

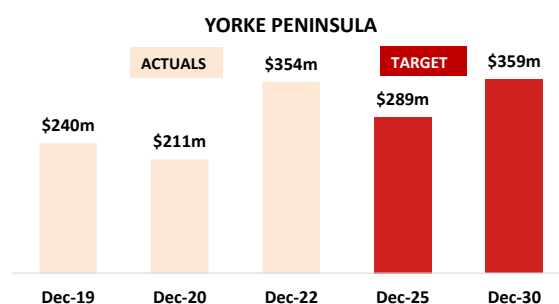
YORKE PENINSULA REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2022

- Currently the Yorke Peninsula contributes \$354 million to the year end December 2022 South Australian expenditure of \$8.3 billion.
- The Yorke Peninsula has achieved 100 per cent of their 2025 target of \$289 million and 99 per cent of their 2030 target of \$359 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2022

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	510,000	90,000	600,000	2,000	602,000
%	85%	15%	100%	0%	100%
<i>Share of Regional SA</i>	15%	9%	13%	4%	13%
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<i>% Across Regional SA</i>	76%	22%	99%	1%	100%
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Nights	1,480,000	367,000	1,846,000	16,000	1,862,000
%	80%	20%	99%	1%	100%
<i>Share of Regional SA</i>	14%	7%	12%	2%	11%
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<i>% Across Regional SA</i>	63%	32%	95%	5%	100%
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Average Length of Stay	2.9	4.1	3.1	8.0	3.1
ALOS Regional SA	3.0	5.1	3.5	16.1	3.7
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Total Expenditure					\$354,000,000
Overnight Expenditure	\$214,000,000	\$48,000,000	\$263,000,000	\$1,000,000	\$264,000,000
Day Trip Expenditure					\$90,000,000
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Domestic Day Trips					702,000

- The Yorke Peninsula saw 600,000 domestic overnight visitors for the year end December 2022.
- 85 per cent of overnight visitors were from intrastate and 15 per cent from interstate.
- The 510,000 intrastate overnight visitors stayed 1.5 million nights with an average length of stay of 2.9 nights.
- There were 90,000 interstate overnight visitors who stayed 367,000 nights with an average length of stay of 4.1 nights
- The region saw 2,000 international visitors with an average length of stay of 8.0 nights and spend of \$1.0 million.
- 702,000 day trips were taken to the Yorke Peninsula for the year with spend of \$90 million.

ALOS = Average Length of Stay

YORKE PENINSULA REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	410,000	134,000	53,000	5,000	602,000
%	68%	22%	9%	1%	100%
<i>Share of Regional SA</i>	17%	12%	6%	3%	13%
<i>% Across all regions</i>	53%	25%	19%	3%	100%

Nights	1,433,000	324,000	96,000	9,000	1,862,000
%	77%	17%	5%	0%	100%
<i>Share of Regional SA</i>	16%	9%	3%	1%	11%
<i>% Across all regions</i>	54%	21%	20%	4%	100%

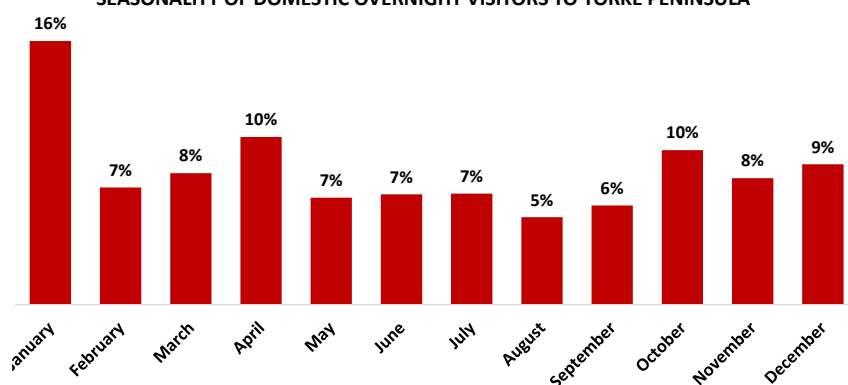
Average Length of Stay	3.5	2.4	1.8	1.8	3.1
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Expenditure					
Annual Expenditure	\$205,000,000	\$34,000,000	\$15,000,000	\$9,000,000	\$264,000,000
Expenditure 2019	\$116,000,000	\$29,000,000	\$16,000,000	\$17,000,000	\$177,000,000
Av spend per night	\$143	\$105	\$156	\$1,000	\$142
Av spend per night Reg SA	\$204	\$112	\$142	\$279	\$175
Share of Regional SA	3%	4%	0.4%	2%	3%

- 90 per cent of overnight visitors to the Yorke Peninsula are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$143 per night compared to VFR visitors who spend \$105 per night.
- Leisure overnight visitors spent \$239 million for the year, making up 91 per cent of all overnight expenditure.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO YORKE PENINSULA



Source: NVS year end December 2022

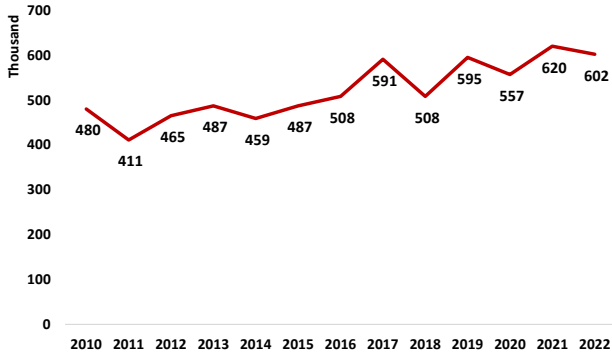
- National Visitor Survey data shows us that in 2022 January, April and October and December are the strongest months for visitation on the Yorke Peninsula.
- December and January are the summer school holidays.
- April and October are strong with Easter, the October long weekend and school holidays.

YORKE PENINSULA REGIONAL PROFILE

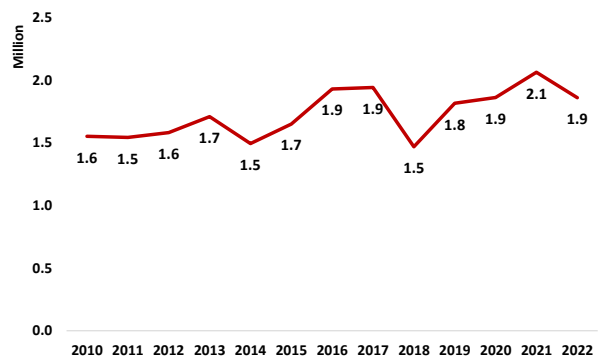


TOTAL OVERNIGHT VISITATION 2010 - 2022

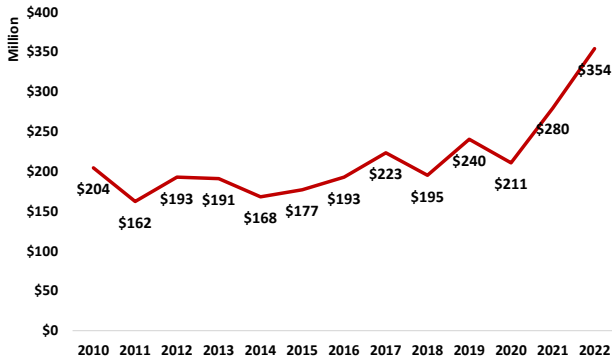
VISITORS YORKE PENINSULA 2010 - 2022 - International and Domestic



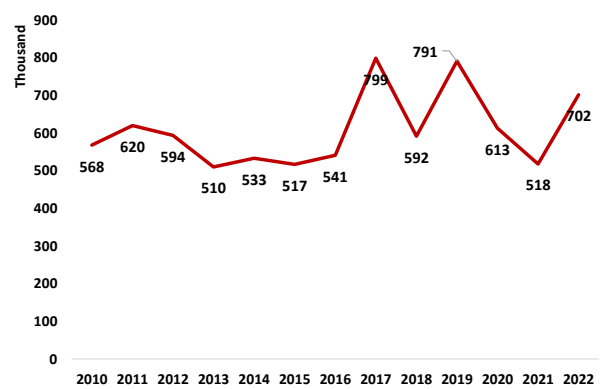
NIGHTS YORKE PENINSULA 2010 - 2022 - International and Domestic



TOTAL EXPENDITURE YORKE PENINSULA 2010 - 2022 - International and Domestic



DAY TRIPS YORKE PENINSULA 2010 - 2022 - 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-22	Change on Dec-19	Dec-22	Change on Dec-19
Adelaide	3,084,000	-21%	4,400,000	-3%
Adelaide Hills	155,000	-31%	225,000	9%
Barossa	319,000	1%	326,000	45%
Clare Valley	196,000	-4%	152,000	29%
Eyre Peninsula	500,000	-14%	503,000	-8%
Fleurieu Peninsula	783,000	-13%	665,000	19%
Flinders Ranges and Outback	835,000	-10%	576,000	12%
Kangaroo Island	171,000	-18%	187,000	-2%
Limestone Coast	622,000	-20%	441,000	5%
Murray River, Lakes and Coorong	381,000	-16%	201,000	-28%
Riverland	412,000	-4%	240,000	23%
Yorke Peninsula	602,000	1%	354,000	47%
Regional SA	4,568,000	-12%	3,980,000	12%
South Australia	7,291,000	-15%	8,340,000	3%

YORKE PENINSULA REGIONAL PROFILE



YORKE PENINSULA TOURISM LISTINGS

Category	# Listings
ACCOMM	322
ATTRACTION	216
GENSERVICE	107
EVENT	60
DESTINFO	46
RESTAURANT	29
TOUR	11
HIRE	7
INFO	6
TRANSPORT	2
JOURNEY	1
Grand Total	807

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

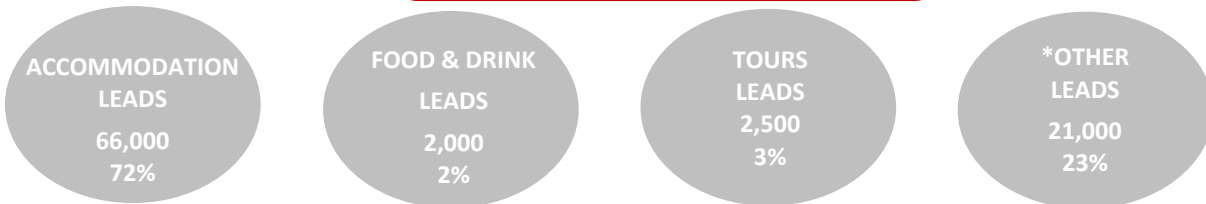
An **ATDW lead** is generated when a user performs one of the following actions when viewing an ATDW product page on southaustralia.com:

- 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

92,000

YEAR END DECEMBER 2022



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

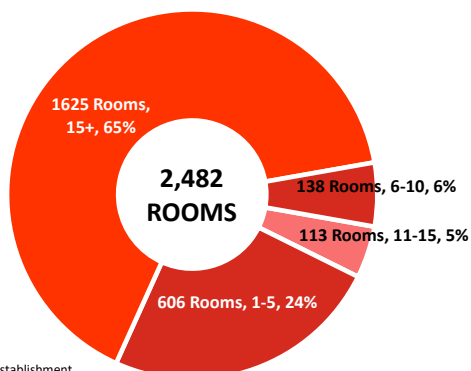
TOP 5

- 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 IN THE YORKE PENINSULA - SOURCE ATDW

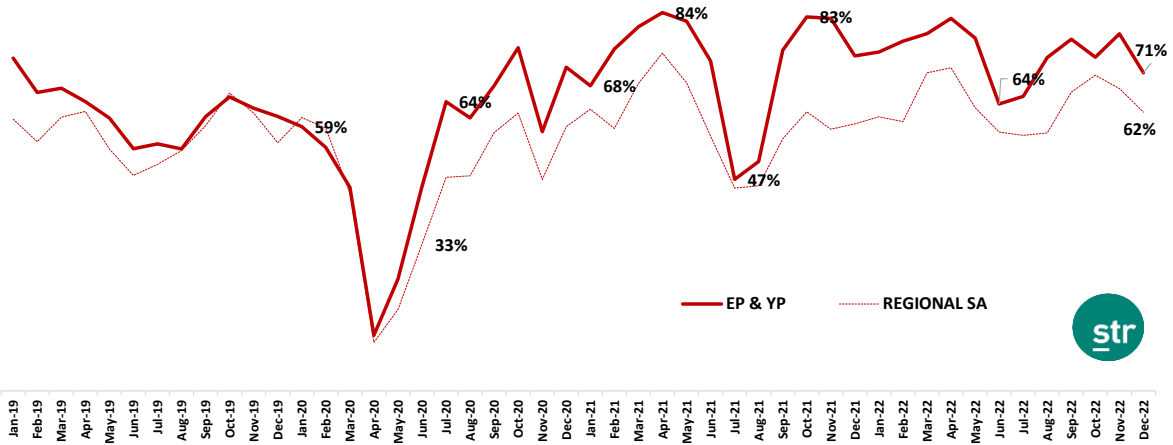


Rooms refers to rooms per establishment

- Currently there are 322 establishments on the Yorke Peninsula that accommodate guests.
- These 322 establishments account for 2,482 rooms across the region.
- 65 per cent of rooms fall into establishment with 15 or more rooms.
- 24 per cent of rooms fall into the 1-5 room establishments.



ACCOMMODATION OCCUPANCY EP & YP

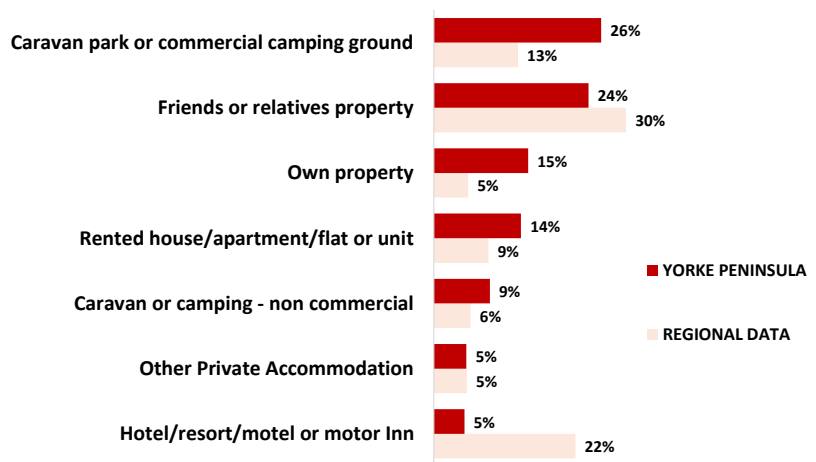


- The EP and YP regions include accommodation data for Eyre Peninsula and the Yorke Peninsula. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the EP and YP region was 62%, this fell to 53% in 2020, rose to 73% in 2021 and grew again in 2022 to 75%.

VISITOR USE OF ACCOMMODATION

- 35 per cent stayed in a Caravan Park or Camping. This compares to the regional average of 19 per cent.
- 24 per cent of domestic overnight visitor nights in the Yorke Peninsula are spent with Friends or Relatives compared to the SA regional average of 30 per cent.
- 5 per cent of nights are spent in Hotels, resorts and motels. This compares to the Regional average of 22 per cent.

ACCOMMODATION USED IN YORKE PENINSULA FOR DOMESTIC VISITORS



TRANSPORT



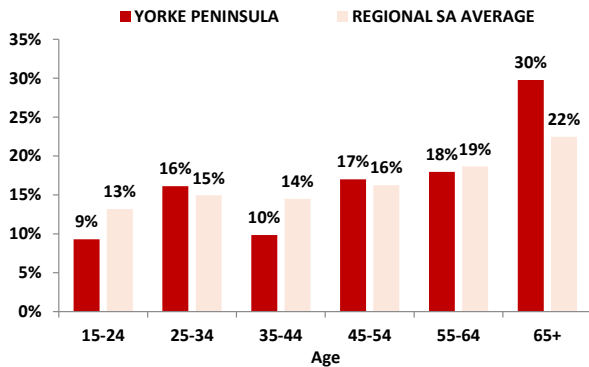
- The main method of transport used on trips to the Yorke Peninsula was a self drive vehicle.
- 97% of visitors used this type of transport.
- 3% of people used another form of transport, this included helicopters, buses etc.

YORKE PENINSULA REGIONAL PROFILE



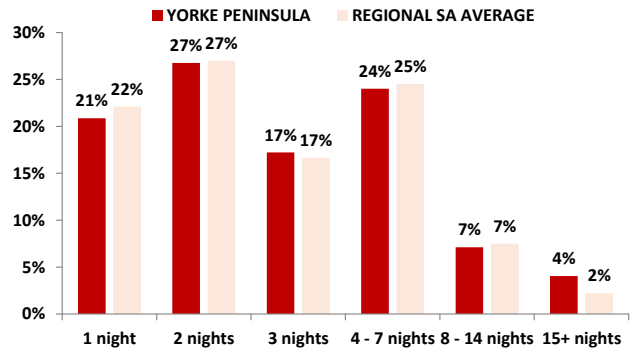
VISITOR PROFILE

AGE OF VISITORS TO YORKE PENINSULA



- Overnight domestically there is a peak in the 65+ age group of 30 per cent. This compares to the regional average of 22 per cent.
- The 15-24 age group under indexes when compared to the regional average.

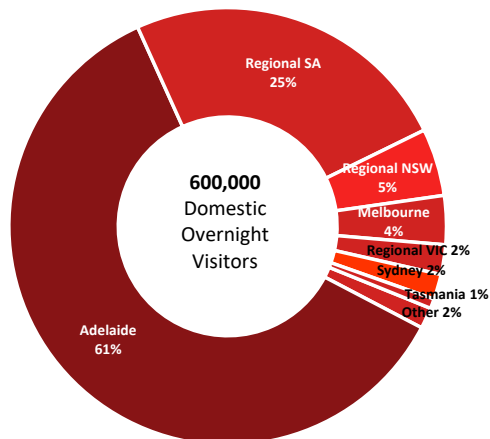
LENGTH OF VISIT TO YORKE PENINSULA



- 48 per cent of domestic overnight visitors like to stay 1-2 nights.
- 24 per cent like to stay between 4 and 7 days, below the regional average of 25 per cent.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO YORKE PENINSULA

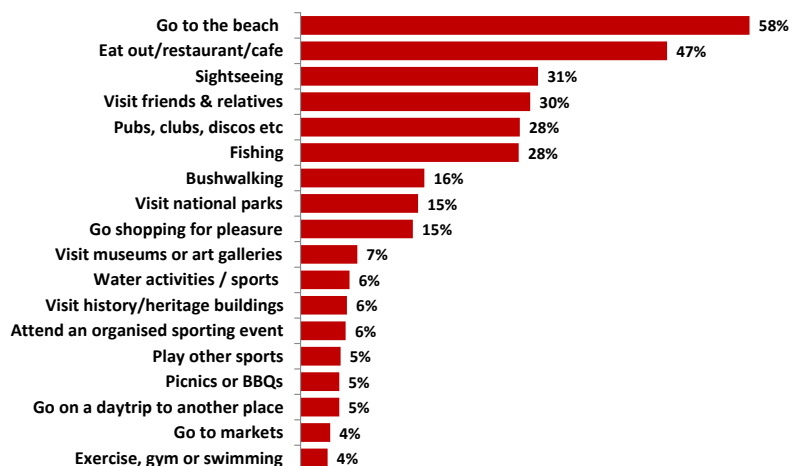


- Victoria at 6 per cent and New South Wales at 7 per cent are the Yorke Peninsula biggest interstate overnight domestic markets.
- Regional South Australia contributes 25 per cent of visitors to the Yorke Peninsula .
- 61 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

- The most popular activity when coming to the Yorke Peninsula is to go to the beach.
- Other popular activities include eating out, visiting a friend or relative, water activities/sports, 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 2020-21, the tourism industry contributed an estimated \$360 million to the Yorke Peninsula regional economy and directly employed approximately 1,900 people.

Employment

- 1,900 jobs for people employed directly by the tourism industry, 700 indirect jobs and a total employment impact of 2,600 people.

Gross Value Added (GVA)

- \$82 million and \$80 million in direct and indirect tourism GVA, and \$162 million in total tourism GVA.

Gross Regional Product (GRP)

- \$93 million and \$100 million in direct and indirect tourism GRP and \$193 million in total tourism GRP.

Tourism Consumption

2020-21

Tourism products - directly consumed

- Takeaway and restaurant meals 18%
- Shopping (including gifts and souvenirs) 14%
- Travel agency and tour operator services 11%
- Fuel (petrol, diesel) 10%
- Accommodation services 8%
- Food products 7%
- Long distance passenger transportation 7%
- Alcoholic beverages and other beverage 7%

Tourism Employment

2020-21

Tourism Industries - 1,900 directly employed

- Cafes, restaurants and takeaway food services 34%
- Retail trade 18%
- Accommodation 16%
- Travel agency and tour operator services 8%
- Clubs, pubs, taverns and bars 7%
- All other industries 5%
- Air, water and other transport 4%
- Road transport and transport equipment rental 3%

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...

- Adventurers
- Caravanners and campers
- Beach seekers
- Families
- Travelling with pets

Prepared by the South Australian Tourism Commission, December 2022

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 2022.

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