

EYRE PENINSULA REGIONAL PROFILE

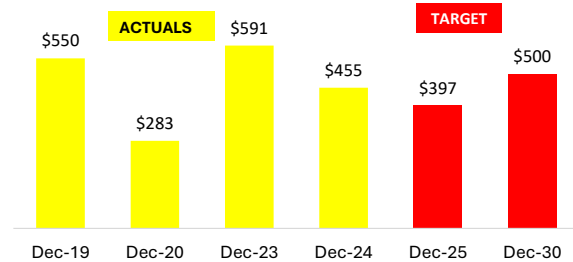


OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2024

- Currently, the Eyre Peninsula contributes \$455 million to the year end December 2024 South Australian expenditure of \$9.8 billion.
- The Eyre Peninsula has achieved 100 per cent of their 2025 target of \$397 million and 91 per cent of their 2030 target of \$500 million.

EYRE PENINSULA (m)



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2024

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	326,000	116,000	442,000	13,000	455,000
% of visits	72%	25%	97%	3%	100%
Share of Regional SA	10%	10%	10%	10%	10%
% 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	998,000	504,000	1,502,000	162,000	1,664,000
% of nights	60%	30%	90%	10%	100%
Share of Regional SA	10%	11%	10%	6%	10%
% 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	3.1	4.3	3.4	12.5	3.7
ALOS Regional SA	2.9	4.2	3.2	19.8	3.7
Total Expenditure					\$455,000,000
Overnight Expenditure	\$290,000,000	\$86,000,000	\$376,000,000	\$16,000,000	\$392,000,000
Day Trip Expenditure					\$63,000,000
Domestic Day Trips					401,000

- The Eyre Peninsula saw 455,000 overnight visitors for the year end December 2024.
- 72 per cent of overnight visitors were from intrastate, 25 per cent from interstate and 3 per cent from overseas.
- The 326,000 intrastate overnight visitors stayed 998,000 nights with an average length of stay of 3.1 nights.
- There were 116,000 interstate overnight visitors who stayed 504,000 nights with an average length of stay of 4.3 nights
- The region saw 13,000 international visitors with an average length of stay of 12.5 nights and spend of \$16 million.
- 401,000 day trips were taken to the Eyre Peninsula for the year with spend of \$63 million.

ALOS = Average Length of Stay

EYRE PENINSULA

REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	179,000	112,000	116,000	49,000	455,000
% of visits	39%	25%	25%	11%	100%
Share of Regional SA	7%	10%	13%	16%	10%
% Across all regions	53%	24%	19%	7%	100%

Nights	701,000	422,000	333,000	209,000	1,664,000
% of nights	42%	25%	20%	13%	100%
Share of Regional SA	8%	10%	12%	14%	10%
% Across all regions	49%	25%	17%	9%	100%

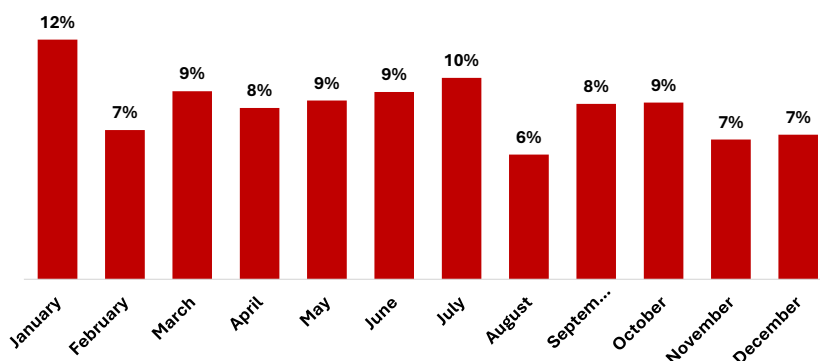
Average Length of Stay	3.9	3.8	2.9	4.3	3.7
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Expenditure					
Annual Overnight Exp	\$149,000,000	\$72,000,000	\$94,000,000	\$77,000,000	\$392,000,000
Expenditure 2019	\$229,000,000	\$48,000,000	\$102,000,000	\$40,000,000	\$419,000,000
Av spend per night	\$213	\$171	\$282	\$368	\$236
Av spend per night Reg SA	\$190	\$103	\$176	\$218	\$169
Share of Regional SA	3%	5%	1.3%	2%	3%

- 64 per cent of overnight visitors to the Eyre Peninsula are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$213 per night compared to VFR visitors who spend \$171 per night.
- Leisure overnight visitors spent \$221 million for the year, making up 56 per cent of all overnight exp

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO EYRE PENINSULA



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

January and July are busy with the school holidays.

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

Source: NVS year end December 2024

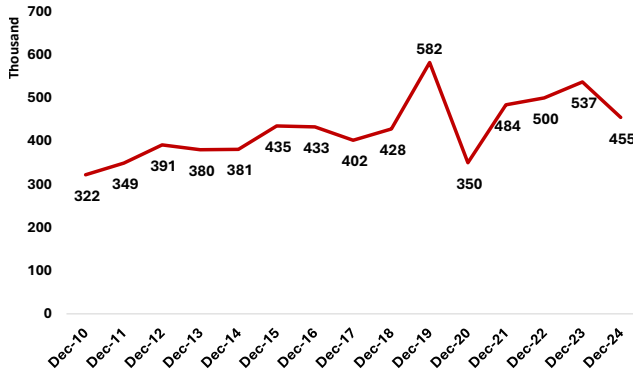
EYRE PENINSULA

REGIONAL PROFILE

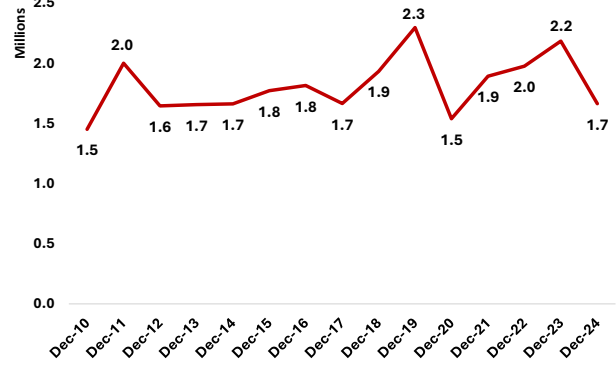


TOTAL OVERNIGHT VISITATION 2010 - 2024

VISITORS EYRE PENINSULA 2010 - 2024 - INTERNATIONAL AND DOMESTIC



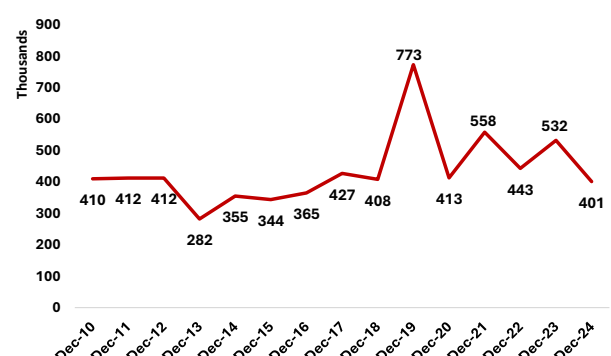
NIGHTS EYRE PENINSULA 2010 - 2024 - INTERNATIONAL AND DOMESTIC



TOTAL EXPENDITURE EYRE PENINSULA 2010 - 2024 - INTERNATIONAL AND DOMESTIC



DAY TRIPS EYRE 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%

EYRE PENINSULA

REGIONAL PROFILE



EYRE PENINSULA TOURISM LISTINGS

Category	# Listings
ACCOMM	164
ATTRACTION	137
RESTAURANT	32
GENSERVICE	31
TOUR	31
EVENT	26
HIRE	12
INFO	6
DESTINFO	2
TRANSPORT	1
JOURNEY	1
Grand Total	443

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

229,000

YEAR END DECEMBER 2024

ACCOMMODATION LEADS

107,000
47%

FOOD & DRINK LEADS

5,200
2%

TOUR LEADS

81,000
36%

*OTHER LEADS

35,000
15%

TOP 5

- CAMEL BEACH HOUSE
- EYRE WAY YAMBARA
- DISCOVERY PARKS STREAKY BAY FORESHORE
- THE GREENLY CARRIAGE
- DISCOVERY PARKS STREAKY BAY FORESHORE

TOP 5

- CALYPSO STAR CHARTERS
- EXPERIENCE COFFIN BAY OYSTER FARM TOURS
- COFFIN BAY OYSTER FARM; TASTING TOURS
- BAIRD BAY EXPERIENCE
- COFFIN BAY OYSTER FARM & TASTING TOURS

TOP 5

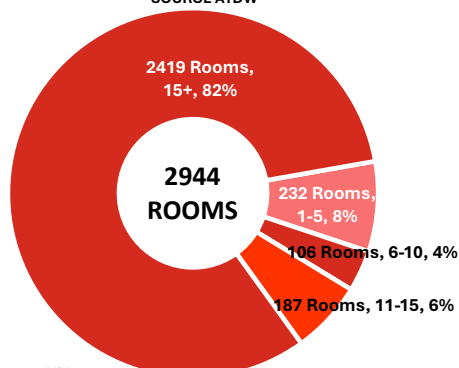
- OYSTER HQ
- 1802 OYSTER BAR
- PETER TEAKLE WINES
- LANSE FRENCH CAFE
- HOTEL BOSTON

* 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

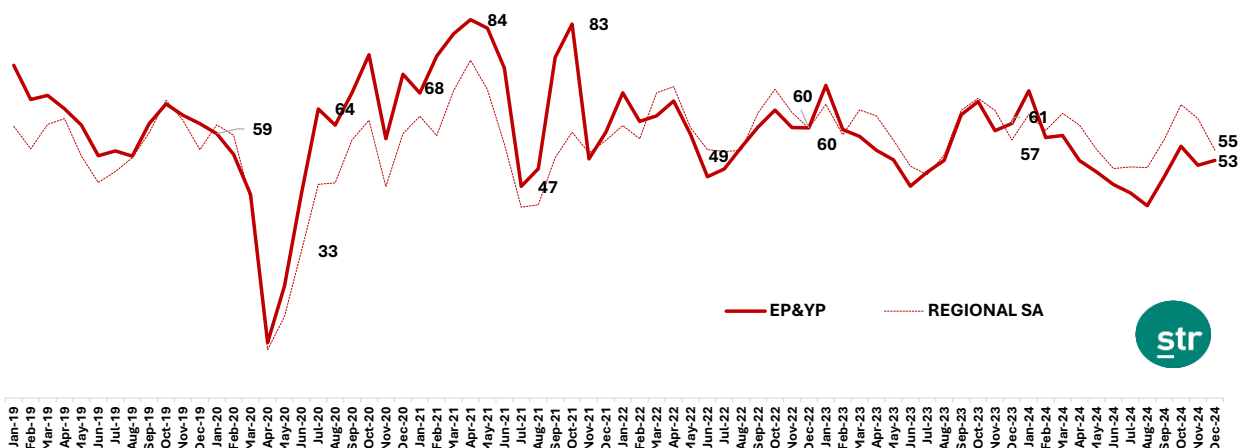
- Currently there are 166 establishments in the Eyre Peninsula that accommodate guests.
- These 166 establishments account for 2,944 rooms across the region.
- 82 per cent of rooms fall into establishment with 15 or more rooms.
- 8 per cent of rooms fall into the 1-5 room establishments.

EYRE PENINSULA REGIONAL PROFILE



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY EYRE PENINSULA AND YORKE PENINSULA

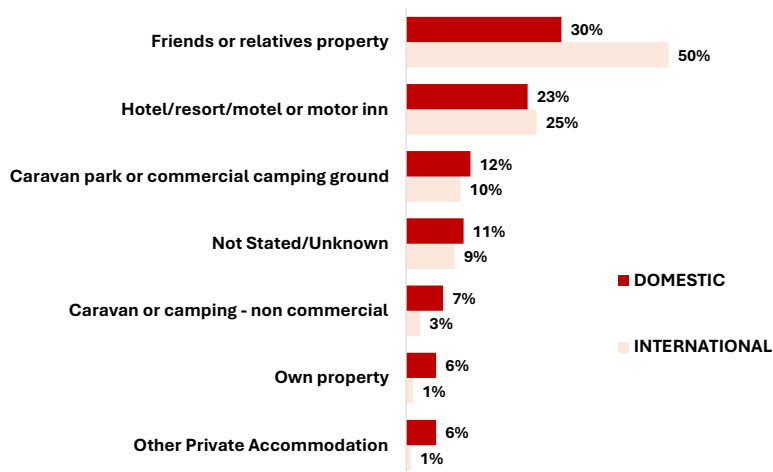


- The EP & YP regions include accommodation data for the Eyre Peninsula and the Yorke Peninsula. Data is not provided for each specific region due to small sample size.
- In 2019 prior to COVID average occupancy for the Eyre Peninsula and the Yorke Peninsula regions was 62 per cent, this fell to 53 per 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

ACCOMMODATION USED IN EYRE PENINSULA FOR DOMESTIC VISITORS

- 30 per cent of domestic overnight visitor nights in the Eyre Peninsula are spent with Friends or Relatives compared to the international average of 50 per cent.
- 23 per cent of domestic visitors stayed in a hotel/resort/motel or motor inn. This compares to the international average of 25 per cent.
- 19 per cent of domestic visitors to the Eyre Peninsula stay in a caravan park. This compares to 13 per cent for international visitors.



TRANSPORT - DOMESTIC OVERNIGHT



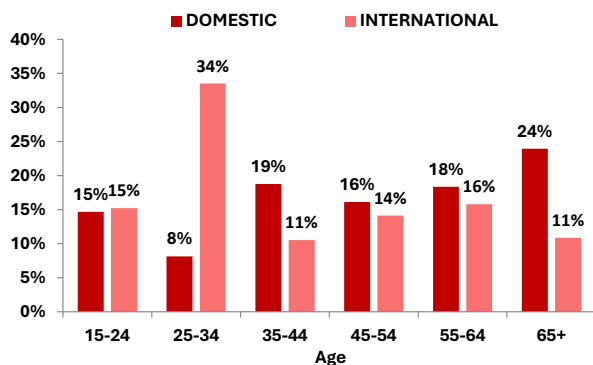
- The main method of transport used on trips to the Eyre Peninsula was a self drive vehicle.
- 82% of visitors used this type of transport.
- 13% of people used an aircraft to get to the region.

EYRE PENINSULA REGIONAL PROFILE



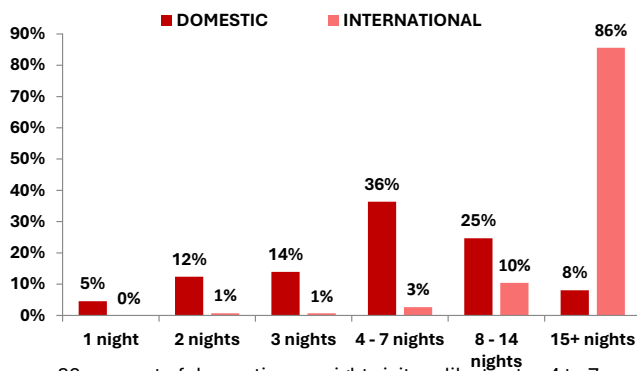
VISITOR PROFILE

AGE OF VISITORS TO EYRE PENINSULA



- Overnight domestic visits peak in the 35-44 and the 65+ age group with 19 per cent and 24 per cent of visits.
- 34 per cent of international visitors are aged 25-34.

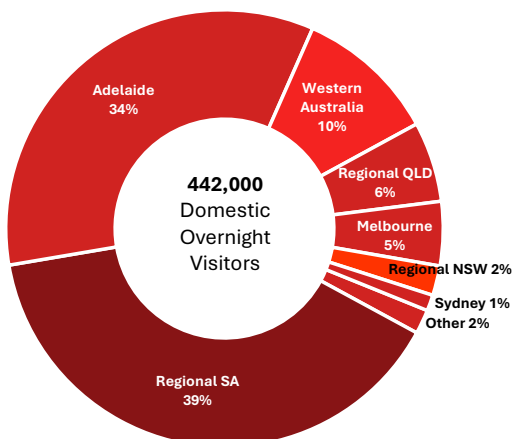
LENGTH OF VISIT TO EYRE PENINSULA



- 36 per cent of domestic overnight visitors like to stay 4 to 7 nights.
- 28 per cent of domestic visitors stayed 2-3 nights.
- 86 per cent of international visitors stayed 15+ nights. The majority of these international nights relate to employment and education visitors.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO EYRE PENINSULA

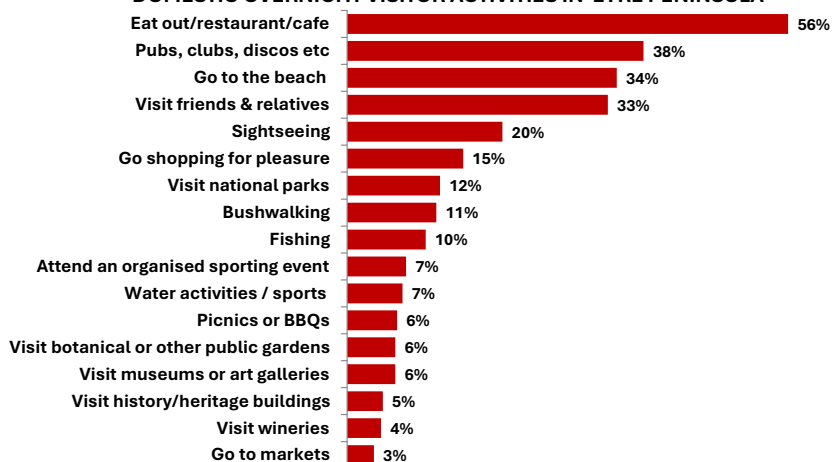


- Western Australia at 10 per cent, Victoria at 6 per cent and regional Queensland are the Eyre Peninsula's biggest interstate overnight domestic markets.
- Regional South Australia contributes 39 per cent of visitors to the Eyre Peninsula.
- 34 per cent of visitors come from Adelaide.

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, going to the beach, bushwalking, visiting national parks, fishing and seeing the sights.

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN EYRE PENINSULA



EYRE PENINSULA

REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2023-24, the tourism industry contributed an estimated \$631 million to the Eyre Peninsula regional economy and directly employed approximately 2,400 people.

Employment

- 2,400 jobs for people employed directly by the tourism industry, 1,100 indirect jobs and a total employment impact of 3,500 people.

Gross Value Added (GVA)

- \$168 million and \$152million in direct and indirect tourism GVA, and \$320 million in total tourism GVA.

Gross Regional Product (GRP)

- \$199 million and \$185 million in direct and indirect tourism GRP and \$384 million in total tourism GRP.

Tourism Consumption

2023-24 Tourism products - directly consumed

- Long distance passenger transportation 18%
- Takeaway and restaurant meals 18%
- Fuel (petrol, diesel) 13%
- Accommodation services 10%
- Shopping (including gifts and souvenirs) 10%
- Food products 6%
- Alcoholic beverages and other beverages 6%
- Travel agency and tour operator services 5%

Tourism Employment

2023-24 Tourism Industries - 2,400 directly employed

- Cafes, restaurants and takeaway food services 37%
- Accommodation 23%
- Retail trade 15%
- Clubs, pubs, taverns and bars 7%
- Air, water and other transport 6%
- Road transport and transport equipment rental 3%
- Travel agency and tour operator services 2%
- Education and training 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 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 there 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:

Find a way to make the drive part of the trip. The destination has to be worth the trip

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?

Focus on travellers who want to escape, disconnect and experience a place different to home

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.

Look at winter tourism

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.

Region appeals to...

- Adventurers
- Caravanners and campers
- Beach only
- 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