

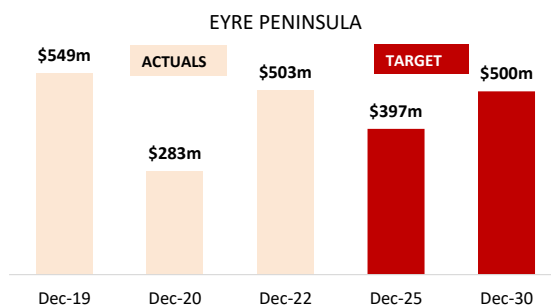
EYRE PENINSULA REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2022

- Currently the Eyre Peninsula contributes \$503 million to the year end December 2022 South Australian expenditure of \$8.3 billion.
- The Eyre Peninsula has achieved 100 per cent of their 2025 target of \$397 million and 100 per cent of their 2030 target of \$500 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2022

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	347,000	148,000	495,000	5,000	500,000
%	70%	30%	99%	1%	100%
Share of Regional SA	10%	14%	11%	10%	11%
<hr/>					
% Across Regional SA	76%	22%	99%	1%	100%
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>					
Nights	1,172,000	718,000	1,890,000	82,000	1,972,000
%	62%	38%	96%	4%	100%
Share of Regional SA	11%	14%	12%	10%	12%
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% Across Regional SA	63%	32%	95%	5%	100%
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>					
Average Length of Stay	3.4	4.9	3.8	16.4	3.9
ALOS Regional SA	3.0	5.1	3.5	16.1	3.7
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Total Expenditure					\$503,000,000
Overnight Expenditure	\$215,000,000	\$180,000,000	\$396,000,000	\$9,000,000	\$405,000,000
Day Trip Expenditure					\$98,000,000
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Domestic Day Trips					430,000

- The Eyre Peninsula saw 495,000 domestic overnight visitors for the year end December 2022.
- 70 per cent of overnight visitors were from intrastate and 30 per cent from interstate.
- The 347,000 intrastate overnight visitors stayed 1.2 million nights with an average length of stay of 3.4 nights.
- There were 148,000 interstate overnight visitors who stayed 718,000 nights with an average length of stay of 4.9 nights
- The region saw 5,000 international visitors with an average length of stay of 16.4 nights and spend of \$9 million.
- 430,000 day trips were taken to the Eyre Peninsula for the year with spend of \$98 million.

ALOS = Average Length of Stay

EYRE PENINSULA REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	193,000	154,000	131,000	40,000	500,000
%	39%	31%	26%	8%	100%
<i>Share of Regional SA</i>	8%	13%	15%	27%	11%
<i>% Across all regions</i>	53%	25%	19%	3%	100%

Nights	910,000	607,000	392,000	64,000	1,972,000
%	46%	31%	20%	3%	100%
<i>Share of Regional SA</i>	10%	17%	11%	10%	12%
<i>% Across all regions</i>	54%	21%	20%	4%	100%

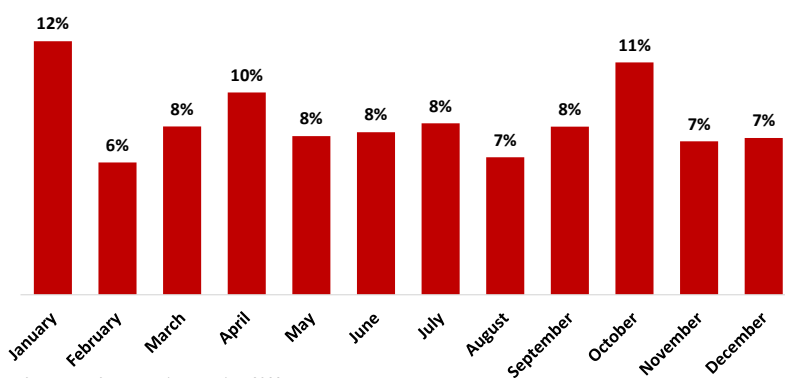
Average Length of Stay	4.7	3.9	3.0	1.6	3.9
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Expenditure					
Annual Expenditure	\$176,000,000	\$68,000,000	\$122,000,000	\$39,000,000	\$405,000,000
Expenditure 2019	\$229,000,000	\$48,000,000	\$102,000,000	\$40,000,000	\$419,000,000
Av spend per night	\$193	\$112	\$311	\$609	\$205
Av spend per night Reg SA	\$204	\$112	\$142	\$279	\$175
Share of Regional SA	3%	4%	0%	2%	3%

- 68 per cent of overnight visitors to the Eyre Peninsula are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$193 per night compared to VFR visitors who spend \$112 per night.
- Leisure overnight visitors spent \$244 million for the year, making up 60 per cent of all overnight expenditure.
- The region also saw 131,000 overnight business visitors who stayed 392,000 nights and spent \$311 per night.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO EYRE PENINSULA



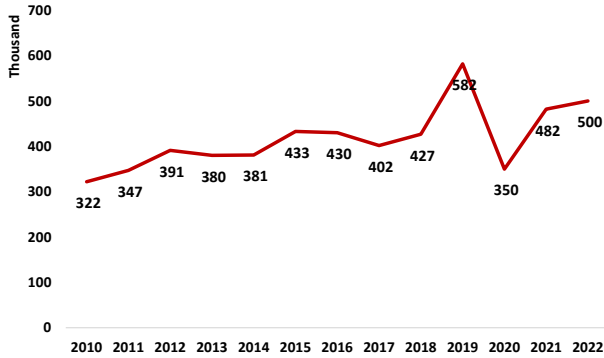
- National Visitor Survey data shows us that in 2022 January, April and October are the strongest months for visitation in the Eyre Peninsula.
- January and April are busy with the school holidays.
- October is strong with the long weekend and school holidays

EYRE PENINSULA REGIONAL PROFILE

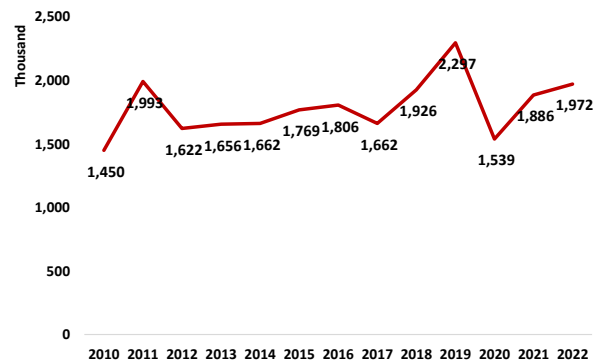


TOTAL OVERNIGHT VISITATION 2010 - 2022

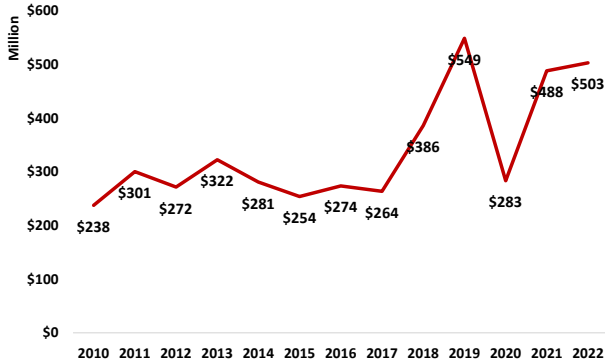
VISITORS EYRE PENINSULA 2010 - 2022 - International and Domestic



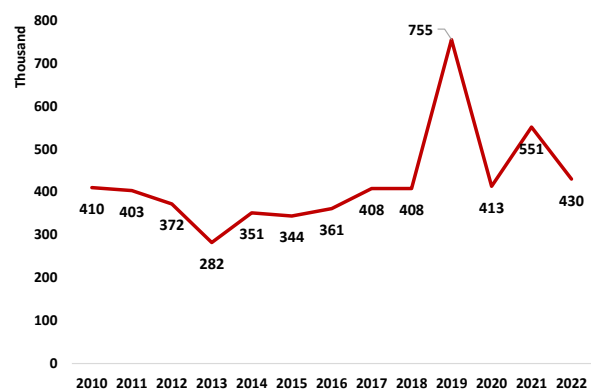
NIGHTS EYRE PENINSULA 2010 - 2022 - International and Domestic



TOTAL EXPENDITURE EYRE PENINSULA 2010 - 2022 - International and Domestic



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

EYRE PENINSULA REGIONAL PROFILE



EYRE PENINSULA TOURISM LISTINGS

Category	# Listings
ACCOMM	177
ATTRACTION	127
GENSERVICE	29
TOUR	29
RESTAURANT	23
EVENT	17
HIRE	7
INFO	4
DESTINFO	4
JOURNEY	2
Grand Total	419

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

123,000

YEAR END DECEMBER 2022

ACCOMMODATION LEADS

58,000
47%

FOOD & DRINK LEADS

3,000
2%

TOURS LEADS

44,000
36%

*OTHER LEADS

19,000
15%

TOP 4

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

TOP 5

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

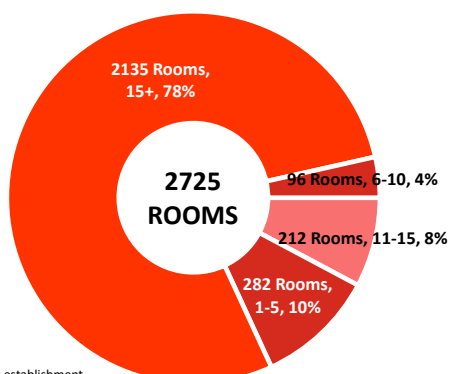
TOP 4

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

* 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



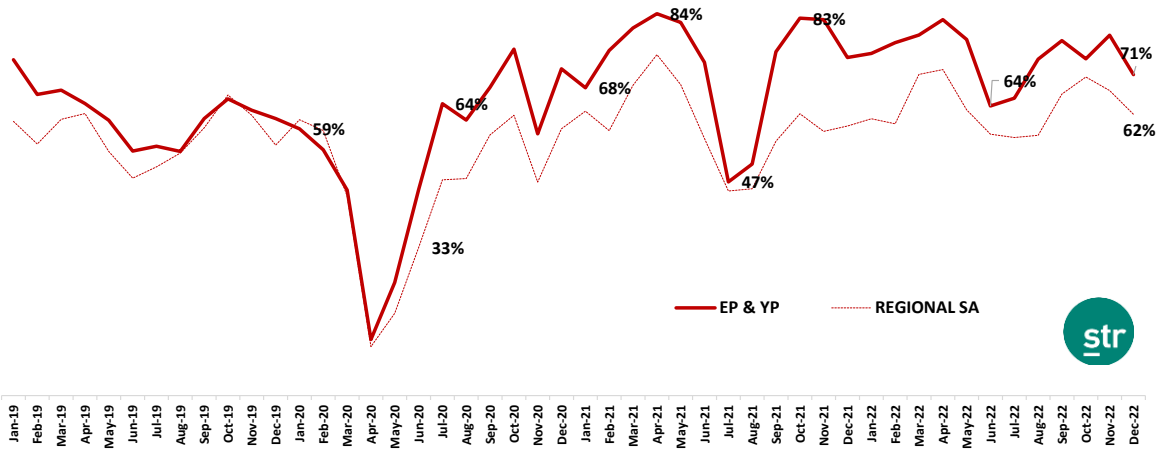
Rooms refers to rooms per establishment

- Currently there are 177 establishments in the Eyre Peninsula that accommodate guests.
- These 177 establishments account for 2,725 rooms across the region.
- 78 per cent of rooms fall into establishment with 15 or more rooms.
- 10 per cent of rooms fall into the 1-5 room establishments.



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY EP & YP

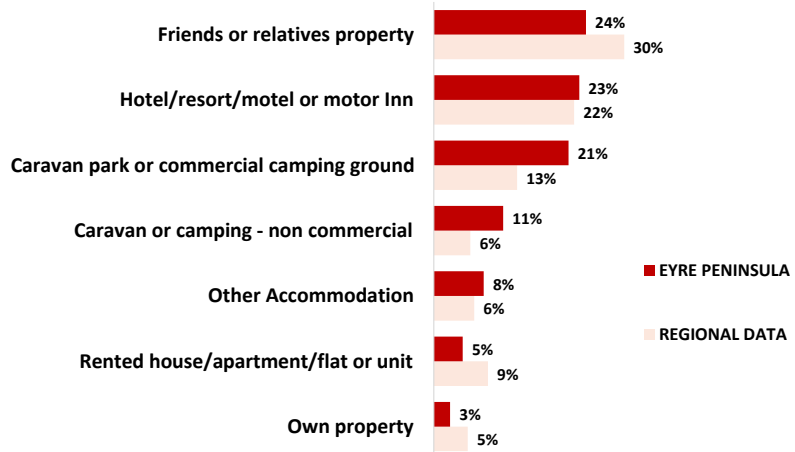


- The EP & YP regions include accommodation data for the Eyre Peninsula and the Yorke Peninsula. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the EP & YP regions was 62 per cent, this fell to 53 per cent in 2020, rose to 73 per cent in 2021 and grew again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

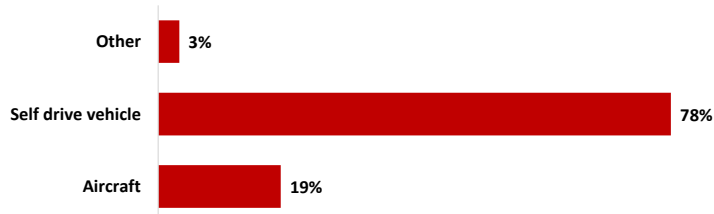
VISITOR USE OF ACCOMMODATION

ACCOMMODATION USED IN EYRE PENINSULA FOR DOMESTIC VISITORS

- 24 per cent of domestic overnight visitor nights in the Eyre Peninsula are spent with Friends or Relatives compared to the SA regional average of 30 per cent.
- 23 per cent stayed in a Hotel/resort/motel or motor inn. This compares to the regional average of 22 per cent.
- 32 per cent of visitor stay in Caravan park or camp ground. This compares to the regional average of 19 per cent.



TRANSPORT



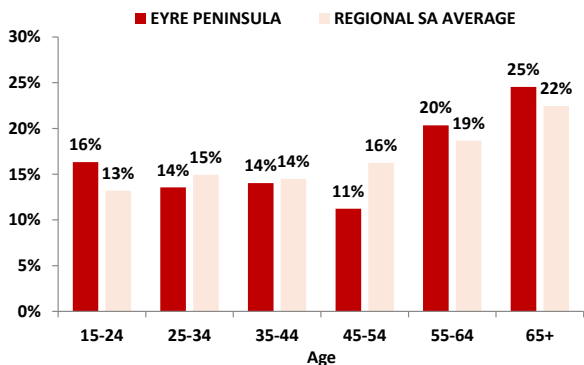
- The main method of transport used on trips to the Eyre Peninsula was a self drive vehicle.
- 78 per cent of visitors used this type of transport.
- 3 per cent of people used another form of transport, this included helicopters, buses etc.
- 19 per cent used aircraft.

EYRE PENINSULA REGIONAL PROFILE



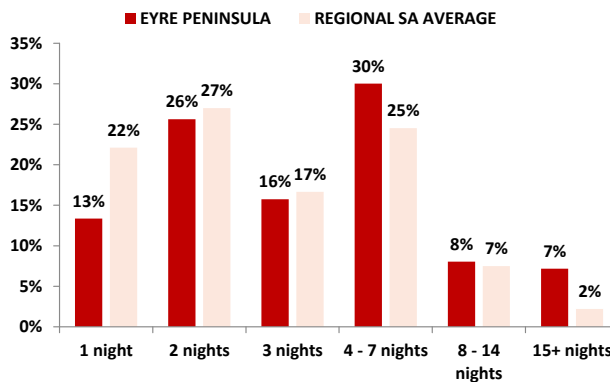
VISITOR PROFILE

AGE OF VISITORS TO EYRE PENINSULA



- Overnight domestically there is a peak in the 55-64 and the 65+ age group of 20 per cent and 25 per cent.
- Both age groups are above the regional average.

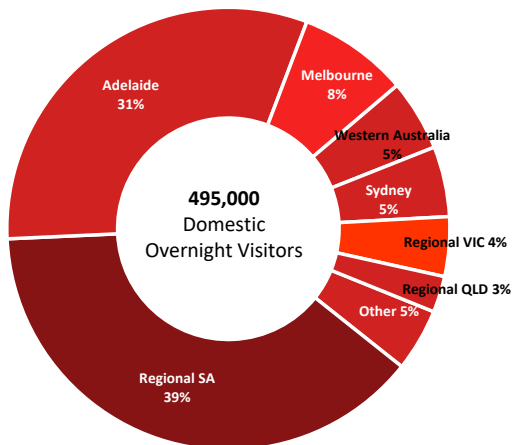
LENGTH OF VISIT TO EYRE PENINSULA



- 26 per cent of domestic overnight visitors like to stay 2 nights.
- 30 per cent like to stay between 4 and 7 days, above the regional average of 25 per cent.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO EYRE PENINSULA

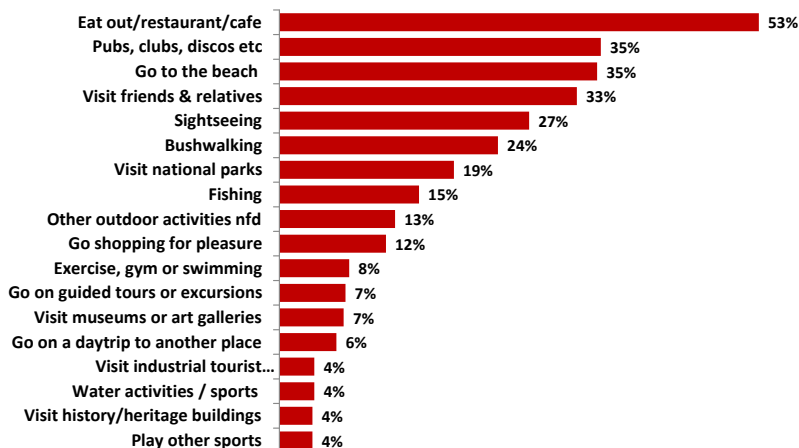


- Victoria at 12 per cent and New South Wales at 7 per cent are the Eyre Peninsula's biggest interstate overnight domestic markets.
- Regional South Australia contributes 39 per cent of visitors to the Eyre Peninsula.
- 31 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN EYRE PENINSULA

- 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, go the beach, visiting wineries, bushwalking, visiting national parks, fishing and seeing the sights.



EYRE PENINSULA REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2020-21, the tourism industry contributed an estimated \$526 million to the Eyre Peninsula regional economy and directly employed approximately 2,900 people.

Employment

- 2,900 jobs for people employed directly by the tourism industry, 1,100 indirect jobs and a total employment impact of 4,000 people.

Gross Value Added (GVA)

- \$156 million and \$119 million in direct and indirect tourism GVA, and \$275 million in total tourism GVA.

Gross Regional Product (GRP)

- \$174million and \$149 million in direct and indirect tourism GRP and \$323 million in total tourism GRP.

Tourism Consumption

2020–21

Tourism products - directly consumed

- Takeaway and restaurant meals 19%
- Shopping (including gifts and souvenirs) 15%
- Travel agency and tour operator services 12%
- Fuel (petrol, diesel) 11%
- Accommodation services 9%
- Food products 8%
- Long distance passenger transportation 7%
- Alcoholic beverages and other beverages 7%

Tourism Employment

2020–21

Tourism Industries - 2,900 directly employed

- Cafes, restaurants and takeaway food services 30%
- Retail trade 18%
- Accommodation 16%
- Travel agency and tour operator services 11%
- Air, water and other transport 7%
- Clubs, pubs, taverns and bars 6%
- All other industries 4%
- Road transport and transport equipment rental 4%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2021

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 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. Un less 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