

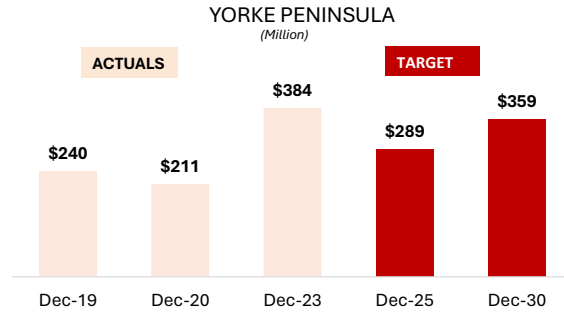
YORKE PENINSULA REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2023

- Currently, the Yorke Peninsula contributes \$239 million to the year end December 2023 South Australian expenditure of \$10.1 billion.
- The Yorke Peninsula has achieved 100 per cent of their 2025 target of \$289 million and their 2030 target of \$359 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2023

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	467,000	56,000	523,000	8,000	530,000
% of visits	88%	11%	99%	2%	100%
Share of Regional SA	10%	2%	7%	2%	7%
<hr/>					
% Across Regional SA	60%	35%	94%	6%	100%
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>					
Nights	1,361,000	164,000	1,525,000	95,000	1,620,000
% of nights	84%	10%	94%	6%	100%
Share of Regional SA	10%	1%	6%	1%	4%
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% Across Regional SA	33%	31%	65%	35%	100%
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>					
Average Length of Stay	2.9	2.9	2.9	11.9	3.1
ALOS Regional SA	2.8	4.6	3.5	32.0	5.1
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Total Expenditure					\$384,000,000
Overnight Expenditure	\$34,000,000	\$214,000,000	\$248,000,000	\$7,000,000	\$255,000,000
Day Trip Expenditure					\$129,000,000
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Domestic Day Trips					664,000

- The Yorke Peninsula saw 530,000 overnight visitors for the year end December 2023.
- 88 per cent of overnight visitors were from intrastate, 11 per cent from interstate and 2 per cent from overseas.
- The 467,000 intrastate overnight visitors stayed 1.4 million nights with an average length of stay of 2.9 nights.
- There were 56,000 interstate overnight visitors who stayed 164,000 nights with an average length of stay of 2.9 nights
- The region saw 8,000 international visitors with an average length of stay of 11.9 nights and spend of \$7 million.
- 664,000 day trips were taken to and within the Yorke Peninsula for the year with spend of \$129 million.

ALOS = Average Length of Stay

YORKE PENINSULA REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	340,000	138,000	41,000	11,000	530,000
% of visits	64%	26%	8%	2%	100%
Share of Regional SA	11%	5%	2%	2%	7%
% Across all regions	41%	33%	21%	6%	100%

Nights	1,049,000	358,000	130,000	83,000	1,620,000
% of nights	65%	22%	8%	5%	100%
Share of Regional SA	8%	2%	2%	1%	4%
% Across all regions	31%	39%	15%	14%	100%

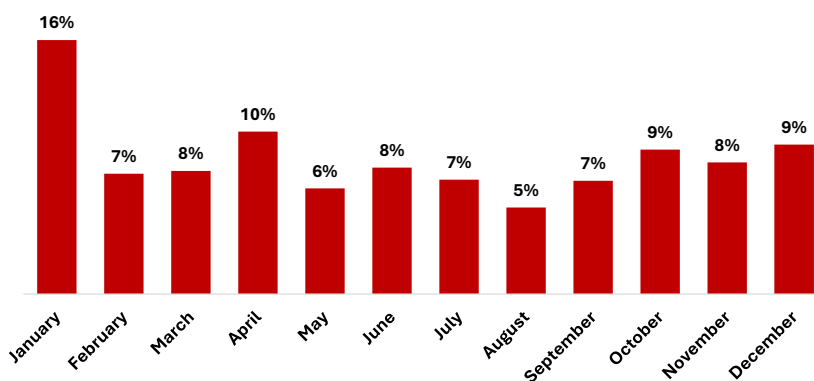
Average Length of Stay	3.1	2.6	3.2	7.5	3.1
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Expenditure					
Annual Expenditure	\$178,000,000	\$40,000,000	\$28,000,000	\$10,000,000	\$255,000,000
Expenditure 2019	\$116,000,000	\$29,000,000	\$16,000,000	\$17,000,000	\$177,000,000
Av spend per night	\$170	\$112	\$215	\$120	\$157
Av spend per night Reg SA	\$224	\$109	\$155	\$297	\$181
Share of Regional SA	3%	5%	1.3%	2%	3%

- 90 per cent of overnight visitors to the Yorke Peninsula are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$170 per night compared to VFR visitors who spend \$112 per night.
- Leisure overnight visitors spent \$218 million for the year, making up 85 per cent of all overnight expenditure.
- There are 41,000 business visitors who stay 130,000 nights with spend of \$28 million.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO YORKE PENINSULA



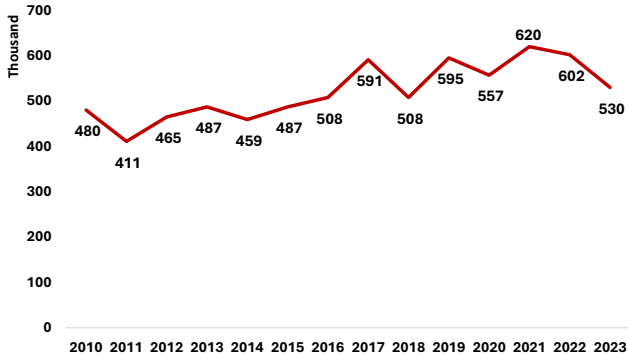
- National Visitor Survey data shows us that in 2023 January, April, October and December are the strongest months for visitation on the Yorke Peninsula .
- January is the busiest month for the year with summer school holidays.
- April and October also strong with school holidays, Easter and the October long weekend.

YORKE PENINSULA REGIONAL PROFILE

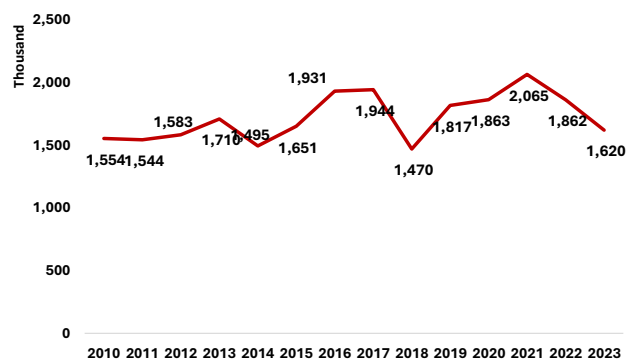


TOTAL OVERNIGHT VISITATION 2010 - 2022

VISITORS YORKE PENINSULA 2010 - 2023 - International and Domestic



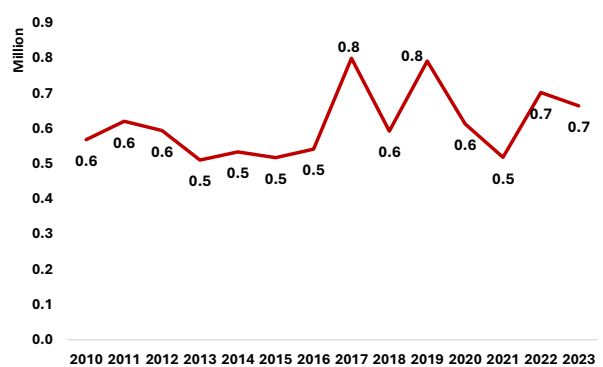
NIGHTS YORKE PENINSULA 2010 - 2023 - International and Domestic



TOTAL EXPENDITURE YORKE PENINSULA 2010 - 2023 - International and Domestic



DAY TRIPS YORKE PENINSULA 2010 - 2023 - 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-23	Change on Dec-19	Dec-23	Change on Dec-19
Adelaide	3,422,000	-13%	\$5,500,000,000	22%
Adelaide Hills	233,000	3%	\$293,000,000	42%
Barossa	343,000	8%	\$261,000,000	16%
Clare Valley	226,000	11%	\$191,000,000	62%
Eyre Peninsula	537,000	-8%	\$591,000,000	7%
Fleurieu Peninsula	868,000	-4%	\$837,000,000	50%
Flinders Ranges and Outback	761,000	-18%	\$610,000,000	19%
Kangaroo Island	205,000	-1%	\$280,000,000	47%
Limestone Coast	763,000	-2%	\$520,000,000	24%
Murray River, Lakes and Cooroo	363,000	-20%	\$373,000,000	33%
Riverland	322,000	-25%	\$239,000,000	22%
Yorke Peninsula	530,000	-11%	\$384,000,000	60%
Regional SA	4,830,000	-7%	\$4,630,000,000	30%
South Australia	7,835,000	-9%	\$10,140,000,000	25%

YORKE PENINSULA REGIONAL PROFILE



YORKE PENINSULA TOURISM LISTINGS

Category	# Listings
Accommodation	339
Attraction	221
General Services	106
Event	49
Destination Information	46
Food & Drink	30
Tour	13
Hire	8
Information Services	6
Transport	2
Journey	1
Grand Total	820

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

84,000

YEAR END DECEMBER 2023

ACCOMMODATION LEADS

57,000
68%

FOOD & DRINK LEADS

2,400
3%

TOUR LEADS

2,500
3%

*OTHER LEADS

22,000
26%

TOP 5

- BIG4 BREEZE HOLIDAY PARKS PORT HUGHES
- THE KLEIN POD
- PORT VINCENT FORESHORE CARAVAN PARK
- POINT TURTON CARAVAN PARK
- WALLAROO BEACHFRONT TOURIST PARK

TOP 5

- BOND STORE WALLAROO
- WATSACOWIE BREWERY
- SUNNY HILL DISTILLERY
- PORT BROUGHTON HOTEL
- BAY STREET CAFE

TOP 5

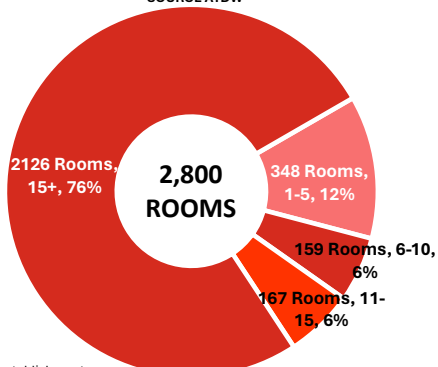
- MARION BAY OCEAN SAFARI
- REEF ENCOUNTERS FISHING CHARTERS
- PACIFIC ESTATE OYSTERS
- REEL SCREAMER FISHING CHARTERS
- ABORIGINAL CULTURAL TOURS SOUTH AUSTRALIA

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 rooms per establishment

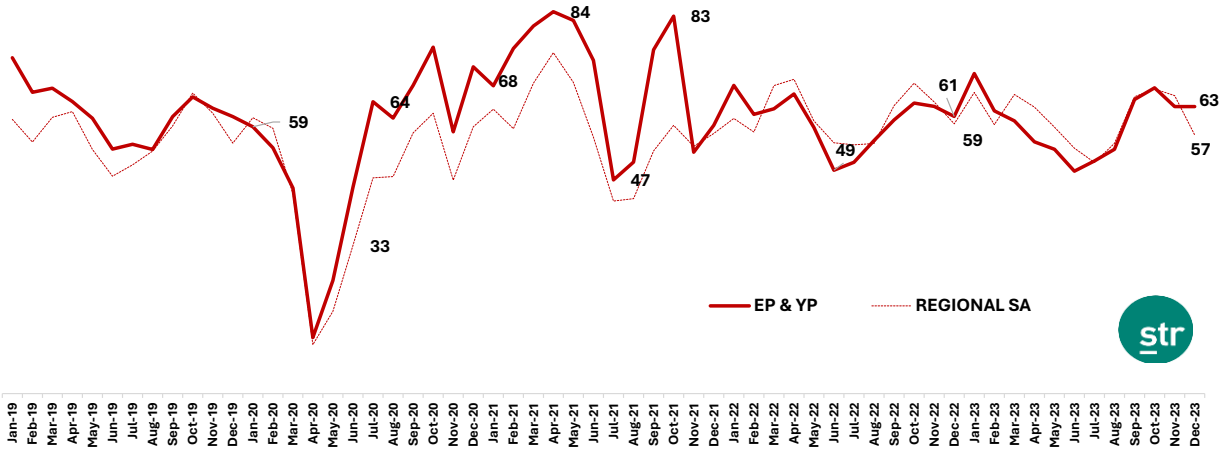
- Currently there are 363 establishments on the Yorke Peninsula that accommodate guests.
- These 363 establishments account for 2,800 rooms across the region.
- 76 per cent of rooms fall into establishment with 15 or more rooms.
- 12 per cent of rooms fall into the 1-5 room establishments.

YORKE PENINSULA REGIONAL PROFILE



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY EP & YP

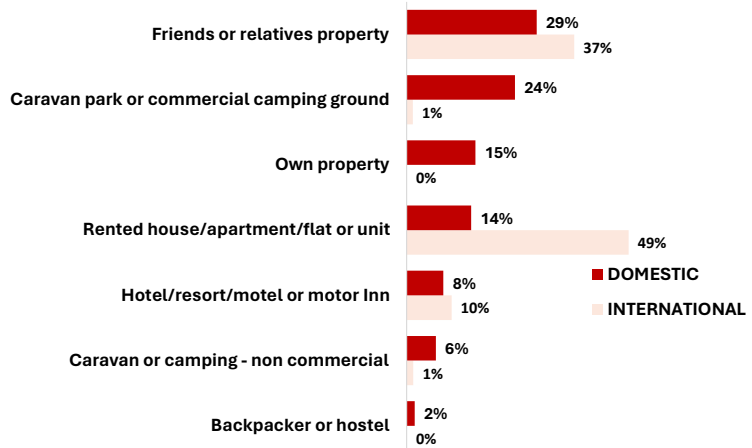


- The EP & YP regions include accommodation data for the Eyre Peninsula and the Yorke Peninsula. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the EP & YP regions was 62 per cent, this fell to 53 per cent in 2020, rose to 69 per cent in 2021, fell to 60 per cent in 2022 and 59 per cent in 2023.

VISITOR USE OF ACCOMMODATION

ACCOMMODATION USED IN YORKE PENINSULA FOR DOMESTIC AND INTERNATIONAL VISITORS

- 29 per cent of domestic overnight visitor nights to the Yorke Peninsula are spent with Friends or Relatives compared to the international average of 37 per cent.
- 8 per cent of domestic and 10 per cent of international visitors stayed in a Hotel/resort/motel or motor inn.
- 30 per cent of domestic visitors to the Yorke Peninsula stay in a caravan park.
- 49 per cent of international visitors stay in a rented house/apartment/flat or unit.



TRANSPORT



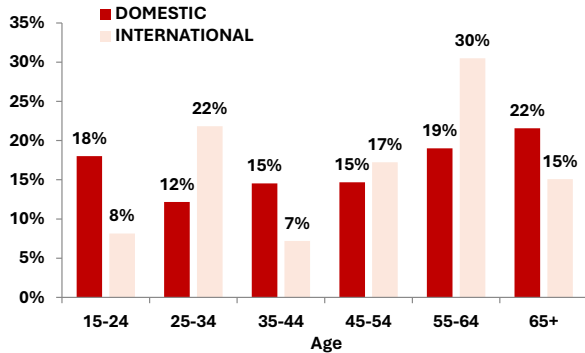
- The main method of transport used on trips to the Yorke Peninsula was self drive.
- 97 per cent travel to the region is through self drive.

YORKE PENINSULA REGIONAL PROFILE



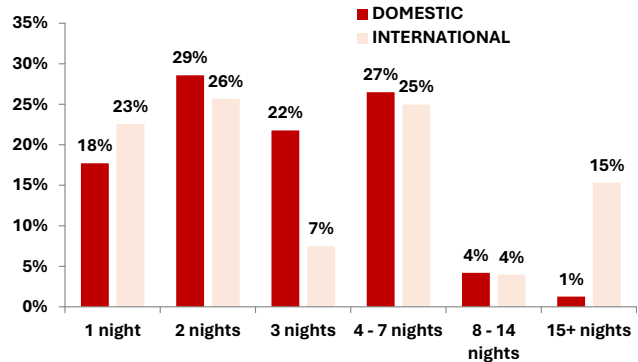
VISITOR PROFILE

AGE OF VISITORS TO YORKE PENINSULA



- In the domestic market the 55+ is the strongest age group with 41 per cent of visitors.
- The International market is also strongest for the 55+ age group with 45 per cent of all visits.

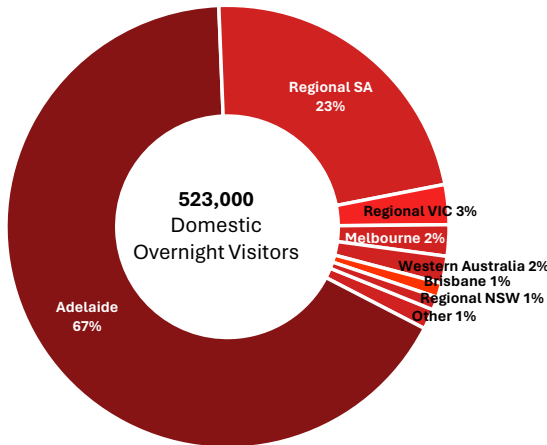
LENGTH OF VISIT TO YORKE PENINSULA



- 47 per cent of domestic overnight visitors like to stay 1 to 2 nights. Domestic market also strong in the 4-7 nights with 27%.
- 49 per cent of international visitors stay 1-2 nights.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO YORKE PENINSULA

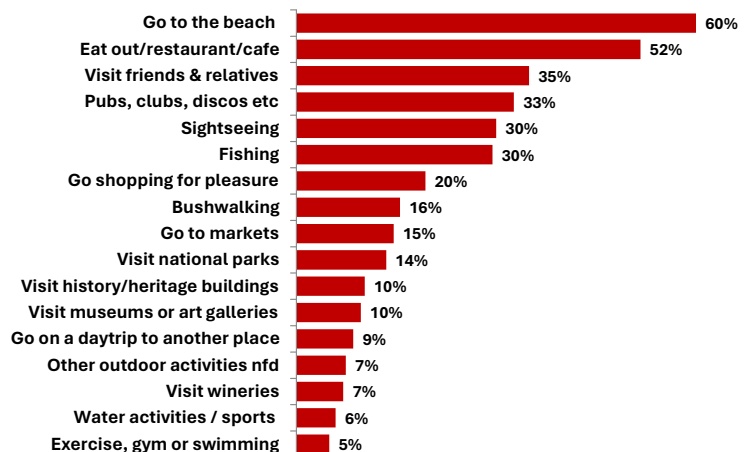


- Victoria at 5 per cent is the Yorke Peninsula biggest interstate overnight domestic markets.
- Regional South Australia contributes 23 per cent of visitors to the Yorke Peninsula.
- 67 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

- The most popular activity when coming to the Yorke Peninsula is to eat out at a restaurant or cafe.
- Other popular activities include going to the beach, visiting a friend or relative, water activities/sports, visiting wineries, bushwalking, visiting national parks, fishing and seeing the sights.

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN YORKE PENINSULA



YORKE PENINSULA

REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2021-22, the tourism industry contributed an estimated \$305 million to the Riverland regional economy and directly employed 1,600 people.

Employment

- 1,600 jobs for people employed directly by the tourism industry, 600 indirect jobs and a total employment impact of 2,100 people.

Gross Value Added (GVA)

- \$61 million and \$72 million in direct and indirect tourism GVA, and \$133 million in total tourism GVA.

Gross Regional Product (GRP)

- \$67 million and \$93 million in direct and indirect tourism GRP and \$160 million in total tourism GRP.

Tourism Consumption

2021-22	
<i>Tourism products</i> - directly consumed	
• Takeaway and restaurant meals	19%
• Shopping (including gifts and souvenirs)	14%
• Fuel (petrol, diesel)	12%
• Long distance passenger transportation	11%
• Accommodation services	10%
• Food products	7%
• Alcoholic beverages and other beverages	7%
• Travel agency and tour operator services	6%

Tourism Employment

2021-22	
<i>Tourism Industries</i> - 1,600 directly employed	
• Cafes, restaurants and takeaway food services	44%
• Accommodation	20%
• Retail trade	14%
• Clubs, pubs, taverns and bars	9%
• Air, water and other transport	4%
• Travel agency and tour operator services	3%
• All other industries	3%
• Other sports and recreation services	1%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2022

REGIONAL PERCEPTIONS REPORTING

- The Yorke Peninsula is seen as a warm and inviting destination for almost all traveller types, from families seeking entertainment and activities to fill the school holidays, through to couples or groups in explore the natural environment and get a taste of the regions seafood.
- A significant challenge for the Yorke Peninsula is a perceived lack of uniqueness relative to other beach destinations, the distance, and that it is seen as a summer destination.

To drive increased visitation and expenditure, we recommend the Yorke Peninsula:

Leverage the perceived quietness to the regions advantage	There is something special for travellers about having a beach or nature experience all to yourself. This quietness could be leveraged to motivate visitation from those looking to escape the rat race of everyday life, and visit a region that truly helps you escape or recharge. Whether it be catching your first fish, or hiking to find some incredible views, there is something to be discovered in the region, and having it all to yourself makes it even more special.
Motivate winter tourism through events	Being seen as a summer only destination is limiting visitation in the cooler months. Holding targeted events, or introducing promotions to drive visitation in the winter will boost tourism and expenditure in the region. People also struggle to envision what a holiday to the Yorke Peninsula would look like in winter, so using imagery of cosy winter campfires with a glass of red, winter hikes, a successful sunset fishing trip, and other activities may increase appeal.
Itineraries for different traveller types to help communicate the style of holidays people can have	The Yorke Peninsula appeals to almost all traveller types once they know more about the region. The challenge is targeting an experience type to the traveller type. Using itineraries may help visitors imagine the type of trip they could have. Combining food and drink experiences with tours to immerse visitors in the local culture and industry, coupled with opportunities to relax and recharge, may motivate increased consideration for the region.
Region appeals to...	<ul style="list-style-type: none"> — Adventurers — Caravanners and campers — Beach seekers — Families — Travelling with pets

Prepared by the South Australian Tourism Commission, December 2023

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 2023.

Regional Perceptions Testing - June 2022 - 3-day, online bulletin board (OBB) Approx. 40 mins of content per person, per day.

Participants were recruited as follows: - 22 Intrastate participants (70% metro, 30% regional), - 20 Interstate participants (Melbourne, Regional VIC and Sydney)

A mix of age (18-44 and 45-69) and gender was achieved across participants. Participants were willing travellers, non-rejectors of travelling to/within SA, and did not live in the region they were recruited to explore (for intrastate).

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