

EYRE PENINSULA REGIONAL PROFILE

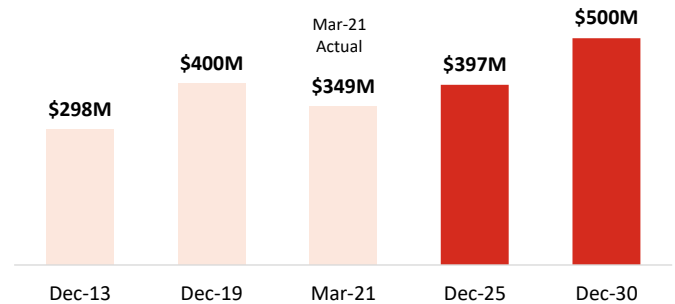


OVERVIEW

ALL DATA BASED ON THE YEAR END MARCH 2021 - FULL YEARS WORTH OF COVID AFFECTED DATA

EYRE PENINSULA

- Currently the Eyre Peninsula contributes \$349 million to the year end March 2021 South Australian expenditure of \$4.4 billion.
- The Eyre Peninsula has achieved 88 per cent of their 2025 target of \$397 million and 70 per cent of their 2030 target of \$499 million.



ANNUAL VISITOR SUMMARY YEAR END MARCH 2021

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	350,000	32,000	382,000	-	382,000
%	92%	8%	100%	0%	100%
% Across all regions	90%	10%	100%	0%	100%
Share of Regional SA	9%	7%	9%	0%	9%
Nights	1,390,000	344,000	1,734,000	-	1,734,000
%	80%	20%	100%	0%	100%
% Across all regions	82%	18%	100%	0%	100%
Share of Regional SA	11%	13%	12%	0%	12%
ALOS	4.0	10.8	4.5	-	4.5
ALOS Regional SA	3.2	6.0	3.5	-	3.5
Total Expenditure					\$349,000,000
Overnight Expenditure	\$236,000,000	\$24,000,000	\$260,000,000	\$0	\$260,000,000
Day Trip Expenditure					\$89,000,000
Domestic Day Trips					551,000

- The Eyre Peninsula saw 382,000 domestic overnight visitors for the year end March 2021.
- 92 per cent of overnight visitors were from intrastate and 8 per cent from interstate.
- The 350,000 intrastate overnight visitors stayed 1.4 million nights with an average length of stay of 4.0 nights.
- There were 32,000 interstate overnight visitors who stayed 344,000 nights with an average length of stay of 10.8 nights
- There have been no international arrivals with the borders closed.
- 551,000 day trips were taken to the Eyre Peninsula for the year with spend of \$89 million.

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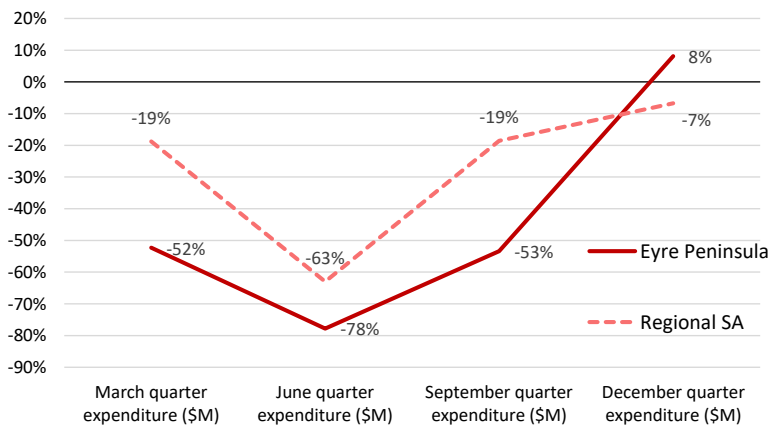


PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	222,000	75,000	82,000	14,000	382,000
%	58%	20%	21%	4%	100%
% Across all regions	56%	22%	18%	5%	100%
Share of Regional SA	9%	7%	9%	0%	9%
Nights	1,195,000	289,000	228,000	21,000	1,734,000
%	69%	17%	13%	1%	100%
% Across all regions	58%	18%	20%	3%	100%
Share of Regional SA	14%	11%	8%	4%	12%
Average Length of Stay	5.4	3.9	2.8	1.5	4.5
Expenditure					
Annual Expenditure	\$163,000,000	\$32,000,000	\$50,000,000	\$14,000,000	\$260,000,000
Av spend per night	\$136	\$111	\$219	\$667	\$150
Av spend per night Regional SA	\$213	\$126	\$132	\$511	\$191
Share of Regional SA	11%	14%	13%	21%	12%

- 78 per cent of overnight visitors to the Eyre Peninsula are leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$136 per night compared to VFR visitors who spend \$111 per night.
- Leisure overnight visitors spent \$243 million for the year, making up 70 per cent of all expenditure.

SPEND 2020 VERSUS 2019

CHANGE IN SPEND - 2020 COMPARED TO 2019



- March quarter 2020 prior to COVID-19 was down 52 per cent on the March quarter in 2019.
- The Eyre Peninsula saw expenditure fall 78 per cent for the June quarter in 2020 compared to June quarter in 2019.
- The September quarter saw a recovery from June, however still down 53 per cent on 2019.
- The December 2020 quarter was up 8 per cent compared to the December quarter in 2019.

EYRE PENINSULA REGIONAL PROFILE



EYRE PENINSULA TOURISM LISTINGS

Category	# Listings
ACCOMMODATION	158
ATTRACTION	129
TOUR	35
GENERAL SERVICE	35
EVENT	31
RESTAURANT	27
DESTINATION INFORMATION	8
HIRE	6
INFORMATION	5
TRANSPORT	1
Grand Total	435

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)

EYRE PENINSULA AUSTRALIAN TOURISM DATA WAREHOUSE LEADS

118,000

YEAR END MARCH 2021

ACCOMMODATION LEADS

64,000
55%

TOP 5

- DISCOVERY PARKS
STREAKY BAY FORESHORE
- CAMEL BEACH HOUSE
- PORT LINCOLN HOTEL
- PORT LINCOLN TOURIST
PARK
- SHELLEY ROCKS HOUSE

FOOD & DRINK LEADS

4,000
3%

TOP 5

- 1802 OYSTER BAR
- BEER GARDEN BREWING
- THE FRESH FISH PLACE FISH
MARKET CAFE
- DEL GIORNOS CAFE
RESTAURANT
- LANSE TUMBY CAFE

TOUR LEADS

29,000
25%

TOP 5

- COFFIN BAY OYSTER FARM
TASTING TOURS
- GAWLER RANGES WILDERNESS
SAFARIS
- BAIRD BAY OCEAN ECO
EXPERIENCE SWIM WITH
DOLPHINS AND SEA LIONS
- CALYPSO STAR CHARTERS
- ADVENTURE BAY CHARTERS

*OTHER LEADS

20,000
17%

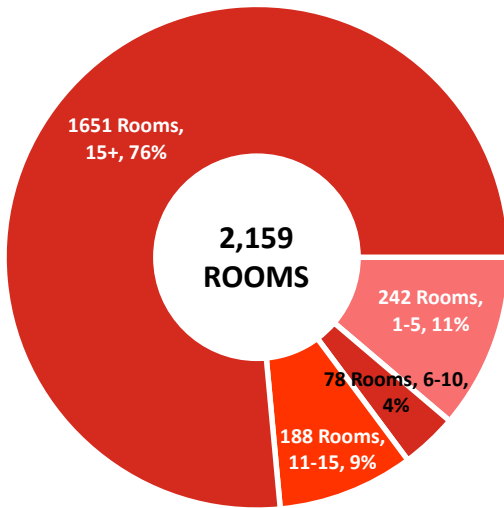
* Other refers to leads for events, destination information, attractions, general services, hire and transport

EYRE PENINSULA REGIONAL PROFILE



ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS IN THE EYRE PENINSULA SOURCE ATDW



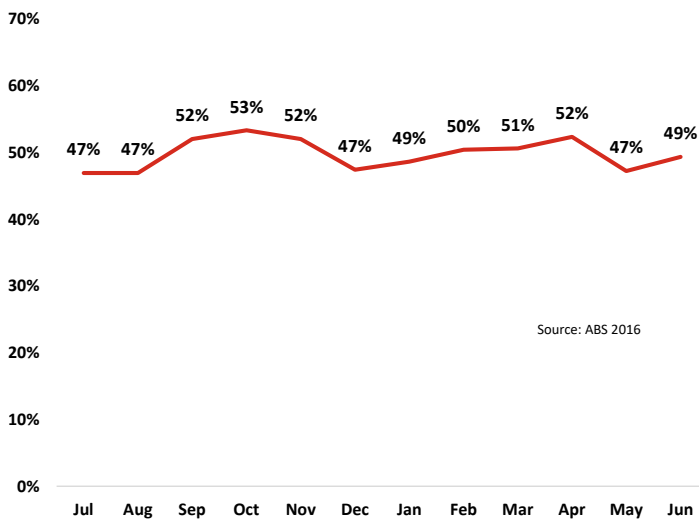
- Currently there are 157 establishments on the Eyre Peninsula that accommodate guests.
- These 157 establishments account for 2,159 rooms ranging from 1 room to over 50.
- 76 per cent of rooms fall into establishment with 15 or more rooms.
- 11 per cent of rooms fall into the 1-5 room establishments.

ACCOMMODATION SUPPLY

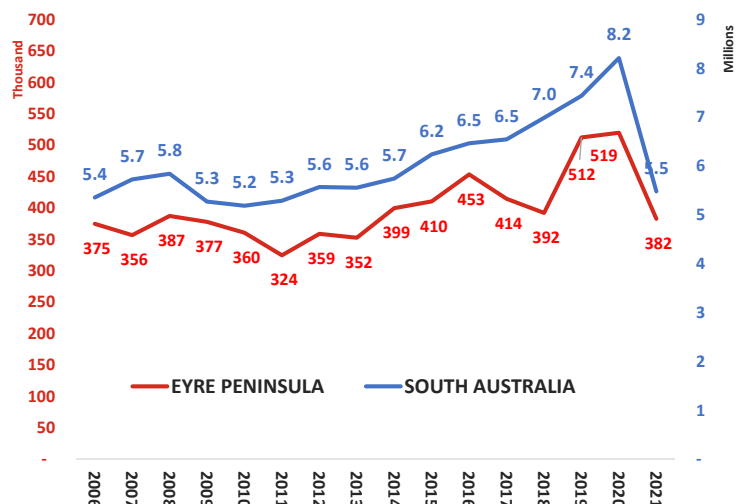
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	26
Rooms	987
Occupancy	50%
Takings	\$21,300,000

- Average occupancy for the year is 50 per cent over 26 establishments and 987 rooms.
- The peak month for the year is October with occupancy of 53 per cent.
- Low point of the year comes in the Winter months with occupancy on average dropping to 48 per cent.

MONTHLY OCCUPANCY RATES YEAR END JUNE 2016 - EYRE PENINSULA



TOTAL OVERNIGHT VISITATION TO EYRE PENINSULA & SOUTH AUSTRALIA



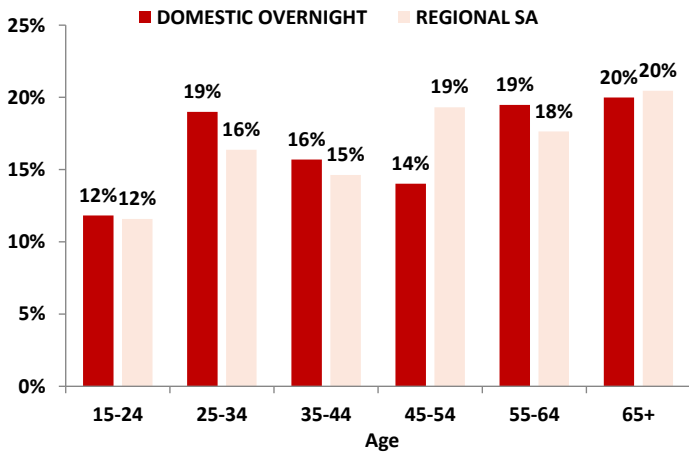
Note: Fluctuations can occur in visitation data due to small sample sizes. Prior regional profiles used data averaged over three years to smooth these fluctuations.

EYRE PENINSULA REGIONAL PROFILE



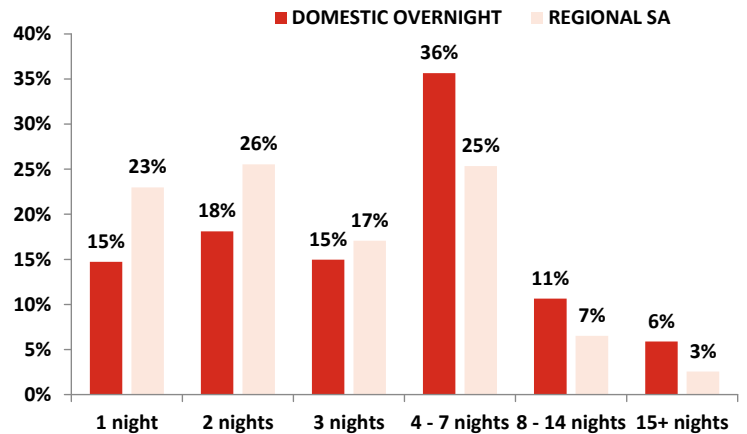
VISITOR PROFILE

AGE OF VISITORS TO EYRE PENINSULA



- Domestically there is a peak in 25-34 age group at 19 per cent.
- Growth has come from the 35-44 age group where we see 16 per cent of visitors, this is up on the prior year result of 13 per cent.

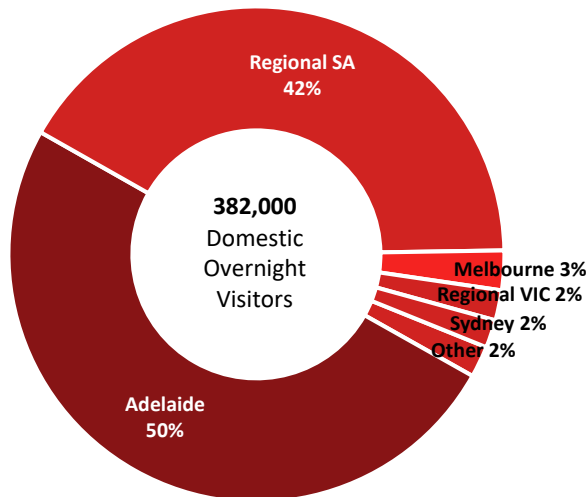
LENGTH OF VISIT TO EYRE PENINSULA



- 36 per cent of visitors prefer to stay between 4 and 7 nights, above the regional average and also higher than the previous year of 31 per cent.
- 33 per cent of Domestic visitors like to stay 1 to 2 nights, well below the regional South Australian average of 49 per

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO EYRE PENINSULA



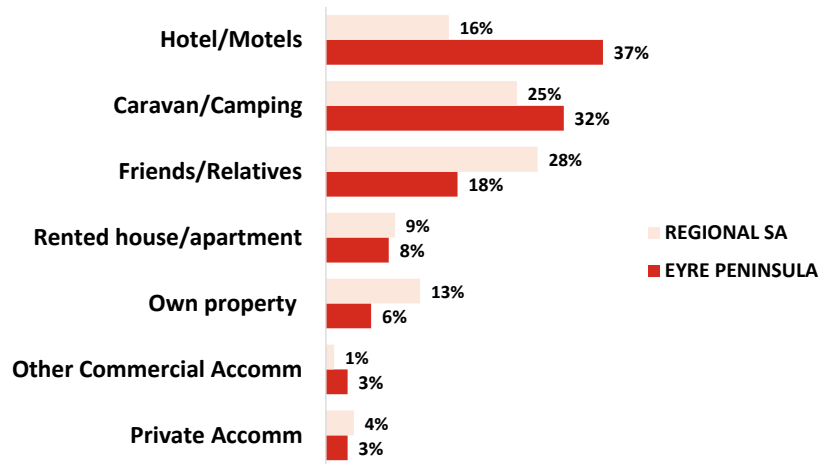
- Victoria and Sydney each accounted for 5 per cent and 2 per cent of visitors to the Eyre Peninsula. Pre COVID Western Australia at 9 per cent and Victoria at 7 per cent were the Eyre Peninsula's biggest Interstate Markets
- Regional South Australia contributes 42 per cent of visitors to the Eyre Peninsula.
- 50 per cent of visitors come from Adelaide, however prior to COVID this was 34 per cent.

EYRE PENINSULA REGIONAL PROFILE



VISITOR USE OF ACCOMMODATION

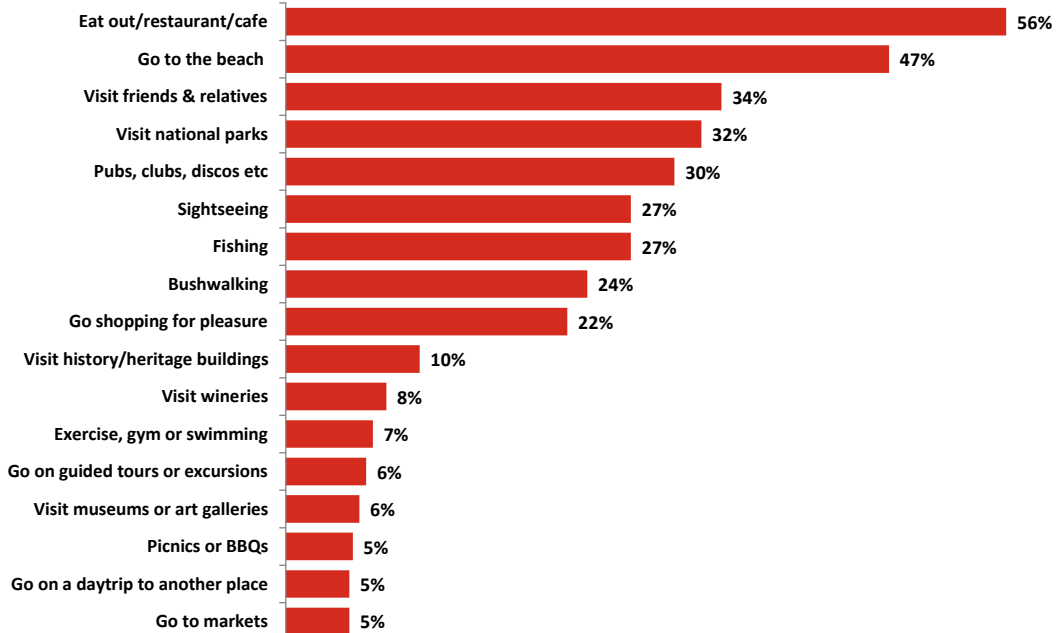
ACCOMMODATION USED IN EYRE PENINSULA FOR DOMESTIC VISITORS



- 55 per cent of domestic visitor nights in the Eyre Peninsula are spent in Hotels or motels. Pre Covid Hotels and Motels accounted for 18 per cent of nights.
- The Eyre Peninsula over indexes for Caravan and Camping when compared to regional South Australia.
- 18 per cent of visitors stayed in a friend or relatives property, below the regional South Australian average of 28 per cent.

VISITOR ACTIVITIES

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN EYRE PENINSULA



- The most popular activity when coming to the Eyre Peninsula is eating out at a restaurant or cafe.
- Other popular activities include going to the beach, visiting national parks, sight seeing, fishing, bush walking, visiting friends and relatives and visiting wineries.

EYRE PENINSULA

REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2019-20, the tourism industry contributed an estimated \$376 million to the Eyre Peninsula regional economy and directly employed approximately 2,000 people.

Employment

- 2,000 jobs for people employed directly by the tourism industry, 700 indirect jobs and a total employment impact of 2,700 people.

Gross Value Added (GVA)

- \$122 million and \$90 million in direct and indirect tourism GVA, and \$212 million in total tourism GVA.

Gross Regional Product (GRP)

- \$130 million and \$115 million in direct and indirect tourism GRP and \$245 million in total tourism GRP.

Tourism Consumption

2019–20

Tourism products - directly consumed

- 17% Long distance passenger transportation
- 16% Takeaway and restaurant meals
- 13% Shopping (including gifts and souvenirs)
- 11% Fuel (petrol, diesel)
- 10% Travel agency and tour operator services
- 7% Accommodation services
- 6% Food products

Tourism Employment

2019–20

Tourism Industries - 2,000 directly employed

- 32% - 642 - Cafes, restaurants and takeaway food services
- 16% - 319 - Retail trade
- 15% - 309 - Accommodation
- 9% - 184 - Travel agency and tour operator services
- 8% - 157 - Air, water and other transport
- 6% - 124 - Clubs, pubs, taverns and bars
- 4% - 84 - Road transport and transport equipment rental

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

REGIONAL INSIGHTS

Interstate

- Coast and seafood the cornerstones of appeal.
- Unique experiences around interaction with aquatic wildlife very appealing.

Intrastate

- Similar appeals to interstate with marine wildlife, scenery and seafood all clear winners.

International

- Viewing and engaging with local wildlife (both sea and land) hold strong appeal for the Eyre Peninsula.
- Uncrowded beaches also appeal.
- Dining on seafood higher for the eastern markets.

Regional Visitor Strategy Priorities

- The opportunity for the Eyre Peninsula is to capitalise on its pristine nature, immersive wildlife experiences and coastal lifestyle, to drive increased overnight stays from international and domestic visitors.
- The region needs to promote these competitive strengths.

Prepared by the South Australian Tourism Commission, March 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 March 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. 8635455001
Consumer Demand Product Testing Phase 1 - BDA Marketing