

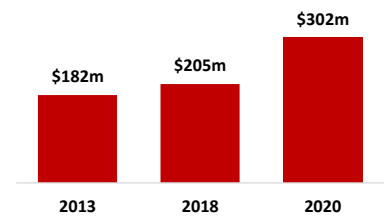
YORKE PENINSULA

REGIONAL PROFILE



OVERVIEW

- Currently the Yorke Peninsula contributes \$205 million to the December 2018 South Australian expenditure of \$6.8 billion.
- The Yorke Peninsula has achieved 68 per cent of their \$302 million 2020 target.



Annual Visitor Summary December 2016 - December 2018

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	462,000	59,000	521,000	7,000	528,000
%	89%	11%	99%	1%	100%
Nights	1,427,000	226,000	1,653,000	93,000	1,747,000
%	86%	14%	95%	5%	100%
Average Length of Stay	3	4	3	13	3
Domestic Day Trips					
Average Annual Day Trips to Yorke Peninsula					653,000
PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	341,000	139,000	30,000	20,000	528,000
%	65%	26%	6%	4%	100%
Nights	1,205,000	383,000	94,000	65,000	1,747,000
%	69%	22%	5%	4%	100%
Average Length of Stay	4	3	3	3	3
Expenditure					
Average Annual Expenditure				\$	205,000,000

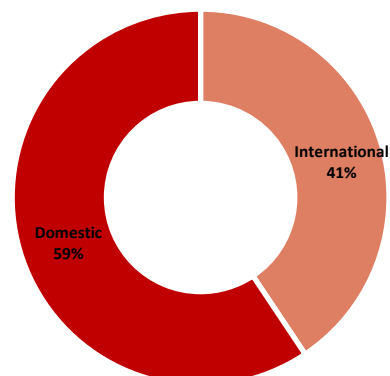
- 99 per cent of visitors are Domestic visitors and 1 per cent are International visitors.
- Domestically 89 per cent of visitors are from within the state compared to 11 per cent from Interstate.
- 91 per cent of visitors to the Yorke Peninsula are Leisure visitors (Holiday + VFR).

YORKE PENINSULA TOURISM LISTINGS

Category	Yorke Peninsula
Accommodation	197
Event	99
Attraction	83
Food and Drink	26
Tour	5
Destination Information	5
General Services	5
Information Services	4
Hire	1
Grand Total	425

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

YORKE PENINSULA MEDIA COVERAGE



Source: Advertising Space Rate - 2018

YORKE PENINSULA REGIONAL PROFILE



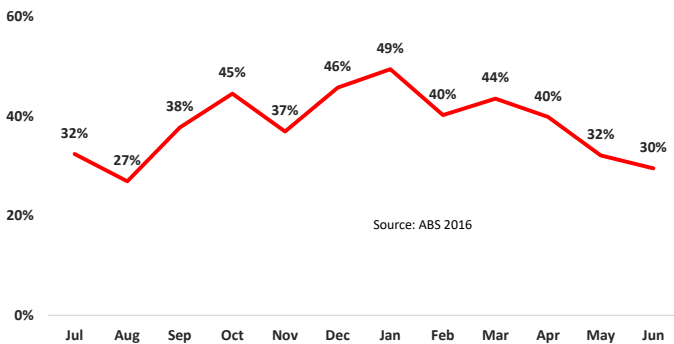
ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms

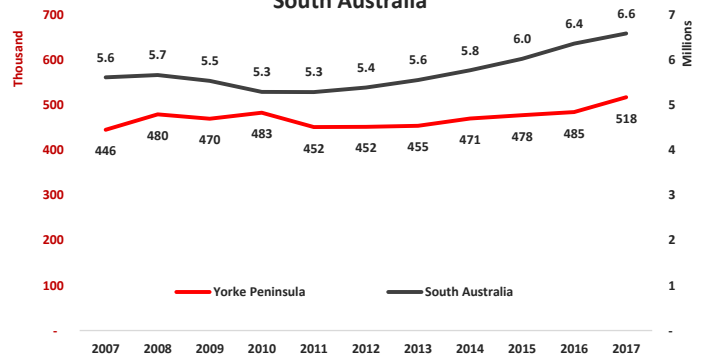
Establishments	7
Rooms	125
Occupancy	38%
Takings	\$1,800,000

- Average occupancy for the year is 38 per cent over 7 establishments 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.
- Through the winter months occupancy averages out at 30 per cent.

Monthly Occupancy Rates Year end June 2016 - Yorke Peninsula

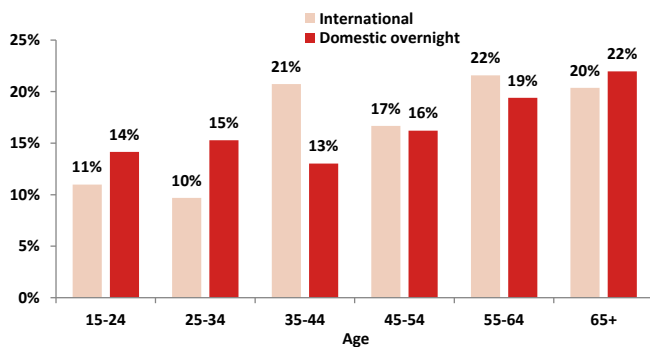


Total Overnight Visitation to the Yorke Peninsula & South Australia



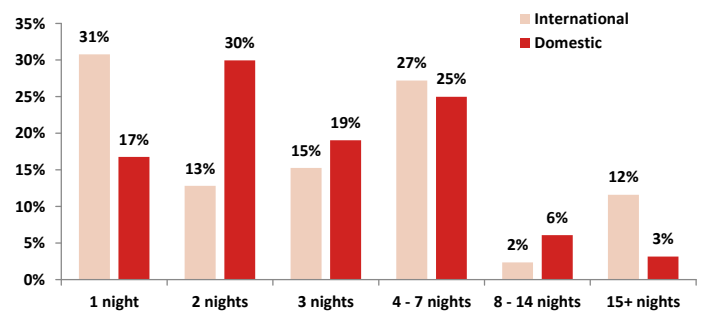
VISITOR PROFILE

Age of Visitors to the Yorke Peninsula



- International visitors peak in the 55-64 age group at 22 per cent.
- 42 per cent of all international visitors are over 55.
- Domestic visitors peak in the 65+ age group at 22 per cent.

Length of Visit to the Yorke Peninsula



- 30 per cent of Domestic visitors stay 2 nights.
- 31 per cent of International visitors stay 1 night in the Yorke Peninsula.
- 27 per cent of International visitors like to stay between 4 and 7 nights.

YORKE PENINSULA

REGIONAL PROFILE



DOMESTIC VISITOR PROFILE

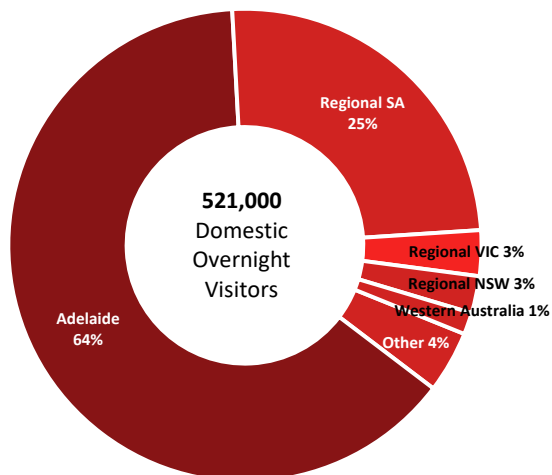
Purpose	Holiday	VFR	Other	Total
Visits	336,000	137,000	50,000	521,000
%	64%	26%	10%	100%
Nights	1,191,000	323,000	140,000	1,653,000
%	72%	20%	8%	100%
ALOS	4	2	3	3

INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	5,000	2,000	np	7,000
%	71%	29%	np	100%
Nights	14,000	60,000	20,000	93,000
%	15%	65%	22%	100%
ALOS	3	30	np	13

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to the Yorke Peninsula



Origin of International Visitors to the Yorke Peninsula



- Regional South Australia contributes 25 per cent of visitors to the Yorke Peninsula.
- Adelaide visitors contribute 64 per cent of the visitors to the Yorke Peninsula.
- Internationally Europeans contribute 44 per cent of the visits to the Yorke Peninsula, with the United Kingdom contributing 19 per cent.

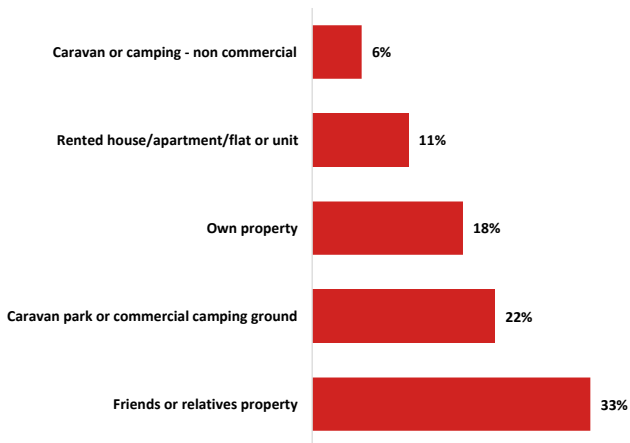
YORKE PENINSULA

REGIONAL PROFILE

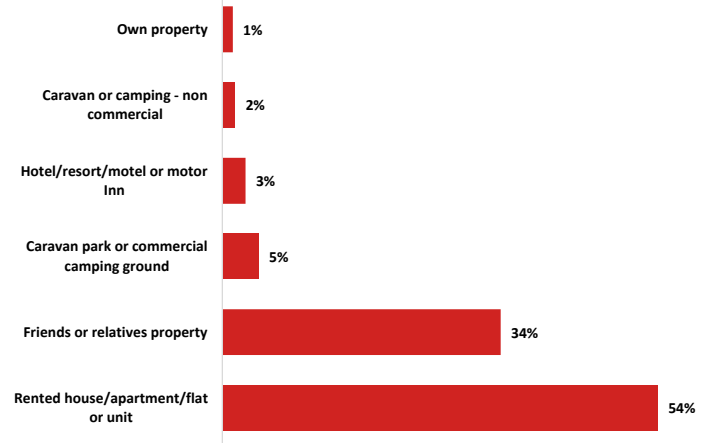


VISITOR USE OF ACCOMMODATION

Accommodation used in the Yorke Peninsula for Domestic Visitors



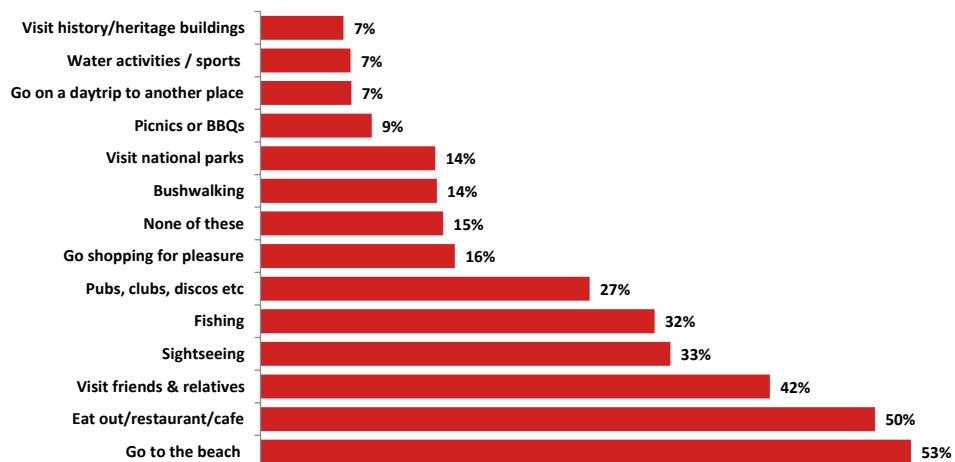
Accommodation used in Yorke Peninsula for International Visitors



- 51 per cent of Domestic visitor nights to the Yorke Peninsula are spent either in a Friends or Relatives property or their own property. 11 per cent of visitors stay in a rented property.
- Domestically Caravan and Camping is also popular with 28 per cent of visitors preferring this accommodation.
- 54 per cent of International visitors stay in a rented house, apartment or flat.
- 34 per cent of International visitors stay in a Friend or relatives property.
- 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 the 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



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2016-17, the tourism industry contributed an estimated \$156 million to the Yorke Peninsula regional economy and directly employed approximately 1,300 people.

Employment

- 1,300 jobs for people employed directly by the tourism industry, 500 indirect jobs and a total employment impact of 1,900 people.

Tourism output

- \$129 million and \$171 million in direct and indirect tourism output, and \$300 million in total tourism output.

Gross Value Added (GVA)

- \$68 million and \$73 million in direct and indirect tourism GVA, and \$141 million in total tourism GVA.

Gross Regional Product (GRP)

- \$74 million and \$82 million in direct and indirect tourism GRP and \$156 million in total tourism GRP.

REGIONAL INSIGHTS

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.
- Distance can be seen as a barrier for interstate visitation.

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.

Regional Visitor Strategy Priorities

- Yorke Peninsula's priority is to increase visitor expenditure and dispersal from intrastate and interstate drive markets.
- Develop new and promote existing experiences that play to the region's strengths of coastal lifestyle, wildlife and nature will be key.

Appeal data is from the consumer surveying conducted for the SATC by BDA Marketing Planning. Sample of 800 interstate travellers and 400 interstate travellers, followed by eight focus groups in Adelaide, Sydney and Melbourne. Comments relating to International appeal are sourced from the Consumer Demand Project run by Tourism Australia in 11 priority markets, with a sample of 1,600 per market.

Prepared by the South Australian Tourism Commission, December 2018

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 2016 to December 2018.

Consumer Demand Product Testing Phase 1 - BDA Marketing

Notes and Abbreviations Totals may not add to 100% due to rounding. VFR: Visiting Friends and Relatives. np: Not Published due to small sample size. ALOS: Average Length of Stay
ABS: Survey of Tourism Accommodation. Hotels, Motels, Guest houses and Serviced Apartments with 15 or more rooms. Cat. No. 8635455001
Consumer Demand Product Testing Phase 1 - BDA Marketing



ABORIGINAL CULTURAL TOURS SOUTH AUSTRALIA

YORKE PENINSULA

ABOUT ABORIGINAL CULTURAL TOURS SOUTH AUSTRALIA

- Aboriginal Cultural Tours South Australia gives people an insight into one of the world's oldest living cultures.
- In operation for 14 years, the business offers Outbush and Coastal Aboriginal experiences led by knowledgeable Aboriginal guides.
- Based in the Yorke Peninsula, owner/operator Quenten Agius has curated 10 different tours that cover a wide area of South Australia including the Yorke Peninsula, Clare Valley and Flinders Ranges and Outback.

BUSINESS GROWTH

- Over 14 years of operating, Aboriginal Cultural Tours South Australia has a wide demographic and steady guest numbers from niche markets.
- The business' markets include: Education 49% (39% Australian, 10% international), International 25% (guests from a variety of places including China, United States of America, Europe and more), Interstate 15% and Intrastate 11%.
- Aboriginal Cultural Tours South Australia has received a variety of accolades including – winner of 29 global, national, state and regional awards, two time SA Tourism Awards Hall of Fame inductee, and eight time Australian Tourism Awards finalist.

CHALLENGES

- Building awareness of the product is an ongoing challenge as people don't know what to expect from a cultural tour. Quenten creates customised tours so people can get the most from it.

- People are also after tours that cover more regions, and Aboriginal Cultural Tours South Australia is working towards including more in the future.

THE FUTURE

- Into the future Aboriginal Cultural Tours South Australia will continue to look at capacity building and a sustainable and economical business strategy. Quenten is looking at building a cultural tour on Kangaroo Island where he also has ancestral connections through his family.

COMMUNITY IMPACT

- Aboriginal Cultural Tours South Australia employs local Aboriginal people on a casual basis.
- The business supports local business on a regular basis including purchasing fuel and using local accommodation providers for tours.
- The business also purchases local produce and ensures visitors taste fresh produce from the region, for example local seafood.

SOUTH AUSTRALIAN TOURISM COMMISSION COLLABORATION

- Aboriginal Cultural Tours South Australia actively participates in SATC marketing including taking part in industry events and promotion of Aboriginal product to international and national markets.
- The SATC includes Aboriginal Cultural Tours South Australia on a variety of media and industry familiarisation itineraries.
- Participated in SATC and Tourism Australia's DERTOUR Germany Marketing Campaign.

WWW.ABORIGINALSA.COM.AU

"Working with the local community is all about not just value adding to our business but value adding to the community's business. I love what I do because it allows me to expose Aboriginal people to the rest of the world and share who we are and our culture."

Quenten Agius, Owner/Operator Aboriginal Cultural Tours South Australia



WWW.TOURISM.SA.GOV.AU