

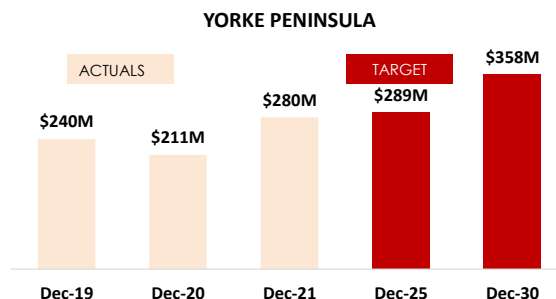
YORKE PENINSULA REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2021

- Currently Yorke Peninsula contributes \$280 million to the year end December 2021 South Australian expenditure of \$6.2 billion.
- The Yorke Peninsula has achieved 97 per cent of their 2025 target of \$289 million and 78 per cent of their 2030 target of \$358 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2021

ORIGIN						
	Intrastate	Interstate	Total Domestic	International	Total	
Overnight Visits	556,000	63,000	620,000	-	620,000	
%	90%	10%	100%	0%	100%	
<i>Share of Regional SA</i>	12%	4%	10%	0%	10%	
<hr/>						
<i>% Across Regional SA</i>	76%	23%	100%	0%	100%	
<hr/>						
Nights	1,686,000	379,000	2,065,000	-	2,065,000	
%	82%	18%	100%	0%	100%	
<i>Share of Regional SA</i>	12%	4%	9%	0%	9%	
<hr/>						
<i>% Across Regional SA</i>	60%	38%	98%	2%	100%	
<hr/>						
Average Length of Stay	3.0	6.0	3.3	-	3.3	
ALOS Regional SA	3.0	6.2	3.7	-	3.8	
<hr/>						
Total Expenditure					\$280,000,000	
Overnight Expenditure	\$190,000,000	\$45,000,000	\$236,000,000	\$0	\$236,000,000	
Day Trip Expenditure					\$44,000,000	
<hr/>						
Domestic Day Trips					518,000	

- The Yorke Peninsula saw 620,000 domestic overnight visitors for the year end December 2021.
- 90 per cent of overnight visitors were from intrastate and 10 per cent from interstate.
- The 556,000 intrastate overnight visitors stayed 1.7 million nights with an average length of stay of 3.0 nights.
- There were 63,000 interstate overnight visitors who stayed 379,000 nights with an average length of stay of 6.0 nights.
- There have been no international arrivals with the borders closed.
- 518,000 day trips were taken to or within the Yorke Peninsula for the year with spend of \$50 million.

ALOS = Average Length of Stay

YORKE PENINSULA REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	455,000	129,000	28,000	18,000	620,000
%	73%	21%	5%	3%	100%
<i>Share of Regional SA</i>	15%	8%	3%	4%	10%
<i>% Across all regions</i>	49%	28%	18%	8%	100%

Nights	1,575,000	362,000	77,000	50,000	2,065,000
%	76%	18%	4%	2%	100%
<i>Share of Regional SA</i>	14%	6%	2%	3%	9%
<i>% Across all regions</i>	50%	26%	17%	8%	100%

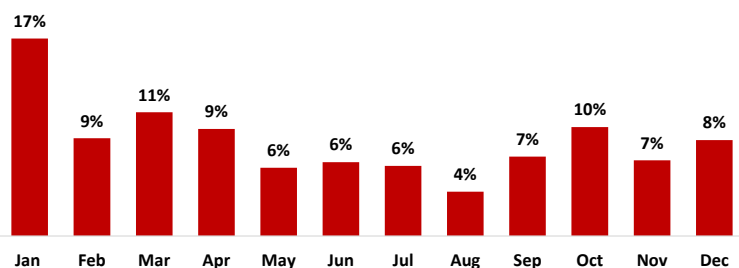
Average Length of Stay	3.5	2.8	2.8	2.8	3.3
-------------------------------	-----	-----	-----	-----	------------

Expenditure					
Annual Expenditure	\$183,000,000	\$32,000,000	\$8,000,000	\$12,000,000	\$235,000,000
Expenditure 2019	\$116,000,000	\$29,000,000	\$16,000,000	\$17,000,000	\$178,000,000
Av spend per night	\$116	\$88	\$104	\$240	\$114
Av spend per night Reg SA	\$154	\$58	\$84	\$80	\$112
Share of Regional SA	7%	4%	2%	2%	5%

- 94 per cent of visitors to the Yorke Peninsula are leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$116 per night compared to VFR visitors who spend \$88 per night.
- Holiday visitors spent \$183 million for the year and VFR visitors \$32 million, making up 91 per cent of total expenditure.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO YORKE PENINSULA



Source: NVS year end December 2021

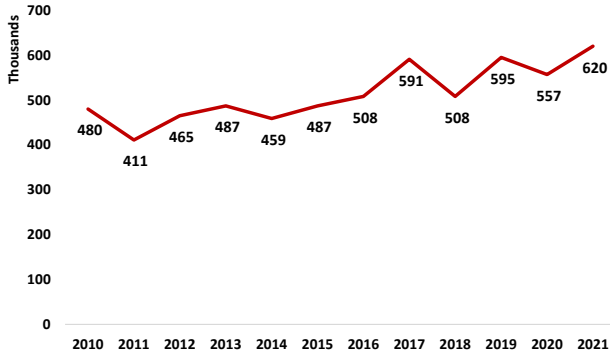
- National Visitor Survey data shows us that January, March, April and October are the busiest months on the Yorke Peninsula.
- January is busy with the Summer/school holidays.
- Increased visitation in April and October with school holidays.
- Visitation increases in March with the long weekend.

YORKE PENINSULA REGIONAL PROFILE

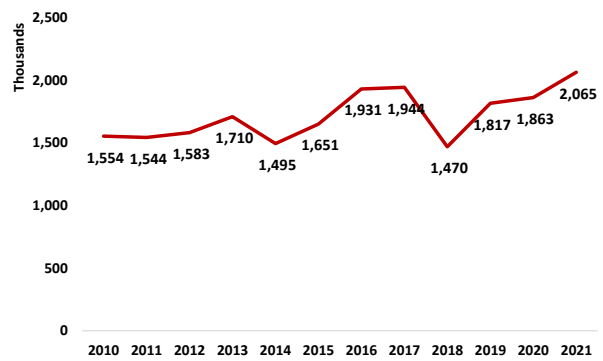


TOTAL OVERNIGHT VISITATION 2010 - 2021

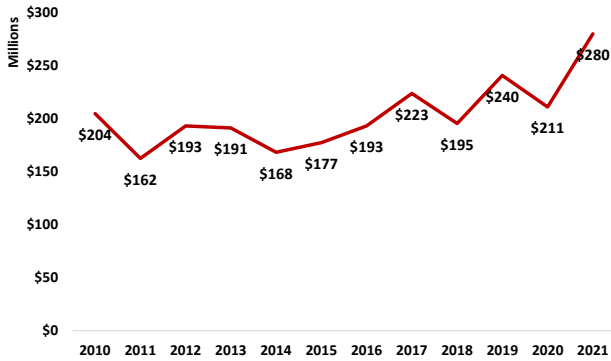
VISITORS YORKE PENINSULA 2010 - 2021 - INTERNATIONAL AND DOMESTIC



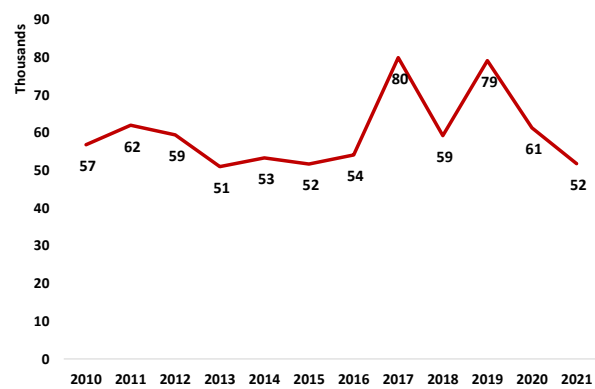
NIGHTS YORKE PENINSULA 2010 - 2021 - INTERNATIONAL AND DOMESTIC



TOTAL EXPENDITURE YORKE PENINSULA 2010 - 2021 - INTERNATIONAL AND DOMESTIC



DAY TRIPS YORKE PENINSULA 2010 - 2021 - DOMESTIC



Note: Fluctuations can occur in visitation data due to small sample sizes. Prior regional profiles used data averaged over three years to smooth these fluctuations.

Regions	Visits		Expenditure	
	Dec-21	Change on Dec-19	Dec-21	Change on Dec-19
Adelaide	1,982,000	-49%	2,549,700,000	-44%
Adelaide Hills	184,000	-18%	204,500,000	-1%
Barossa	230,000	-28%	291,600,000	29%
Clare Valley	282,000	38%	171,700,000	46%
Eyre Peninsula	482,000	-17%	488,400,000	-11%
Fleurieu Peninsula	894,000	-1%	662,900,000	19%
Flinders Ranges and Outback	638,000	-31%	359,700,000	-30%
Kangaroo Island	189,000	-9%	238,500,000	25%
Limestone Coast	610,000	-21%	438,600,000	4%
Murray River, Lakes and Coorong	391,000	-13%	211,200,000	-25%
Riverland	345,000	-20%	231,600,000	19%
Yorke Peninsula	620,000	4%	279,500,000	16%
Regional SA	4,424,000	-14%	3,601,600,000	1%
South Australia	6,077,000	-29%	6,151,300,000	-24%

YORKE PENINSULA REGIONAL PROFILE



YORKE PENINSULA TOURISM LISTINGS

Category	# Listings
Accommodation	290
Attraction	117
General Services	73
Event	40
Food and Drink	22
Destination Information	20
Hire	5
Tour	4
Information Services	3
Transport	1
Grand Total	575

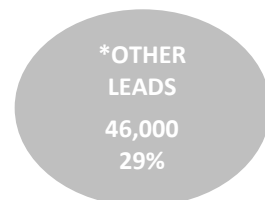
*Note: some listings have multiple categories of accommodation
Source: Australian Tourism Data Warehouse
Categories above defined at - <https://tourism.sa.gov.au/support/atdw>*

The **Australian Tourism Data Warehouse (ATDW)** is Australia's national platform for digital tourism information. Eligible tourism businesses can create a listing for their accommodation, tour, food and drink establishment, event and more, free of charge. These listings appear on websites such as southaustralia.com

An **ATDW lead** is generated when a user performs one of the following actions when viewing an ATDW product page on southaustralia.com:

- Website click through (via visit website button or website URL)
- Book now button click
- Claim deal button click
- Clicking on contact email address to start writing email
- Clicking on a phone number to start a phone call (mobile only)

**YORKE PENINSULA
AUSTRALIAN TOURISM DATA WAREHOUSE
LEADS
158,000
YEAR END DECEMBER 2021**



TOP 5

- WALLAROO MARINA APARTMENTS
- HILLOCKS OCEAN POD HILLTOP
- PORT HUGHES TOURIST PARK
- MARION BAY CARAVAN PARK
- YONDAH BEACH HOUSE

TOP 5

- COOPERS ALEHOUSE AT WALLAROO
- BOND STORE WALLAROO
- SUNNY HILL DISTILLERY
- THE SMELTER
- WATSACOWIE BREWERY

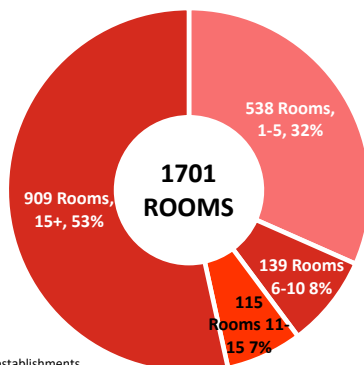
TOP 5

- MARION BAY OCEAN SAFARI
- REEF ENCOUNTERS FISHING CHARTERS
- ABORIGINAL CULTURAL TOURS SOUTH AUSTRALIA
- PACIFIC ESTATE OYSTERS
- REEL SCREAMER FISHING CHARTERS

* Other refers to leads for events, destination information, attractions, general services, hire and transport

ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS IN THE YORKE PENINSULA SOURCE ATDW



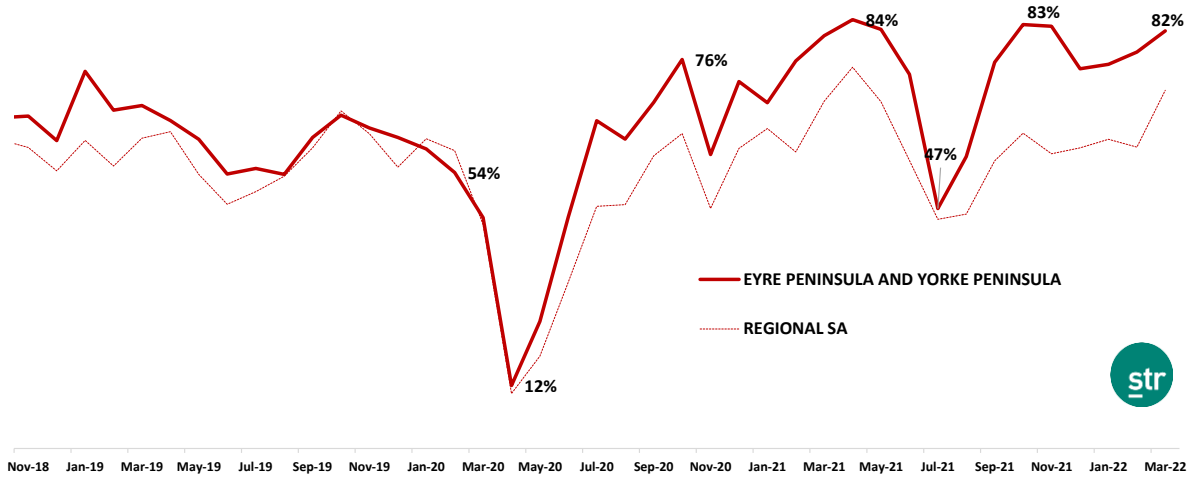
Rooms refers to room per establishments

- Currently there are 290 establishments in Yorke Peninsula that accommodate guests.
- These 290 establishments account for 1701 rooms across the region.
- 53 per cent of rooms fall into establishment with 15 or more rooms.
- 32 per cent of rooms fall into the 1-5 room establishments.



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY EYRE PENINSULA AND YORKE PENINSULA

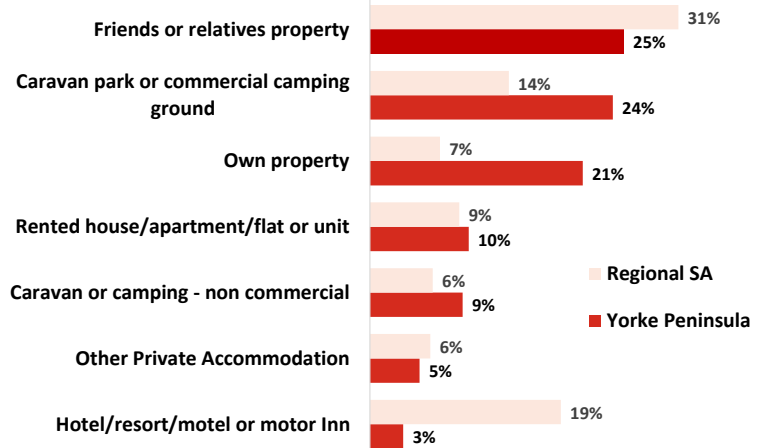


- Yorke Peninsula and Eyre Peninsula are combined together. Occupancy data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for these combined regions was 62%, this fell to 53% in 2020, rose to 74% in 2021 and for the first 3 month of 2022 the average is 78%.

VISITOR USE OF ACCOMMODATION

- 31 per cent of Domestic visitor nights are spent in a friend or relatives property, well above the regional South Australia average of 25 per cent.
- 33 per cent of people prefer to Caravan and Camp, above the regional average of 20 per cent. Prior to COVID-19, 27 per cent of visitor nights were spent caravan and camping.

ACCOMMODATION USED ON THE YORKE PENINSULA FOR DOMESTIC VISITORS



TRANSPORT

TRANSPORT YORKE PENINSULA DECEMBER 2021



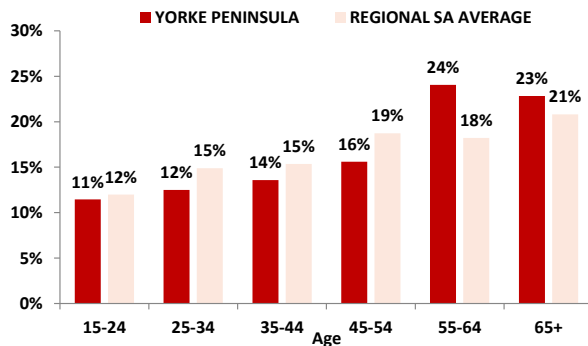
- The main method of transport used for the Yorke Peninsula was a self drive vehicle.
- 97 per cent of visitors used this type of transport.
- 3 per cent of people used other land transport and aircraft.

YORKE PENINSULA REGIONAL PROFILE

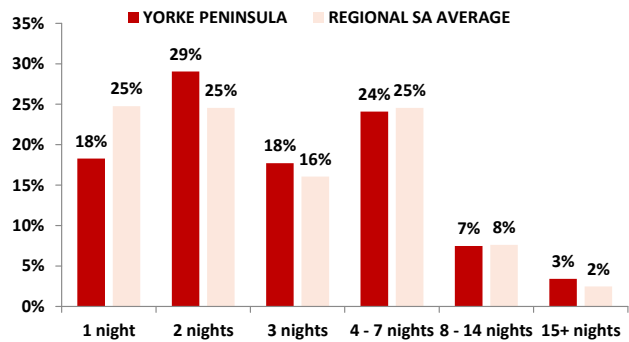


VISITOR PROFILE

AGE OF VISITORS TO YORKE PENINSULA



LENGTH OF VISIT TO YORKE PENINSULA

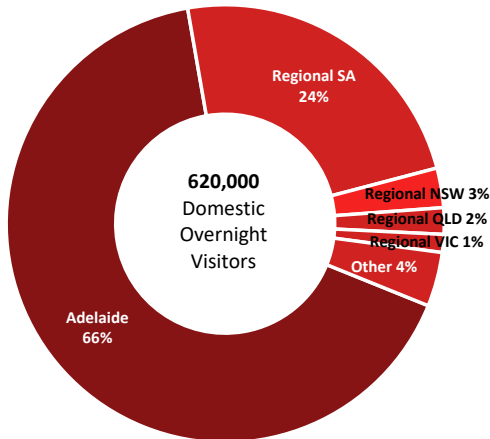


- Domestically there is a peak in 55+ age group at 47 per cent above the regional average of 39 per cent.
- The 45-54 age group at 16 per cent is well below the regional average of 19 per cent.
- 25-34 at 12 per cent is below South Australian average of 15 per cent.

- 29 per cent of domestic overnight visitors like to stay 2 nights, above the regional South Australia average of 25 per cent.
- 24 per cent of visitors like to stay 4-7 nights. This was in line with the regional average of 25 per cent.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO THE YORKE PENINSULA

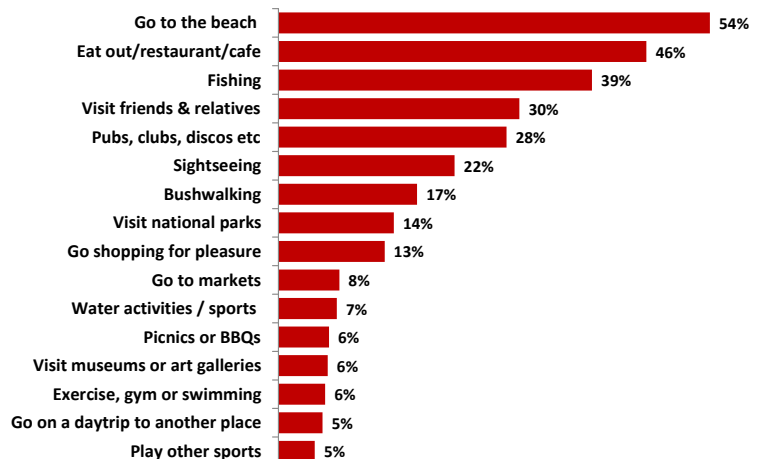


- NSW accounted for 4 per cent of visitors to the Yorke Peninsula.
- Regional South Australia contributes 24 per cent of visitors to the Yorke Peninsula, however prior to COVID this was 28 per cent.
- 66 per cent of visitors come from Adelaide, pre COVID-19 this was 60 per cent.

VISITOR ACTIVITIES

- The most popular activity when coming to Yorke Peninsula is going to the beach.
- Other popular activities include eating out, visiting friends and relatives, fishing, sightseeing, visit national parks, bush walking, visit museums, water sports and going to

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN YORKE PENINSULA





REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2019-20, the tourism industry contributed an estimated \$328 million to the Yorke Peninsula regional economy and directly employed approximately 1,600 people.

Employment

- 1,600 jobs for people employed directly by the tourism industry, 600 indirect jobs and a total employment impact of 2,200 people.

Gross Value Added (GVA)

- \$77 million and \$77 million in direct and indirect tourism GVA, and \$153 million in total tourism GVA.

Gross Regional Product (GRP)

- \$82 million and \$98 million in direct and indirect tourism GRP and \$180 million in total tourism GRP.

Tourism Consumption

2019–20

Tourism products - directly consumed

- 16% Long distance passenger transportation
- 15% Takeaway and restaurant meals
- 12% Shopping (including gifts and souvenirs)
- 12% Travel agency and tour operator services
- 11% Fuel (petrol, diesel)
- 7% Accommodation services
- 6% Food products
- 6% Alcoholic beverages and other beverages

Tourism Employment

2019–20

Tourism Industries - 1,600 directly employed

- 38% - 602 - Cafes, restaurants and takeaway food services
- 15% - 242 - Retail trade
- 14% - 228 - Accommodation
- 8% - 122 - Travel agency and tour operator services
- 7% - 116 - Clubs, pubs, taverns and bars
- 4% - 71 - Air, water and other transport

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2020

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

Prepared by the South Australian Tourism Commission, December 2021

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 year end December 2021.

Consumer Demand Product Testing Phase 1 - BDA Marketing - 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.

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. 865455001
Consumer Demand Product Testing Phase 1 - BDA Marketing