

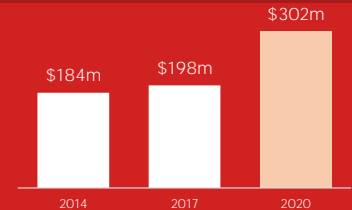
YORKE PENINSULA

Regional Profile



OVERVIEW

- Currently the Yorke Peninsula contributes \$198 million to the December 2017 South Australian expenditure of \$6.6 billion.
- The Yorke Peninsula has achieved 66 per cent of their \$302 million 2020 target.



Annual Visitor Summary December 2015 - December 2017

ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	451,000	61,000	512,000	6,000	518,000
%	88%	12%	99%	1%	100%
Nights	1,444,000	247,000	1,691,000	109,000	1,800,000
%	85%	15%	94%	6%	100%
Average Length of Stay	3	4	3	18	3
Domestic Day Trips					625,000
Average Annual Day Trips to Yorke Peninsula					625,000

PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	344,000	139,000	20,000	17,000	518,000
%	66%	27%	4%	3%	100%
Nights	1,273,000	399,000	74,000	53,000	1,800,000
%	71%	22%	4%	3%	100%
Average Length of Stay	4	3	4	3	3
Expenditure					198,000,000
Average Annual Expenditure					198,000,000

- 99 per cent of visitors are Domestic visitors and 1 per cent are International visitors.
- Domestically 88 per cent of visitors are from within the state compared to 12 per cent from Interstate.
- 93 per cent of visitors to the Yorke Peninsula are Leisure visitors (Holiday + VFR).

YORKE PENINSULA TOURISM LISTINGS

Category	Yorke Peninsula
Accommodation	297
Attraction	86
Destination Information	35
Event	112
Food and Drink	21
General Services	2
Hire	4
Information Services	4
Tour	8
Transport	1
Grand Total	570

Note: some listings have multiple categories of accommodation

YORKE PENINSULA MEDIA COVERAGE



Source: Item Count - SATC Internal - 2017

YORKE PENINSULA

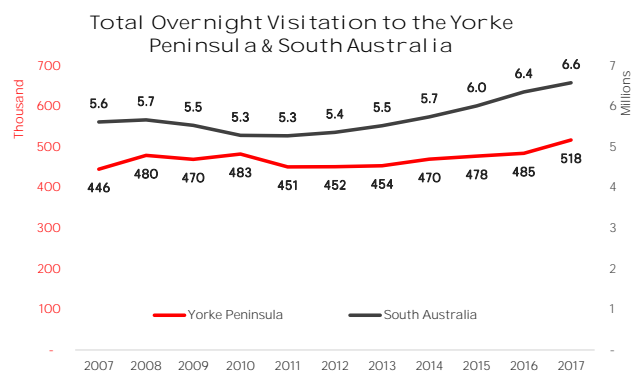
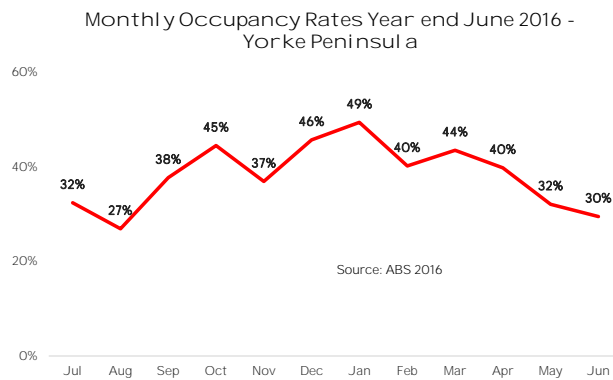
Regional Profile



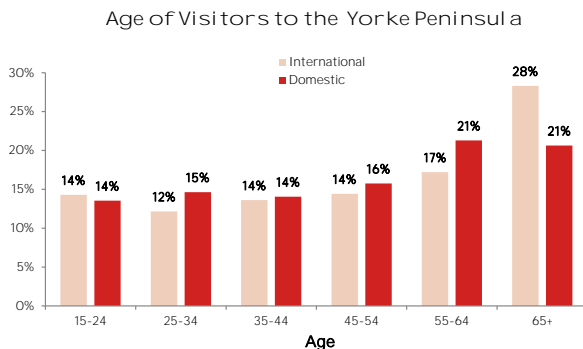
ACCOMMODATION SUPPLY

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

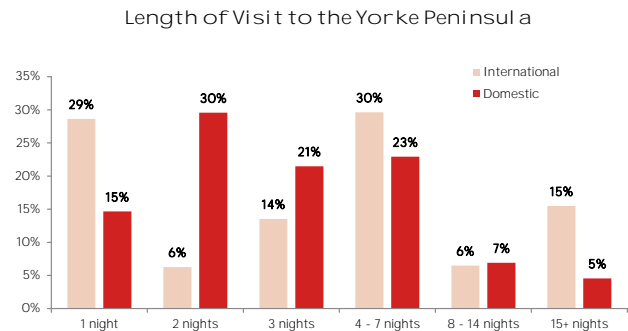
- Average occupancy for the year is 38 per cent over 7 establishments and 125 rooms.
- The peak months are December and January with occupancy at 46 per cent and 49 per cent respectively.
- Low point of the year comes in August where occupancy drops to 27 per cent.
- Through the winter months occupancy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



VISITOR PROFILE



- International visitors peak in the 65+ age group at 28 per cent.
- For Domestic visitors the peak age groups are 55-64 and 65+ (both 21 per cent).



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

YORKE PENINSULA

Regional Profile



DOMESTIC VISITOR PROFILE

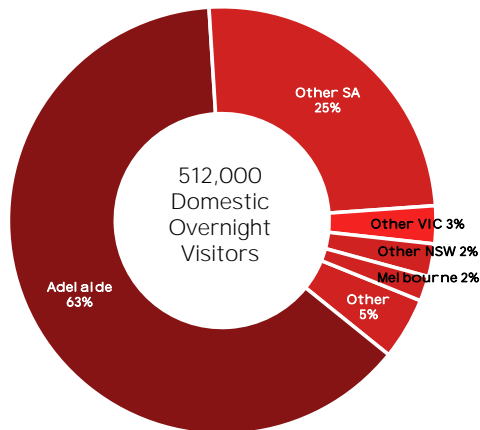
Purpose	Holiday	VFR	Other	Total
Visits	340,000	138,000	35,000	512,000
%	66%	27%	7%	100%
Nights	1,238,000	336,000	117,000	1,691,000
%	73%	20%	7%	100%
ALOS	4	2	3	3

INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	4,000	1,000	1,000	6,000
%	67%	17%	17%	100%
Nights	35,000	62,000	12,000	109,000
%	32%	57%	11%	100%
ALOS	9	62	12	18

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 63 per cent of the visitors to the Yorke Peninsula.
- Internationally Europeans contribute 45 per cent of the visits to the Yorke Peninsula, with the United Kingdom contributing 20 per cent.

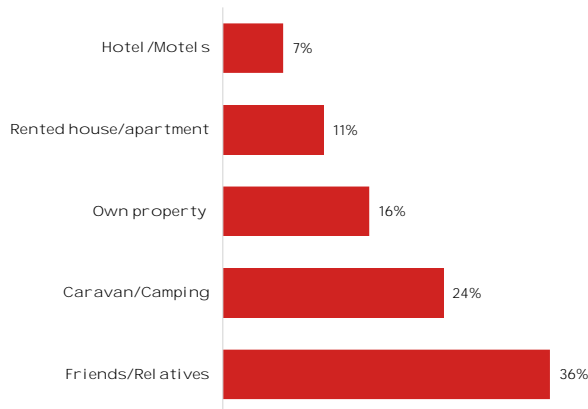
YORKE PENINSULA

Regional Profile

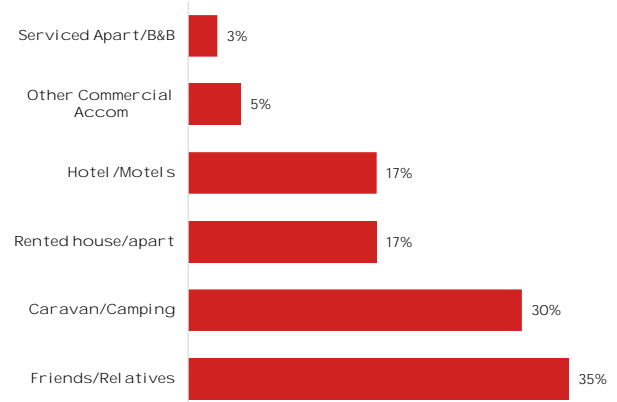


VISITOR USE OF ACCOMMODATION

Accommodation used in the Yorke Peninsula for Domestic Visitors



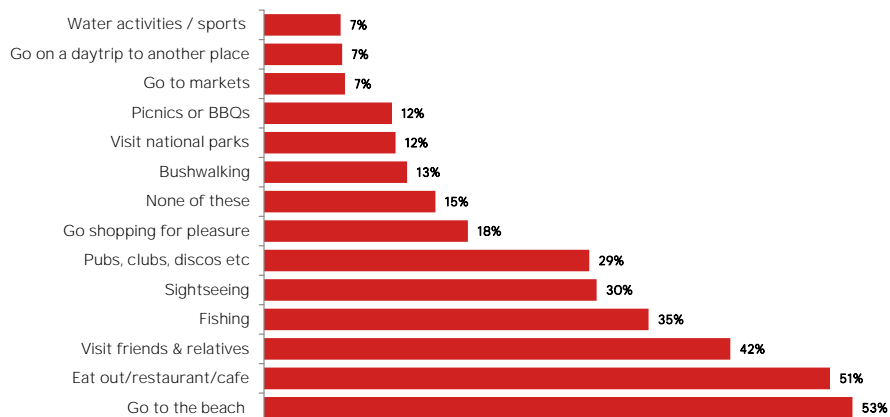
Accommodation used in Yorke Peninsula for International Visitors



- 63 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 24 per cent of visitors preferring this accommodation.
- 75 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 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 2017

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 2015 to December 2017. 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