

YORKE PENINSULA REGIONAL PROFILE

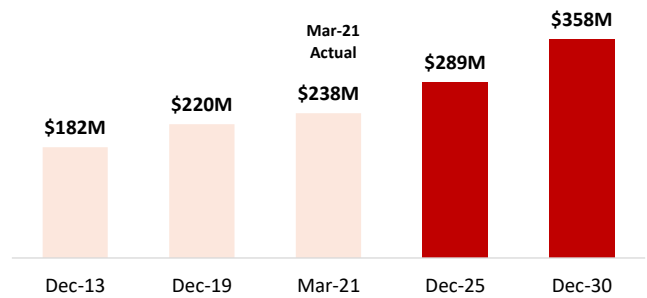


OVERVIEW

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

YORKE PENINSULA

- Currently Yorke Peninsula contributes \$238 million to the year end March 2021 South Australian expenditure of \$4.4 billion.
- The Yorke Peninsula has achieved 82 per cent of their 2025 target of \$289 million and 66 per cent of their 2030 target of \$358 million.



ANNUAL VISITOR SUMMARY YEAR END MARCH 2021

ORIGIN						
	Intrastate	Interstate	Total Domestic	International	Total	
Overnight Visits	575,000	41,000	616,000	-	616,000	
%	93%	7%	100%	0%	100%	
% Across all regions	90%	10%	100%	0%	100%	
Share of Regional SA	15%	9%	15%	0%	15%	
Nights	1,833,000	272,000	2,105,000	0%	2,105,000	
%	87%	13%	100%	0%	100%	
% Across all regions	82%	18%	100%	0%	100%	
Share of Regional SA	15%	10%	14%	0%	14%	
ALOS	3.2	6.6	3.4	-	3.4	
ALOS Regional SA	3.2	6.0	3.5	-	3.5	
Total Expenditure					\$238,000,000	
Overnight Expenditure	\$166,000,000	\$23,000,000	\$188,000,000	\$0	\$188,000,000	
Day Trip Expenditure					\$50,000,000	
Domestic Day Trips					608,000	

- Yorke Peninsula saw 616,000 domestic overnight visitors for the year end March 2021.
- 93 per cent of overnight visitors were from intrastate and 7 per cent from interstate.
- The 575,000 intrastate overnight visitors stayed 1.8 million nights with an average length of stay of 3.2 nights.
- There were 41,000 interstate overnight visitors who stayed 272,000 nights with an average length of stay of 6.6 nights
- There have been no international arrivals with the borders closed.
- 608,000 day trips were taken to Yorke Peninsula for the year with spend of \$50 million.

ALOS = Average Length of Stay

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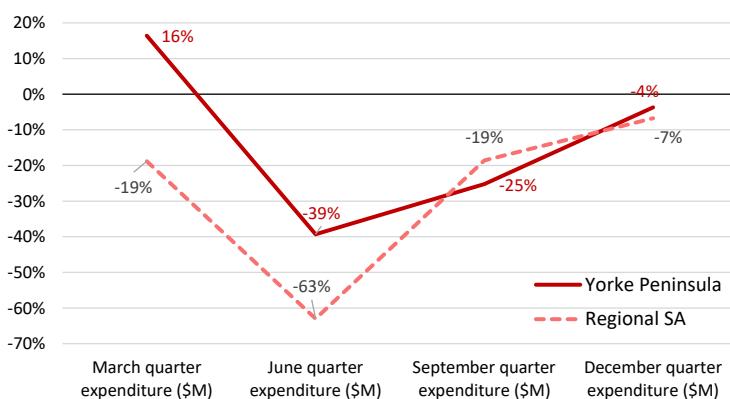
PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	418,000	142,000	37,000	31,000	616,000
%	68%	23%	6%	5%	100%
% Across all SA regions	56%	22%	18%	5%	100%
<i>Share of Regional SA</i>	15%	9%	15%	0%	15%
Nights	1,550,000	368,000	123,000	65,000	2,105,000
%	74%	17%	6%	3%	100%
% Across all regions	58%	18%	20%	3%	100%
<i>Share of Regional SA</i>	18%	14%	4%	13%	14%
Average Length of Stay	3.7	2.6	3.3	2.1	3.4
Expenditure					
Annual Expenditure	\$140,000,000	\$26,000,000	\$6,000,000	\$17,000,000	\$188,000,000
Av spend per night	\$90	\$71	\$49	\$262	\$89
Av spend per night Regional SA	\$213	\$126	\$132	\$511	\$191
<i>Share of SA</i>	9%	9%	3%	11%	8%

- 91 per cent of visitors to the Yorke Peninsula are leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$90 per night compared to VFR visitors who spend \$71 per night.
- Holiday visitors spent \$140 million for the year and Leisure visitors \$26 million, making up 88 per cent of total expenditure.

SPEND 2020 VERSUS 2019

CHANGE IN SPEND - 2020 COMPARED TO 2019



- March quarter 2020 prior to COVID-19 was up 16 per cent on the March quarter in 2019.
- The Yorke Peninsula saw expenditure fall 39 per cent for the June quarter in 2020 compared to June quarter in 2019.
- The September quarter saw a recovery from June, down 25 per cent on 2019.
- The December 2020 quarter was down 4 per cent compared to the December quarter in 2019.

YORKE PENINSULA

REGIONAL PROFILE



YORKE PENINSULA TOURISM LISTINGS

Category	# Listings
ACCOMMODATION	322
ATTRACTION	146
GENERAL SERVICES	83
DESTINATION INFORMATION	38
RESTAURANT	25
EVENT	16
TOUR	8
HIRE	7
INFORMATION	5
JOURNEY	1
TRANSPORT	1
Grand Total	652

*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 MARCH 2021**

**ACCOMMODATION
LEADS
124,000
73%**

**FOOD & DRINK
LEADS
3,500
2%**

**TOUR
LEADS
2,800
2%**

***OTHER
LEADS
40,000
23%**

TOP 5

- WALLAROO MARINA APARTMENTS
- BAYSIDE GLAMPING
- HILLOCKS OCEAN POD HILLTOP
- PORT VINCENT FORESHORE CARAVAN PARK
- YONDAH BEACH HOUSE

TOP 5

- WATSACOWIE BREWING COMPANY
- COOPERS ALEHOUSE AT WALLAROO
- BOND STORE WALLAROO
- WATSACOWIE BREWERY
- THE SMELTER

TOP 5

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

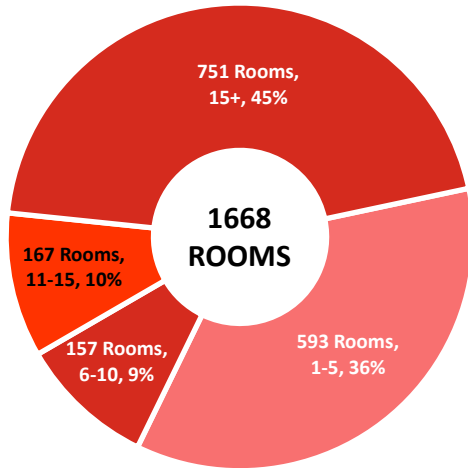
* Other refers to leads for events, destination information, attractions, general services, hire and transport

YORKE PENINSULA REGIONAL PROFILE



ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS IN THE YORKE PENINSULA SOURCE ATDW



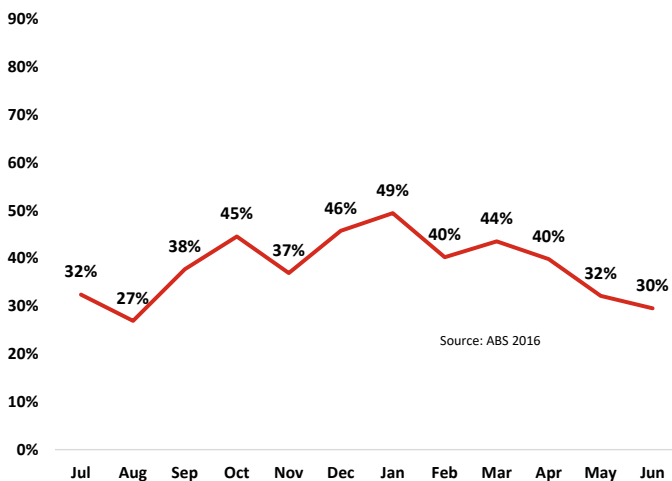
- Currently there are 322 establishments in Yorke Peninsula that accommodate guests.
- These 322 establishments account for 1668 rooms ranging from 1 room to over 50.
- 45 per cent of rooms fall into establishment with 15 or more rooms.
- 36 per cent of rooms fall into the 1-5 room establishments.

ACCOMMODATION SUPPLY

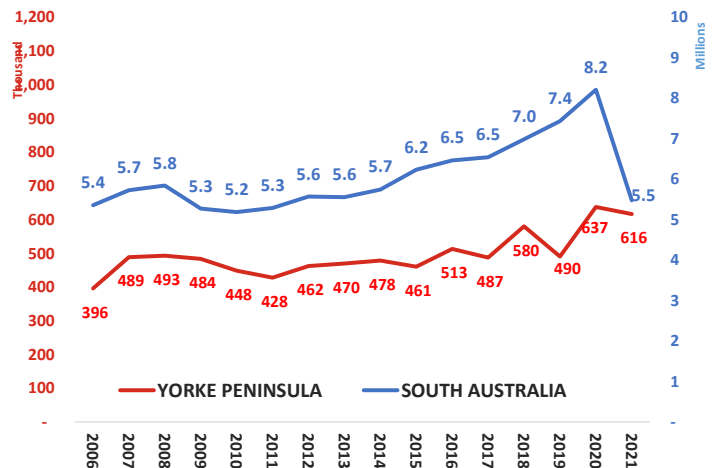
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	7
Rooms	125
Occupancy	38%
Takings	\$1,800,000

- Average occupancy for the year is 38 per cent over 7 establishments and 125 rooms.
- The peak months are December and January with occupancy at 46 per cent and 49 per cent respectively.
- Low point of the year comes in August where occupancy drops to 27 per cent.
- Through the winter months occupancy averages out at 30 per cent.

MONTHLY OCCUPANCY RATES YEAR END JUNE 2016 - YORKE PENINSULA



TOTAL OVERNIGHT VISITATION TO YORKE PENINSULA & SOUTH AUSTRALIA



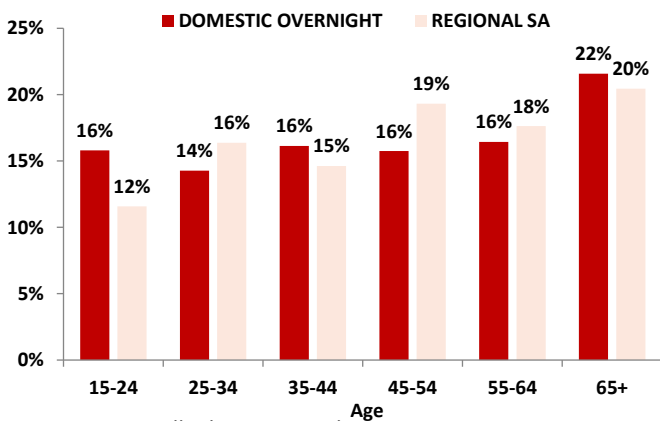
Note: Fluctuations can occur in visitation data due to small sample sizes. Prior regional profiles used data averaged over three years to smooth these fluctuations.

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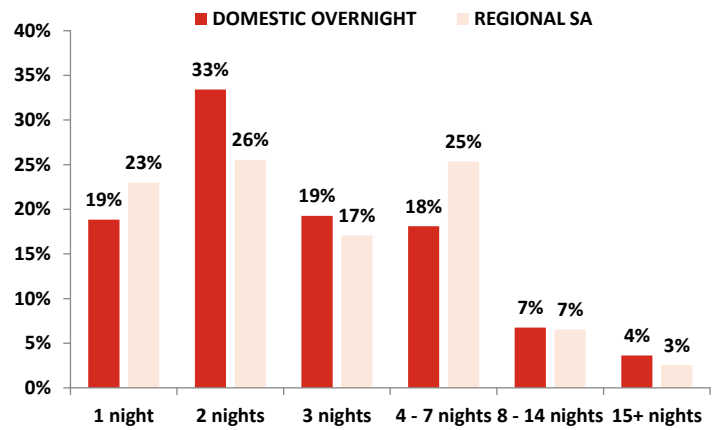
VISITOR PROFILE

AGE OF VISITORS TO YORKE PENINSULA



- Domestically there is a peak in 65+ age group at 22 per cent above the regional average of 20 per cent.
- The 45-54 age group at 16 per cent is well below the regional average of 19 per cent.
- 15-24 over indexes with 16 per cent compared to the

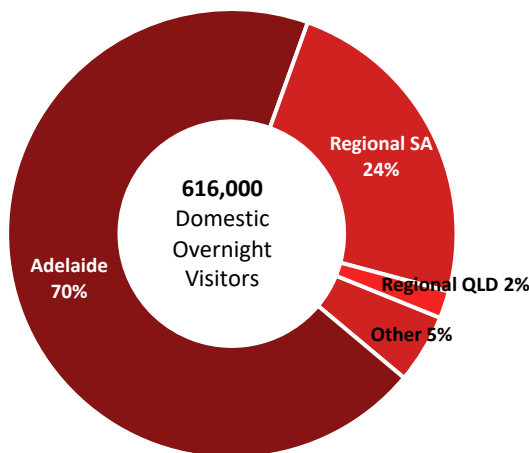
LENGTH OF VISIT TO YORKE PENINSULA



- 52 per cent of domestic overnight visitors like to stay 1-2 nights, above the regional South Australia average of 49 per cent.
- 18 per cent of visitors like to stay 4-7 nights. This was below the regional average of 25 per cent.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO YORKE PENINSULA



- Queensland accounted for 3 per cent of visitors to the Yorke Peninsula .
- Regional South Australia contributes 24 per cent of visitors to the Yorke Peninsula, however prior to COVID this was 28 per cent.
- 70 per cent of visitors come from Adelaide, pre COVID-19 this was 60 per cent.

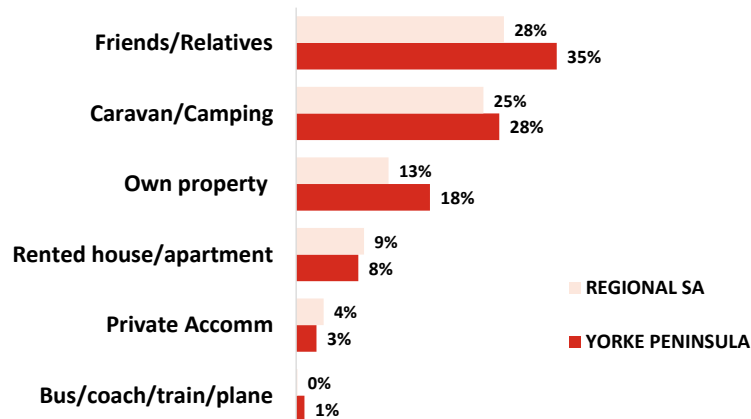
YORKE PENINSULA

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VISITOR USE OF ACCOMMODATION

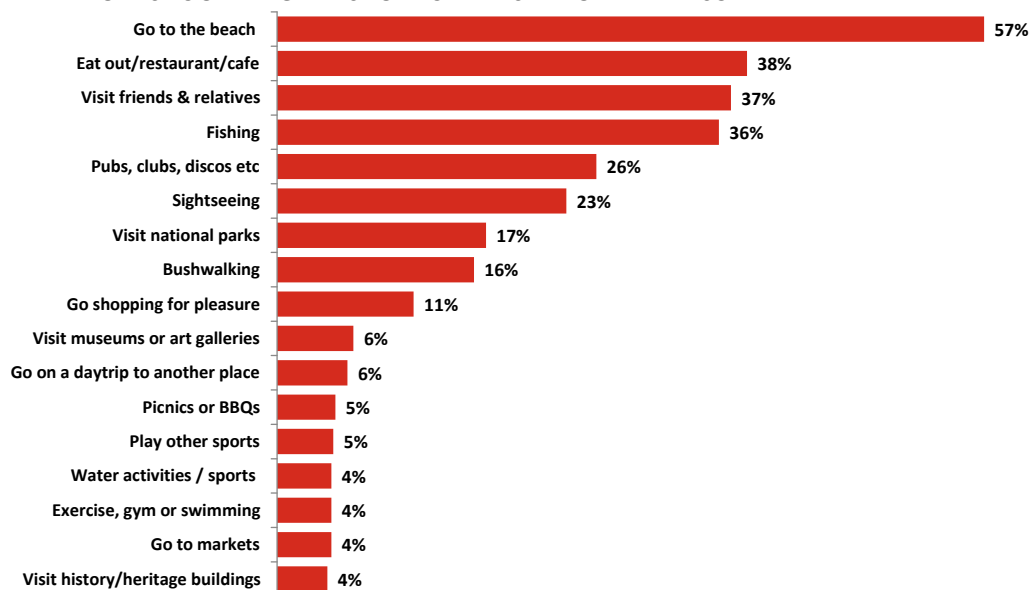
ACCOMMODATION USED IN YORKE PENINSULA FOR DOMESTIC VISITORS



- 35 per cent of Domestic visitor nights are spent in a friend or relatives property, well above the regional South Australia average of 28 per cent.
- 28 per cent of people prefer to Caravan and Camp, above the regional average of 25 per cent. Prior to COVID-19 27 per cent of

VISITOR ACTIVITIES

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN YORKE PENINSULA



- The most popular activities when coming to Yorke Peninsula is going to the beach.
- Other popular activities include eating out, visiting friends and relatives, fishing, sightseeing, visit national parks, bush walking, visit museums, water sports and going to markets.

YORKE PENINSULA

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REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2019-20, the tourism industry contributed an estimated \$328 million to the Riverland regional economy and directly employed approximately 1,600 people.

Employment

- 1,600 jobs for people employed directly by the tourism industry, 600 indirect jobs and a total employment impact of 2,200 people.

Gross Value Added (GVA)

- \$77 million and \$77 million in direct and indirect tourism GVA, and \$153 million in total tourism GVA.

Gross Regional Product (GRP)

- \$82 million and \$98 million in direct and indirect tourism GRP and \$180 million in total tourism GRP.

Tourism Consumption

2019–20

Tourism products - directly consumed

- 16% Long distance passenger transportation
- 15% Takeaway and restaurant meals
- 12% Shopping (including gifts and souvenirs)
- 12% Travel agency and tour operator services
- 11% Fuel (petrol, diesel)
- 7% Accommodation services
- 6% Food products

Tourism Employment

2019–20

Tourism Industries - 1,600 directly employed

- 38% - 602 - Cafes, restaurants and takeaway food services
- 15% - 242 - Retail trade
- 14% - 228 - Accommodation
- 8% - 122 - Travel agency and tour operator services
- 7% - 116 - Clubs, pubs, taverns and bars
- 4% - 71 - Air, water and other transport

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

REGIONAL INSIGHTS

Interstate

- The ocean and all its delights a highly attractive proposition.
- Surfing and seafood add to holiday appeal.
- Natural setting & wildlife in the area resonate strongly.
- Distance can be seen as a barrier for interstate visitation.

Intrastate

- Seen as a family friendly holiday destination.
- Fishing high up on the list of reasons to go.
- The beach and coastline provide experiences to fill an itinerary.
- Distance is the main hindrance to travel, considered further away than expected for those who have been.

International

- The International market is not a key focus for this area with low awareness.

Regional Visitor Strategy Priorities

- Yorke Peninsula's priority is to increase visitor expenditure and dispersal from intrastate and interstate drive markets.

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. 865455001
Consumer Demand Product Testing Phase 1 - BDA Marketing