

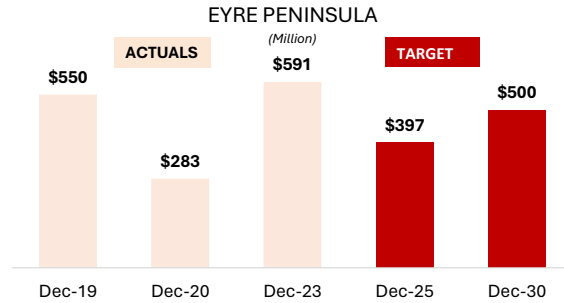
# EYRE PENINSULA REGIONAL PROFILE



## OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2023

- Currently, the Eyre Peninsula contributes \$591 million to the year end December 2023 South Australian expenditure of \$10.1 billion.
- The Eyre Peninsula has achieved 100 per cent of their 2025 target of \$397 million and their 2030 target of \$500 million.



## ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2023

ORIGIN						
	Intrastate	Interstate	Total Domestic	International	Total	
<b>Overnight Visits</b>	416,000	103,000	<b>519,000</b>	18,000	<b>537,000</b>	
% of visits	77%	19%	<b>97%</b>	3%	<b>100%</b>	
<b>Share of Regional SA</b>	9%	4%	<b>7%</b>	4%	<b>7%</b>	
<hr/>						
<b>% Across Regional SA</b>	60%	35%	<b>94%</b>	6%	<b>100%</b>	
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>						
<b>Nights</b>	1,462,000	491,000	<b>1,953,000</b>	227,000	<b>2,180,000</b>	
% of nights	67%	23%	<b>90%</b>	10%	<b>100%</b>	
<b>Share of Regional SA</b>	11%	4%	<b>8%</b>	2%	<b>5%</b>	
<hr/>						
<b>% Across Regional SA</b>	33%	31%	<b>65%</b>	35%	<b>100%</b>	
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>						
<b>Average Length of Stay</b>	3.5	4.8	<b>3.8</b>	12.6	<b>4.1</b>	
<b>ALOS Regional SA</b>	2.8	4.6	<b>3.5</b>	32.0	<b>5.1</b>	
<hr/>						
<b>Total Expenditure</b>						<b>\$591,000,000</b>
<b>Overnight Expenditure</b>	\$98,000,000	\$325,000,000	<b>\$423,000,000</b>	\$18,000,000	<b>\$441,000,000</b>	
<b>Day Trip Expenditure</b>						<b>\$150,000,000</b>
<hr/>						
<b>Domestic Day Trips</b>						<b>532,000</b>

- The Eyre Peninsula saw 537,000 overnight visitors for the year end December 2023.
- 77 per cent of overnight visitors were from intrastate, 19 per cent from interstate and 3 per cent from overseas.
- The 416,000 intrastate overnight visitors stayed 1.5 million nights with an average length of stay of 3.5 nights.
- There were 103,000 interstate overnight visitors who stayed 491,000 nights with an average length of stay of 4.8 nights
- The region saw 18,000 international visitors with an average length of stay of 12.6 nights and spend of \$18 million.
- 532,000 day trips were taken to the Eyre Peninsula for the year with spend of \$150 million.

ALOS = Average Length of Stay

# EYRE PENINSULA REGIONAL PROFILE



## PURPOSE

	Holiday	VFR	Business	Other	Total
<b>Overnight Visits</b>	188,000	127,000	189,000	38,000	<b>537,000</b>
% of visits	35%	24%	35%	7%	<b>100%</b>
<b>Share of Regional SA</b>	6%	5%	11%	8%	<b>7%</b>
<b>% Across all regions</b>	<b>41%</b>	<b>33%</b>	<b>21%</b>	<b>6%</b>	<b>100%</b>

<b>Nights</b>	865,000	593,000	657,000	65,000	<b>2,180,000</b>
% of nights	40%	27%	30%	3%	<b>100%</b>
<b>Share of Regional SA</b>	7%	4%	11%	1%	<b>5%</b>
<b>% Across all regions</b>	<b>31%</b>	<b>39%</b>	<b>15%</b>	<b>14%</b>	<b>100%</b>

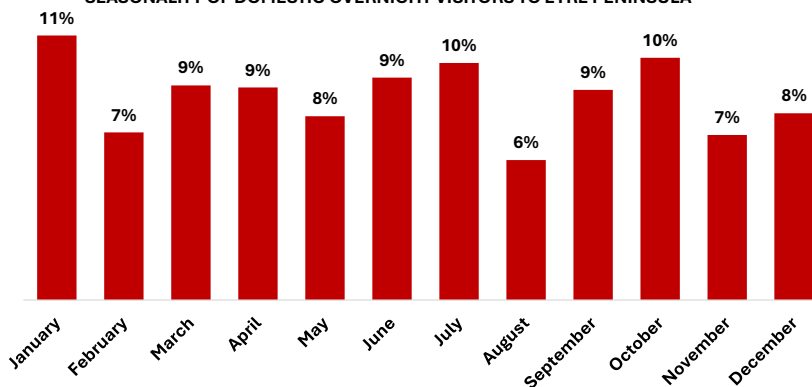
<b>Average Length of Stay</b>	4.6	4.7	3.5	1.7	<b>4.1</b>
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Expenditure					
<b>Annual Expenditure</b>	\$186,000,000	\$53,000,000	\$131,000,000	\$71,000,000	<b>\$441,000,000</b>
<b>Expenditure 2019</b>	\$229,000,000	\$48,000,000	\$102,000,000	\$40,000,000	<b>\$419,000,000</b>
<b>Av spend per night</b>	\$215	\$89	\$199	\$1,092	\$202
<b>Av spend per night Reg SA</b>	\$224	\$109	\$155	\$297	\$181
<b>Share of Regional SA</b>	3%	5%	1.3%	2%	<b>3%</b>

- 59 per cent of overnight visitors to the Eyre Peninsula are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$215 per night compared to VFR visitors who spend \$89 per night.
- Leisure overnight visitors spent \$239 million for the year, making up 54 per cent of all overnight expenditure.

## SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO EYRE PENINSULA



National Visitor Survey data shows us that January and October are the strongest months for visitation in the Eyre Peninsula.

January and October are busy with the school holidays and the long weekends.

March and April are usually strong on the back of the long weekend and the school holidays.

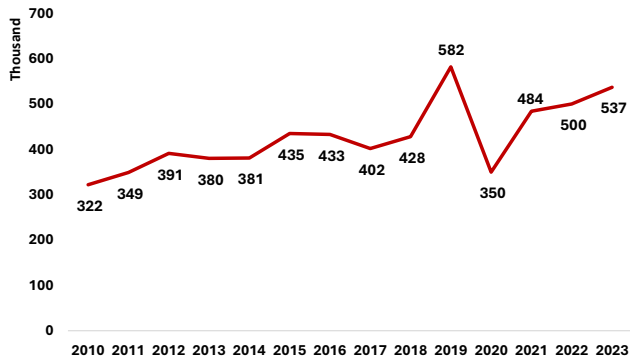
July was strong with the school holidays.

# EYRE PENINSULA REGIONAL PROFILE

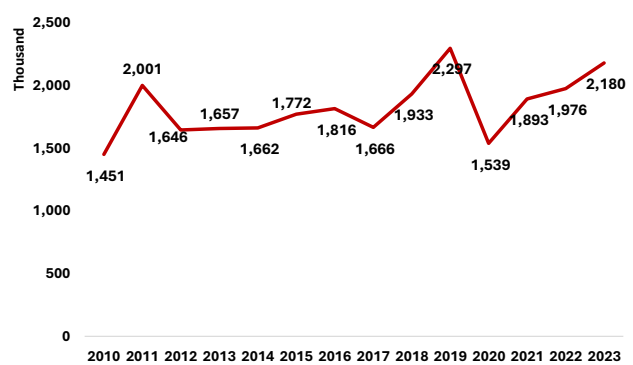


## TOTAL OVERNIGHT VISITATION 2010 - 2022

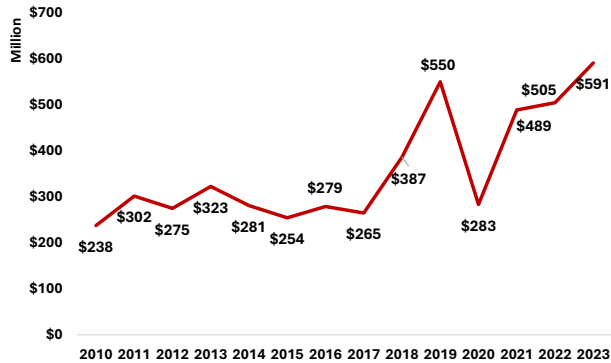
**VISITORS EYRE PENINSULA 2010 - 2023 - International and Domestic**



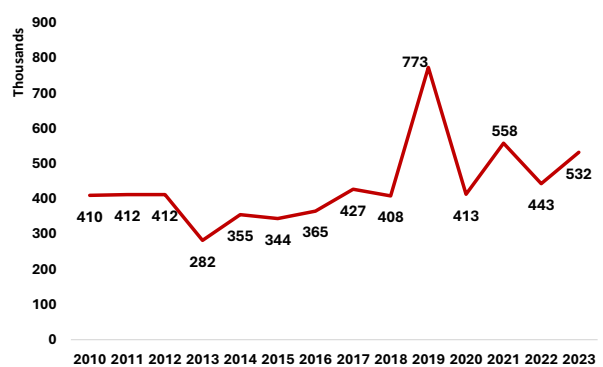
**NIGHTS EYRE PENINSULA 2010 - 2023 - International and Domestic**



**TOTAL EXPENDITURE EYRE PENINSULA 2010 - 2023 - International and Domestic**



**DAY TRIPS EYRE 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 Coorong	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%
<b>South Australia</b>	<b>7,835,000</b>	<b>-9%</b>	<b>\$10,140,000,000</b>	<b>25%</b>

# EYRE PENINSULA REGIONAL PROFILE



## EYRE PENINSULA TOURISM LISTINGS

Category	# Listings
Accommodation	179
Attraction	133
General Services	32
Tour	29
Food & Drink	28
Event	16
Hire	10
Information Services	5
Destination Information	4
Journey	2
<b>Grand Total</b>	<b>437</b>

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](https://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](https://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)

## EYRE PENINSULA AUSTRALIAN TOURISM DATA WAREHOUSE LEADS

# 108,000

YEAR END DECEMBER 2023

### ACCOMMODATION LEADS

49,000  
46%

### FOOD & DRINK LEADS

2,000  
2%

### TOUR LEADS

38,000  
35%

### \*OTHER LEADS

19,000  
17%

#### TOP 5

- DISCOVERY PARKS STREAKY BAY FORESHORE
- CAMEL BEACH HOUSE
- CEDUNA FORESHORE CARAVAN PARK
- CEDUNA SHELLY BEACH CARAVAN PARK AND BEACHFRONT VILLAS
- WUDINNA HOTEL MOTEL

#### TOP 5

- OYSTER HQ
- PETER TEAKLE WINES
- 1802 OYSTER BAR
- HOTEL BOSTON
- THE FRESH FISH PLACE RETAIL STORE & SEAFOOD EATERY

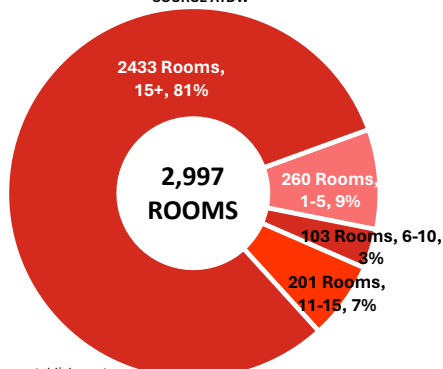
#### TOP 5

- CALYPSO STAR CHARTERS
- CUTTYS TOURS
- COFFIN BAY OYSTER FARM & TASTING TOURS
- BAIRD BAY OCEAN ECO EXPERIENCE
- EXPERIENCE COFFIN BAY OYSTER FARM TOURS

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

## ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

### ROOMS IN THE EYRE PENINSULA SOURCE ATDW



Rooms refers to rooms per establishment

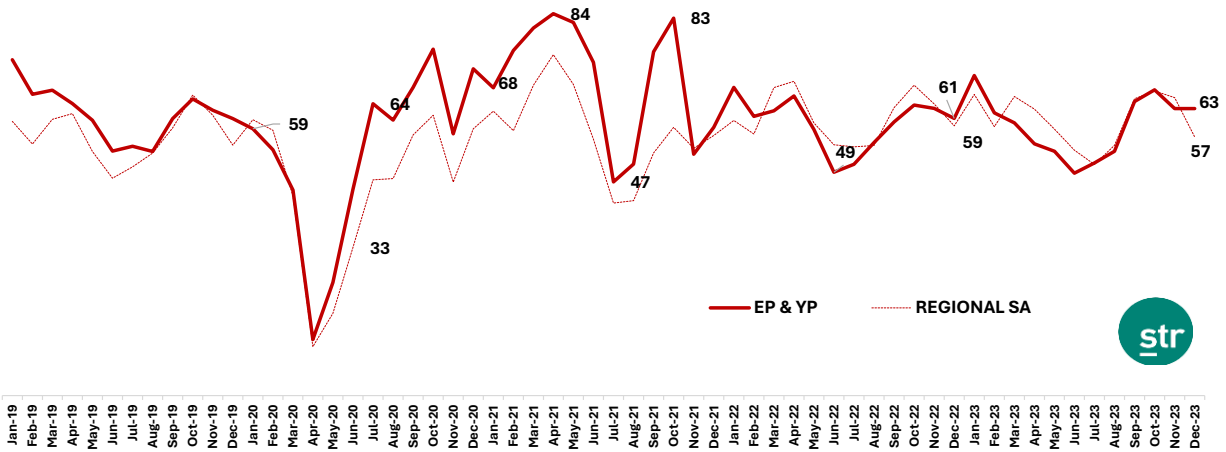
- Currently there are 177 establishments in the Eyre Peninsula that accommodate guests.
- These 177 establishments account for 2,997 rooms across the region.
- 81 per cent of rooms fall into establishment with 15 or more rooms.
- 9 per cent of rooms fall into the 1-5 room establishments.

# EYRE PENINSULA REGIONAL PROFILE



## ACCOMMODATION STR

### ACCOMMODATION OCCUPANCY EP & YP

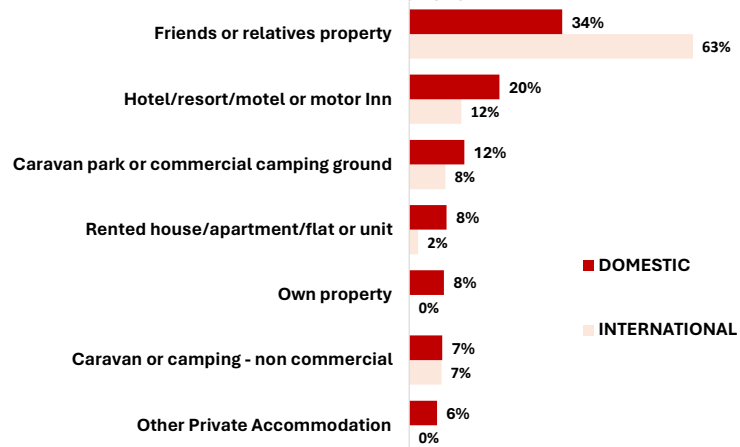


- The EP & YP regions include accommodation data for the Eyre Peninsula and the Yorke Peninsula. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the EP & YP regions was 62 per cent, this fell to 53 per cent in 2020, rose to 69 per cent in 2021, 60 per cent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

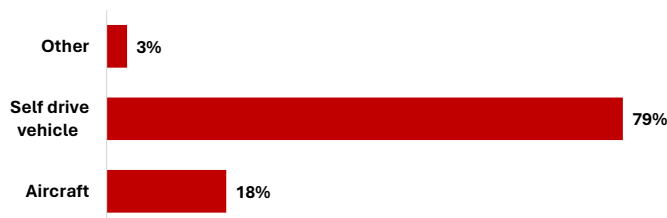
## VISITOR USE OF ACCOMMODATION

### ACCOMMODATION USED IN EYRE PENINSULA FOR DOMESTIC AND INTERNATIONAL VISITORS

- 34 per cent of domestic overnight visitor nights in the Eyre Peninsula are spent with Friends or Relatives property compared to the international average of 63 per cent.
- 20 per cent of domestic visitors stayed in a Hotel/resort/motel or motor inn. This compares to the international average of 12 per cent.
- 19% of domestic visitors to the Eyre Peninsula stay in a caravan park.



## TRANSPORT



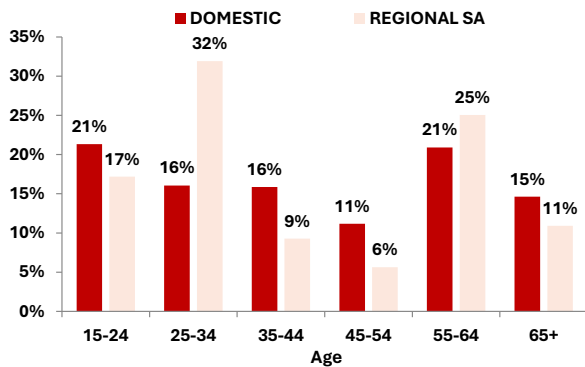
- The main method of transport used on trips to the Eyre Peninsula was a self drive vehicle.
- 79% of visitors used this type of transport.
- 18% of people used an aircraft to get to the region.

# EYRE PENINSULA REGIONAL PROFILE



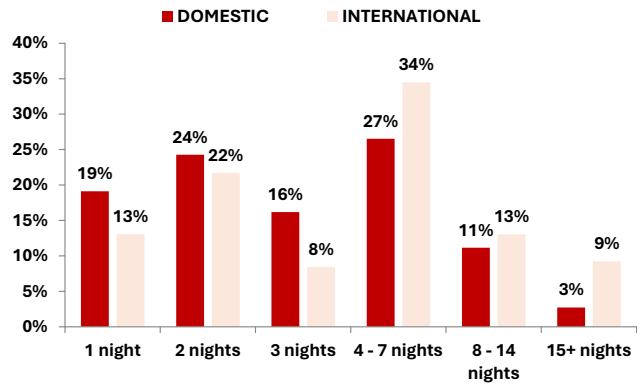
## VISITOR PROFILE

### AGE OF VISITORS TO EYRE PENINSULA



- The 35-54 and 65+ age brackets exhibited a stronger performance in the local market.
- The 25-34 and 55-64 age groups show a higher proportion of international visitors.

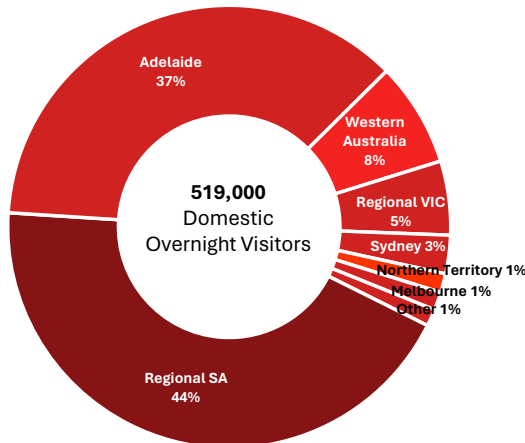
### LENGTH OF VISIT TO EYRE PENINSULA



- 43 per cent of domestic overnight visitors like to stay 1 to 2 nights.
- 34 per cent of visitors stayed 4-7 nights.

## VISITOR ORIGIN

### ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO EYRE PENINSULA

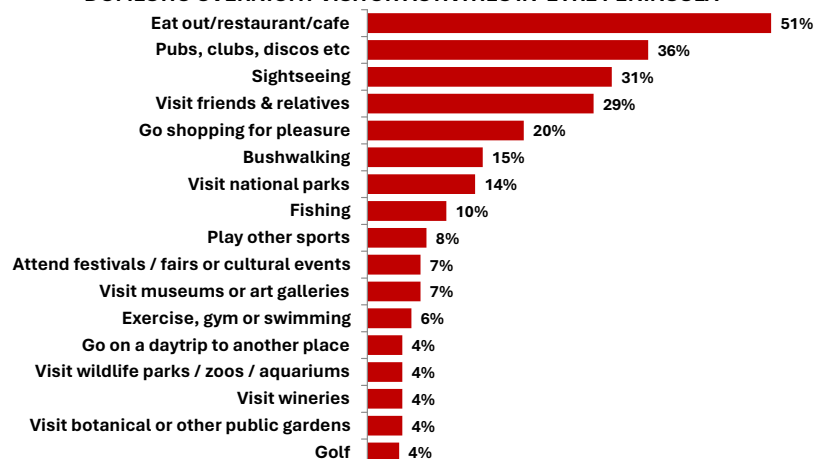


- Western Australia at 8 per cent and Victoria at 6 per cent are the Eyre Peninsula biggest interstate overnight domestic markets.
- Regional South Australia contributes 44 per cent of visitors to the Eyre Peninsula.
- 37 per cent of visitors come from Adelaide.

## VISITOR ACTIVITIES

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

### DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN EYRE PENINSULA



# EYRE PENINSULA REGIONAL PROFILE



## REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2021-22, the tourism industry contributed an estimated \$405 million to the Eyre Peninsula regional economy and directly employed approximately 2,100 people.

### Employment

- 2,100 jobs for people employed directly by the tourism industry, 700 indirect jobs and a total employment impact of 2,900 people.

### Gross Value Added (GVA)

- \$107 million and \$96 million in direct and indirect tourism GVA, and \$203 million in total tourism GVA.

### Gross Regional Product (GRP)

- \$116 million and \$123 million in direct and indirect tourism GRP and \$240 million in total tourism GRP.

#### Tourism Consumption

2021-22 Tourism products - directly consumed	
• Takeaway and restaurant meals	20%
• Shopping (including gifts and souvenirs)	15%
• 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 Tourism Industries - 2,100 directly employed	
• Cafes, restaurants and takeaway food services	39%
• Accommodation	20%
• Retail trade	15%
• Clubs, pubs, taverns and bars	8%
• Air, water and other transport	8%
• Travel agency and tour operator services	5%
• All other industries	2%
• Other sports and recreation services	2%

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 Eyre Peninsula is perceived as a hidden gem of South Australia.
  - Port Lincoln and Coffin Bay are more widely known, the rest of the region is largely seen as untapped, unspoilt and therefore something to see.
  - The major barrier to driving visitation to the Eyre Peninsula is the effort it takes to get there, with a perception that the re is nothing to do along the way, and that the effort (cost, time) is not worth it.
  - We need to communicate the reward of visiting among those most interested by the value proposition of the Eyre Peninsula.
- To drive increased visitation and expenditure, we recommend the Eyre Peninsula:

<b>Find a way to make the drive part of the trip. The destination has to be worth the trip</b>	Making the journey a part of the holiday may minimise the barrier of the effort required to get there. Develop itineraries for interstate and intrastate travellers incorporating the journey as part of the trip. Highlight attractions and sights along the way that will make the trip there more worthwhile, and seem less of an effort. Similarly, consider itineraries based on where people will start... if you start in Port Lincoln, what's the ideal route to see as much as possible without backtracking?
<b>Focus on travellers who want to escape, disconnect and experience a place different to home</b>	The Eyre Peninsula is not a place for everyone. Although the beaches are incredible, the accommodation stock is a barrier, as is the distance. The travellers that are most likely to be attracted to the region are couples or families looking to escape the everyday – they might not mind a caravan park or holiday house, and want to see and feel different, by disconnecting and getting far away from. They have to be prepared to do away with some creature comforts, but the benefits they'll reap will be worth it.
<b>Look at winter tourism</b>	People would stay a minimum of 5 days, ideally 7-10 days in and around the Eyre Peninsula, however typically in summer only. The value of the region is perceived as diminishing when the colder weather sets in and typical beachside activities are perceived as less feasible and enjoyable. Consider promoting activities or events that are actually better in winter – is it a type of fishing, is it the most delicious oysters? Use this benefit to promote urgency towards off-season travel to the region.
<b>Region appeals to...</b>	<ul style="list-style-type: none"> <li>– Adventurers</li> <li>– Caravanners and campers</li> <li>– Beach only</li> <li>– Travelling with pets</li> </ul>

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