member communication 20 June 2019

(instead of $165), while the remaining $110 goes to CVWFTC to allow CVBTA members to benefit from CVWFTC promotional activities.

Current Tourism Projects

- Industry Development opportunities
- Networking opportunities
- Familiarisation Days
- Representation on Clare Valley Alliance
- Shop Local incentive program
- Totally Local Program
- Assist with promotion of events (where possible)
- Advocate for tourism and business promotion
- Previous owners of clarevalley.com.au

7.1.6 Clare Valley Grape + Wine Association

Clare Valley Grape + Wine Association (CVWGA), established in 2018, is the peak wine industry body in Clare Valley. On behalf of 59 Winemakers and 88 grape growers[110], CVWGA is the beacon for collaborative investment and collective action, initiating and delivering projects for the benefit of the Clare Valley wine industry.

South Australia's grape and wine industry has access to a reliable source of funds through the Wine Industry Funds. This gives it the capacity to innovate, the ability to adopt best industry practice, and the resources required to respond positively to the demands of the modern market place.

Primary Industries and Regions SA (PIRSA) administers funds established under the Primary Industries Funding Schemes Act (SA) 1989 and makes payment to a body representing the fund contributors, which is the CVWGA.

With these funds, the CVWGA leverage and invest in sector development, marketing and management of the wine industry in the Clare Valley Wine Region.

Current Tourism Projects

- International Tourism Project (Commissionable product, video footage, marketing campaign, website language conversion)
- Development of Clare Valley Red Wine Story
- Growing Wine Tourism Program
- Clare Valley Gourmet Weekend
- Domestic Wine Events
- Cellar Door Benchmarking program

[110] https://clarevalleywine.com.au/wga-members

7.1.7 Visual and Performing Arts Association

The vision of the Mid North Visual and Performing Arts Association (VAPAA) is of a vibrant arts community in the Clare Valley and surrounding towns. It is one that is inclusive of all arts and encompasses the whole community.

Their objectives are to:

- Provide leadership in the development of arts and cultural facilities in our region, engagement with artists and a voice for recognition for arts.
- Develop community awareness and a love of art and help artists in developing their skills through strategic relationships and member benefits
- Support and deliver extraordinary arts opportunities to the membership, local and wider community through all media and special events

Current Tourism Projects

- Development of the Clare Valley Arts Trail http://www.vapaa.org.au/files/uploads/2018/12/VAPAA-ART-TRAIL-050818.pdf

7.1.8 Clare Valley Cuisine

Clare Valley Cuisine (CVC) is the peak industry body for food and commodity growers, producers, brewers, fermenters, retailers, restaurants, caterers and hospitality bodies who grow/produce/serve/sell food within the Clare Valley region. Members share a commitment to the development and protection of sustainable food production in the region as well as effective promotion of the Region as a leading food producer and food destination, helping to build the overall status of the destination.

CVC is governed by a volunteer committee, with practical experience in many aspects of the business of food. The networking potential of the committee members is used to influence and generate support from within the industry, and to build relationships with key stakeholders.

The committee is currently not working on any tourism specific projects.

7.1.9 Burra Goyder Visitor Information Centre

The Burra Goyder Visitor Information Centre (BGVIC) is a nationally accredited visitor information centre located in the heart of Burra in Market Square. The BGVIC is owned and managed by the Regional Council of Goyder (since 2017), and acts as a business unit within Council.

In terms of resourcing, the Council’s Tourism Manager is responsible for overseeing the day-to-day operations, supported 1.5 FTEs, and a volunteer base.

The Centre is a traditional brochure, maps and information centre, and is open 7 days a week. The Centre is also the start location for visitor exploring the Burra Heritage Passport Trail.

7.1.10 Clare Valley Wine, Food and Tourism Centre

The Clare Valley Wine, Food and Tourism Centre (CVWFTC) is an incorporated body and is the accredited Visitor Information Centre located on the southern outskirts of Clare. It is located on the southern outskirts of Clare, next to the Discovery Holiday Park Clare, It is also a short walk/ride to join the Riesling Trail.

The Organisation is governed by a board which has representatives from each of the region's industry associations, including Clare Valley Grape and Wine Association, Clare Valley Business and Tourism Association, Clare Valley Cuisine and Clare Valley Visual and Performing Arts Association.

The centre has a funding agreement with the Clare + Gilbert Valley Council which supports the administration and facility management costs associated with running the Centre. The agreement is current until 2025.

The Centre employs a Centre Manager (FTE), and a PromotionalCoordinator (.6 FTE), Customer Service Officers (1.5FTE) who are supported by 35 volunteers.

Recently awarded South Australia's best Visitor Information Centre in the 2017 South Australian Tourism Awards, the Centre is a showcase of locally made products (including wine and food), coffee and cake, along with traditional visitor servicing and sales.

Current Tourism Projects

- Hosting the Annual South Australian VIC Conference in May 2020
- Friday Night Drinks – Each Friday at the Centre
- Representing the region at Trade and Consumer Marketing (such as Adelaide Caravan + Camping Show, Australian Tourism Exchange – see Section 8.3.1)
- Showcasing Clare Valleys regional produce and wine in the Centre
- Ultra-Series Event (running on Lavender Federation Trail) June 2020
- Support the Clare Classic Event
- Digital Marketing – Manage clarevalley.com.au and social media pages (see Section 7 for details)
- Assisting with editing the Clare Valley regional tourism guide
- Acting at the Clare Gourmet Weekend point of contact and bus location
- Handling phone, email & direct enquiries/bookings of Accommodation & Tours

7.1.11 Local Business/Progress Associations, Council Owned Asset Management Committees and/or Town Committees

In each of Council areas there are a number of Local Business/Progress Associations and/or Town Committees (some incorporated entities, others are section 31 committees of Council) who's mandate is to maintain a healthy and vibrant local economy. Activities of these groups could be the run small events, placemaking beautification projects (landscaping, town entrance signage, public art, silo art), maintaining visitor information bays, industry development workshops, manage community assets, manage town tourism websites and social media accounts.

These organisations are an extremely important part of the fabric of the visitor economy, and are the resources who have capacity to implement actions at a town level.

7.1.12 National Trust of SA Burra Branch

The Burra branch of the National Trust of South Australia is a volunteer committee established and is responsible for the care and maintenance of some of the Burra Passport Heritage Trail sites. The Committee works closely with Regional Council of Goyder on maintenance, management and marketing of the Trail.

Funding is generated via grant applications and their share of takings on the Burra Passport Trail visitors. Opportunity exists for the development of a strategic, consumer focused Marketing Plan for the Burra Passport Heritage Trail be developed in conjunction with all Burra Passport Trail Stakeholders.

Assets they are responsible for are:

- Bon Accord Cottage
- Bon Accord Mine Complex
- Burra Police Lockup and Stables
- Malowen Lowarth Cottage
- Miner's Dugouts
- Market Square Museum
- Peacock's Chimney Stack
- Redruth Gaol

Current + Future Projects

- Maintenance and management of certain Burra Heritage Trail sites
- Development of new audio History and Interpretation for the Police Stables
- Ongoing fund applications to further activate their Assets
- Currently looking at option to employ a coordinator for the Museums to further activate their offering.

7.1.13 Riesling Trail Management Committee

A volunteer committee are responsible for the management and maintenance of the Riesling Trail, as well as provide some marketing of the Trail. Funding for trail maintenance and upgrades are via the Office for Recreation, Sport and Racing (ORSR) (Auburn to Clare section only – around $20,000 per annum), as well as project by project and in-kind support from Clare and Gilbert Valley Council. Annual membership packages and support from locals and businesses also raises around ($20,000 per annum approx.), which is important to trail maintenance outside the ORSR funded section.

The committee are custodians of the popular Riesling Trail brochure (DL size). The latest iteration of the brochure (20,000 printed in early 2019) was distributed to visitor centres and key businesses along and around the Trail. They support the inclusion of the Rattler Trail due to its limited funds and trail experiences.

Some marketing of the Trail is undertaken via the Committee as outlined, however no proactive, consumer focus marketing is undertaken. However, the Trail is listed as #1 experience to do in the Clare Valley on TripAdvisor and also the most widely used hashtag in the region. Opportunity exists for a strategic

Marketing Plan for the Trail to be developed in conjunction with all Riesling Trail Stakeholder to further amplify the trail's strong positive online advocacy further, and also use the Clare Valley branding in it's marketing.

Marketing

- Manage website www.rieslingtrail.com.au and https://www.facebook.com/rieslingtrail/, however these are mainly aimed at locals business supporters.
- Membership of Rail Trails of Australia https://www.railtrails.org.au/
- Riesling Trail Brochure development and distribution

Current Projects

- Connection of Riesling and Rattler Trails via 1km stretch in Auburn[111]
- Ongoing improvement of facilities + amenities along trail – seating, shelters, information signs, and shelters, artworks as required and able due to funds.
- Connection of new walking trails to the Riesling Trail in Clare utilising public parks.

7.1.14 South Australian Tourism Commission

The South Australian Tourism Commission (SATC) is South Australia's peak tourism organisation responsible for implementing the South Australian Tourism Plan 2020. The SATC works closely with regional tourism bodies to build regional brands, to increase domestic and international visitors to Adelaide and the regions, and to provide information and support to regional tourism boards and businesses.

As outlined in 7.2.2, SATC provides annual resources which co-funds a human resource (together with RDAYMN) to administer set activities on behalf of state government.

The SATC is responsible for:

- Providing leadership for industry and government for the collective ownership and achievement of the outcomes in the South Australian Tourism Plan 2020
- Fostering collaboration among industry, business and Government
- Driving demand for South Australian experiences - Direct to consumer marketing, Public Relations and Famils, and Digital marketing and facilitation
- Supporting the timely sharing and provision of research and insights that support good decision making by all stakeholders in the industry
- Working closely with aviation partners and other key access and transport stakeholders, such as Cruise Lines, to maintain and grow capacity and ease of access
- Improving understanding of the tourism industry's contribution to South Australia's economy
- Facilitating cooperative marketing
- Working with industry stakeholders (private and government) to support the development of demand driving experiences

---

[111] http://rieslingtrail.com.au/wp-content/uploads/2018/10/RT-AGM-Chairmans-report-2018.pdf

- Supporting the industry's ease of access to external business support programs, grants and other opportunities for industry development and investment
- Working closely with regions, industry associations and partners to grow tourism across the whole State.

In early 2019, the SATC developed a new draft South Australian Tourism Plan 2030 in consultation with industry, which outlines an ambitious target of $12.8b and 16,000 jobs by 2030.[112]

Current Projects

The Destination Development team are currently (July 2019) undertaking product gap analysis for South Australia, and are seeking support of SATC trade partners to complete a survey which will provide them with important information regarding operators developing new demand-driving tourism experiences in the future.

Two key elements:

1. What you know now about existing tourism products
2. What you think should be developed in the future to be the next game-changer

They are currently collating results and will use this to identify key gaps in the international marketplace. This information will provide significant insight for the region as to where the gaps exist for the Region in terms of commissionable product.

[112] SATC Draft Tourism Plan 2030 > https://tourism.sa.gov.au/research-and-statistics/strategies/tourism-plan-2030)

8. Brand + Marketing

This section identifies the current brand and positioning for the Clare Valley Tourism Region. It also highlights the current destination marketing initiatives implemented by the tourism stakeholders within the Region.

Key Findings

Branding - The Region have recently (2016) collaborated on the development of a brand project to reflect the Region's personality and promise. The new brand was launched into industry with a short video interviewing industry champions, in conjunction with public workshops and the dissemination of the strategy and implementation guidelines through the various sector groups and associations.

Whilst businesses throughout the region are increasingly implementing the brand on packaging and tourism stakeholders are using the brand across marketing platforms, opportunities exist to educate the industry and wider local communities how to effectively implement the Brand from a storytelling perspective as a way to unite the community and Region's experiences with one voice.

Regional Marketing Strategy + Resourcing - There is currently no collaborative marketing strategy which encompasses the whole tourism Region. The Region's tourism stakeholders implement marketing initiatives individually, with slight content nuances directed at slightly different visitor segments.

The Region's marketing is currently implemented by 6 paid resources across 4 organisations which are custodians of 2 tourism websites and 19 social media accounts. The main challenge this presents is the quality and consistency of strategic implementation to achieve cut-through and subsequent demand from the identified high yielding visitor personas.

Additionally, analysis of digital metrics indicate a lack of engagement and conversion of the key digital marketing platforms for the region, which presents a major opportunities of activating a whole of region marketing strategy, with a laser focus on telling the right story on the right platform, by the right storyteller at the right time.

And, whilst each organisation are undertaking some regional marketing, no organisation has a strategic marketing plan in place, which means return on investment and marketing impact cannot be effectively measured. It also means the resourcing that goes into the implementation of initiatives is not accounted for.

Visitor Advocacy - It was evident through desktop research, that in comparison to other South Australian Tourism Regions, there is a distinct lack of content and visitor reviews for the Region and its experiences online (via search, social media and review websites). In saying this, the advocacy that exists is positive, there is just not enough of it.

Given that visitor advocacy is the most trusted and influential form of destination marketing, great opportunity exists to educate industry on best practice digital marketing to drive more advocacy for the Region online.

8.1 Clare Valley Tourism Region Brand

In 2016, the Clare Valley Alliance (CVA) spearheaded a branding project for the region, which garnered support from SATC. Parallax, a creative branding agency, developed new graphic and positioning statement for the tourism region that can be implemented on marketing and signage across all levels of the industry.

8.1.1 Personality

It has been said that if Barossa is the produce store, Clare Valley is the farm. This single statement defines Clare Valley's personality. Clare Valley is the Australian farmer. Clare Valley is authentic, welcoming, unpretentious, humble and laconic. This personality should be evident in the way stories are told and dressed, and the way people charged with representing the region behave.

8.1.2 Positioning

Distance has traditionally been an obstacle to visitation and tourism in the past. Clare Valley is just a little too far for a day trip. But let's turn that negative into a positive. The distance means you will need to stay a while. You will need to slow down. You will need to relax, unwind, soak it up and breathe it in.

Clare Valley's new positioning statement is "Breathe it in." It is a positioning that works across experiences in both a literal and metaphorical manner. The wine lover literally breathes in the wine. The visitor to Mintaro metaphorically breathes in the history. The trail cyclist breathes in the purest country air. The adventurer breathes in the incredible scenery.

8.1.3 Implementation

RDAYMN are the custodians of the Brand, managing any queries with regard to implementation.

Once the Brand Strategy was developed, and short video interviewing tourism champions within the region was developed to communicate the Strategy more broadly. This, in conjunction with public workshops where the CVA presented the Brand Strategy. This was followed up with the dissemination of the strategy and implementation guidelines through the various sector groups and associations.

Anecdotally, businesses throughout the region are increasingly implementing the brand on packaging and tourism stakeholders are using the brand across marketing platforms.

Challenges were highlighted in the use of the brand hashtag #breathitin (via Table 22), as it is generic hashtag, not linking to place or location, and is used globally by travel, fitness and health communities, which dilutes its effectiveness online.

8.2 Marketing

There is currently no collaborative marketing strategy which encompasses the whole tourism region. The Region's tourism stakeholders implement marketing initiatives individually, with slight content nuances directed at slightly different visitor segments.

8.2.1 Initiatives

Table 20 (below) is an overview the current Regional marketing initiatives, whilst Table 21 (below) offers a high level review of the performance of each of the initiatives.

Marketing Initiatives Performance Snapshot

- *Stakeholder Implementation*
  - APC and CVBTA currently do not implement any consumer marketing initiatives, and WRC only manage a Facebook Page with a primary purpose of informing residents with limited visitor information.
- *Websites*
  - The two major websites for the Region are www.clarevalley.com.au and www.visitburra.com
  - Neither of the tourism websites have a set of established KPIs to measure engagement or referral to local businesses
  - The Google Analytics account was assessed for www.clarevalley.com.au, with the results available in section 8.3.2
  - Nil SEO across either site, impacting visibility in search engines

- Very limited storytelling on either website, impacting visibility in search engines, and engagement of website content. News section currently aimed at industry, not consumers.
- *Social Media*
    - There is a great deal of duplication across multiple social platforms - Facebook, Instagram in particular.
    - Limited inspiring and helpful content directed toward ideal customer segments (mostly event and business profiling), which has negatively impacted engagement levels across all social platforms.
    - A lack of strategic direction has resulted in no single platform performing particularly well in terms of engagement.
    - Hashtags (important for collecting + finding regional stories) are underperforming due to lack of promotion to locals and residents alike.
- *Consumer and Trade Shows*
    - Significant investment in trade and consumer shows with limited ROI – some show participation based on non-high yielding markets

Table 20 - Overview of Regional Marketing Initiatives for the Clare Valley Tourism Region

	TOURISM WEBSITE	FACEBOOK	INSTAGRAM	TWITTER	YOUTUBE	CONSUMER EMAIL MARKETING	GOOGLE MY BUSINESS	PUBLIC RELATIONS	COLLATERAL (OWN PRODUCED)	OFFLINE ADVERTISING	CONSUMER SHOWS	TRADE SHOWS	EMAIL MARKETING
Regional Development Australia Yorke and Mid North		Y	Y	Y	Y			Y	Y			Y	
Clare and Gilbert Valley Council		Y		Y									
Regional Council of Goyder	Y	Y - 2	Y				Y - BGVIC						
Wakefield Regional Council		Y											
Clare Valley Wine + Grape Association		Y	Y	Y – 2		Y		Y	Y	Y	Y	Y	Y
Clare Valley Wine, Food and Tourism Centre	Y	Y	Y	Y	Y		Y		Y	Y	Y		
Clare Valley Cuisine		Y											

Table 21 - Review of Recent Marketing Activities for the Clare Valley Tourism Region

TACTIC	ACTIVITY	OWNER	CUSTOMER GROUP	REVIEW NOTES
Website	www.clarevalley.com.au	CVWFTC	*Primary* – Visitors *Secondary* - Residents	• Revamped and relaunched on 23rd May 2019 • Comprehensive product listings and information (ATDW) • Storytelling - Minimal itineraries (blog section) • Events Calendar • Conversions - Online bookings via V3 book now button (not integrated into site) • Nil SEO • No redirects in place to refer traffic from old website to new pages + non optimised 404 error page. • User Experience (UX) – Responsive, Booking UX compromised, no clear path to conversion, inspirational content hidden, product listing top heavy, • Improving engagement rate and time on website for new website users but fall in traffic (common for first 3 months of a new website). Refer GA Review (section 8.3.2) for detailed insights. • Competitor website is www.bookclarevalley.com.au
	www.visitburra.com	RCG	*Primary* – Visitors *Secondary* - Residents	• Developed 2015 • Basic visitor information • Basic business directory • Nil Storytelling • Nil SEO • Conversions - Online bookings via V3 book now button • UX - Compromised across the site – Nil path to conversion, not responsive, nil inspirational content • Currently under redevelopment (due to launch July 2019) • Competitor site visitburra.com.au is confusing for visitors (owned/managed by BnB Booking Service, Kim Michelmore)
Facebook	/clarevalleyaustralia/	CVWFTC –	*Primary* – Visitors *Secondary* - Residents	• Focus on promoting businesses and events on in the region • Very small community size (compared to similar FB communities of similar regions eg. Adl Hills) • Very low organic engagement. • Nil path to conversion with www.clarevalley.com.au. Lack of clarity its official FB page of the region. • Current MOU with RDAYMN to use the page for their campaigns
	/theclarevalley/	CVWFTC	*Primary* – Visitors *Secondary* - Residents	• A page specifically for the Centre • Focus of what's on for visitors and community • This page is linked as primary Facebook Page to www.clarevalley.com.au

				• Lacks inspirational content
	/ClareWineSA/	CGWA	*Primary* – Visitors *Secondary* – Local Wine Industry + Residents	• Focus on promotion of wine tourism, events and news • Very low engagement • Could be confused with Clare Valley Australia FB page as same log use.
	/ClareValleyCuisine/	CVC	*Primary* – Visitors *Secondary* – Local Food Industry + Residents	• Focus on information for industry and for visitors • Minimal Engagement
	/VAPAAmidnorth/	MNVAPAA	*Primary* – Visitors *Secondary* – Local Arts Industry + Residents	• Focus on promotion of arts and events within the Mid North region. • Minimal Engagement
	/ClareGilbertValleysCouncil/	CGVC	*Primary* - Residents	• Focus on sharing information on events, and information relevant for residents • Some visitor information
	/BurraVisitorInformationCentre/	RCG	*Primary* – Visitors *Secondary* - Residents	• A page specifically for the Centre • Focus of what's on and information for visitors and community • This page is linked as primary Facebook Page to www.visitburra.com.au • Minimal engagement
	/regionalcouncilofgoyder/	RCG	*Primary* – Residents	• Focus on sharing information on events, and information relevant for residents • Some visitor information
	/wrc.sa.gov.au/	WRC	*Primary* – Residents	• Focus on sharing information on events, and information relevant for residents • Some visitor information
	/WhatsOnInClareValley/	External	*Primary* – Visitors *Secondary* - Residents	• This is an external group, that curates and reposts visitor posts only. • Minimal engagement
Instagram	/clarevalleysa/	RDAYMN	*Primary* – Visitors *Secondary* - Residents	• Clare Valley SA • Repost of what is shared on the RDAYMN Facebook Page • Links to www.clarevalley.com.au • Lacks strategic Instagram content (non-branded, visually stunning) • Current MOU with RDAYMN to use the page for their campaigns
	/clarevalleytourism/	CVWFTC	*Primary* – Visitors	• Access given to CVWFTC in May 2019 from RDAYMN • Clare valley tourism 'official' • Focus of what's on for visitors + promotion of booking service • This page is linked as primary Facebook Page to www.clarevalley.com.au • Needs more strategic Instagram content, visually stunning and storytelling.

	/clarevalleygourmet/	CGWA	*Primary* – Visitors	• Focus on information for the event (pre-event) and during the event • Started Feb 2019
	/visitburra/	RCG	*Primary* – Visitors	• Focus of what's on and inspiring images of Burra • Very small community size based on similar destinations • Needs more strategic Instagram content, visually stunning and storytelling.
Twitter	/ClareValleySA	CGWA	*Primary* – Visitors	• Joined April 2011 • Inactive since May 2011
	/ClareWineSA	CGWA	*Primary* – Visitors	• Active – posting approximately fortnightly • Joined February 2013
	/CGVCouncil	CGVC	*Primary* – Residents	• Focus on sharing predominantly information and events for residents • Some reference to visitor information
YouTube	/channel/UCxIihpShV8tC6Wb2zJ0vyxw	CVWFC	*Primary* – Visitors	• Channel Name – Clare Valley • Created 2015 • 8 Videos • 22 Subscribers • 5,352 Video Views • Nil profile optimisation of platform (URL, Video Descriptions, ALT Text) • Mix of industry + consumer videos
	/channel/UC6mNAkPT1lh3D538K9IXNXg	RDAYMN	*Primary* – Visitors	• Channel Name – Clare Valley • Created 2018 • 1 Video – CV Rebrand • 13 Video Views • Nil Subscribers • Nil profile optimisation of platform (URL, Channel Cover Image, Video Descriptions, ALT Text)
Collateral	Clare Valley Regional Visitor Guide	SATC / RDAYMN	*Primary* – Visitors	• RDAYMN are the liaison point for SATC in the development of the Regional Guide
	Visitor Information Brochures	CVWFTC, CGWA, BGVIC	*Primary* – Visitors	• The 2 visitor centres produce a range of brochures for relevant niche groups. Mostly created inhouse. • CGWA have developed some wine specific collateral (eg. Clare Valley Rocks which is Geological info for consumers)

Advertising				• No collaborative regional advertising in past 12 months
Public Relations	Famils	RDAYMN	*Primary* - Visiting Journalists	• Regional Tourism Manager hosts famils as pre-arranged with SATC • Approximately 4-8 famils per year with ITOs and Journalists
Email Marketing	Consumers	CGWC	*Primary* - Visitors	• Ownership of relatively new database of consumers from Melbourne Good Food and Wine Show (2019) and Clare Gourmet Weekend 2019.
	Industry	RDAYMN, CGWA, CVBTA	*Primary* - Industry	• Enewsletters are sent out regularly to members of the organisations, and to the industry (RDAYMN)
Trade + Consumer Shows	Australian Tourism Exchange	RDAYMN	*Primary* – Inbound Tour Operators, Travel Trade	• Regional Tourism Manager attended ATE19 in Perth
	Various Consumer Shows	CVWFC + CGWA	*Primary* - Visitors	• CGWA - Caravan and Camping, Plant 4 Bowden, Cellar Door festival Adelaide, Good Food and Wine Show • CVWFTC – Caravan and Camping Shows • RCG - Caravan and Camping Shows

Table 22 - Review of Clare Valley Tourism Region hashtags performance

Hashtag (via Instagram)	# Uses	Notes + Recommendations
#breathitin	11905	Promoted as main brand hashtag – Clare Valley Visitor Guide. However, nothing to link it to the destination. It is also used globally by travellers, fitness and aromatherapy communities, so it's not an ideal brand #hashtag. Recommend not promoting it moving forward.
#clarevalley	58209	Use by many residents + local businesses, including tourism + wine brands. Some good advocacy in the region but need to work through a lot of other not engaging content to find. Monitor it for UGC content, but don't promote it.
#clarevalleysa	6808	Promoted by SATC as key tourism hashtag and used to find user generated content. Used on WIFI signage around region. Promoted in visitor guide. Increase promotion to industry + visitors as the region wide hashtag. Then also use with relevant town or experience hashtag (eg #clarevalleysa, #rieslingtrail) etc.
#burra	43,074	Used globally, not recommended to promote for the region.
#visitburra	438	Promoted by RCG + BVIC. Used by a few local retail and tourism businesses but it's underperforming. Could be much better activated via Visitor Collateral, Industry and Town Signage. Increase promotion to industry + visitors.
#clarevalleywine	1522	Recommend a CVWGA choose + promote single CV wine hashtag promoted to industry and locals, to bring all wine discussions as best as possible into one. Monitor for UGC for main Consumer social media channels.
#clarevalleywines	2534	
#clarevalleyweddings	887	Good quality advocacy for the region. Advocacy for the promotion to relevant industry suppliers. Promote where relevant.

8.2.2 Visitor Insights Review www.clarevalley.com.au

A high level review of website users of www.clarevalley.com.au was undertaken on the 25th June 2019, to provide further insight into the performance of the website (Table 23 and 24). As this website is the main, website representing the whole region and promoted in all marketing activities for the region, its critical it is performing at a high level in attracting and converting visitors to the region.

This review compared the 1 month of 23 May – 23 June 2019, which is the first month of the newly updated website with the same period in 2018.

Overall, engagement on the new website is improving (people spending more time, looking at more pages), however the website is underperforming in areas of attracting visitors and then converting their enquiry or interest.

Positive Insights

- Users are staying longer on the new website (up 18%)
- Users are looking at more pages on the new website (up 21%)
- Bounce rate has improved by 32% (meaning less people are leaving from the 1st page they visit on the website)

Negative Insights

- 35% decrease in website users for the same period overall. However, this is to be expected as takes up to 3 months for Google to re-index an update Website URLs.
- No content other than top level navigation is driving traffic in search results
- No conversion tracking set up (to track strategic KPI's, such as referral to business, online bookings, # brochure downloads, phone calls, enquiries etc).
- No URL redirects are in place to refer traffic from old, redundant URLs to new URLS, leading to poor UX and potential lost traffic.
- Very low referral traffic from social media (only 166 in June 2019), and is an indicator of lack of strategic posting of content and also lack of social media channel conversion optimisation.

Table 23 - Audience and Acquisition Review of www.clarevalley.com.au

AUDIENCE			
	Current Period 23 May - 23 June 2019	Previous Period 23 May - 23 June 2018	% Change
# Sessions	7,011	10,806	35.12
# Users	5,547	8,465	34.47
# Page Views	24,689	31,262	21.03
Pages per Session	3.52	2.89	21.72
Ave. Session Duration	3:04	2:35	18.94
Bounce Rate	36.59%	54.19%	32.49
Top Cities			
1	Adelaide	Adelaide	
2	Melbourne	Melbourne	
3	Sydney	Sydney	
Mobile Overview			
Desktop	47.30%	44.68%	5.86%
Mobile	40.02%	40.88%	2.15%
Tablet	12.67%	14.44%	13.97%
Mobile Visitor Average Time on Site	1:45	1:35	10.43%

ACQUISITION			
	Current Period 23 May - 23 June 2019	Previous Period 23 May - 23 June 2018	% Change
Traffic Sources			
Organic %	3842	6804	43.53%
Direct %	1375	1303	5.77%
Referral %	272	403	32.51%
Social %	140	134	4.48 %
Email %	14	5	180.00%
Social Referrals			
TOTAL sessions from social referral	166	215	35.12%
Facebook	147	142	3.52%
Twitter	3	0	100.00%
Instagram	2	44	95.45%
Pinterest	14	3	366.67%
TripAdvisor	0	26	100%
Top Referring Websites			
1	www.facebook.com	www.southaustralia.com	
2	www.southaustralia.com	www.facebook.com	
3	www.clareclassic.com.au	www.claregilbertvalleys.com.au	

Table 24 - Top Content being accessed on www.clarevalley.com.au

BEHAVIOUR		
	Current Period **23 May - 23 June 2019**	**Previous Period** **23 May - 23 June 2018**
Top Content (URLs)		
1	Home Page	Home Page
2	https://www.clarevalley.com.au/stay/	www.clarevalley.com.au/stay/accommodation-directory
3	https://www.clarevalley.com.au/explore/	www.clarevalley.com.au/wine/cellar-doors/
4	https://www.clarevalley.com.au/whats-on/	www.clarevalley.com.au/events/events-calendar/
5	https://www.clarevalley.com.au/eat/	www.clarevalley.com.au/food/cuisine-members
Top Landing Pages (URLs)		
1	Home Page	Home Page
2	www.clarevalley.com.au/stay/	www.clarevalley.com.au/wine/cellar-doors/
3	www.clarevalley.com.au/explore/markets	www.clarevalley.com.au/stay/
4	www.clarevalley.com.au/stay	www.clarevalley.com.au/events/events-calendar/
5	www.clarevalley.com.au/explore/cycling	www.clarevalley.com.au/explore/things-to-do/
Top Exit Pages (URLs)		
1	Home Page	Home Page
2	www.clarevalley.com.au/stay/	www.clarevalley.com.au/wine/cellar-doors/
3	https://www.clarevalley.com.au/whats-on/	www.clarevalley.com.au/stay/accommodation-directory
4	www.clarevalley.com.au/explore/markets	www.clarevalley.com.au/events/events-calendar/
5	www.clarevalley.com.au/stay	www.clarevalley.com.au/stay/

8.2.3 Resourcing

Over the course of the past year (to June 2019) the Region's marketing has been implemented by 6 individuals across 4 organisations:

- CVWFTC's manager and part time resource which manages the regional website www.clarevalley.com.au and their owned social media accounts (Facebook and Instagram)
- CVWGA executive officer manages the Facebook and Instagram accounts for the organisation and have contracted external marketing agency for a limited time to manage social media for Clare Valley Gourmet Weekend on behalf of the organisation.
- RDAYMN manage a Facebook Page and Instagram Account on behalf of the wider region, which is resourced through the Regional Tourism Manager and Administration support at the organisation.
- BGVIC (+ RCG) manage a Website, Facebook Page and Instagram account

Whilst there are a number of marketing initiatives in-train, no organisation has a strategic marketing plan in place, which means return on investment and marketing impact cannot be effectively measured. It also means the resourcing that goes into the implementation of initiatives is not accounted for.

8.2.4 Australian Tourism Data Warehouse Product Listings

Australian Tourism Data Warehouse (ATDW) is the national digital database for tourism product, providing free listing for all South Australian tourism businesses and events (subsidised by SATC), which can then be distributed throughout Australia and global websites, such as www.southaustralia.com and www.clarevalley.com.au.

The inclusion of all regional tourism experiences and products on the ATDW is a simple and effective way to increase the digital footprint of tourism experiences in the region.

SATC reported that the Region had a total of 165 listings on ATDW as at FY2019. A breakdown of the number of listings within each category is available by contacting SATC.

8.2.5 Online Product Distribution

Through consultation with stakeholders, it was identified that there are still many tourism experiences that are not online bookable.

Additionally, there is limited commissionable product available in the Region (tourism operators offering commission to wholesalers to distribute product to international visitor markets), which is a challenge when it comes to attracting international visitors.

Opportunities exist to educate tourism operators on how to activate online bookings, and also advocate for the development of commissionable product and where commissionable product exists, connect and collaborate to harness opportunities and provide economies of scale at trade events.

8.3 Visitor Sentiment

What visitors are staying online about a destination is a key indicator on the performance of products and the wider destination experience as a whole, and indicator of advocacy of the region.

Desktop research on TripAdvisor, Google and Instagram can provide insights into visitor sentiment. The insights below are purely qualitative, and they lack quantitative measurement of sentiment and likelihood of future advocacy.

Overall, sentiment for the tourism experiences analysed are very high (mostly 4 star), and comments regarding the assets are very positive, with only a few negative comments. However, it's noted many brands in the region are lacking in their own online promotion to encourage online advocacy for their experiences.

Table 25 - Digital Visitor Sentiment for Key Tourism Experiences in the Clare Valley Tourism Region

		TripAdvisor		Google		Instagram	
Product / Experience	**Product Category (Activity / Attraction)**	**# Reviews**	**Rating**	**# Reviews**	**Rating**	**#Hashtag**	**# Uses**
Clare Valley Sub Region							
Riesling Trail	Attraction	272	4.5	Nil	Nil	#Rieslingtrail #Rieslingtrailclarevalley	1,906 126
Spring Gully Conservation Park	Attraction	8	4	19	4.3	#springgullyconservationpark	50
CV Food, Wine Tourism Centre	Attraction / VIC	93	4.5	87	4.5	#clarevalleywinefoodandtouristcentre	34
Clare Country Club	Accommodation	1192	4.5	280	4.3	#clarecountryclub	224
Discovery Parks - Clare	Accommodation	265	4	205	4.3	#discoveryparksclare	23
St Helen's Country Cottages	Accommodation	56	4.5	13	4.9	#sthelenscountrycottages	3
Shut the Gate Wines	Cellar Door	20	4.5	16	4.6	#shutthegatewines	548
O'Leary Walker Wines	Cellar Door	85	4.5	14	4.6	#olearywalkerwines #olearywalker	770 395
Sevenhill Cellars	Attraction / Cellar Door	251	4.5	27	4.9	#sevenhillcellars #sevenhillwinery	246 262
Sevenhill Hotel	Hotel / restaurant	343	4.5	286	4.4	#sevenhillhotel	188
Velvet + Willow Wines	Café / Cellar Door	37	5	52	4.6	#velvetandwillow #velvetandwillorwines	63 16
Stonebridge Wines	Cellar Door	26	4.5	28	4.1	#stonebriedgewines	143
Pikes Brewrey	Cellar Door / Restaurant / Brewery	66	4.5	11	4.8	#pikeswines #pikeswine #pikeswinery	707 52 55
Paulett Wines + Bush DeVine Cafe	Cellar Door / Restaurant	210	4.5	41	4.8	#paulettswiney #bushdevinecafe	22 12

Simpsons Rices Creek	Attraction	7	4.5	23	4.5	#simponsricescreek	17
Mintaro Maze	Attraction	137	4	204	4.2	#mintaromaze	712
Clare Valley Art Gallery	Attraction	17	4.5	10	4.6	Nil	
Burra Sub Region							
Burra Heritage Passport	Attraction	132	4.5	Nil	Nil	#burrapassport #Burrapassporttour #burraheritagepassport	10 1 12
Paxton Square	Accommodation	87	4	41	4.3	#paxtonsquarecottages	30
Burra Caravan and Camping Park	Accommodation	110	4	151	4.1	#burracaravanpark	3
Burra Motor Inn	Accommodation	160	3.5	23	4.2	NIl	
Burra Heritage Cottages Tivers Row	Accommodation	24	5	1	5	#burraheritagecottages	5
Burra Regional Art Gallery	Attraction	20	4.5	9	4.6	#burraregionalartgallery #burraartgallery	21 8
Redbanks Conservation Park	Attraction	4	4	7	4.1	#redbanksconservationpark	101
La Pecora Nera	Restaurant	272	4.5	109	4.6	nil	
Jumbucks	restaurant	36	4.5	2	4.5	Nil	
Agricultural Districts Sub Region							
Lake Bumbunga	Attraction	Nil	Nil	86	4.6	#lakebumbunga	2446
Empire Cafe	Café	4	3.5	81	4.3	Nil	
Two Wells Bakery	Bakery	15	4.5	273	4.7	#twowellsbakery	12
Colin Thiele Drive	Tour	2	4.5	2	4.5	Nil	
Eudunda Heritage Walk	Tour	2	4.5			Nil	
Eudunda Family Heritage Gallery	Attraction	1	5	5	4.8	Nil	
Eudunda Bakery	Bakery	7	4.5	43	4.4	#eudundabakery	1
Balaklava Cafe	Café	14	4.5	45	4.4	#balaklavacafe	1
Terminus Hotel Balaklava	Restaurant	18	4.5	55	4.1	#terminushotelbalaklava	3
Balaklava Golden Wheat Bakery	Bakery	16	4.5	15	4.6	Nil	
Rocks Reserve	Attraction	2	5	1	4	#rocksreserve	24
Mallala Motorsport Park	Attraction	0	0	201	4.5	#mallalamotorsportpark	1422
Mallala Hotel Restaurant	Restaurant	2	4	85	4.1	Nil	
Audrey's Accommodation	Accommodation			5	4.8	Nil	

9. Visitor Servicing

This section provides an overview Visitor Servicing from a National and State perspective, in addition to future best practice Visitor Servicing, and current Visitor Servicing initiatives and outcomes within the Region.

Key Findings

There are two Accredited Visitor Information Centres (AVICs) in the Region, the Clare Valley Wine, Food and Tourism Centre (CVWFTC) located on the southern outskirts of Clare, and the Burra Goyder Visitor Information Centre (BGVIC) located in the town centre of Burra.

There are several Visitor Information Centre Outlets (VIOs) throughout the Region, which distribute visitor information, but their sole purpose is not to service visitors within their locality, like an AVIC.

Whilst both AVICs are receiving excellent reviews and feedback with regard to the quality of their servicing within their Centres, over the past 4 years visitation to these centres has plateaued (CVWFTC) or is in decline (BGVIC), and the capture rate (the number of visitors serviced in comparison to the total number of visitors) is very low. This suggests that the majority of visitors to the Region are not calling into the AVICs, and therefore will be either finding their information online, or through word of mouth by locals once they are in the Region.

Great potential exists for both AVICs to re-align their visitor servicing and destination marketing actions to meet the needs of the Region's Visitor Personas.

Firstly, to set up and resource digital visitor servicing initiatives (at a minimum, active listening and responding on social media and review websites, social media and website live chat) and build this servicing into their daily operations (also reporting on these interactions as 'visitors serviced). Secondly, to implement additional outreach visitor servicing at events and in key visitor precincts (Clare and Burra Main Streets).

9.1 Visitor Servicing Beyond 2020

Accredited Visitor Information Centres (AVICs), and the value they contribute to their region's visitor economy, is a consistent challenge that many States and Regions in Australia are currently reviewing, especially with changing visitor markets and expectations.

AVICs are a significant cost line in an operating budget for Local Governments, with return on investment notoriously hard to measure. Research reports and case studies highlight Visitor Centres can be a key driver of regional dispersal and spend if they commit to evolve and innovate their business models to be agile and responsive to changing visitor and industry needs.

9.1.1 Visitor Servicing Research

South Australia's most recent research on the impact and role of regional AVICs to the South Australian tourism industry in studies in 2011[113] and 2012[114]. While there are some relevant insights for the Region, the dramatic change in travellers' path to purchase over the last 8 years and expectation of being able to find visitor information online, means this research is now not relevant for the Region.

More recently, Victoria invested in a 'Victorian Accredited Visitor Information Servicing Survey'[115], which investigated how accredited AVICs influenced visitors yield and length of stay. The report has some key insights for consideration at a state level for South Australia and its tourism regions.

Key insights from the December 2018 report found that visitors who visited an AVIC:

- 93% of visitors visited attractions or places that they otherwise wouldn't have
- $132 is the average additional amount spent per respondent as a result of visiting the AVIC
- 1 in 5 visitors stayed longer in the region as a result of the AVIC
- 83% predicted they would do extra activities or go to new places as a result of their visit to the AVIC

Visit Victoria also produced a Visitor Information Centre Analysis of international and domestic visitors who visited an AVIC, which provide insights into the different usage of AVICs.

The following insights were identified:

- 18.1% of international overnight visitors to Victoria visited a AVIC, although this proportion declined 3.0 percentage points compared with the previous period.
- Only 6.4 % of domestic overnight and 2.7% daytrip visitors to Victoria are likely to go to a VIC in Victoria, but daytrip visitors' propensity to visit an AVIC has remained relatively stable.

In April 2019, the Legatus Group (https://legatus.sa.gov.au/) commissioned Leonie Boothby and Associates to undertake gap analysis research with regard to visitor servicing and future trends for its local government constituents. This report is still in development (as at July 2019), which is due for release in the coming months. This report will be a robust, valid and comprehensive view on the direction for visitor servicing for the Region, and its recommendations and actions will be highly considered for implementation in the new Destination Management + Marketing Plan.

9.1.2 Visitor Servicing Industry Best Practice

While the previous research studies highlight the value AVICs can bring to a region, it's important to note that there is no one size fits all approach to Visitor Servicing.

The 'A National Perspective on Visitor Servicing' report showcases recommendations and case studies on what constitutes 'Best Practice' visitor servicing by using examples of what regions are doing around Australia. CVWFTC was acknowledged in the report as a good example of being an attraction in its own right with its showcase of regional food, wine and art.

For the Region, both AVICs in Clare and Burra are receiving great feedback online (see Section 8.4), it's recommended more is done by both Centres to evolve their visitor servicing activities, so they support the Region's High Yielding Visitors Personas across the purchase journey.

---

[113] https://www.tra.gov.au/tra/2016/documents/srr/DVS_SRR_SA_Regional_Visitor_Information_Centres_WEB_FINAL.pdf
[114] https://www.tra.gov.au/ArticleDocuments/185/SRR_SA_The_role_of_VICs_in_distributing_tourism_product_FINAL.pdf.aspx?Embed=Y
[115] https://www.vtic.com.au/wp-content/uploads/2019/01/VIS-Survey-Results-Half-Yearly.pdf

From a regional perspective, recommendations to guide the Region's AVICs in the future are summarised below, and can be read in full in Tourism eSchool's blog articles '12 Things Successful Visitor Centres Do Differently'[116].

- **"Visitor Servicing" not "Visitor Information Centre Focused"**. Successful AVICs understand their centre is one of many touch-points that visitors are accessing to learn more about how to experience the destination. They know the expectation that Visitors all come into their Centre is a dated and broken model.
- **Online visitor servicing is embraced** – They support the key online touchpoints of their region's identified high yielding customer segments (and potential customers) who prefer to find their information online. This includes online review management, provision of visitor information via online messaging and chat, online distribution of all visitor collateral and support/management of relevant regional website.
- **Location Focused**. Unless they are co-located with an attraction or located in a high traffic visitor area, visitor numbers will continue to fall.
- **Outreach Visitor Servicing**. They don't limit their visitor servicing to their physical centre, but where relevant offer mobile visitor servicing around a region to key visitor hots spots (such as events/local markets etc), roving ambassadors, mobile booths. Non-accredited visitor information outlets are also investigated as alternative, lower cost options for visitor hot spots in a region.
- **Address Market Failure**. Where private business hasn't filled a product gap, they step in to provide a product offer for visitors.
- **Resident, Retailers and Service Providers are engaged**. They understand how important residents, retail traders and supporting service providers are when it comes to influencing visitors to their region. They work with all local partners (such as visitor hot spots such as Tarlee Bakery) for brochure distribution and invest in proactive activities to growth word of mouth advocacy from everyone living + working in the region.
- **Measure + Report the right metrics**. They don't just measure traditional reach metrics (such as visitors through the Visitor Centre door), but also expand measurement to include:
    - Visitor Centre Engagement
        - Centre dwell time
        - Sales: online, retail, in-person sales'
        - Advocacy + Sentiment: What people are saying about their Centre
    - Online Engage Engagement Metrics
        - Download + engagement with digital visitor guides/maps/fact sheets
        - Online Bookings and/or Retail Sales
        - Engagement metrics of online platforms they have influence over (eg Facebook Engagement, Instagram Engagement, Website Engagement)
    - Local Community/Industry/ Events Engagement
        - Events attended
        - Growth in database of local residents
        - Engage/Conversion metrics with enewsletters
        - Local engagement on FB posts in community groups etc

- **Financially Sustainable Focus**. Multiple streams of income are developed, and they test and tweak what works based on their resources and their local industry. Revenue streams can include.

[116] https://tourismeschool.com/blog/12-things-successful-visitor-centres-do-differently/

- **Industry Contributions**. Via their Industry Prospectus, such has having brochures racking. Where resources are available, they also provide fee-for-service support, such as helping with ATDW listing set up, Google My Business and TripAdvisor Training.
- **Booking Commission**. Via Online Bookings, Face to Face Bookings, Event Tickets, Owned Product Packaging + Distribution
- **Retails Sales + Gift Packages**. Sold either offline (in VIC, at Events) or online via their Website.
- **Own Product Sales.** Entrance Fees, Own Tour Products (only where market gaps exist) such as Guiding Service (groups), Hire, Transport, Walking Tours
- **Advertising Opportunities.** In Centre - Posters, Window Projections, Touchscreen, Print.
- **Venue Hire.** If they have venue space, hire it out for local events.

9.2 Visitor Servicing Performance

9.2.1 Accredited Visitor Information Centres + Visitor Information Outlets

There are two Accredited Visitor Information Centres (AVICs) in the Region, the Clare Valley Wine, Food and Tourism Centre (CVWFTC) located on the southern outskirts of Clare, and the Burra Goyder Visitor Information Centre (BGVIC) located in the town centre of Burra.

There are several Visitor Information Centre Outlets (VIOs) throughout the Region, which distribute visitor information, but their sole purpose is not to service visitors within their locality, like an AVIC.

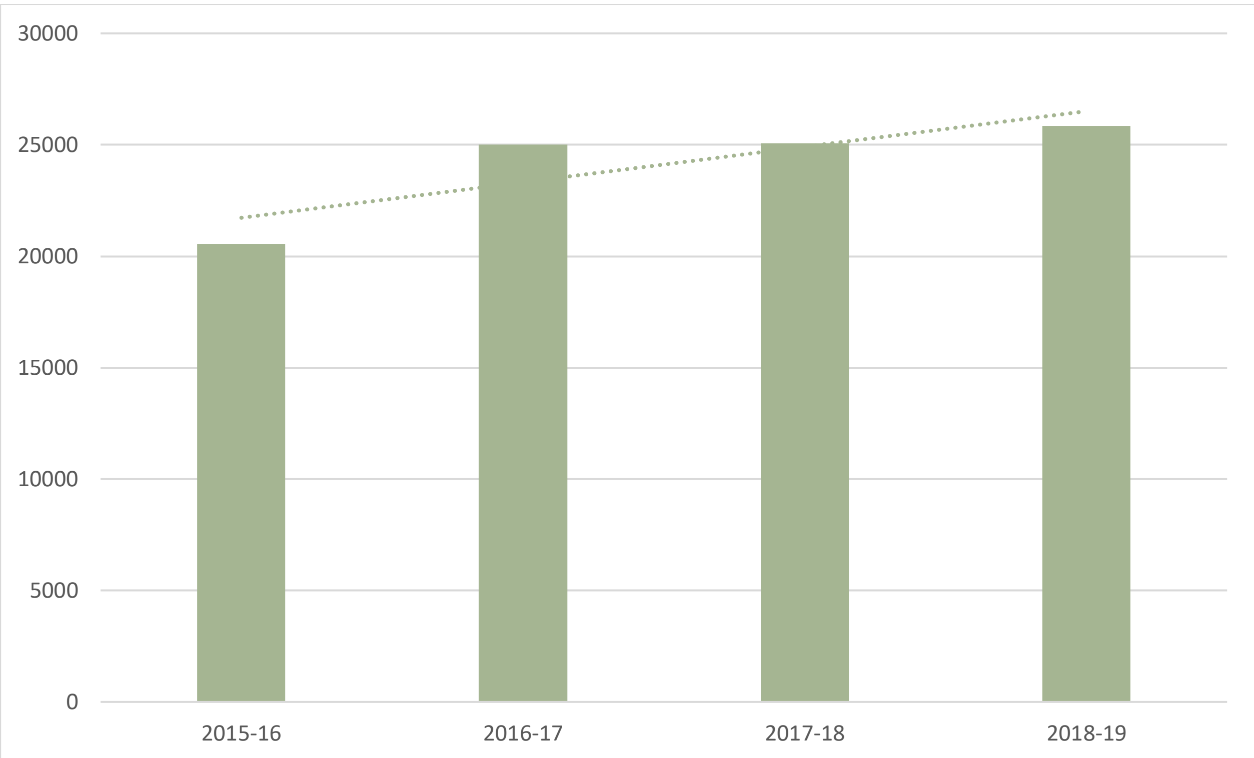
9.2.2 AVIC Visitation Statistics

The annual number of visitors through the CVWFTC and the BGVIC over previous years are outlined below. Notably, their current 'capture rate' of total visitors to the Region, is quite low.

Clare Valley Wine Food + Tourism Centre

Following is the number of visitors serviced at the CVWFTC over the previous 4 years at its current location.

Figure 25 - CVWFTC Total Visitor Numbers (FY2015 – FY2019)



Data Source – Supplied by CVWFTC Manager, July 2019

During 2013 – 2015 the CVWFTC (this was the Clare Valley Visitor Information Centre the CVWFTC now incorporates the CVVIC) was co-located in the Library (new discovery) , and as such the below visitor numbers data is an indicator only.

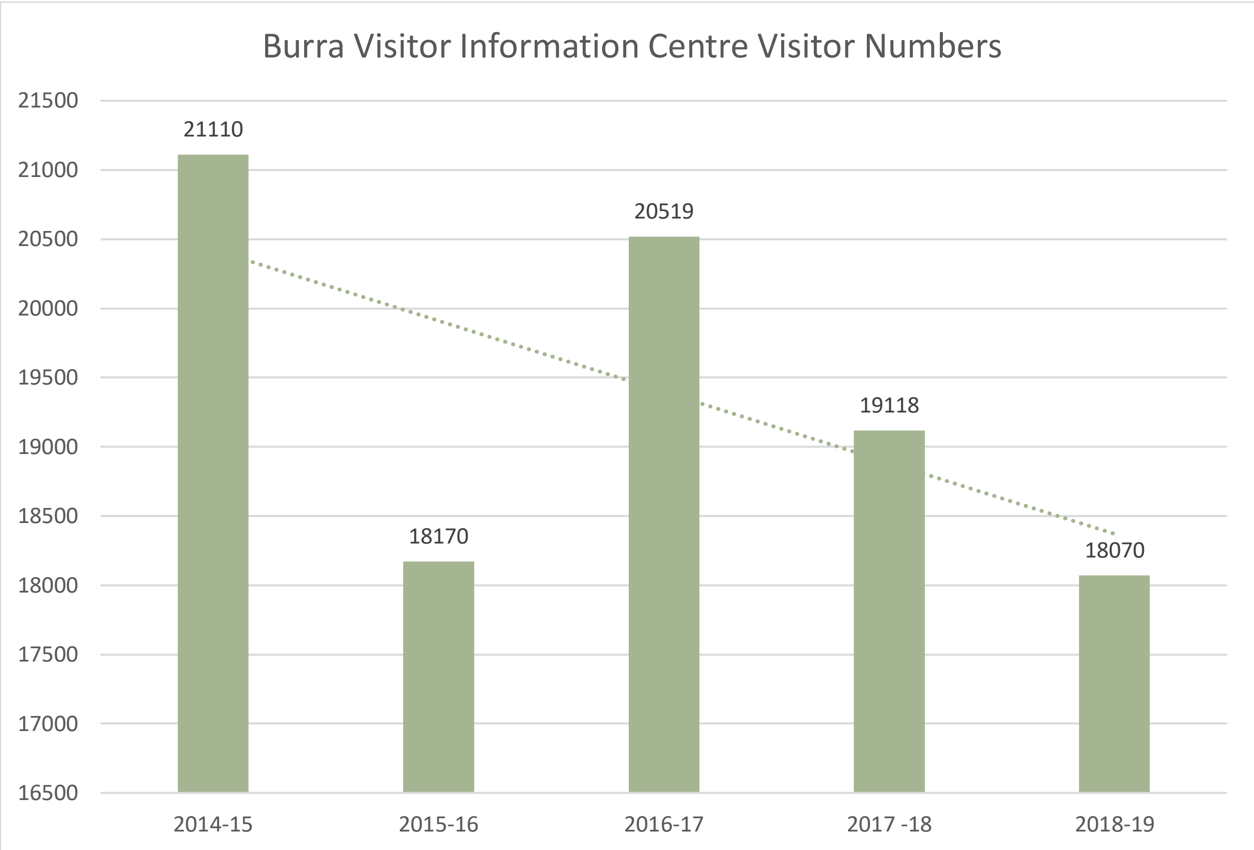
- July 2013- Mar 2014: 21, 009 Visitors. Note the VIC was co-located with the Library on 1st April 2014 and separate visitor numbers are unable to be collected. The figure represents 9 month only.
- April 2014 – June 2014: 29195 Visitors. However the VIC was co-located with the Public Library and visit numbers include library customers
- July 2014 - Mar 2015: VIC was co-located with Library. Staff estimate 16000 of these visits were tourists but the manual recording methodology was flawed.

Burra Goyder Visitor Information Centre (BGVIC)

Following is an overview of Visitors Serviced at the BGVIC from 2014 – 2019. Note that during 2017, the Visitor Centre was returned to Council Management, and during this time Visitor Numbers were not collected.

It's difficult to analyse the visitor data available given the validity of the data, however, from the data collected, it can only be surmised that visitation to the Centre is trending negatively.

Figure 26 - BGVIC Centre Visitor Numbers (FY2014-FY2019)



Data Source – Supplied by RCG Tourism Manager, July 2019

*Note. Figures between July 2017-October 2017 in above graph are estimated.

9.2.3 Visitor Insights

Centre Insights

Currently, the Managers/Staff from each Centre are reporting two very distinct demographics and tourism markets in their Centre. BGVIC is anecdotally receiving visitors most interested in *History + Heritage*, while CVWFTC are receiving visitors most interested in *Food and Wine*. These anecdotes are no surprise and reflect current marketing strategy (or lack thereof) and 'Primary Experience' drivers of each of their sub-regions as per (Table 13).

It highlights great opportunities for both Centres to increase cross promotion of each sub-region's offering.

This opportunity is also reflected through insights from the newly established 'Burra Consumer Survey', which is surveying current visitors at Paxton Square Cottages, BGVIC and the Burra Caravan Park to capture visitor booking/travel trends.

As at June 2019, 130 surveys had been collected and trends appearing include:

- 90% of those surveyed are over 50 years of age (over 70% are over 60)
- Our top state of origin markets are NSW (33%), SA (25%) and Vic (20%)
- The Riverland is the most popular 'pre Burra' town/region visited
- "Next town" to visit is "undecided" (26%) and Adelaide (21%)
- 64% of visitors to Burra regularly use Caravan Parks or RV Parks
- Word of Mouth is how most visitors hear about Burra (56%)
- Things that visitors enjoyed "most" about Burra and Goyder is History and Heritage (70%) and "locals" (18%)
- "Better Signage" and an "Easier to Read" hard copy maps were identified as visitors as opportunities.

While insights from the Survey are a great indicator that the current visitors to Burra are the older generational segments (section 3.3.2) it also reinforces that the Regional Council of Goyder has great opportunity to realign visitor servicing + marketing investment to the identified High Yielding + Niche Visitor Segments within that generational segment.

Visitor Sentiment

Both Centres are performing very well as it relates to servicing visitors within the Centre (as per sentiment and advocacy review on TripAdvisor and Google Maps).

However, when looking at both Centres in context of the Region's Identified High Yielding Visitor Personas and Niche Segments (as identified in the Section 13 below) and their preferred means of obtaining visitor information, great potential exists for both Centres to re-align their visitor servicing and destination marketing actions to include online visitor servicing, outreach visitor servicing, local/resident/business engagement and improve their measurement and reporting.

Brochure Dispersal

It was identified in the consultation process that numerous other towns and locations around the Region are key dispersal points for visitor information in the Region.

For example, it been noted by the current Regional Council of Goyder's Tourism Manager in his previous role at Peterborough Council, that the Tarlee Bakery has been a significant distribution point for brochures promoting Jamestown's Steamtown Heritage Railway over and above other visitor centres in the Region.

This highlights the opportunity for both Centres to further engage with key businesses and visitor hotspots in the Region for distribution of visitor information.

10. Strategic Context

In order for a new strategy to act as a relevant and valid compass for the development of the visitor economy in the region, it must acknowledge and support tourism strategies and reports already in-train as developed by the Region's key stakeholders.

Key Findings

In order to grow the Region's visitor economy, it is essential that the Region develops and maintains strong and collaborative working relationships with key National, State and Regional stakeholders, in addition to maintaining alignment of all strategic planning with the South Australian Tourism Commission's 2030 Strategic Plan.

This will not only show the commitment the Region has to growing it's local economy, but how that commitment helps the State (and Nation) achieve their objectives too.

Some of the key considerations for the Destination Management + Marketing Plan, derived from relevant National, State and Regional Strategies include:

- The need to build digital capacity across all industry stakeholders and projects (experience development + marketing)
- Need for strategic events planning for regional areas, to stimulate visitation
- Effectively communicate the value of tourism to all regional stakeholders
- Understand the potential of the national demand from Asia, and how that presents itself for the Region
- Opportunities to grow heritage and nature base tourism niches

10.1 Policy Context

Below are the strategies that will influence the direction of this Strategy.

10.1.1 National Level

Tourism 2020

The Tourism 2020 strategy was developed to provide long term goals for the Australian tourism industry. The six key areas of the strategy include:

- Grow demand from Asia;
- Build competitive digital capability;
- Encourage investment and implement the regulatory reform agenda;
- Ensure tourism transport environment supports growth;
- Increase supply of labour, skills and Indigenous participation; and
- Build industry resilience, productivity and quality.

10.1.2 State Level

South Australian Draft 2030 Tourism Plan

The South Australian visitor economy has been growing strongly steadily over the past decade, with visitor expenditure reaching $7.2b in the latest available figures in the year to March 2019. The State is on track to achieve the ambitious target of $8.0b by December 2020 (set in the previous Tourism Plan). The South Australian Tourism Commission have recently prepared a new Draft Tourism Plan 2030, which is currently out for consultation (June 2019).

The Draft 2030 Tourism Plan seeks to continue this strong momentum and unprecedented growth for the next decade and sets a bold ambition of growing the Visitor Economy yet further to $12.8b by 2030, generating an additional 16,000 jobs in South Australia.

This will be achieved through 6 strategic priorities:

- Marketing
- Experience + Supply Development
- Collaboration
- Industry Capability
- Leisure + Business Events
- Promoting the Value of Tourism

It's essential that the regional strategy align with the State's tourism strategy, to ensure all initiatives can be leveraged at a regional level.

South Australian Regional Visitor Strategy 2020

Regional tourism is critical to the State's visitor economy. It generates 13,000 direct and 6,000 indirect tourism regional jobs and $2.6 billion in visitor expenditure. In fact, by 2020 this has the potential to grow to $3.55 billion. Although only 23% of South Australians live in regional areas, these areas account for over 40% of the State's total visitor spend.

To reach this 2020 potential, the tourism regions (through extensive consultation) collectively developed a new South Australian Regional Visitor Strategy, where an expenditure target of $99m by 2020 was set for the Clare Valley Tourism Region, along with the following regional priority action areas and key initiatives:

- Marketing: target active/indulgent travellers, position as authentic Australian, incorporate Breathe It In in messaging, align with SATC digital strategies
- Events: new flagship events to increase dispersal, support produce events, encourage longer stays and more spend, focus on high-yielding events not volume, corporate and weddings

- Collaboration: councils & tourism associations, leverage touring routes, visitor servicing, foster relationships with Yorke Peninsula and Flinders Ranges
- Industry Capability: digital marketing, customer service, event management, event promotion, commissionable product, retain hospitality staff
- Accommodation: develop 51 new rooms, upgrade 7 rooms from 3 to 4 stars, development of 6-star boutique accommodation, farm and vineyard stays
- Experience development: Increase commissionable products, develop soft adventure, wellness experiences along trails network, more food and wine experiences
- Visitor Infrastructure: improve telecommunications, maintenance of heritage assets, amenities and signage at nature-based assets, connect regional trails, seal the aerodrome

Each region has a selection of experience which reflect the strengths and priorities of that region. For the Clare Valley Tourism Region, the following response priorities have been identified:

- UK, Germany, New Zealand International Markets
- Food, Wine + Beverages
- Cycling
- Short Drive (close to Adelaide)
- Historic
- Local Produce

As this strategy was developed in conjunction with the Region's stakeholders only 18-24 months ago, the priority areas and strategic actions will be taken into consideration in the development of the Region's action plan.

Nature Base Tourism Strategy

South Australia has a strategy and action plan to transform the state's nature-based tourism sector.

The strategy and action plan outline the State Government's vision and actions to make South Australia a world leader in nature-based tourism, while supporting the ongoing conservation of our State's natural and cultural heritage.

The strategy offers opportunities to further develop experiences that are sustainable, have potential for growth and have proven demand. These include developing:

- Standout walking journeys across the landscape
- Unrivaled native wildlife experiences close to Adelaide
- Immersive marine wildlife experiences without equal
- Cutting edge sensory experiences that leave a lasting impression.

The action plan includes five themes:

1. Lead South Australia's nature-based tourism activation agenda
2. Support existing nature-based tourism experiences and create new ones
3. Remove red tape and barriers to investment
4. Raise awareness of South Australia's unique appeal
5. Empower and build the capacity of community-based tourism networks.

Given that the Clare Valley Tourism Region relies on its natural environ and historical significance as a differentiator, this strategy and the actions within will be taken into consideration in the development of the Region's action plan.

10.1.3 Regional Level

RDA Yorke and Mid North 2018-2028 Regional Roadmap

The Regional Development Australia Yorke and Mid North (RDAYMN) Regional Roadmap 2018-2028 takes a local, state, and national perspective to building a vision for the region and identifies associated priorities to assist in the engineering growth in the Yorke and Mid North.

The Regional Focus Areas for this Roadmap include:

- Our Economy – Great Infrastructure and Technology, Economy built on value adding and innovation and People with the skills to get the job done
- Our Environment – Healthy environments, Sustainable and productive use
- Our Community – Local services for local people, growing and diverse populations, and Younger people living, working and investing in our region

10.1.4 Local Government

Clare + Gilbert Valley Council

The most recent strategic plan for the CGVC is the 2020 Strategic Plan, which highlights their commitment to the visitor economy in the following Priority Areas:

1. Recreation and Lifestyle
2. National and Built Environ
3. Business and Economy

Whilst this strategy is due for renewal very soon, there are certainly specified outcomes that will be taken into consideration when developing the actions within this strategy.

Regional Council of Goyder

The RCG 2018-2033 Masterplan identifies long-term strategic objectives (14-20) that relate to the development of the visitor economy, including:

- **Objective 14:** Develop Goyder Economic Development Taskforce
- **Objective 15:** Review Councils Development Plan to ensure adequate and appropriately located land is zoned for a range of industrial & commercial activities
- **Objective 16:** Facilitate the provision of essential infrastructure to support economic development in partnership with the private sector and other spheres of government where applicable

- **Objective 17:** Advocate for improved broadband access and mobile phone coverage to assist small businesses, farming enterprises and residents to access economic opportunities
- **Objective 18:** Implement the 2017 Goyder Tourism Strategic Plan, Arts Development Strategy 2018 - 2023
- **Objective 19:** Operate the Burra Goyder Visitor Information Centre as the principal tourism destination to promote tourism experiences in Goyder
- **Objective 20:** Continue to maintain existing Council owned tourism accommodation and regularly review management arrangements to maximise community benefit

This strategy is supported by the most recent Tourism Strategy (2017/2018), which identifies 6 priority areas:

- Market Research and Stakeholder Engagement
- Building Our Tourism Assets and Product
- Infrastructure
- Deliver the Clare Valley Tourism Brand to Everyone
- Promotion of the Region: Burra As the Hero
- Connections

Council have also endorsed an Arts Development Strategy 2018/2023, with the strategic priority areas of:

1. Community Connection and communication
2. Places + Spaces
3. Major Projects

The priorities and actions within each of these strategies will be taken into consideration in the development of this Strategy and Action Plan.

Wakefield Regional Council

The WRC Strategic Plan 2017-2022 identifies the economy as a Pillar 1, and sitting under that is Action 1.3 which identifies that Council are looking to develop a Tourism Strategy (which is not yet achieved). Within this action, they have identified dispersal, signage, experience development, feasibility studies, and collaboration as key actions to investigate.

Adelaide Plains Council

The APC Strategic Plan 2017-2000 identifies ‘Growing the Economy’ as Pillar. Within this Pillar, one of the key strategies is to ‘Promote the growth of Tourism’ with the potential of developing a Tourism Strategy. Within this action, they have identified sector development, collaboration, accommodation and retail expansion, business support services, and marketing strategy as key actions to investigate.

10.1.5 Regional Tourism Projects

Clare Valley and Burra Research Project 2015/2016

In 2015/2016 the Clare Valley Alliance initiated a primary research which qualitatively and quantitatively calibrated the opportunity for the region amongst the visitor markets from SA, Eastern Seaboard Australia, NZ, Northern Europe and North America.

The research methodology consisted of presenting concepts designed to test appeal of attractions the region *could potentially* offer as well as what is already available to offer direction on what investment is required in the region to successfully target high yielding, sustainable markets.

The outcome of the research not only identified 4 customer segments and their potential with regard to driving future visitation, but also the experiences (current and potential) that would influence their travel behaviour.

For detail on the Project, see section 3.2.3. The results from this research will be analysed and used to guide the development strategy and action plan.

Clare Valley Brand

In 2016, the Clare Valley Alliance spearheaded a branding project for the region, which was support by SATC. A new graphic and positioning statement were developed for the Region that can be implemented on marketing and signage across all levels of the industry. For detail on the Brand, see section 8.2.

11. SWOT Analysis

Throughout the consultation process (see Acknowledgements) strengths, challenges, threats and opportunities for the Region were identified. While many of these Opportunities and Challenges have been discussed already, following is a high-level snapshot of the consistent themes that were discussed, all of which will be addressed in the Strategy and Action Plan.

Table 26 - Strengths, Challenges + Threats for Tourism in the Clare Valley Tourism Region

<table>
<tr><th>STRENGTHS</th><th>WEAKNESSES / CHALLENGES</th><th>THREATS</th></tr>
<tr>
<td>
Visitor Economy

Expenditure and visitation are growing (albeit slowly)
Forecasts are trending positively

Resource, Governance + Collaboration

Part-Time resource dedicated to Regional Tourism (with RDAYMN)
State Regional Tourism Plan developed, and ready for coordinated implementation
Industry associations and Local Government already investing in visitor economy (infrastructure, marketing, visitor servicing)
Active and passionate private businesses, industry organisations and local government all determined to grow the visitor economy

Visitor Experiences

40+ wineries in the Clare Valley Wine Region
A good awareness of the CV wine region brand both in Australia + specific international markets
Some wine brands have notable, aspirational brand recognition
High quality range of established and new regional restaurants (eg. Slate, Watervale Hotel, Umbria, Indii of Clare, Seed Winehouse + Kitchen)
Accessible and enriching history and heritage assets (mining and agricultural)
Well known and established ‘Riesling Trail’
Development of new tourism experiences (eg. Lake Bumbunga, Watervale Hotel)
Range of quality accommodation options, mainly Bed and Breakfast

Access

Proximity to Adelaide, Yorke Peninsula beaches, Barossa and on-route to Flinders Ranges.

</td>
<td>
Visitor Economy

Limited market share of regional overnight visitation in South Australia (lowest yielding destination in regional SA)
Perception as a day-trip destination

Resourcing, Governance + Collaboration

Lack of single organisation adequately resourced to market the Region
Existing organisations are working in silos when it comes to marketing and product development, resulting in duplication and dilution of efforts, disenchantment with different stakeholders and lack of cut through with the region’s Ideal Customers.

Visitor Experience + Product Development

Attracting and retaining career focused tourism and hospitality staff in the region, which is affecting the visitor experience
Clare Main Street – Perceived as ‘Ugly’, Empty Shops, High Rents, Non-engaging retail mix, Lack of Night Economy, Reduced Opening Hours on weekends, lack of signage, non-attractive bins, lack of street trees, Toilets, RV Parks (Underground Power, Trees, Welcome Signage, new Bins)
Under-investment of private tourism enterprises
Lack of larger and higher quality accommodation options (large groups or higher end visitors not catered for well in the Region)
Aging population, less younger people volunteering, impacting sustainability of volunteer run events and committees.
Independent RV Travellers – growth in numbers, putting pressure on viability of many volunteer run RV Camping grounds
Lack of product packaging (intra-regional packaging)
Resourcing (funds and volunteer management) of walking and cycling trails within the Region.

Infrastructure

Poor maintenance of public toilets and bins at key areas of the region

</td>
<td>
Visitor Economy

South Australian State Government marketing budget cuts (FY2019/2020)

Resourcing, Governance + Collaboration

All stakeholders maintain silo approach and do not work together to drive results for the region
Change in Local Government leadership and elected bodies, with less focus on the Visitor Economy
Plans are developed and actions not implemented
Change in implementation personnel in individual organisations (delay in implementation)
Change in State Government and/or SATC staff and marketing investment / product development

Natural Assets

Natural disasters – floods, bushfires
Climate change trending longer periods between rain events, causing dry rivers.

Consumers

Changes in consumer confidence, interest rates and exchange rates

History + Culture Preservation

The heritage and cultural aspects of the region, especially around Burra and the small rural villages. If these are not preserved/captured for successive custodians they will be lost, especially as small businesses like local pubs close.

Competition

Popularity of other destinations with similar product profiles both in South Australia and Australia offering a diverse experience for visitors

Visitor Experience
</td>
</tr>
</table>

• Closest access to authentic Australian Outback from any Australian major city. **Landscapes + Natural Beauty** • Quintessential South Australian landscapes • The historic villages, rolling vineyards surrounded by eucalypts of the Clare Valley. • The patchwork of broad acre cropping and stark rolling hills of grazing country in rest of the region. • Edge of outback vistas on eastern boundary, and pink beauty of Salt Lake Bumbunga in the West. **Infrastructure** • Activation of key visitor precincts (eg. Clare Main Street) • Activation of WIFI hotspots throughout the Region **Brand + Marketing** • 2015/2016 Clare Valley and Burra Tourism Research Project • Development of new Regional Brand, and implementation on product and marketing across industry • Redevelopment of www.clarevalley.com.au • Establishment of social media platforms and hashtags • Development of campaigns and content on platforms **Visitor Servicing** • Professionally managed accredited Visitor Centres with knowledgeable VIC staff in Clare + Burra.	• Lack of directional signage at key access points to the region (often talks about Flinders Ranges but not the Region). **Brand + Marketing** • Lack of qualified and skilled resources and strategic planning and implementation in best practice destination marketing • Lack of measurement of ROI of marketing investment • Lack of clarity of who the Region's most profitable customers are • Lack of singular ownership and strategic alignment of Region's digital assets to the Region's Ideal Customers • Lack of Clare Valley brand activation – logo is developed but needs key message and wholehearted engagement by the whole Region • Underperforming digital marketing assets (in comparison to other regions in SA) • The region is perceived for older people, and as only offering wine • Lack of awareness and advocacy of what to see and do around the region (locals, wider industry, visitors) • Limited visitor advocacy for experiences online • Visitor perceptions - often perceived as pass through region on the way to Barossa/Flinders Ranges • Lack of funds to invest in marketing and product development • Lack of Marketing Plan for Riesling Trail + Burra Heritage Passport Trail (key Regional visitor experiences) • Limited available commissionable product for the Region • Limited online bookable product (via operator websites) **Visitor Servicing** • No online visitor servicing by either CVWFTC or BGVIC • Limited outreach visitor servicing by by either CVWFTC or BGVIC • Limited skills or resources to adequately evolve the Visitor Servicing to online and outreach activities • Lack of strategic, measurable Business Plans for either Centre • Small visitor capture rate. Both Centres only servicing only small % of overall region's visitors.	• If visitors have a poor-quality experience, then they are unlikely to return and further highly trusted word of mouth marketing (social media/review websites etc) may discourage many more to not bother.

Below is a list of high-level opportunities that will be outlined in the Action Plan.

Table 27 - Opportunities for Tourism in the Clare Valley Tourism Region

OPPORTUNITIES	
Resourcing, Governance + Collaboration	• Governance structure that is conducive to achieving outcomes within the new Plan. • Qualified and skilled resource and budget allocated for new Plan (specifically resourcing, and marketing activities) • MOU's developed with Region's stakeholders to align efforts to achieving the new Plan. • Industry and community Education - communication schedule developed and implemented to educate all Stakeholders on the relevant opportunities for each group • Advocate for cross collaboration and communication between relevant stakeholder groups within the Region
Strategy	• Report on the achievements of the actions within this Plan annually to relevant stakeholders • Educate all levels of industry and stakeholders on the importance and value the visitor economy can bring to the Region
Brand + Positioning	• Further develop the Brand story to include storylines to be used when promoting the wider visitor experience (eg. to promote as an overnight stay destination, leverage off hero products from broader region) • Educate industry on how to leverage Clare Valley brand and storylines (in marketing and product packaging)

Market Segments	• Potential growth markets for consideration:
	  • Generational - Baby Boomers, Millennials
	  • Life Stages - Families, DINKs/SINKs
	  • Niche Market Segments – Caravan + Camping, Wedding, Business Events, Cruise
	  • Niche Interest Segments – Cycle, Sport, Food + Wine, Nature-Based, Culture + Heritage + Well-Being
	• Engage with SATC and DEWR on activation of Nature Based Product Development + Heritage Tourism

Visitor Experience + Product Development	• Grow the quality and quantity of Visitor Experiences – focusing on its strengths + hero products that will attract the identified ideal customers + niche visitor segments and markets. Specifics include Food (Paddock to Plate, Agritourism), Wine (immersive experiences), Heritage (Burra Passport Trail, Sir Hubert Wilkins Home), Trails (eg Riesling Trail) and Outback + Wellness (new experiences). • Advocate for commissionable product and where commissionable product exists, connect and collaborate to harness opportunities and provide economies of scale at trade events, etc. • Advocate for the development of more night time/morning experiences to encourage overnight visits • Activation of indigenous experiences and storytelling in all tourism experiences, and integration of Njadjuri Lands recognition on product packaging • Advocate for and leverage Discovery Holiday Parks brand equity and investment in Clare Valley Caravan Park (opportunity to grow families market) • Further activation of iconic photo spots of Lake Bumbunga and Midnight Oil House and improve the visitor experience • Advocate for increased use of regional Food + Wine with all relevant businesses in the region (eg. self-contained accommodation) • Advocate for programs that attract, train and retain quality hospitality staff in the region • Continue to conduct feasibility studies on game changer products (eg. Art Gallery in Clare, 6 star luxury hotel) • Develop investment prospectus and work to attract investment in product gap areas (eg. luxury, medium sized accommodation offerings, with conferencing facilities) • Advocate for the increase in sharing economy for accommodation supply • Advocate for product packaging with Flinders Ranges + Outback experiences (particularly group tours) and between sub-regions • Advocate for product packaging with other destination experiences for specific niches • Advocate for / attract fly in/fly out tour operators for groups and events, and new, high-end tour operators (eg. Helivista Helicopters, based in Flinders Ranges) via the Clare Aerodrome • Advocate for extended opening hours for retail shops to support visitors on the weekends and peak holiday travel periods • Identify opportunities to attract more cruise ship visitors to the region (pre/post and shore excursions out of Wallaroo) • Audit all community and tourism events and align to the Plan's customer segments • Identify new event opportunities to support customers and niche segments (including Night Events, Low Season, Major Events, Business Events) • Further activation of the Riesling Trail, including extension and loop trails, including more destinations and points as interest, improved wayfinding and interpretive signage. Supporting MTB and road cycling trails. • Connection of Riesling + Rattler Trail into the proposed Australian Wine Trail Cycle Trail. • Activation of section of most scenic sections of the trails, and transfers for walkers by local tour operators to/from start and end points. • Increase usage of Regional food producers in wider hospitality industry and food retailers in the region. • Activate food producers in Adelaide Plains Council area – Largest tomato glasshouse in southern hemisphere

	• Work with Local and State Government to ensure policies support Visitor Economy activation and enable small businesses to expand and deliver visitor experiences across the region • Industry engagement with Tourism Operators to connect them with opportunities to grow their businesses (eg. marketing up skilling, ATDW, saleable through AVICs, working with Travel Trade etc.) • Professional development for industry stakeholders in best practice tourism marketing and visitor experience • Advocate and encourage networking opportunities for industry • Identify and apply for relevant grants to activate relevant projects within the Plan • Connect relevant business and organisations with relevant grant opportunities
Infrastructure	• Advocacy for the improvement of identified roads in the region, specifically the Horrocks Highway • Improved WIFI and mobile coverage in/around major placemaking hotspots • Improve visitor signage around the region, including wayfinding, interpretive, directional, placemaking and tourist trails. • Advocate for Visitor Economy projects/impacts considered as part of council's investment in around the Region • Activation of Clare Main Street as visitor experience • Develop and implement placemaking plans for supporting villages around the region which are key visitor experiences or service towns (eg. Mintaro, Sevenhill, Auburn and Tarlee) • Improved parking options for RV and Caravan travellers • Support for volunteer community groups looking after caravan and RV travellers in their towns (toilets/parks/rubbish maintenance) • Support smaller villages across the region to ensure meet needs of visitors (public toilets, interpretation, parking etc). • Advocate for local government to prioritise road upgrades funding into key visitor access roads • Advocate for use of Clare Aerodrome for inclusion into fly in/fly out tour groups and events • Councils to work with their local Progress and Community Groups to prioritise Information Bay Upgrades, support in the management of RV Campgrounds, management of rubbish and cleanliness and maintenance of public toilets.
Marketing + Communications	• Experienced destination marketing specialist to oversee implementation of strategic destination marketing activities • Develop, implement and report on a single, whole of region Marketing Plan annually to drive demand of the region's identified Ideal customers and niche segment groups via relevant marketing channels and tactics. • Activation of regional brand throughout whole Region, including brand guide book, industry and local education, development of key messages for sub regions. • Content strategy to target events, seasonality, day trip visitation from surrounding destinations, multi-day itineraries (to convert day trips into overnights), and must-stop inclusion in Flinders Ranges + Outback itineraries for identified customer and niche segments • Improve performance (attraction + conversion) of www.clarevalley.com – storytelling, whole of region experience, conversion optimisation, conversion tracking • Increase # of Regional listings on ATDW, including AirBnB and events • Advocate for increased digital footprint by supporting operators to become online bookable • Consolidation of social media channels + regional hashtags and ensure effective and efficient resourcing • Partnership marketing with relevant brands + stakeholders to further activate niche markets (Cruise, Sport, Business Events, Weddings) • Partnership marketing activities with brands aligned to the region's Ideal Customer (eg Discovery Holiday Parks, Wine Brands exporting to US/China) • Develop an Advocacy Plan for residents, local businesses, consolidation of user generated hashtags, development of advocacy devices • Advocate for development of Strategic Marketing for Burra Passport Trail + Riesling Trail assets • Increase digital footprint and online storytelling by tourism businesses • Liaise with SATC to increase storytelling of the Region in all relevant marketing activities and channels such as SA.com, social media and email • Liaise with SATC to extend the Region's experience and product stories in their promotion of the Epicurean/Explorers Way.
Visitor Servicing	• Develop Strategic Plans for CVWFTC and BGVIC to drive best practice visitor servicing tactics (on and offline visitor servicing), review Participation Agreement, industry engagement activities, industry famils, partnerships with surrounding VICs, collateral development + distribution and customer service standards • Review, consolidate, update existing visitor collateral, including distribution strategy to align with identified high yielding customers • Professional development for frontline and management staff for evolution to activities to include digital visitor servicing • Increase the cross promotion of experiences between the two accredited Visitor Centres • Identify and enhance current VIOs across the region, look at opportunities to establish new VIOs (where relevant)

Acknowledgements

The **Clare Valley Tourism Region Destination Situation Analysis, July 2019** has been prepared through extensive consultation with key tourism stakeholders across community, industry, business and government. Stakeholder input to the Report was gathered through the following sources during February – June 2019:

- Via 46 responses through online survey of residents, community groups, local government, industry and government staff (March 2019)
- Over 60 tourism operators and key stakeholders were involved in 2 face to face consultation workshops in Auburn and Burra (March 2019)
- Individual meetings were also conducted with key government and industry stakeholder organisations (February-July 2019)

Local and State Government	Industry	Local Community
• Clare + Gilbert Valley Council • Regional Council of Goyder • Wakefield Regional Council • Adelaide Plains Council • South Australian Tourism Commission – Marketing, Product Development • Department of Environment + Water • Department of Primary Industries + Research.	• Regional Development Australia Yorke Mid North • Clare Valley Alliance • Clare Valley Business and Tourism Association • Clare Valley Wine Grape Growers Association • Clare Valley Food Wine and Tourism Centre • National History Trust of SA Burra Branch • Riesling Trail Management Committee • Clare Valley Weddings	80+ Local Residents, Business Owners, Wineries, Tourism Providers in the Region

The development of the Tourism Plan, management and execution of the stakeholder engagement was conducted by Rebecca White and Paige Rowett, Directors, Tourism eSchool (www.tourismeschool.com).

References

In addition to the references Strategies and Footnotes throughout the Plan, following is a summary of all additional resources referenced in the development of this Document.

- Colours of Clare - A Town Centre Study and Roadmap
- Expedia Generations on the Move
- Expedia Generation Alpha Research
- Clare Valley Tourism Region Destination Action Plan 2012 - 2015
- Clare Valley Gourmet Weekend – Media + Event Evaluation Reports 2016 – 2018
- Regional Roadmap 2018 – 2028 Engineering the Growth in The Yorke and Mid North
- Clare Valley Regional Visitor Strategy, 2017
- Chinese Free and Independent Travellers to South Australia, March 2017
- Economy.ID
- Goyder Tourism Strategy 2017
- South Australian Regional Visitor Strategy
- South Australian International Wine Tourism Strategy
- SA Recreational Trails 10 Year Masterplan 2015-2025
- South Australia Visitor Economy Sector Plan 2030 – Draft for Industry Feedback
- The South Australian Bike Economy
- The camping habits and economic value of ‘free-camping’ travellers, 2017
- Tourism 2020
- Tourism Australia International Marketing Profiles
- Tourism Australia Market Profiles
- Tourism Research Australia (TRA)
- Queensland Camping Options Toolkit, March 2014
- Burra Tourism Concept Feasibility Study, July 2015
- Australian Wine Capital Cycle Trail, October 18
- SA Bike Economy Industry Roundtable Nov 17