

YORKE PENINSULA

Regional Profile December 2014-2016

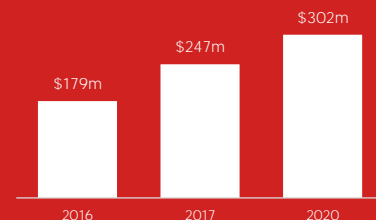


ADELAIDE SOUTH AUSTRALIA



OVERVIEW

- Currently the Yorke Peninsula contributes \$179 million to the December 2016 South Australian expenditure of \$5.8 billion.
- The Yorke Peninsula has achieved 59 per cent of their \$302 million 2020 target.



Annual Visitor Summary December 2014 - December 2016

ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Visits	429,000	50,000	480,000	5,000	485,000
%	89%	10%	99%	1%	100%
Nights	1,361,000	236,000	1,597,000	98,000	1,695,000
%	85%	15%	94%	6%	100%
Average Length of Stay	3.2	4.7	3.3	19.6	3.5

Day Trips

Average Annual Day Trips to the Yorke Peninsula 530,000

PURPOSE

	Holiday	VFR	Business	Other	Total
Visits	341,000	118,000	14,000	13,000	485,000
%	70%	24%	3%	3%	100%
Nights	1,271,000	334,000	56,000	35,000	1,695,000
%	75%	20%	3%	2%	100%
Average Length of Stay	3.7	2.8	4.0	2.7	3.5

Expenditure

Average Annual Expenditure \$ 179,000,000

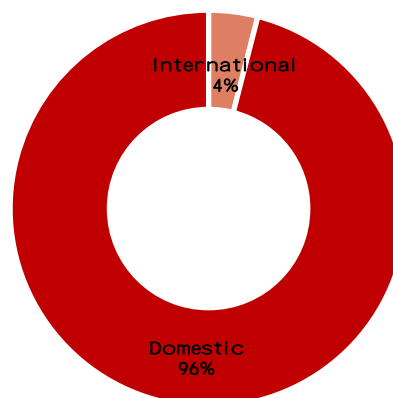
- 99 per cent of visitors are Domestic Visitors and 1 per cent are International Visitors.
- Domestically 89 per cent are from within the state compared to 11 per cent from Interstate.
- 95 per cent of visitors to the Yorke Peninsula are Leisure visitors (Holiday + VFR).

YORKE PENINSULA TOURISM LISTINGS

Category	Yorke Peninsula
Accommodation	299
Event	271
Attraction	127
Food and Drink	23
Tour	8
Information Services	5
Hire	3
General Services	2
Transport	1
Grand Total	739

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

YORKE PENINSULA MEDIA COVERAGE



Source: Item Count - SATC Internal - 2016

YORKE PENINSULA

Regional Profile December 2014-2016

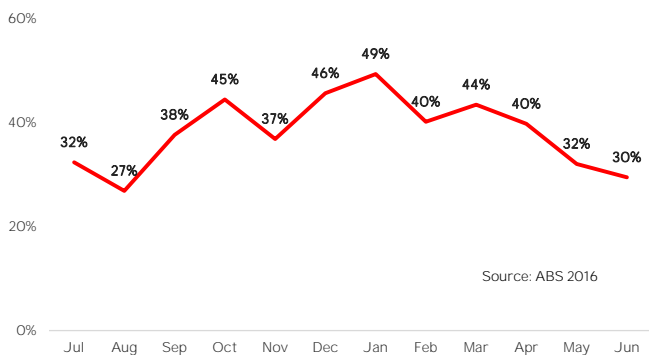


ACCOMMODATION SUPPLY

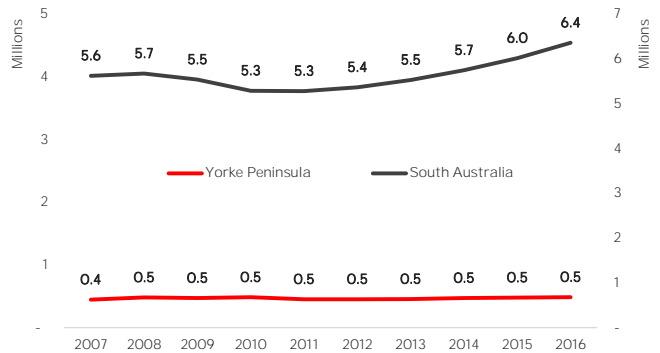
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	7
Rooms	125
Occupancy	38%
Takings	\$ 1,800,000

- Average occupancy for the year is 38 per cent over 7 establishment and 125 rooms.
- The peak months are December and January with occupancy at 46 per cent and 49 per cent respectively.
- Low point of the year comes in August where occupancy drops to 27 per cent.
- Occupancy through the winter months with an average of 30 per cent.

Monthly Occupancy Rates Year end June 2016 - Yorke Peninsula

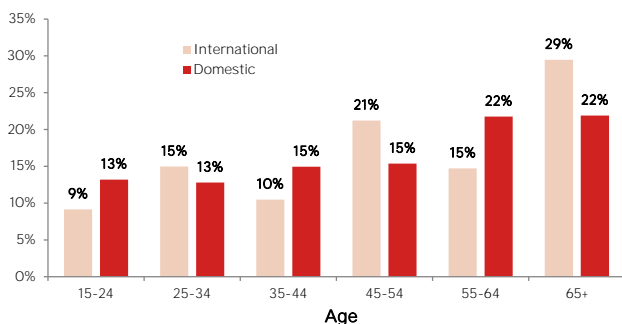


Total Overnight Visitation to Yorke Peninsula & South Australia



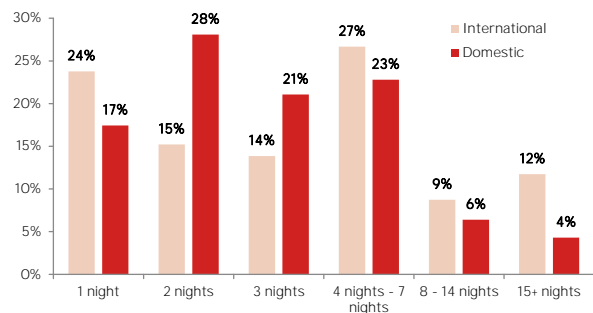
VISITOR PROFILE

Age of Visitors to Yorke Peninsula



- International Visitors peak in the 65+ age group at 29 per cent.
- For Domestic Visitors the peak age groups are 55 -64 and 65+ (both 22 per cent).

Length of Visit to Yorke Peninsula



- 39 per cent of International Visitors prefer to stay 1 or 2 night in the Yorke Peninsula.
- 45 per cent of Domestic Visitors stay 1-2 nights.
- 27 per cent of International Visitors like to stay between 4 and 7 nights.

YORKE PENINSULA

Regional Profile December 2014-2016

ADELAIDE SOUTH AUSTRALIA



DOMESTIC VISITOR PROFILE

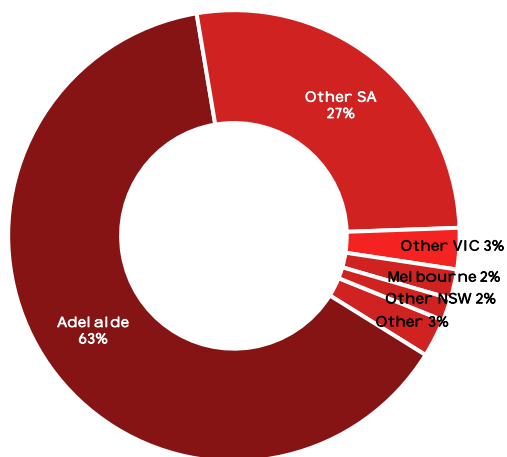
Purpose	Holiday	VFR	Other	Total
Visits	337,000	117,000	27,000	480,000
%	70%	24%	6%	100%
Nights	1,238,000	282,000	78,000	1,597,000
%	78%	18%	5%	100%
ALOS	3.7	2.4	2.9	3.3

INTERNATIONAL VISITOR PROFILE

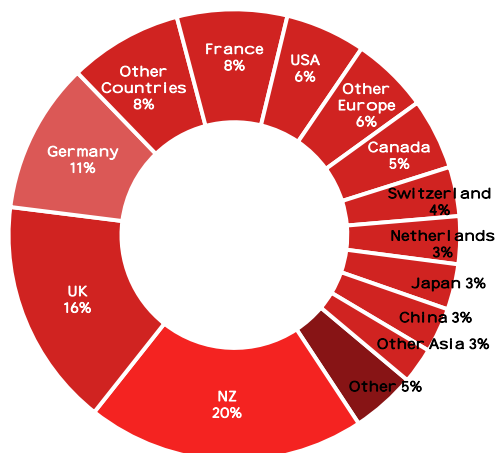
Purpose	Holiday	VFR	Other	Total
Visits	4,000	1,000	np	5,000
%	80%	20%	np	100%
Nights	33,000	52,000	12,000	98,000
%	34%	53%	12%	100%
ALOS	8.3	52.0	np	19.6

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Yorke Peninsula



Origin of International Visitors to Yorke Peninsula



- Regional South Australia contributes 27 per cent of visitors to the Yorke Peninsula.
- Adelaide visitors contribute 63 per cent of the visitors to the Yorke Peninsula.
- Internationally Europeans contribute 49 per cent of the visits to the Yorke Peninsula, with other countries 41 per cent.

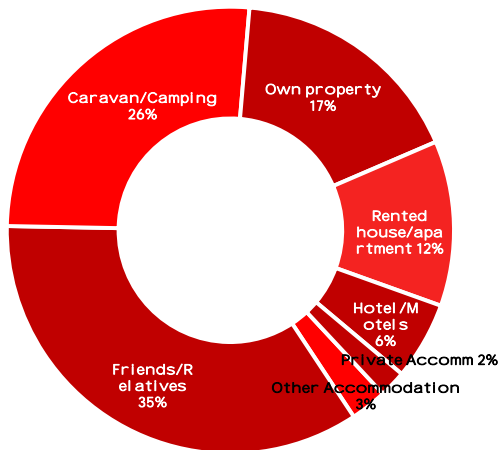
YORKE PENINSULA

Regional Profile December 2014-2016

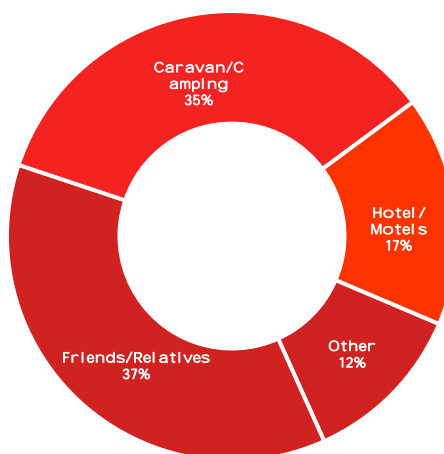


VISITOR USE OF ACCOMMODATION

Accommodation used in Yorke Peninsula for Domestic Visitors



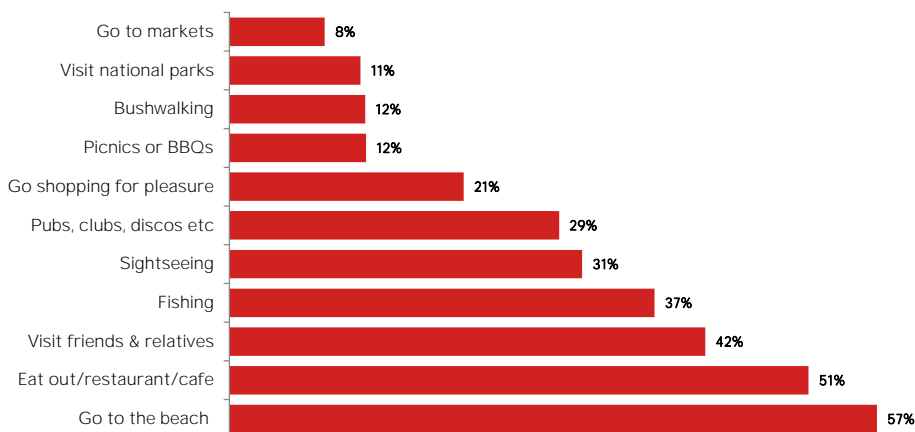
Accommodation used in Yorke Peninsula for International Visitors



- 64 per cent of Domestic Visitor nights to the Yorke Peninsula are spent either in a Friends or Relatives property, their own property or a rented house.
- Domestically Caravan and Camping is also popular with 26 per cent of visitors preferring this accommodation.
- 72 per cent of International Visitors either stay in a Friends or relatives property or use Caravan and Camping as accommodation.
- Beach shacks are a popular form of accommodation on the Yorke Peninsula and are part of the Friends and Relatives Properties for both Domestic and International Visitors.

VISITOR ACTIVITIES

Domestic Visitor Activities in Yorke Peninsula



- The most popular activity when coming to Yorke Peninsula is to go to the beach or Eat out or Dine at a restaurant and or cafe.
- Other popular activities include Fishing, Bushwalking, Visiting the National Parks and Sightseeing.

YORKE PENINSULA

Regional Profile December 2014-2016



ADELAIDE
SOUTH AUSTRALIA



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

- In 2013-14, the tourism industry contributed an estimated \$236 million to the Yorke Peninsula regional economy (14.1 per cent of gross regional product) and directly employed approximately 900 people (6.6 per cent of regional employment).

In 2013-14, the tourism activity on the Yorke Peninsula generated:

- \$97 million and \$375 million in direct and indirect tourism output, and \$472 million in total tourism output;
- \$50 million and \$157 million in direct and indirect tourism GVA, and \$206 million in total tourism GVA;
- \$53 million and \$183 million in direct and indirect tourism GRP and \$236 million in total tourism GRP; and
- 900 jobs for people employed directly by the tourism industry, 1,500 indirect jobs and a total employment impact of 2,400 people.

REGIONAL INSIGHTS

- An appealing seaside escape, but not unique.

Interstate

- The ocean and all its delights a highly attractive proposition.
- Surfing and seafood add to holiday appeal.
- Natural setting & wildlife in the area resonate strongly.
- However there is perceived to be a lack of a unique drawcard to justify an interstate trip and distance creates a further barrier.

Intrastate

- Seen as a family friendly holiday destination.
- Fishing high up on the list of reasons to go.
- The beach and coastline provide experiences to fill an itinerary.
- Distance is the main hindrance to travel, considered further away than expected for those who have been.

International

- The International market is not a key focus for this area with low awareness and appeal.

Appeal data is from the consumer surveying conducted for the SATC by BDA Marketing Planning. Sample of 800 Interstate travellers and 400 Interstate travellers, followed by eight focus groups in Adelaide, Sydney and Melbourne. Comments relating to International appeal are sourced from the Consumer Demand Project run by Tourism Australia in 9 priority markets, with a sample of 500 per market.

Prepared by the South Australian Tourism Commission, December 2016

Sources Unless otherwise stated, all data in this report is from the International Visitor and National Visitor Surveys (IVS and NVS) Conducted by Tourism Research Australia. These Sources are based on sample surveys and as with all sample surveys, are subject to sampling errors. Caution is required in interpreting some estimates, in particular, regional estimates can be affected by small sample sizes and can be subject to a high level of sampling error. Regional data should accordingly be used with a high level of caution and treated as being for indicative purposes only. Data refers to visitors 15 years and over. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from December 2014 to December 2016
Consumer Demand Product Testing - BDA Marketing
Notes and Abbreviations Totals may not add to 100% due to rounding. VFR: Visiting Friends and Relatives. np: Not Published due to small sample size. ALOS: Average Length of Stay
ABS: Survey of Tourism Accommodation. Hotels, Motels, Guest houses and Serviced Apartments with 15 or more rooms. Cat. No. 8635455001