

YORKE PENINSULA

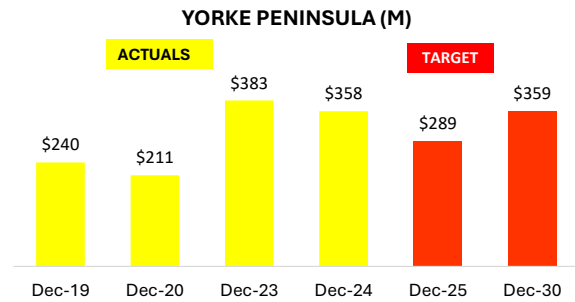
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2024

- Currently, the Yorke Peninsula contributes \$358 million to the year end December 2024 South Australian expenditure of \$9.8 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 2024

| ORIGIN | | | | | |
|--|---------------|--------------|----------------------|---------------|----------------------|
| | Intrastate | Interstate | Total Domestic | International | Total |
| Overnight Visits | 551,000 | 61,000 | 612,000 | 8,000 | 620,000 |
| % of visits | 89% | 10% | 99% | 1% | 100% |
| Share of Regional SA | 16% | 5% | 14% | 6% | 13% |
| % Across Regional SA | 73% | 24% | 97% | 3% | 100% |
| % Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international | | | | | |
| Nights | 1,782,000 | 199,000 | 1,980,000 | 192,000 | 2,172,000 |
| % of nights | 82% | 9% | 91% | 9% | 100% |
| Share of Regional SA | 19% | 4% | 14% | 7% | 13% |
| % Across Regional SA | 57% | 28% | 85% | 15% | 100% |
| % Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international | | | | | |
| Average Length of Stay | 3.2 | 3.3 | 3.2 | 24 | 3.5 |
| ALOS Regional SA | 2.9 | 4.2 | 3.2 | 20 | 3.7 |
| Total Expenditure | | | | | \$358,000,000 |
| Overnight Expenditure | \$221,000,000 | \$23,000,000 | \$244,000,000 | \$21,000,000 | \$265,000,000 |
| Day Trip Expenditure | | | | | \$93,000,000 |
| Domestic Day Trips | | | | | 725,000 |

- The Yorke Peninsula saw 620,000 overnight visitors for the year end December 2024.
- 89 per cent of overnight visitors were from intrastate, 10 per cent from interstate and 1 per cent from overseas.
- The 551,000 intrastate overnight visitors stayed 1.8 million nights with an average length of stay of 3.2 nights.
- There were 61,000 interstate overnight visitors who stayed 199,000 nights with an average length of stay of 3.3 nights
- The region saw 8,000 international visitors with an average length of stay of 24 nights and spend of \$21 million.
- 725,000 day trips were taken to and within the Yorke Peninsula for the year with spend of \$93 million.

ALOS = Average Length of Stay

YORKE PENINSULA

REGIONAL PROFILE



PURPOSE

| | Holiday | VFR | Business | Other | Total |
|-------------------------|---------|---------|----------|-------|----------------|
| Overnight Visits | 421,000 | 117,000 | 77,000 | 9,000 | 620,000 |
| % of visits | 68% | 19% | 12% | 1% | 100% |
| Share of Regional SA | 17% | 11% | 9% | 3% | 13% |
| % Across all regions | 53% | 24% | 19% | 7% | 100% |

| | | | | | |
|----------------------|-----------|---------|---------|--------|------------------|
| Nights | 1,528,000 | 334,000 | 244,000 | 66,000 | 2,172,000 |
| % of nights | 70% | 15% | 11% | 3% | 100% |
| Share of Regional SA | 18% | 8% | 8% | 4% | 13% |
| % Across all regions | 49% | 25% | 17% | 9% | 100% |

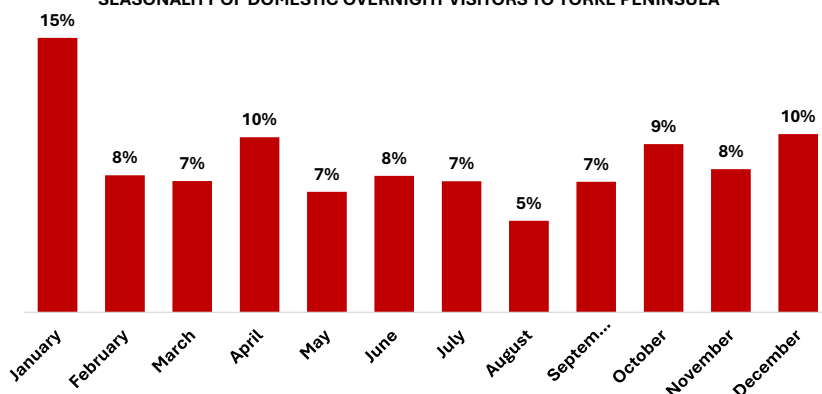
| | | | | | |
|-------------------------------|-----|-----|-----|-----|------------|
| Average Length of Stay | 3.6 | 2.9 | 3.2 | 7.3 | 3.5 |
|-------------------------------|-----|-----|-----|-----|------------|

| | | | | | |
|---------------------------|---------------|--------------|--------------|--------------|----------------------|
| Expenditure | | | | | |
| Annual Overnight Exp | \$188,000,000 | \$40,000,000 | \$27,000,000 | \$10,000,000 | \$265,000,000 |
| Expenditure 2019 | \$116,000,000 | \$29,000,000 | \$16,000,000 | \$17,000,000 | \$177,000,000 |
| Av spend per night | \$123 | \$120 | \$111 | \$152 | \$122 |
| Av spend per night Reg SA | \$190 | \$103 | \$176 | \$218 | \$169 |
| Share of Regional SA | 3% | 5% | 1.3% | 2% | 3% |

- 87 per cent of overnight visitors to the Yorke Peninsula are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$123 per night compared to VFR visitors who spend \$120 per night.
- Leisure overnight visitors spent \$228 million for the year, making up 86 per cent of all overnight expenditure.
- There are 77,000 business visitors who stay 244,000 nights with spend of \$27 million.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO YORKE PENINSULA



Source: NVS year end December 2024

- National Visitor Survey data shows us that in 2024 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.

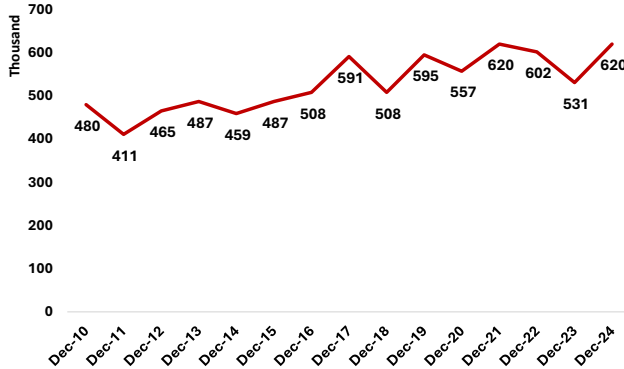
YORKE PENINSULA

REGIONAL PROFILE

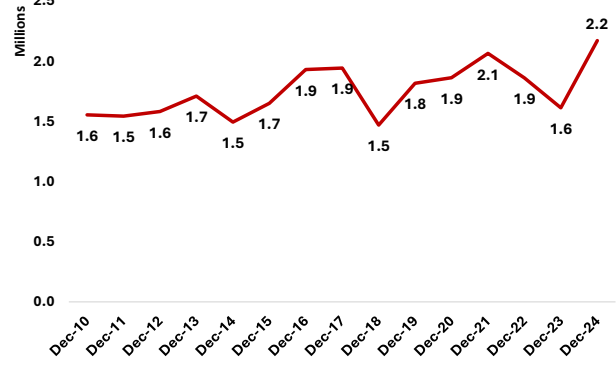


TOTAL OVERNIGHT VISITATION 2010 - 2024

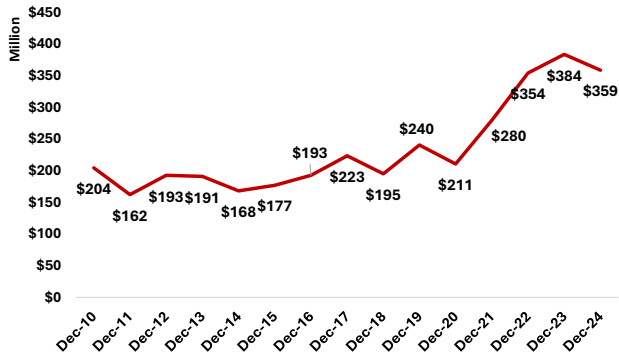
VISITORS YORKE PENINSULA 2010 - 2024 - INTERNATIONAL & DOMESTIC



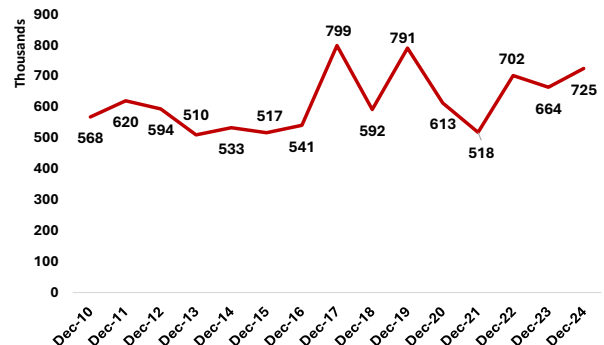
NIGHTS YORKE PENINSULA 2010 - 2024 - INTERNATIONAL & DOMESTIC



TOTAL EXPENDITURE YORKE PENINSULA 2010 - 2024 - INTERNATIONAL & DOMESTIC



DAY TRIPS YORKE PENINSULA 2010 - 2024 - 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-24 | Change on Dec-19 | Dec-24 | Change on Dec-19 |
| Adelaide | 3,933,000 | 0% | \$5,800,000,000 | 29% |
| Adelaide Hills | 200,000 | -12% | \$192,000,000 | -7% |
| Barossa | 244,000 | -23% | \$287,000,000 | 27% |
| Clare Valley | 222,000 | 9% | \$162,000,000 | 38% |
| Eyre Peninsula | 455,000 | -22% | \$455,000,000 | -17% |
| Fleurieu Peninsula | 727,000 | -19% | \$519,000,000 | -7% |
| Flinders Ranges and Outback | 699,000 | -25% | \$603,000,000 | 17% |
| Kangaroo Island | 182,000 | -12% | \$197,000,000 | 4% |
| Limestone Coast | 807,000 | 4% | \$662,000,000 | 57% |
| Murray River, Lakes and Coorong | 396,000 | -12% | \$223,000,000 | -20% |
| Riverland | 464,000 | 8% | \$236,000,000 | 21% |
| Yorke Peninsula | 620,000 | 4% | \$358,000,000 | 49% |
| Regional SA | 4,615,000 | -11% | \$3,950,000,000 | 11% |
| South Australia | 8,034,000 | -6% | \$9,800,000,000 | 21% |

YORKE PENINSULA

REGIONAL PROFILE



YORKE PENINSULA TOURISM LISTINGS

| Category | # Listings |
|-------------|------------|
| ACCOMM | 389 |
| ATTRACTION | 233 |
| GENSERVICE | 101 |
| DESTINFO | 44 |
| RESTAURANT | 30 |
| EVENT | 29 |
| TOUR | 15 |
| HIRE | 7 |
| INFO | 6 |
| TRANSPORT | 2 |
| JOURNEY | 1 |
| Grand Total | 857 |

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

170,000

YEAR END DECEMBER 2024

ACCOMMODATION LEADS

122,000
72%

FOOD & DRINK LEADS

4,000
2%

TOUR LEADS

5,000
3%

*OTHER LEADS

40,000
23%

TOP 5

- PORT VINCENT FORESHORE CARAVAN PARK
- PORT HUGHES TOURIST PARK
- MARION BAY CARAVAN PARK
- INNES NATIONAL PARK CAMPGROUNDS
- STANSBURY FORESHORE CARAVAN PARK

TOP 5

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

TOP 5

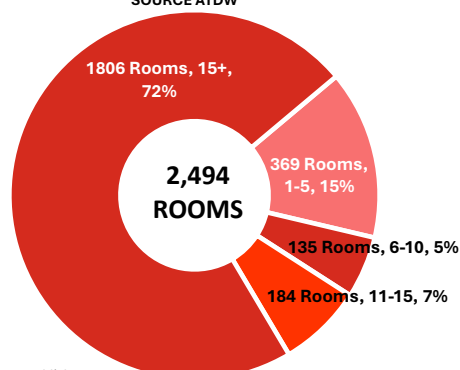
- BOND STORE WALLAROO
- SUNNY HILL DISTILLERY
- WATSACOWIE BREWERY
- COOPERS ALEHOUSE AT WALLAROO
- BARLEY STACKS WINES

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

ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS ON THE YORKE PENINSULA

SOURCE ATDW



Rooms refers to rooms per establishment

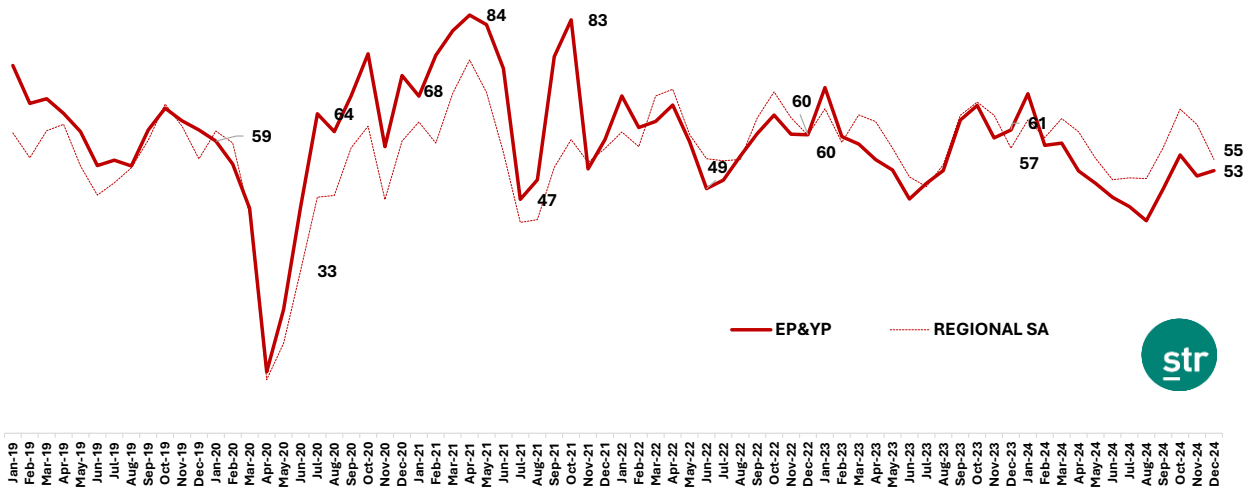
- Currently there are 389 establishments on the Yorke Peninsula that accommodate guests.
- These 389 establishments account for 2,494 rooms across the region.
- 72 per cent of rooms fall into establishment with 15 or more rooms.
- 15 per cent of rooms fall into the 1-5 room establishments.

YORKE PENINSULA REGIONAL PROFILE



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY EYRE AND YORKE PENINSULA

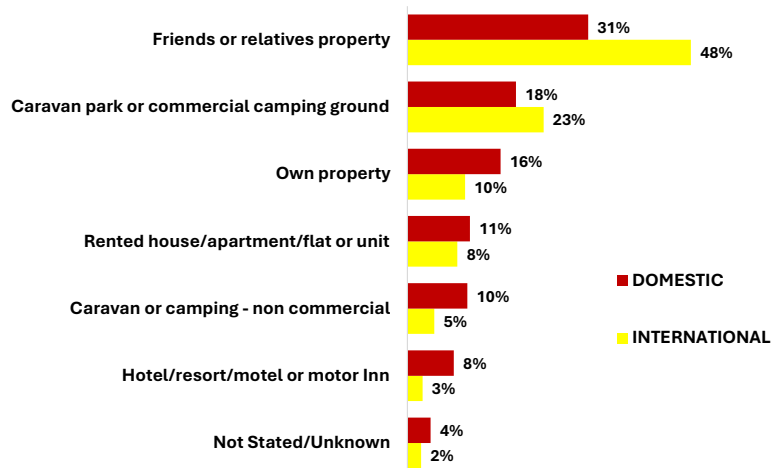


- The EP & YP regions include accommodation data for the Eyre Peninsula and the Yorke Peninsula. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the EP & YP regions was 62 per cent, this fell to 53 per cent in 2020, rose to 69 per cent in 2021, 60 per cent in 2022, 58 per cent in 2023 and 53 per cent in 2024.

VISITOR USE OF ACCOMMODATION

- 31 per cent of domestic overnight visitor nights to the Yorke Peninsula are spent with Friends or Relatives compared to the international average of 48 per cent.
- 8 per cent of domestic and 3 per cent of international visitors stayed in a Hotel/resort/motel or motor inn.
- 28 per cent of domestic and international visitors to the Yorke Peninsula stay in a caravan park.

ACCOMMODATION USED IN YORKE PENINSULA FOR DOMESTIC VISITORS



TRANSPORT - DOMESTIC OVERNIGHT



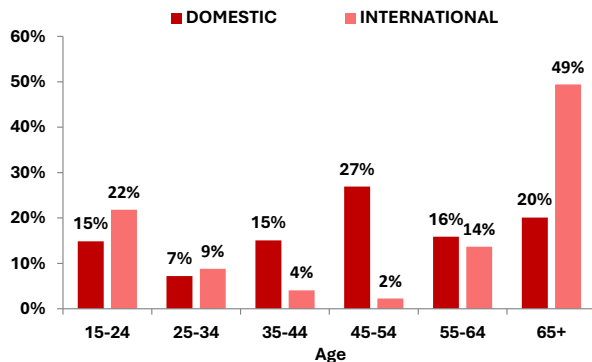
- The main method of transport used on trips to the Yorke Peninsula was self drive.
- 98 per cent travel to the region is through self drive.

YORKE PENINSULA REGIONAL PROFILE



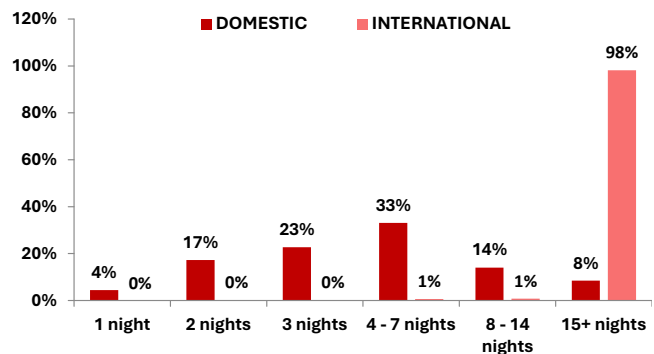
VISITOR PROFILE

AGE OF VISITORS TO YORKE PENINSULA



- In the domestic market the 45-54 is the strongest age group with 27 per cent of visitors.
- The International market is strongest for the 65+ age group with 49 per cent of all visits.

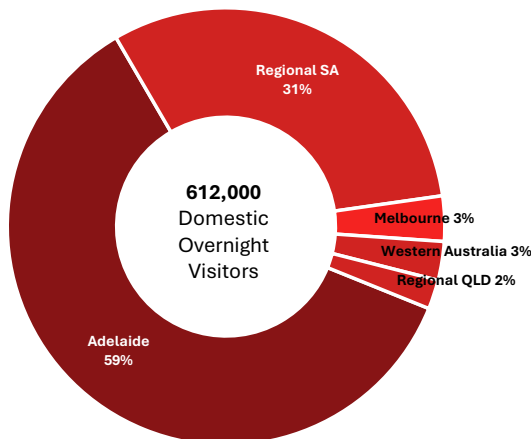
LENGTH OF VISIT TO YORKE PENINSULA



- 44 per cent of domestic overnight visitors like to stay 1 to 3 nights. Domestic market also strong in the 4-7 nights with 33%.
- 98 per cent of international visitors stay 15+ nights. This is due to employment in the region.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO YORKE PENINSULA

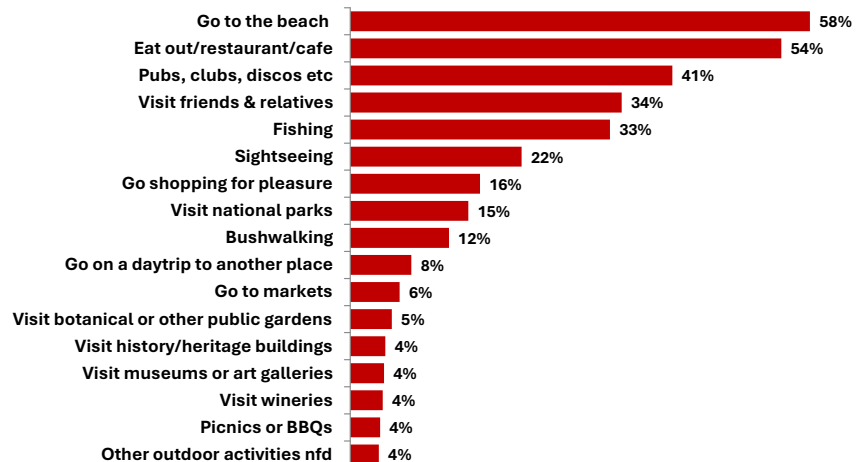


- Victoria at 3 per cent is the Yorke Peninsula biggest interstate overnight domestic markets.
- Regional South Australia contributes 31 per cent of visitors to the Yorke Peninsula.
- 59 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

- The most popular activity when coming to the Yorke Peninsula is to go to the beach followed by eating out at a restaurant or cafe.
- Other popular activities include 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 2023-24, the tourism industry contributed an estimated \$468 million to the Yorke Peninsula regional economy and directly employed 1,600 people.

Employment

- 1,600 jobs for people employed directly by the tourism industry, 800 indirect jobs and a total employment impact of 2,400 people.

Gross Value Added (GVA)

- \$86 million and \$105 million in direct and indirect tourism GVA, and \$191 million in total tourism GVA.

Gross Regional Product (GRP)

- \$103 million and \$128 million in direct and indirect tourism GRP and \$231 million in total tourism GRP.

Tourism Consumption

2023-24

Tourism products - directly consumed

- Takeaway and restaurant meals 17%
- Long distance passenger transportation 16%
- Fuel (petrol, diesel) 14%
- Actual and imputed rent on dwellings 10%
- Shopping (including gifts and souvenirs) 10%
- Accommodation services 8%
- Food products 6%
- Alcoholic beverages and other beverages 6%

Tourism Employment

2023-24

Tourism Industries - 1,600 directly employed

- Cafes, restaurants and takeaway food services 45%
- Accommodation 20%
- Retail trade 16%
- Clubs, pubs, taverns and bars 9%
- Road transport and transport equipment rental 3%
- Air, water and other transport 2%
- All other industries 2%
- Travel agency and tour operator services 2%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2024

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 2024

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 2024.

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