

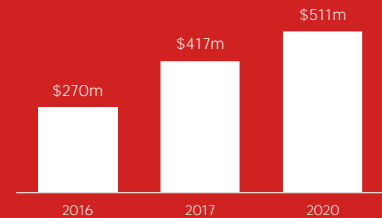
EYRE PENINSULA

Regional Profile December 2014-2016



OVERVIEW

- Currently the Eyre Peninsula contributes \$270 million to the December 2016 South Australian expenditure of \$5.8 billion.
- The Eyre Peninsula has achieved 53 per cent of their \$511 million 2020 target.



Annual Visitor Summary December 2014 - December 2016

ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Visits	279,000	118,000	397,000	18,000	415,000
%	70%	30%	96%	4%	100%
Nights	1,024,000	566,000	1,589,000	156,000	1,745,000
%	64%	36%	91%	9%	100%
Average Length of Stay	3.7	4.8	4.0	8.7	4.2

Day Trips

Average Annual Day Trips to Eyre Peninsula 352,000

PURPOSE

	Holiday	VFR	Business	Other	Total
Visits	168,000	101,000	104,000	48,000	415,000
%	40%	24%	25%	12%	100%
Nights	792,000	327,000	405,000	221,000	1,745,000
%	45%	19%	23%	13%	100%
Average Length of Stay	4.7	3.2	3.9	4.6	4.2

Expenditure

Average Annual Expenditure \$ 270,000,000

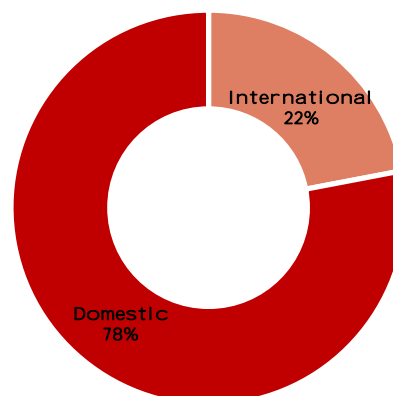
- 96 per cent of the Eyre Peninsula Visitors are Domestic Visitors and 4 per cent are International Visitors.
- Domestically, 70 per cent are from within the state compared to 30 per cent from Interstate.
- 68 per cent of visitors to the Eyre Peninsula are Leisure Visitors (Holiday + VFR) to the Eyre Peninsula.

EYRE PENINSULA TOURISM LISTINGS

Category	Eyre Peninsula
Destination Information	247
Accommodation	178
Event	98
Attraction	75
Tour	25
Food and Drink	13
Information Services	4
Transport	1
Hire	1
Grand Total	642

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

EYRE PENINSULA MEDIA COVERAGE



Source: Item Count - SATC Internal - 2016

EYRE PENINSULA

Regional Profile December 2014-2016



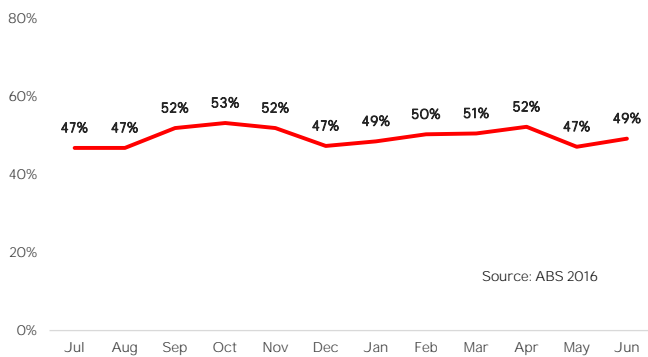
ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms

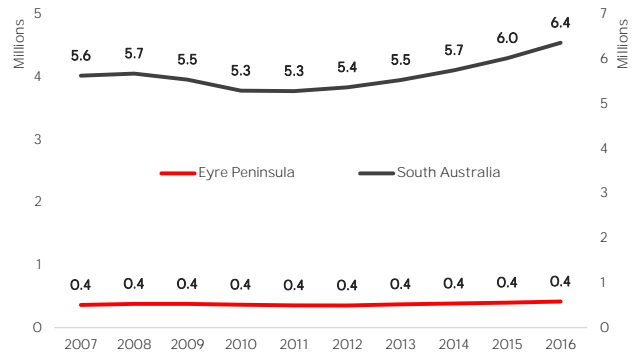
Establishments	26
Rooms	987
Occupancy	50%
Takings	\$ 21,300,000

- Average occupancy for the year is 50 per cent over 26 establishment and 987 rooms.
- The peak month for the year is October with occupancy of 53 per cent.
- Low point of the year comes in the Winter months with occupancy on average dropping to 48 per cent.

Monthly Occupancy Rates Year end June 2016 - Eyre Peninsula

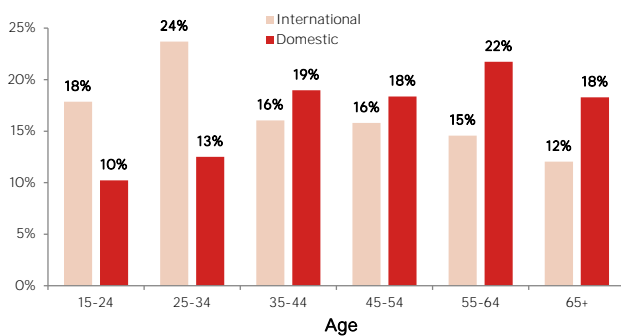


Total Overnight Visitation to Eyre Peninsula & South Australia

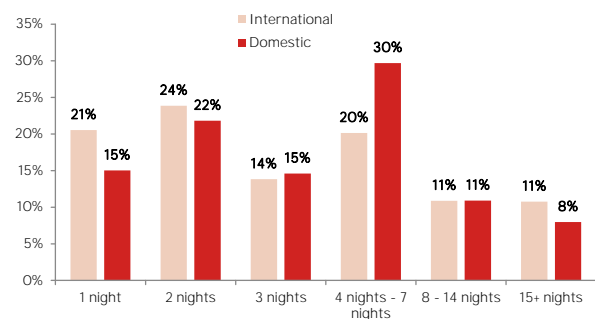


VISITOR PROFILE

Age of Visitors to Eyre Peninsula



Length of Visit to Eyre Peninsula



- International Visitors peak in the 25-34 age group at 24 per cent.
- Domestically age is pretty consistent, with 59 per cent of visitors ages between 35 and 64.

- 45 per cent of International Visitors prefer to stay 1 - 2 nights on the Eyre Peninsula.
- 30 per cent of Domestic Visitors stay between 4-7 nights.

EYRE PENINSULA

Regional Profile December 2014-2016



DOMESTIC VISITOR PROFILE

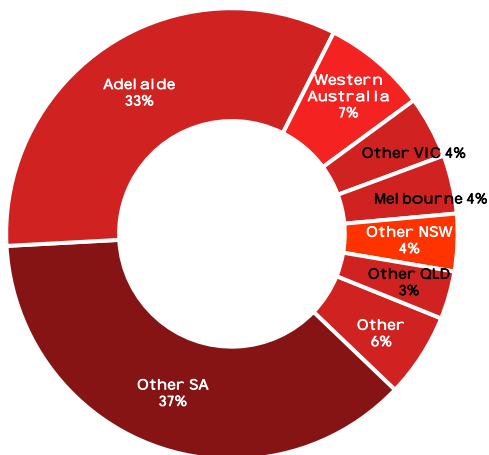
Purpose	Holiday	VFR	Other	Total
Visits	155,000	99,000	148,000	397,000
%	39%	25%	37%	100%
Nights	737,000	295,000	557,000	1,590,000
%	46%	19%	35%	100%
ALOS	4.8	3.0	3.8	4.0

INTERNATIONAL VISITOR PROFILE

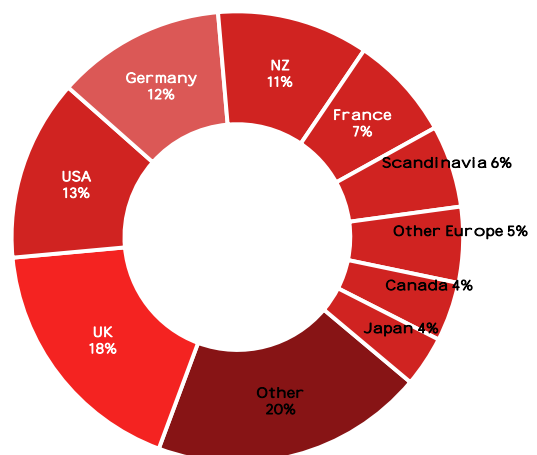
Purpose	Holiday	VFR	Other	Total
Visits	13,000	2,000	3,000	18,000
%	72%	11%	17%	100%
Nights	55,000	32,000	68,000	156,000
%	35%	21%	44%	100%
ALOS	4.2	16.0	22.7	8.7

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Eyre Peninsula



Origin of International Visitors to Eyre Peninsula



- Victoria at 8 per cent and at Western Australia at 7 per cent are the Eyre Peninsula's biggest Interstate Markets.
- Regional South Australia contributes 37 per cent of visitors to the Eyre Peninsula and Adelaide visitors contribute 33 per cent of the visitors.
- Internationally, Europeans contribute 58 per cent of the visits to the Eyre Peninsula, with the United Kingdom contributing 18 per cent and Germany 12 per cent.
- The United States of America contributed 13 per cent and New Zealand 11 per cent of visitors to the Eyre Peninsula.

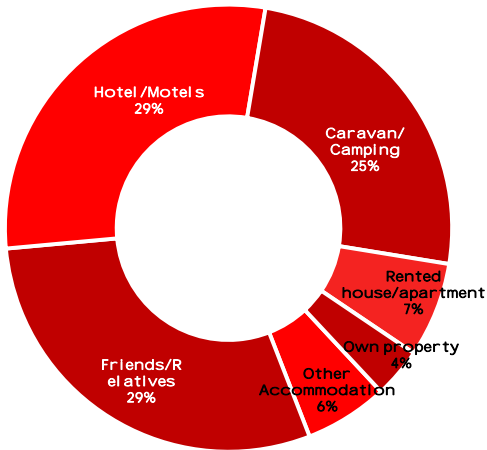
EYRE PENINSULA

Regional Profile December 2014-2016

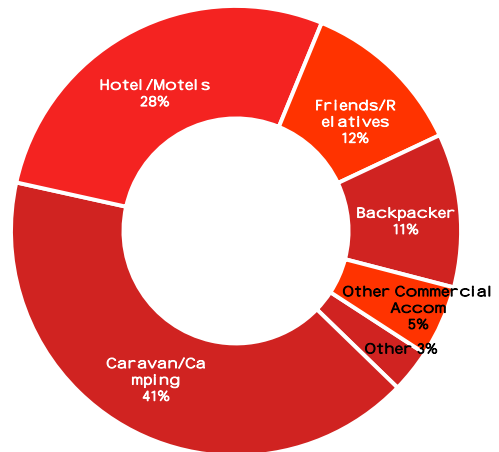


VISITOR USE OF ACCOMMODATION

Accommodation used in Eyre Peninsula for Domestic Visitors



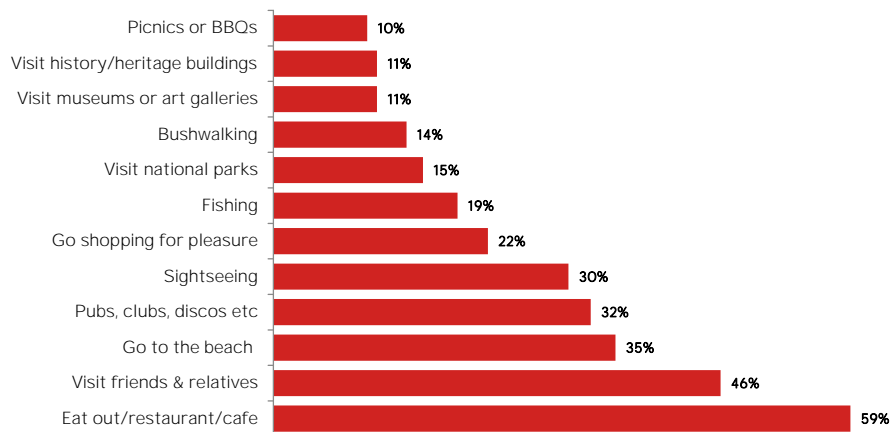
Accommodation used in Eyre Peninsula for International Visitors



- 58 per cent of Domestic Visitor nights in the Eyre Peninsula are spent either with Friends or Relatives or in Hotels and similar accommodation.
- Domestically, Caravan and Camping is also popular with 25 per cent of visitors preferring this accommodation.
- 41 per cent of International Visitors to the Eyre Peninsula prefer Caravan and Camping accommodation.
- 40 per cent of International Visitors stay with Friends or Relatives or in a Hotel/Motel.

VISITOR ACTIVITIES

Domestic Visitor Activities in Eyre Peninsula



- The most popular activity when coming to The Eyre Peninsula is to eat out or visits friend or relatives.
- Other popular activities include going to the beach, visiting wineries, going to the markets and undertaking cultural experiences.

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Government of South Australia
South Australian Tourism Commission

REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

- In 2013-14, the tourism industry contributed an estimated \$293 million to the Eyre Peninsula regional economy (9.5 per cent of gross regional product) and directly employed approximately 1,500 people (6.4 per cent of regional employment).

In 2013-14, the tourism activity in Eyre Peninsula generated:

- \$208 million and \$360 million in direct and indirect tourism output, and \$568 million in total tourism output;
- \$113 million and \$148 million in direct and indirect tourism GVA, and \$261 million in total tourism GVA;
- \$121 million and \$172 million in direct and indirect tourism GRP and \$293 million in total tourism GRP; and
- 1,500 jobs for people employed directly by the tourism industry, 1,500 indirect jobs and a total employment impact of 3,000 people.

REGIONAL INSIGHTS

Interaction with the natural aquatic environment.

Interstate

- Coast and seafood the cornerstones of appeal.
- Unique experiences around interaction with aquatic wildlife very appealing.
- Distance raised as the biggest potential negative.

Intrastate

- Similar appeals to interstate with marine wildlife, scenery and seafood all clear winners.
- Distance from Adelaide a detractor.

International

- Viewing and engaging with local wildlife (both sea and land) hold strong appeal for the Eyre Peninsula.
- Uncrowded beaches also appeal.
- Dining on seafood higher for the eastern markets.

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