EYRE PENINSULA DESTINATION MANAGEMENT PLAN

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Regional Development Australia
EYRE PENINSULA INC.

"A well-designed and managed tourism sector can generate trade opportunities, create an avenue for cultural exchange and understanding, empower communities and preserve the natural and cultural heritage assets upon which they depend." (United Nations World Tourism Organisation)

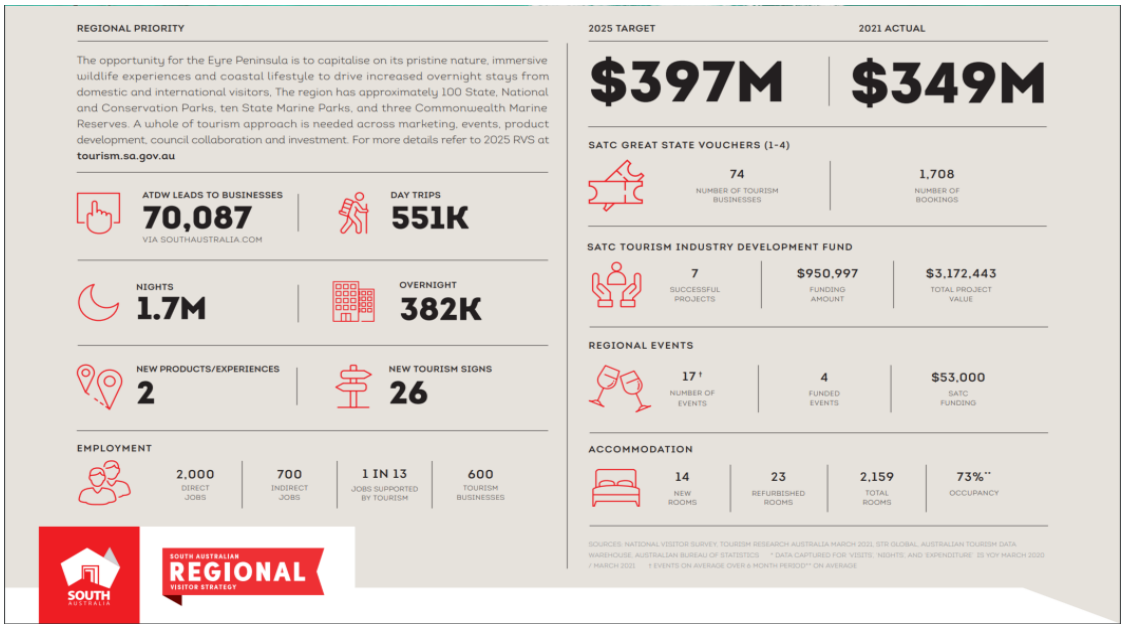
Acknowledgement of Country

The lands and waters of the Eyre Peninsula are central to the culture and beliefs of our First Nations people, who have occupied, enjoyed, utilised, and managed the area since the creation.

The Eyre Peninsula tourism industry acknowledges our First Nations people as the traditional owners, and we respect their spiritual relationship with Country. We pay our respects to Elders past, present and emerging. We honour their stories, songs, art and culture and their aspirations for the future of all people and these lands.

Progress Snapshot

Regional Visitor Strategy Progress Snapshot: 1 Jan to 30 Jun 2021



Source: SATC

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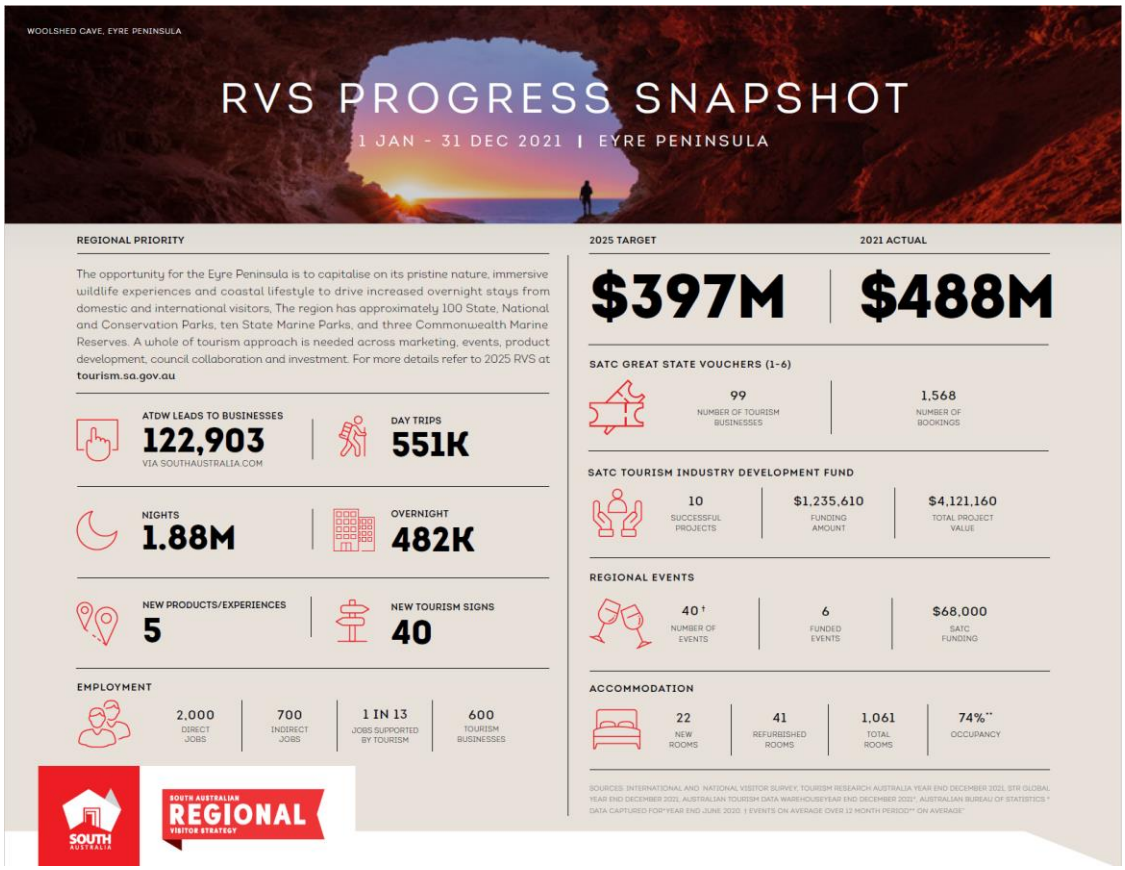

Source: SATC

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1.0 Introduction

The Eyre Peninsula (EP) generated $400m in visitor expenditure in 2019, making it the third highest regional tourism economy in South Australia (SA). With growth aspirations to reach $500 million by 2030, tourism is regarded as a valuable industry, owing to its capacity to provide employment and sustain communities across the EP. While the COVID-19 pandemic has created significant challenges and disruption, it has also presented opportunities to improve the visitor experience through increased investment and a renewed focus on sustainability.

As stated in the South Australian Regional Visitor Strategy (SARVS) (SATC, 2021) "the opportunity for the EP is to capitalise on its strengths, including pristine nature, immersive wildlife experiences and coastal lifestyle – to drive increased overnight stays from domestic and future international visitors. The region has approximately 100 state, national and conservation parks, ten state marine parks, and three commonwealth marine reserves. A whole of tourism approach is needed across marketing, events, product development, council collaboration and investment."

Regional Development Australia Eyre Peninsula (RDAEP) is the lead body charged with tourism development for the EP. RDAEP acts as a central facilitator to diversify the regional visitor economy and to recognise and exploit comparative advantage of the EP to maintain a globally competitive tourism industry. Aligning with the SARVS (SATC, 2021), the Destination Management Plan (DMP) outlines the activity, and stakeholder framework necessary to realise the tourism aspirations of the Eyre Peninsula.

1.1 South Australia Tourism Strategy

Aligning with the strategic visitation of the state, provides a basis to leverage state-led insights and initiatives, and to identify shared priorities for the region. Two key strategic documents include the SA 2030 plan, and the regional 2025 plan as follows:

The South Australian Visitor Economy Sector Plan 2030 (SATC, 2030) was developed via extensive consultation with over 400 members of the tourism Industry and sets the bold ambition to grow the SA visitor economy to $12.8 billion by 2030. The plan identifies six priority areas: marketing, experience and supply development, collaboration, industry capability, leisure and business events and promoting the value of tourism.

The South Australian Regional Visitor Strategy 2025 (SARVS) (SATC, 2021) provides a roadmap for the tourism industry to navigate challenges and seize opportunities. It was developed in consultation with 800 industry stakeholders and sets a target to grow the state's regional visitor expenditure to $4.0 Billion by 2025. The SARVS outlines five strategic pillars that apply across regions, that are critical to the success of SA's visitor economy. The EP tourism priorities are outlined on pages 41-43 (SATC, 2021) and form the basis of the EP DMP.

1.2 Aboriginal Tourism Strategy

The Aboriginal Tourism Strategy for the Far West of SA was developed in 2017 by RDAEP in partnership with Indigenous businesses and communities and aimed to provide support for current and emerging business. While the strategy has been pivotal for the Nullarbor and Far West, expanding the scope to an all-of-region Aboriginal Tourism Strategy has potential to facilitate wider benefits. Additionally, incorporating Aboriginal perspectives more broadly into the regional tourism

agenda, will ensure Aboriginal interests and products are better represented within the tourism landscape.

1.3 Eyre Peninsula Destination Management Plan

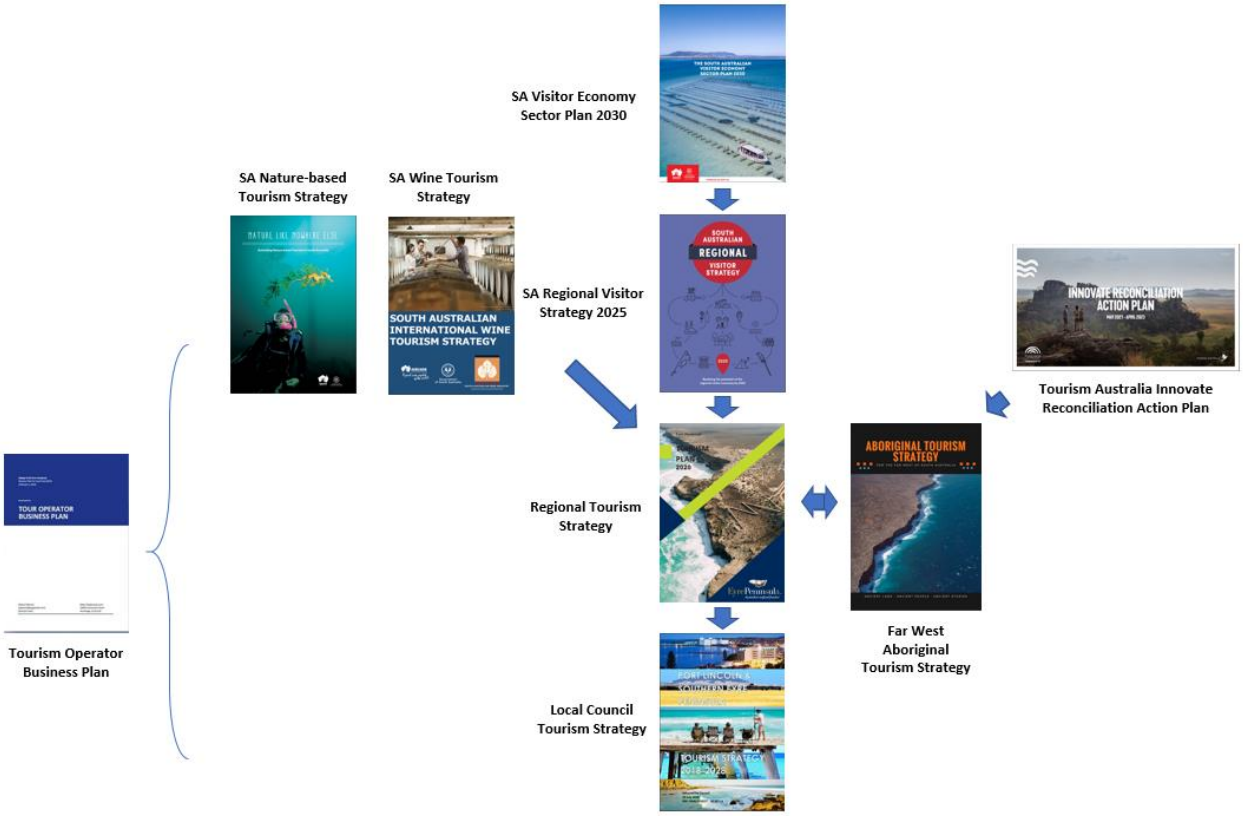
Developed in consultation with EP stakeholders, the 25 regional priorities outlined in the SARVS (SATC, 2021) form the strategic roadmap for EP tourism. The priorities summarise marketing, supply development, collaboration, leisure and events and industry capability objectives, which when successfully implemented will position the EP tourism sector with a sustainable visitor economy.

EP Regional Tourism Plans:

Destination Management Plan Components	Revision (Due Date):
EP Destination Management Plan 2021-2025	November 2025, with annual review of the tourism action plan conducted in November each year.
Far West Aboriginal Tourism Strategy (2017)	2022

While the regional priorities will remain the same, annual review of the DMP is required to ensure actions are prioritised relative to the operating environment. The tourism planning framework (see figure 1) identifies resources that can be utilised by stakeholders during their own planning process.

Figure 1: Tourism Planning Framework



2.0 Tourism Context

2.1 The Visitor Economy

While intrinsically linked to tourism, the term 'Visitor Economy' is much broader; it refers to money that any visitor spends in the region (see figure 2). This includes not only traditional tourism business such as accommodation, attractions and food and beverage outlets, but also money distributed to the broader economy via a multiplier effect. Tourism brings the added advantage of attracting new money from outside the region which strengthens the regional economy, creating jobs and supporting industries and services that benefit the community.

Figure 2: The Visitor Economy

Source: Limestone Coast Destination and Tourism Marketing Plan 2025

2.2 Regional Context

The EP encompasses 234,937km² of land in the far west of SA comprising about 23% of the state. The region is bound by Spencer Gulf in the east and consists of approximately 2,000 km of coastline to the Western Australia border. With a population of 58,000 people, EP contains approximately 3.5% of the SA population (RDAEP, 2019/20).

Figure 3: Eyre Peninsula Regional Map

Source: RDAEP

EP includes several geographical contexts spanning varying local governments, Aboriginal groups, and communities (See Figure 3). From a consumer perspective the EP is defined by six geographic profiles (RDAEP, 2021) (See Appendix A), which fall within the council boundaries of 11 Local Government Authorities (LGA) (See Appendix B). In addition, there are vast areas supported by the Outback Communities Authority, including Maralinga, The Gawler Ranges and Nullarbor. Indigenous representation across the region includes eight Aboriginal groups, which continue to be defined geographically by native title claims.

Figure 4: Eyre Peninsula Geographical Context

Geographic Region	Towns/Communities*	Council	Aboriginal Groups
Nullarbor and Far West Coast	Ceduna, Coorabie, Denial bay, Head of Bight, Penong, Smoky Bay, Thevenard, WA/SA Border Village, Nullarbor Plain, Koonibba, Scotdesco, Yalata, Maralinga, Oak Valley, and Great Australian Bight	DC of Ceduna Outback Communities Authority	Wirangu Kokatha Mirning

Outback	Iron Knob, Mt Ive Station and Gawler Ranges	Outback Communities Authority	Barngarla Kokatha
West Coast	Baird Bay, Elliston, Port Kenny, Sceale Bay, Streaky Bay, Venus Bay	Elliston DC Streaky Bay DC	Wirangu Nauo
Central Eyre Peninsula	Kimba, Darke Peake, Kyancutta, Lock, Minnipa, Poochera, Wirrulla and Wudinna	DC of Kimba DC of Elliston DC of Cleve DC of Wudinna	Barngarla
Southern Eyre Peninsula	Port Lincoln, Coffin Bay, Cummins, Koppio, Port Neill, Tumby Bay, Wangary & Mount Dutton Bay	City of Port Lincoln DC of Lower Eyre Peninsula DC of Tumby Bay	Nauo Barngarla
East coast	Whyalla, Arno Bay, Cleve, Cowell, Lucky Bay, Port Augusta and Port Gibbon	City of Whyalla DC of Cleve DC of Franklin Harbour	Barngarla

*Includes a selection of main towns and communities, but not all.

2.3 The Eyre Peninsula Appeal

With its pristine natural environment and vast unspoilt areas occupying the west of South Australia, the EP is home to some of Australia's most iconic tourism experiences. Great white cage diving is one of the region's most infamous experiences, attracting both domestic and international visitors. The wealth of marine diversity offers a huge variety of ocean-based adventures including opportunities to swim-with sea lions, dolphins, and giant cuttlefish. The expansive EP coastline is ideal for a wealth of aquatic experiences including whale watching, surfing, kiteboarding, paddle boarding, sea kayaking, scuba diving, snorkelling, fishing, and boating.

The EP's marine environment is contrasted and complimented by the rugged outback and remarkable geological landscapes, creating the perfect environment for land-based adventures including four-wheel driving, bushwalking, viewing native wildlife and camping.

The Far West of the EP for Ceduna to the WA border is emerging as an Aboriginal Tourism destination, where community managed experiences include the Head of Bight Whale Centre, Yatala Fishing, Maralinga Village Tours, and the Ceduna Arts Centre.

2.4 Target Market Segments

While further research is required to identify target markets for the Eyre Peninsula, Tourism Research Australia (TRA, 2021) categorised travellers into 12 target market groups. Understanding the preferences and needs of these market segments makes it easier to appeal to certain market segments. While characteristics and motivations of travellers are currently very dynamic, the following market segments help categorise travellers (pre-covid) within Australia:

Commercial Caravan and Camping

Almost half of caravanning and campers are aged 50+ years old, with 33% of trips including children. 78% of these trips are taken for holidays, with regional destinations being highly popular places to visit (92%). Travelling interstate makes up approximately 79% of commercial caravans and campers, with it being highly likely they will visit multiple destinations. With an average trip length of 5 days, common activities undertaken include eating out, sightseeing, going to the beach, bushwalking, and visiting historic and heritage buildings and sites. 92% of trips are self-driven, with 27% utilising a caravan, 22% camping, and 40% staying in a cabin (commercial sites).

Visiting Friends and Relatives

Approximately, 33% of all overnight trips are to visit friends and relatives, with those over 55 accounting for 38% of these trips. Solo travellers makeup 41% of those visiting friends and relatives, and 27% are adult couples with most trips involving no children (81%). Almost all (89%) of these trips are to one destination, more often being regional (59%). Trips often only last for 1-2 nights, however the average trip length is 3.2 nights. Those no longer working often meant there was an increase in the length of their trips. 77% of trips include a self-drive element, and only 18% of trips include flights. The most popular social activity is eating out, accounting for 59%, with going to the beach being the most popular outdoor activity (22%).

Solo Travellers

Solo travellers account for 34% of all overnight domestic trips, with men taking more than women. Capital city residents account for more than 50% of solo travellers, and there is generally an even split between those aged in their 20s up to 50s. Business trips (41%) and visiting friends and relatives (40%) make up a large percent of solo travelling. On average, those travelling solo stay in one destination for 3.3 nights, with longer stays more likely in regional areas. 83% of solo traveller trips include social activities, with only 22% including outdoor nature activities.

Short Stay Visitors (1-2 nights)

More than half of all domestic overnight trips are made up of short stay visitors, evenly distributed between the ages of 20–60. Almost 25% of all short stay visits are for business, with most trips being for leisure. Intrastate destinations are included in more than 75% of all short stay trips, with just under 25% including interstate destinations. 45% of nights are stayed at commercial accommodation, with standard hotels being the most popular. Majority of travellers drive to their chosen destination, with only 16% of short stay visits including flights. Short stay visitors participate in significantly less activities than all other visitors, with the main activities including eating out (59%) and visiting friends and relatives (45%).

Youth travellers (Aged 15-29)

Youth travellers accounted for 27.3 million trips in 2019, with approximately half of youth travellers working full time. Travelling alone or with friends are the two most common types of travel, with the majority of trips occurring for leisure. 93% of youth travellers only include 1 destination in their travels, with 61% of trips being to regional destinations. Youth travellers travel for 3.2 nights on average, with interstate trips often being longer with an average trip length of 4.5 nights. A large proportion of youth travellers visit and stay with friends or relatives, accounting for 44% of trips. Commercial accommodation only accounts for 37% of trips, with standard hotels being the most popular commercial accommodation choice. Popular outdoor activities include going to the beach (27%), visiting national parks (13%), bushwalking (13%), and exercising (9%).

Holidays with Flights

Holidays with flights are most often taken by full time, working, capital city residents. 90% of these trips include interstate destinations, with holiday periods being a common time for these trips. On average, trips that include a regional destination are longer (5 nights) compared to other trips (4.3 nights). 70% of trips include commercial accommodation, with luxury hotels being the most popular. Sightseeing (48%) and eating out (89%) are the most popular social activities, with going to the beach being the most popular outdoor activity (44%).

Older Non-working Travellers

Older non-working travellers account for approximately 17% of all domestic overnight trips, with almost half travelling as a couple. April is the most popular travel time, with trips during the winter months dropping. Most trips are only to one destination, with approximately 75% of trips including interstate travel. The average trip length for older non-working travellers is 5.1 nights, with 8.3 nights being the average for interstate trips. Private accommodation is the most popular place for them to stay, with caravan and camping being the next most popular. Only 15% of these trips include flights, with eating out (64%) and visiting friends and relatives (58%) being the most popular activities participated in.

Long Stay Visitors

Most long stay visitors are travelling for leisure and have a strong connection with seasons, with January and April being the most popular months for travel. Regional destinations are accounted for in 67% of trips, with multiple destinations often being visited. The average length of a long stay trip is 6.3 nights, with almost half being spent at the home of a friend or relative. Long stay visitors engage in social activities such as eating out (70%), sightseeing (33%), and shopping (24%).

Adult Couple

More than half of adult couple trips are taken by those over the age of 55, with the age range of 20 to 29 being the next most common traveller ages. Leisure is the most common reason for travelling with 66% of trips including regional destinations, and interstate destinations making up 73% of trips. Interstate travel often results in a longer trip, with an average of 5.9 nights compared to intrastate travel being 2.8 nights. Approximately 33% of nights are spent with friends or relatives, with caravan and camping grounds being the next most popular accommodation type. Like other traveller types, 70% of adult couples engage in eating out, with visiting friends and relatives (48%) being the next most common social activity.

Recent Migrants

Migrant trip patterns often differ from those of other travellers. Those under the age of 35 account for 70% of migrant travellers, with most coming from capital cities (82%). The main reason for travel is leisure, with 82% of all trips including no children. There is a 50/50 split between trips spent in capital and regional locations, with an average trip length of 3.2 nights. Recent migrants often have a slight preference for interstate trips, with most trips to one destination only. Commercial accommodation is where more than half of recent migrant travellers stay, with hotels rated 3 stars or below being the most popular accommodation type. Recent migrants most commonly engage in social activities, with eating out (73%) being the most common.

Families with Children

Approximately half of the adults travelling with children are between the ages of 35 and 49, with holidays being the main purpose for travel. Families tend to prefer regional destinations and often stay slightly longer than capital cities. Trips often coincide with school holidays and Christmas and Easter holiday periods, with an average stay of 3.7 nights. Almost half of these trips are spent in commercial accommodation, with friends and relatives accounting for 36% of stays. Outdoor nature activities are the most popular for families with children, with going to the beach (41%) and visiting national parks being highly participated activities (19%).

Business Travellers

Business travellers are usually of an older demographic with almost half aged 45 and over. Historically a male dominated travel type, female business visitors are quickly becoming a more popular travel type. Both regional areas and capital cities are likely destinations for travel, with an average trip length of 3.5 nights. 70% of all domestic business visitors stay in commercial accommodation, with hotels and motor inns being the most popular. Outside of business activities, the most common activity business visitors participate in is eating out (63%) with only 14% visiting friends and relatives.

2.5 Domestic Consumer Trends

Research by KPMG (KPMG, 2021) has uncovered several key trends relevant to the domestic tourism industry, all of which will continue to evolve in response to the global health crisis. KPMG predict that recreational travellers will be driven by three key mindsets over the next 12-24 months:

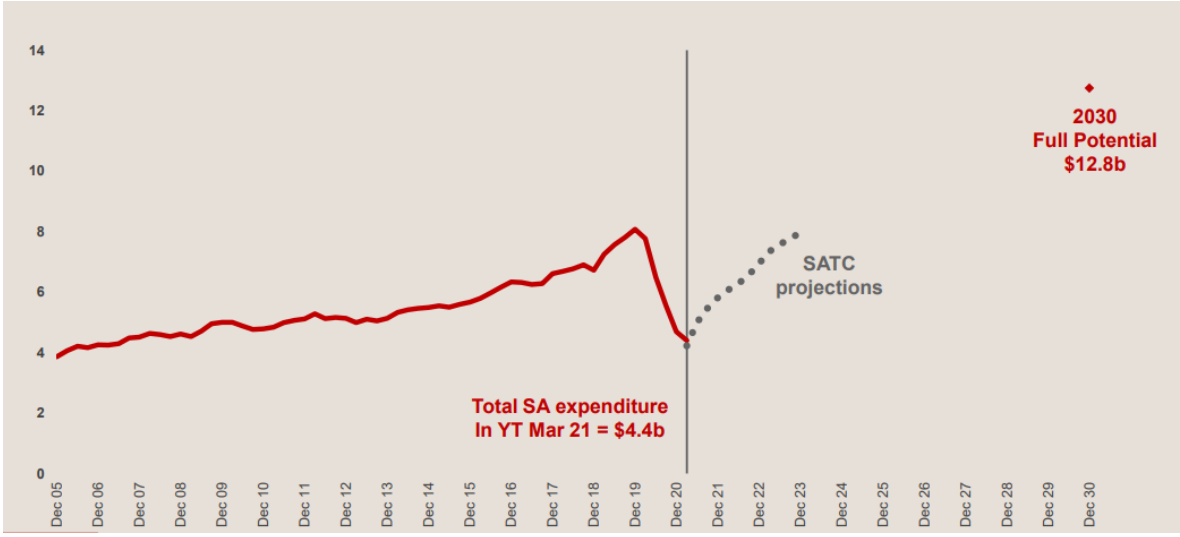
- Ticking off the backyard bucket list – There is a tendency among young Australians to travel overseas in their younger years and wait until they have a family or even until retirement before taking the time to really explore Australia. The pandemic may force this trend to be reversed.
- Experimenting with the working holiday – The recent prevalence of flexible working brought about by the pandemic and made possible by technological developments is providing an opportunity to travel for more nights and not be constrained by annual leave or public holidays.
- Romancing with the great Aussie-road trip – Given that much of the growth in domestic travel will be shorter, more frequent, and more affordable holidays, it is likely that many of these trips will be taken by road. The profile of road trippers in 2021 may include more young professionals, older families, cruise enthusiasts and backpackers who would otherwise be overseas.

3.0 Operating Environment

3.1 State Progress Towards 2030

Following years of steady growth, SA, like all destinations globally has seen a decline in tourism expenditure resulting from the impact of COVID-19 (See Figure 5). The ability of the SA tourism industry to achieve the pre-COVID-19 state-wide target of $12.8 billion remains uncertain, however with growing vaccination rates consumer confidence is increasing leading into summer 2021/22. The recovery is driven in the first instance by intrastate travel, particularly leisure travel to regional areas of SA. The interstate recovery has shown glimpses of revival but has continued to be hindered by state border closures. State borders are expected to remain open as vaccination levels across each state reach 80%. At current vaccination rates South Australia will be 80% fully vaccinated by November 2021. The return of international travel from an inbound traveller perspective remains uncertain, however from November 2021 Australian's will be permitted to travel overseas and return without the need to hotel quarantine (Remeikis, Knaus, & Visontay, 2021).

Figure 5: South Australia Progress Towards 2030

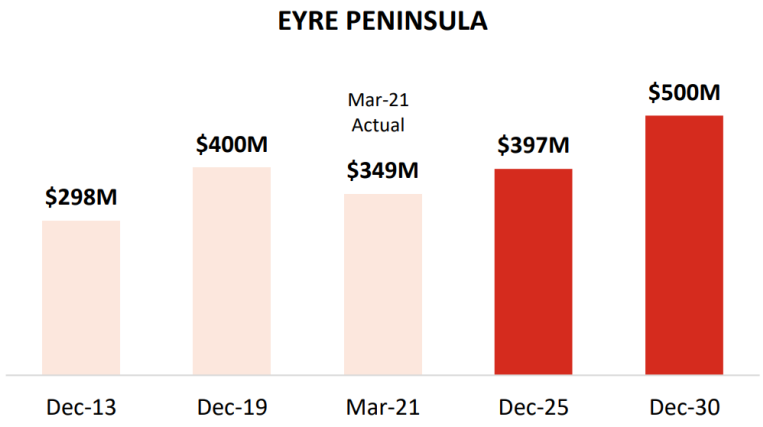


Source: SATC, 2021

3.2 Regional Outlook for 2030

In the year ending December 2019 the Eyre Peninsula recorded $400 million in tourism expenditure and was well on track to achieve the 2030 target of $500 million (See Figure 6). While the impact of the COVID-19 pandemic has made it difficult to accurately measure, in the year ending March 2021 tourism on the EP resulted in $349 million in expenditure, just 13% down on pre-covid levels. In the absence of international travel, the emphasis has fallen on the domestic tourism market, with 92% of visitors to the region from within the state (See Appendix D). The interstate market has shown great promise at times when state borders were open, however consumer confidence continues to be shaken, particularly from states with more restrictive COVID-19 responses such as WA.

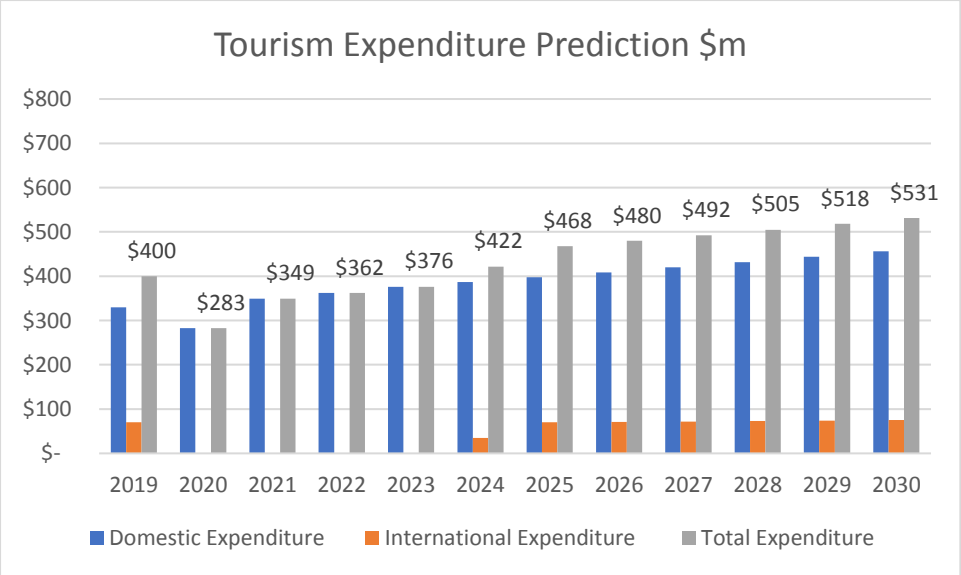
Figure 6: Eyre Peninsula Tourism 2030 Target



Source: SATC (2019). Regional Profile

The below tourism expenditure table (See Figure 7) uses data and insights to predict the outlook for tourism expenditure in the region up to 2030. The calculations use the SATC post COVID-19 performance figure of $349m from 2021 (SATC, 2021) which includes domestic tourists considering international borders were closed. The pre COVID-19 average domestic growth rate in S.A is 2.8% (TRA, National Visitor Survey, 2021) which is applied from 2022, up to 2030 for domestic travel. Conservatively the chart predicts that international travel to the EP will resume in 2023, returning to pre-covid expenditure levels by 2024 (Deloitte Access Economics, 2021). Thereafter a 2% growth is applied based on historic Tourism Australia growth data (Deloitte Access Economics, 2021). As seen in Figure 7, the tourism outlook prediction demonstrates a pathway for the EP to achieve the pre COVID-19 target of $500 million by 2030.

Figure 7: Regional Outlook Prediction ($ value = millions)



Source: Developed by RDAEP using data from SATC, Tourism Australia and Deloitte.

3.3 Opportunities and Challenges

3.3.1 Opportunities

The region's natural environment is its biggest drawcard and the key strength of the EP. The pristine environs, stunning coastline, outback scenery, and iconic wildlife experiences have great appeal across a range of market segments. Hero experiences such as cage diving and swim-with marine-life tours are strong drawcards, while off-road adventuring and outback trekking are areas that can be further explored and promoted. The EP's exceptional seafood is also a strength and is recognised through the Seafood Frontier brand and the Seafood Frontier Touring Route. It is not only well-known, but something that is broadly touted for visitors. Space tourism is an emerging opportunity for the Eyre Peninsula with a test rocket range at Koonibba and an orbital rocket range in development at Whalers Way. The rich Indigenous culture and heritage is an undercapitalised strength for the region. Indigenous products and experiences have great appeal for travellers, and this potential exists in the EP but is not yet realised. The Far West Aboriginal Tourism Strategy addresses these opportunities and challenges in greater detail (RDAEP, 2017).

In the absence of international travellers, several new trends have emerged presenting opportunities for EP. Naturally owing to the impact of lockdowns in response to the pandemic, consumers are more than ever seeking open spaces and opportunities to immerse in nature. While the pandemic has paused the international backpacker market, this has somewhat been replaced by long-term domestic travellers including not just grey nomads, but digital nomads, working while travelling Australia or part thereof. Considering the staffing shortages in addition to a scarcity in housing the digital nomad is an appealing market with potential to boost the economy, fill labour gaps, without needing traditional accommodation. The rise of the grey and digital nomad is likely indicated by the increased average length of stay of intestate travellers; from 5 to 10.8 nights (see appendix D). Appealing to the interstate traveller provides an opportunity to close the gap on tourism expenditure particularly while international travel remains uncertain. While the caravan and camping segment has always been a popular mode of travel for the EP, between 2019 and 2021 there was a 20% increase in accommodation use for hotels and motels. This presents an opportunity to target a higher value traveller by appealing to the drive / stay market. Research is required to identify how visitors travel throughout the region, and to ascertain seasonality across different market segments, which can inform strategies for dispersal of travellers throughout the year.

3.3.2 Challenges

While the natural environment is one of the region's strengths, it is also one of the disadvantages. The large distances between Adelaide and the EP, and by extension the EP and other parts of Australia, are a significant factor in the decision to travel to the region. However, the impact of the pandemic has reduced the psychological barrier of distance for many domestic travellers who are more motivated due to limited travel opportunities. Telecommunications across the region are inconsistent and, in some areas, completely unavailable. In a hyper-connected world, lack of internet connection and phone service can be a deterrent for visitors and also has implications for safety. Local infrastructure is also below standard, particularly when compared to neighbouring states. Increased visitation to popular campsites particularly during peak season has resulted in environmental impacts and the need for improved infrastructure to better manage the camping segment. The EP by nature is suited to the drive market, yet the lack of well-developed camping sites, roads and signage remains an issue. While these weaknesses can be obstructions to visitation,

enhancement of this infrastructure have the potential to positively influence the visitor experience and are likely to increase average length of stay.

Labour shortages are an emerging challenge for the tourism sector with many operators struggling to find suitable workers. In December 2020, 33 percent of accommodation and food service operators indicated they were having difficulty finding staff. By June 2021, this increased to 38 per cent. This is both a supply and demand challenge. For example, with less business and international travel, hotel demand is concentrated on weekends which makes recruitment more difficult. Some businesses have had to scale back operations due to insufficient staff. Compounding the issue is a lack of temporary migrants who used to fill some of these roles. These include people on the Working Holiday Maker program, and international students who often work while studying.

4.0 Strategic Framework

4.1 Vision

To facilitate sustainable development of the visitor economy

4.2 Guiding Principles

Several guiding principles underpin the EP tourism strategy which include:

- Adopt a sustainable approach across all tourism planning and management
- Drive balanced demand across the region
- Provide visitors with a quality and safe experience
- Strengthen the regions competitive advantage
- Provide equitable opportunities for participation in tourism
- Use data and insights to inform action

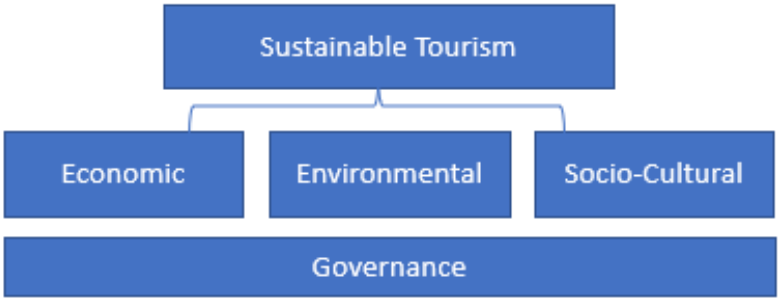
4.2.1 Sustainable Tourism

Sustainable tourism is a core guiding principle of the EP Tourism Strategy, which is defined as:

"Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities" (UNWTO, 2021)

The triple bottom line is the conceptual model for sustainable tourism, incorporating economic, environment and socio-cultural factors (See Figure 8). A fourth element of governance is widely considered in sustainability planning. Applying the sustainable tourism model to all aspects of regional tourism planning and management will help the EP achieve a sustainable visitor economy.

Figure 8: Model for Sustainable Tourism



Adapted from: (Stoddard & Pollard, 2012)

4.3 Organisational Framework

4.3.1 Regional Development Australia Eyre Peninsula

RDAEP is part of a national network of 52 regional development agencies which were established by the federal government in 2010. RDAEP is an incorporated association operating as an independent autonomous body. The board is uniquely placed to facilitate strategic economic and regional development initiatives across the Eyre Peninsula. RDAEP is supported through a cooperative arrangement with 10 of 11 local councils, in addition to State, and federal government.

Whilst the three tiers of governments provide funding to the operations of the board the organisation attracts and leverages funding for the delivery of priority projects and service contracts that provide long term benefits to the region. For example, a financial partnership with the South Australian Tourism Commission (SATC) to grow the regional visitor economy.

4.3.2 The Role of RDAEP as the Regional Tourism Organisation

Regional Development Australia Eyre Peninsula (RDAEP) is the lead body charged with tourism development for the Eyre Peninsula. RDAEP acts as a central facilitator to diversify the regional visitor economy and to realise the comparative advantage of the Eyre Peninsula to maintain a globally competitive tourism industry. Aligning with the SARVS 2025 the Eyre Peninsula Destination Management Plan 2025 sets the strategy and actions for a sustainable visitor economy.

Acting as the Regional Tourism Organisation (RTO) for the Eyre Peninsula, the RDAEP is responsible for the following:

1. Develop and lead the strategy for sustainable development of the visitor economy
2. Develop and implement the Eyre Peninsula destination marketing strategy via management of regionally owned marketing assets
3. Work with the tourism industry and stakeholders to facilitate tourism investment and product development
4. Facilitate opportunities for capacity development of the tourism sector
5. Facilitate regional tourism collaboration via stakeholder communication and coordination of a project pipeline.

6. Perform Executive Officer duties for Eyes on Eyre
7. Perform local contact duties for the South Australian Tourism Commission per 4.3.4

4.3.3 Eyes on Eyre

Eyes on Eyre is a joint initiative of Regional Development Eyre Peninsula (RDAEP), the Eyre Peninsula Local Government Association (EPLGA), Eyre Peninsula Landscape board (EPLB) and the Department for Environment and Water (DEW) that aims to 'enhance the Eyre Peninsula as a distinctive, cultural and remarkable world-class destination, underpinned by the character of its local communities and coupled with the conservation and protection of its pristine environment.'

Eyes on Eyre projects will assist the EP to move to the front of South Australia's visitor economy growth and respond to the SARVS (SATC, 2021). Key objectives of Eyes on Eyre include:

- Signage and Wayfinding: Develop a consistent product to direct and attract people to key sites.
- Visitor Experience and Camping Nodes: Develop and maintain consistent and high-quality infrastructure and facilities that promote increased visitation, enhanced visitor experience and revenue whilst conserving and protecting the environment.

4.3.4 Tourism Advisory Committee

Following the development of the SARVS in 2018, a holistic approach to tourism was required across marketing, events, product development, council collaboration and investment.

The Tourism Advisory Committee was established by RDAEP and EPLGA in 2018, at the request of Council CEOs. The TAC operates as a subcommittee of the CEO Committee and facilitates a regional approach to tourism projects, allowing for the timely allocation of local budgets and resources for tourism projects.

Key objectives include:

- Inform the development, implementation and review of member Council's tourism priorities and opportunities.
- Advise and support member Councils regarding tourism issues and make recommendations to them, as appropriate.
- Deliver regional tourism initiatives that enhance EP's status as a 'must visit' tourist destination.
- Review on an annual basis, TAC priorities from the regional Tourism Action Plan.

4.3.5 South Australian Tourism Commission

Since 2011 RDAEP, under agreement with the South Australian Tourism Commission (SATC) RDAEP is funded as the peak regional tourism organisation charged with driving the strategic growth of the EP visitor economy. Key deliverables under the SATC agreement include:

- Ensure that regional operators are kept fully informed of opportunities and developments in tourism including, but not limited to, grants, strategies, reports, and marketing campaigns from the SATC, Tourism Australia and other state and federal agencies.

- Carry out Local Contact Officer duties as required by SATC including digital content, trade & media hosting, public relations, marketing, product development, photo shoots, coordinate regional functions and provide input to SATC's regional events and festivals programs.
- Contribute to the development and implementation of the South Australian Regional Visitor Strategy (SARVS).
- Ensure that local councils in the region are kept abreast of key SATC and RTO tourism initiatives and promote the economic value of tourism to councils and other stakeholders.
- Provision of reports to the SATC in line with Key Performance Indicators.

5.0 Measuring Success

The success of the EP DMP will be measured annually using eight Key Performance Indicators (KPIs). Performance reports will be shared with regional stakeholders via the TAC structure. Additional metrics which measure progress of the DMP, and industry objectives will be added as relevant.

5.1 Key Performance Indicators

SATC:

- Expenditure
    - Day trippers
    - Overnight visits
    - Nights (number of)
- ATDW listings / leads
- Great State Voucher (bookings)
- Accommodation
    - Occupancy
    - Refurbs (#)
    - New (#)
- TIDF (investment) number of projects, and funds for the region
- Experiences (new)
- Signage (number of new) supports tourism infrastructure
- Employment

RDAEP:

- Website performance
- Social media reach and engagement
- EoE projects implemented
- TAC projects implemented
- Workplace employment results
- Other data as identified

6.0 Project Pipeline (July 2021 to June 2025)

The Project pipeline is designed to identify regional tourism projects, allowing stakeholders to proactively plan and seek budget allocation to support the agreed activities. The Project Pipeline is to be endorsed by the TAC and EPLGA. While projects will be agreed, the pipeline will be reviewed in January each year to ensure projects remain relevant and adaptable to regional priorities.

Fin Year	Task	Lead	Stakeholders	Funding	Comment
July 2020 to June 2021					
Q4	Regional Trails Strategy	RDAEP / TDM	EPLGA / TAC Councils (Excl. Franklin Harbour, Whyalla, Tumby Bay & Ceduna) Tredwell	$65,800	Sport & Rec Grant $25K LGA's $32,473 (excl FH, TB, Ceduna & Whyalla) RDAEP $8327
July 2021 to June 2022					
Q1	EP Destination Management Plan 2025	RDAEP / TDM	All of region	N/A	Project pipeline to be endorsed by CEO's Committee
Q2	Regional Camping Nodes Project (Phase 1 Online Booking Pilot)	RDAEP / TDM	Eyes on Eyre Elliston Council	$500k Grant	DEW Grant 1:1 $ matching required Note: All LGA's were invited to submit EOI.
Q3	Regional Camping Nodes Project (Phase 2 roll out)	RDAEP / TDM	Eyes on Eyre Elliston, Franklin Harbour, Lower EP	(As above)	DEW Grant 1:1 $ matching required Note: All LGA's were invited to submit EOI.
July 2022 to June 2023					
Q1	EP Regional Brand Strategy – Research & Insights (Phase 1)	RDAEP / TDM	All Councils Industry Consumers Community Appointed agency	$77,116	Phase 1: Includes Stakeholder Consultation & Analysis Funds held by RDAEP for all LGA's except Whyalla (Invoice sent 8 Feb 2022)

Q2	EP Regional Branding Strategy – Develop & Implement (Phase 2)	RDAEP / TDM	All Councils		Pending outcome of review, develop brand strategy including brand assets, guidelines, and implementation.
Q3/4	Regional Camping Nodes Project (Broader roll-out across)	RDAEP / TDM	Eyes on Eyre Participating Councils		Grant Funding Applied. 1:1 $ matching required
July 2023 to June 2024					
	Signage Project	RDAEP / TDM	Eyes on Eyre Councils / TAC DIT		
	Progress Regional Trails Strategy	RDAEP / TDM	Councils TWG Nature Based Tourism Organisations		
	Regional Camping Nodes Project (Continued roll out)	RDAEP / TDM	Eyes on Eyre Councils		
July 2024 to June 2025					
Q1	Regional Events Strategy	RDAEP / TDM	Councils / TAC Event Organisers		
Q3	EP Destination Management Plan 2030	RDAEP / TDM	All of Region		The 2030 plan will commence July 2025

TDM: Tourism Development Manager

Project Status:

Not Commenced	In Progress	Complete

7.0 Action Plan

Period: July 2021 to June 2025 (Moving forward the tourism action plan will span a five-year period)

Marketing

Objective / Action	Lead	Key Stakeholders	Year	Outcome
Improve the region's digital presence and align this with SATC's digital efforts.				
Continue to enhance the EP website to promote the region e.g., integration of walking trails and bookable campgrounds	RDAEP / TDM	All LGA	2021/22	Campground booking & trails story-map added to www.eyrepeninsula.com and relevant council websites
Conduct an audit of regional digital assets and identify opportunities for consolidation and improved performance.	RDAEP / TDM	All LGA	2021/22	Consolidated digital assets leading to improved digital marketing performance Gaps in digital assets identified Local guides integrated
Increase the reach of digital assets via digital promotion on Google Ads and social media marketing	RDAEP / TDM	All LGA, Industry	Ongoing	Increase consumer engagement with www.eyrepeninsula.com Increase social media reach on Facebook and Instagram
Increase regional representation and reach via ATDW	RDAEP / TDM	All LGA, Industry	Ongoing	Increase the number and quality of listings on ATDW Increase the regional reach via ATDW distributors
Integrate digital representation of print marketing assets	RDAEP / TDM	All LGA	Ongoing	Website to house digital visitor guide and Nullarbor map, Seafood Frontier driving route, local guides integrated
Leverage SATC promotion of EP across owned digital assets	RDAEP / TDM	All LGA	Ongoing	Increased digital promotion of EP tourism
Standardise visitor guide design and leverage digital promotion of local visitor guides across the region.	RDAEP / TDM	All LGA	2023	Template available for each LGA to use if desired. Embed visitor guide links on eyrepeninsula.com
Increase promotion of the region's competitive strengths and new offerings (coastal, wildlife, seafood, soft adventure, outback, Aboriginal experiences and astrotourism).				
Promote tourism experiences on digital, print, and social media platforms and monitor performance.	RDAEP / TDM	All LGA, Industry	Ongoing	Grow ATDW leads Increase website engagement Increase social media reach
Ensure new and existing products are updated on ATDW	RDAEP / TDM	All LGA, Industry	Ongoing	Increase the number and quality of ATDW listings

Capture, collate and share quality destination content including images and video	RDAEP / TDM	All LGA, Industry	2021/22	Delivery of the TA National Experience Content Initiative Grow image assets of EP in SATC Media gallery Content captured that aligns with the SATC photography style guide and shared with SATC media library
Promote different seasonal wildlife and nature occurrences across the whole year.				
Promote seasonal wildlife and nature occurrences across print, digital, and social platforms	RDAEP / TDM	All LGA	2021/22	Increased consumer awareness and participation in seasonal wildlife and natural activities Increase in nature and wildlife experiences on ATDW
Grow select smaller higher yielding cruise visitation and capture greater onshore regional spend				
Continue to grow the expenditure from existing cruise visitation by offering onshore excursions	RDAEP / TDM	SATC, PLCC, DCLEP, DCTB, Industry	Ongoing	Increased onshore cruise revenue
Capitalise on the region's appeal and growth potential from relevant SATC international market priorities.				
TBD	RDAEP / TDM			
Develop a regional brand strategy that identifies and communicates the unique qualities of the Eyre Peninsula including the Seafood Frontier brand.				
Apply the regional brand strategy across the Eyre Peninsula to deliver a consistent brand message across each LGA	RDAEP / TDM	TAC, All LGA Industry, Community	Ongoing	Consistent brand image recognised by consumers
Conduct a consumer sentiment survey to understand the perception of the Seafood Frontier brand and identify opportunities for increased impact across the EP.	RDAEP / TDM	TAC, Industry, Community	2021/22	Brand sentiment and opportunities identified
Regional Brand strategy (Research & Strategy)	RDAEP / TDM	TAC, Industry, Community, tourists	2022/23	Destination brand image that represents the region's competitive strengths that resonates with travellers.

Experience and Supply Development

Objective / Action	Lead	Key Stakeholders	Year	Outcome
Create compelling new visitor experiences across coastal, wildlife, seafood, outback, soft adventure, Astro tourism and Aboriginal themes.				
Implement the Regional Trails Strategy	RDAEP / TDM	EPLGA / TAC	Ongoing	Increased number and quality of walking trails

		Trails Working Group		Development of new regional trails which provide immersive nature-based-tourism experiences
Develop themed driving trails that inspire travel across the EP	RDAEP / TDM	All LGA	2022/23	New driving trails developed and promoted Opportunities to leverage the Seafood Frontier driving route capitalised
Support the implementation of the Far West Aboriginal Tourism Strategy	RDAEP / TDM	DC of Ceduna, Indigenous Groups, Industry	Ongoing	Quality Aboriginal tourism products developed
Provide high-level support to industry and start-up businesses via shared resources and promotion of support services	RDAEP / TDM	All LGA's, Industry, TDM	Ongoing	Businesses are connected with relevant support groups and services
Increase bookable products via travel intermediaries that help build the regions profile domestically and internationally				
Share details of travel intermediaries that have potential to reach target intrastate, interstate and international markets	RDAEP / TDM	All LGA, Industry	Ongoing	Tourism products are available to book via a range of suitable travel intermediaries e.g., Booking.com, Red balloon etc
Enhance the evolution of the Seafood Frontier brand for those experiences related to coastal Eyre Peninsula.				
Increase development of quality seafood experiences	RDAEP / TDM	All LGA (except inland), Industry Industry	Ongoing	Increase seafood experiences listed on ATDW Seafood product gaps identified
Work with tourism, hospitality, and aquaculture businesses to foster development of immersive seafood experiences	RDAEP / TDM	All LGA (except inland), Industry	Ongoing	Increase in quantity and quality of seafood experiences
Build the region's accommodation yields by aiming to develop 63 new rooms and upgrade 133 rooms (from 3 to 4 star) by 2025, especially in more remote locations.				
Share high level guidance for accommodation providers and encourage new development and upgrades.	RDAEP / TDM	All LGA, Accommodation Industry	Ongoing	Increased quality and quantity of accommodation
Work with government bodies to facilitate and inform of funding opportunities for accommodation providers	RDAEP / TDM	All LGA, Accommodation Industry	Ongoing	Increased number and quality of rooms available Accommodation developments funded by grants e.g., TIDF
Encourage the development of sustainable 5 or 6 star accommodation in a national park or iconic natural location				
Seek opportunities to attract investment for development of luxury accommodation	RDAEP / TDM	Relevant LGA's, DEW, Landscapes Board, Coastal	Ongoing	Increase in quality nature-based accommodation Engaged with investor community to promote investment opportunities on the EP

		Protection, Indigenous groups, Accommodation Industry		
Support the Eyes on Eyre project, which includes camping, infrastructure, regional trails, wayfinding and signage, Wi-Fi, and visitor interpretation experiences.				
Work with government organisations to attract funding to progress EoE projects	RDAEP / TDM	EOE, All LGA	Ongoing	Funding obtained for Eyre-on-Eyre projects
Implement a campsite booking platform and supporting infrastructure to address visitor impact issues	RDAEP / TDM	EOE, All LGA	2021/22	Improved visitor experience and campground management Sustainable economic model for future management
Facilitate infrastructure upgrades with smart technology to create efficiencies and modernise the visitor experience.	RDAEP / TDM	EOE, All LGA	Ongoing	Improved visitor experience and sustainable technology
Maintain and enhance key coastal infrastructure and national parks including trails for walking, cycling, and fishing				
Regional Trails Strategy	RDAEP / TDM	Subscribed LGAs Trails Working Group	2021/22	Regional Trails Strategy Project Delivered Upgrades to 19 existing priority trails, particularly with a consideration of signage, safety and risk management
Progress Trails Strategy to develop multi day, regional trails	RDAEP /TDM	Trails Working Group, RTM	2022/23	Multi-day trails developed
Invest in infrastructure that supports the drive market and encourages overnight stays				
Progress deliverables within the Camping Nodes Project	RDAEP / TDM	All LGA EOE	Ongoing	Improved infrastructure to create a quality visitor experience and improved campground management
Address reliability of water, energy supply and telecommunications for regional tourism related businesses				
Support and advocate for initiatives in this space	RDAEP / TDM	All LGA, EDM Related water, energy, and telecommunications organisations		TDM ensured that the RDAEP Economic Development Manager is informed of opportunities relating to tourism.

Collaboration

Objective / Action	Lead	Key Stakeholders	Year	Outcome
Develop the regions' network of visitor information services to meet changing consumer behaviour and digital needs				
Facilitate collaboration across the EP VIS outlets to disperse visitors across the EP.	RDAEP / TDM	All LGAs with VIO/VIC	Ongoing	Improved collaboration and knowledge across the EP VIS network
Develop digital VIS within the EP VIC/VIO network	RDAEP / TDM	All LGAs with VIO/VIC	Ongoing	Port Lincoln VIC conference attended Opportunities regarding digital resources identified
Build on existing partnerships and collateral to drive dispersal to inland and outback Eyre Peninsula.				
Ensure inland and outback products are adequately represented in print, digital and social media platforms.	RDAEP / TDM	All of LGA SATC	Ongoing	Inland and outback products represented in print, digital and social media platforms.
Seek partnership opportunities to develop and promote itineraries and drive routes that inspire inland travel.	RDAEP / TDM	All of LGA SATC	Ongoing	Dispersal of travellers across the region
Continue working with aviation partners to deliver flexible and affordable access across the region for business and leisure travellers and regain lost COVID-19 capacity and loads.				
Work with SATC and airline stakeholders to return flight capacity to the region to pre-covid levels	RDAEP / TDM	Relevant LGA's SATC, Rex Airlines, Qantas	Ongoing	EP flights return to pre-covid-19 capacity
Increase visitation along the Seafood Frontier touring route and foster dispersal from the route to other parts of the region including inland.				
Promotion of the Seafood Frontier across digital, print, and social media	RDAEP / TDM	All LGA SATC	Ongoing	Increased visitor awareness and participation of the Seafood Frontier driving route
Develop a series of driving itineraries that encourage dispersal across the region.	RDAEP / TDM	All of LGA SATC	2022	Themed driving itineraries developed and listed as *journeys* on ATDW (when feature is available)
Increase collaboration and alignment of activities across the three tiers of federal, state, and local government including Regional Development Australia Eyre Peninsula led projects for greater impact.				
Facilitate opportunities for engagement between industry stakeholders to encourage collaboration.	RDAEP / TDM	LGA, PIRSA, DEW, Landscapes SA, Indigenous, IEDM	Ongoing	Collaboration across all levels of government

TAC meetings to discuss and progress regional tourism projects	TAC Chair	EPLGA / LGA, TDM, PIRSA Landscape SA	Quarterly	Regional collaboration and efficiencies achieved
Meetings with Tourism Group across region to share information and facilitate collaboration across the EP	RDAEP / TDM	All of LGA	Monthly	Shared knowledge and improved efficiency via aligned planning and action.

Industry Capability

Objective / Action	Lead	Key Stakeholders	Year	Outcome
Raise industry capability in the areas of digital marketing, business operation, product development, event management and event promotion.				
Deliver digital capability programs for EP tourism operators	RDAEP / TDM	All of LGA, tourism business	Ongoing	ATDW training delivered in 2021
Share opportunities for capacity development and training with appropriate stakeholders	RDAEP / TDM	All of LGA, tourism business	Ongoing	Increased capacity of tourism businesses
Address workforce shortages via a Regional Workforce skills and development program in collaboration with multiple private and public stakeholders including three tiers of government.	RDAEP / RWC	All of LGA, TSM, industry	Ongoing	RWC informed by TDM of tourism challenges and opportunities. Workplace skills and labour shortages addressed
Support Aboriginal tourism operators across all areas for business growth				
Engage with indigenous stakeholders to identify opportunities to integrate Aboriginal tourism into mainstream projects	RDAEP / TDM	All of LGA, tourism business, Indigenous Groups	Ongoing	Greater representation of Indigenous groups and narrative e.g., interpretation signage, brochures, EoE projects etc.
Revision of the Far West Aboriginal Tourism Plan (ensure alignment with SATC and TA Aboriginal tourism initiatives)	RDAEP / IEDM	Ceduna, Indigenous Groups, TDM	2022	Far West Aboriginal Tourism Plan delivered and possibly expanded to all-of region Work with RDAEP Aboriginal Economic Development Manager to identify collaborative opportunities.

Business and Events:

Objective / Action	Lead	Key Stakeholders	Year	Outcome
1.Create an event strategy to support, develop and attract events that are fitting to the character and aspirations of the region and build a balanced portfolio of signature events.				
Develop a Regional Events Strategy	RDAEP / TDM	EPLGA / TAC, Events groups, Industry	2025	Regional events strategy created
2.Grow existing signature events such as Tunarama and create new community events to attract new visitors and increase length of stay and visitor spend.				
Create a regional events calendar	RDAEP / TDM	All of LGA, VIO/VIC's, Events groups, industry	Ongoing	Event calendar created Event gaps identified
Inform of funding opportunities for event providers	RDAEP / TDM	All of LGA, Events Groups	Ongoing	Grant funded events
3.Build regional event resourcing to support this events strategy.				
TBD	RDAEP / TDM	All of LGA	2025	TBD

TDM: Tourism Development Manager (Annabelle Hender)

IEDM: Indigenous Economic Development Manager (Howard Coote)

EDM: Economic Development Manager (Trevor Smith)

RFC: Regional Workforce Coordinator (Casey Peters)

PO: Project Officer (Tamsin Schultz)

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Appendix:

Appendix A: Geographic Profile

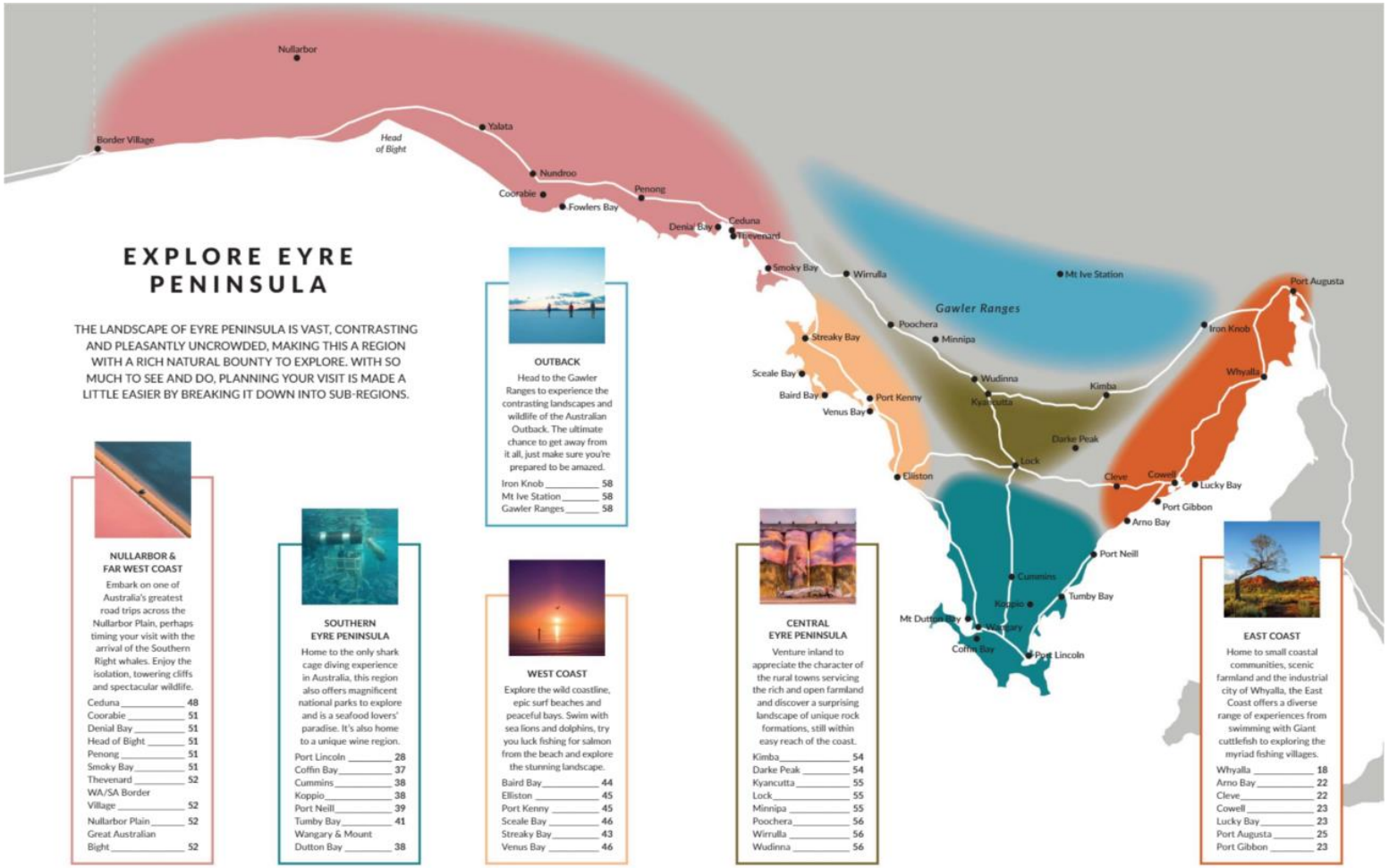


Image: www.eyrepeninsula.com.au

Appendix B: Local Government Authorities

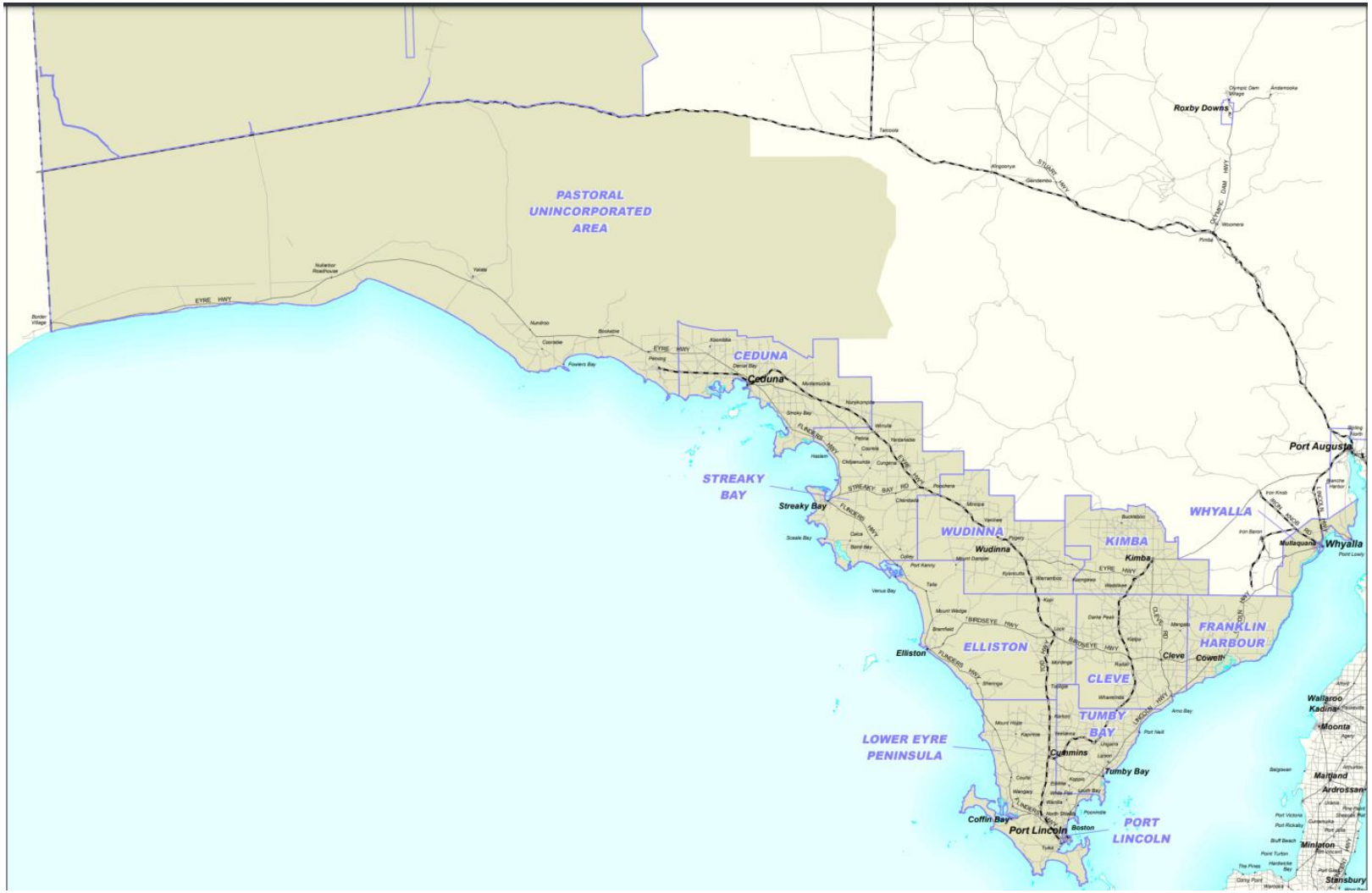


Image: plan.sa.gov.au

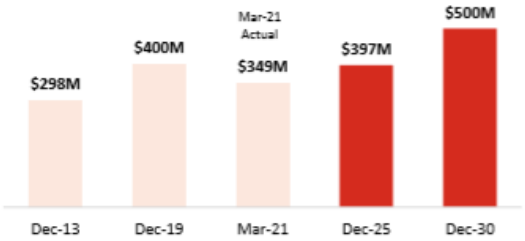
Appendix C Eyre Peninsula Regional Visitor Profile (YE March 2021)

OVERVIEW

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

- Currently the Eyre Peninsula contributes $349 million to the year end March 2021 South Australian expenditure of $4.4 billion.
- The Eyre Peninsula has achieved 88 per cent of their 2025 target of $397 million and 70 per cent of their 2030 target of $499 million.

EYRE PENINSULA



ANNUAL VISITOR SUMMARY YEAR END MARCH 2021

ORIGIN	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	350,000	32,000	**382,000**	-	**382,000**
%	92%	8%	100%	0%	100%
% Across all regions	90%	10%	100%	0%	100%
Share of Regional SA	9%	7%	9%	0%	9%
Nights	1,390,000	344,000	**1,734,000**	-	**1,734,000**
%	80%	20%	100%	0%	100%
% Across all regions	82%	18%	100%	0%	100%
Share of Regional SA	11%	13%	12%	0%	12%
ALOS	4.0	10.8	**4.5**	-	**4.5**
ALOS Regional SA	3.2	6.0	**3.5**	-	**3.5**
Total Expenditure					**$349,000,000**
Overnight Expenditure	$236,000,000	$24,000,000	**$260,000,000**	$0	**$260,000,000**
Day Trip Expenditure					**$89,000,000**
Domestic Day Trips					**551,000**

- The Eyre Peninsula saw 382,000 domestic overnight visitors for the year end March 2021.
- 92 per cent of overnight visitors were from intrastate and 8 per cent from interstate.
- The 350,000 intrastate overnight visitors stayed 1.4 million nights with an average length of stay of 4.0 nights.
- There were 32,000 interstate overnight visitors who stayed 344,000 nights with an average length of stay of 10.8 nights
- There have been no international arrivals with the borders closed.
- 551,000 day trips were taken to the Eyre Peninsula for the year with spend of $89 million.

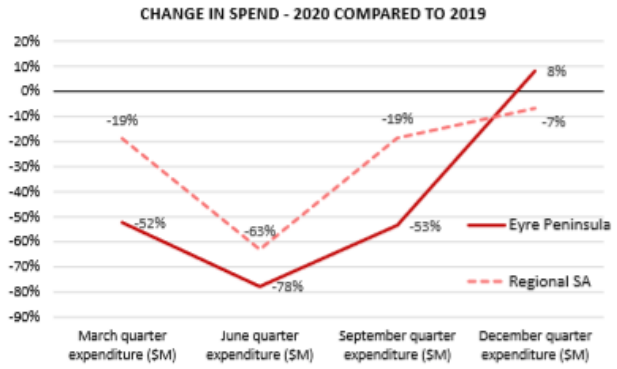
ALOS = Average Length of Stay

PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	222,000	75,000	82,000	14,000	**382,000**
%	58%	20%	21%	4%	**100%**
% Across all regions	56%	22%	18%	5%	**100%**
Share of Regional SA	9%	7%	9%	0%	**9%**
Nights	1,195,000	289,000	228,000	21,000	**1,734,000**
%	69%	17%	13%	1%	**100%**
% Across all regions	58%	18%	20%	3%	**100%**
Share of Regional SA	14%	11%	8%	4%	**12%**
Average Length of Stay	5.4	3.9	2.8	1.5	**4.5**
Expenditure					
Annual Expenditure	$163,000,000	$32,000,000	$50,000,000	$14,000,000	**$260,000,000**
Av spend per night	$136	$111	$219	$667	**$150**
Av spend per night Regional SA	$213	$126	$132	$511	**$191**
Share of Regional SA	11%	14%	13%	21%	**12%**

- 78 per cent of overnight visitors to the Eyre Peninsula are leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend $136 per night compared to VFR visitors who spend $111 per night.
- Leisure overnight visitors spent $243 million for the year, making up 70 per cent of all expenditure.

SPEND 2020 VERSUS 2019



- March quarter 2020 prior to COVID-19 was down 52 per cent on the March quarter in 2019.
- The Eyre Peninsula saw expenditure fall 78 per cent for the June quarter in 2020 compared to June quarter in 2019.
- The September quarter saw a recovery from June, however still down 53 per cent on 2019.
- The December 2020 quarter was up 8 per cent compared to the December quarter in 2019.

EYRE PENINSULA TOURISM LISTINGS

Category	# Listings
ACCOMMODATION	158
ATTRACTION	129
TOUR	35
GENERAL SERVICE	35
EVENT	31
RESTAURANT	27
DESTINATION INFORMATION	8
HIRE	6
INFORMATION	5
TRANSPORT	1
Grand Total	435

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

118,000

YEAR END MARCH 2021

ACCOMMODATION LEADS
64,000
55%

FOOD & DRINK LEADS
4,000
3%

TOUR LEADS
29,000
25%

***OTHER LEADS**
20,000
17%

TOP 5

- DISCOVERY PARKS STREAKY BAY FORESHORE
- CAMEL BEACH HOUSE
- PORT LINCOLN HOTEL
- PORT LINCOLN TOURIST PARK
- SHELLEY ROCKS HOUSE

TOP 5

- 1802 OYSTER BAR
- BEER GARDEN BREWING
- THE FRESH FISH PLACE FISH MARKET CAFE
- DEL GIORNOS CAFE RESTAURANT
- LANSE TUMBY CAFE

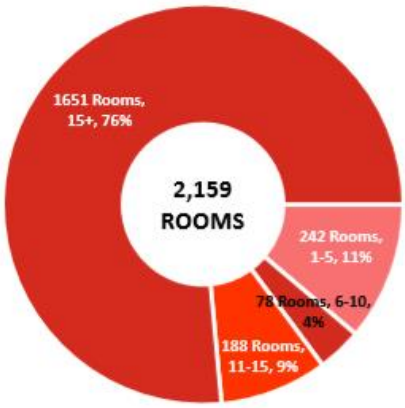
TOP 5

- COFFIN BAY OYSTER FARM TASTING TOURS
- GAWLER RANGES WILDERNESS SAFARIS
- BAIRD BAY OCEAN ECO EXPERIENCE SWIM WITH DOLPHINS AND SEA LIONS
- CALYPSO STAR CHARTERS
- ADVENTURE BAY CHARTERS

* 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



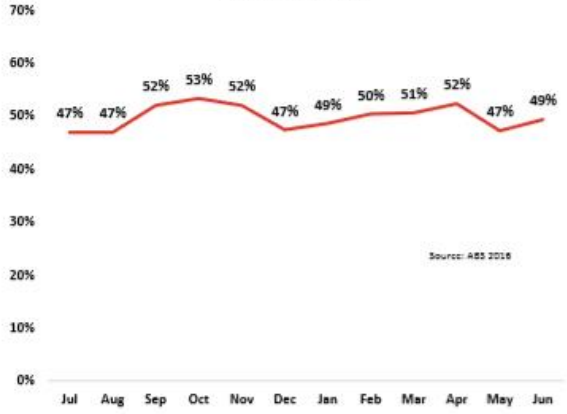
- Currently there are 157 establishments on the Eyre Peninsula that accommodate guests.
- These 157 establishments account for 2,159 rooms ranging from 1 room to over 50.
- 76 per cent of rooms fall into establishment with 15 or more rooms.
- 11 per cent of rooms fall into the 1-5 room establishments.

ACCOMMODATION SUPPLY

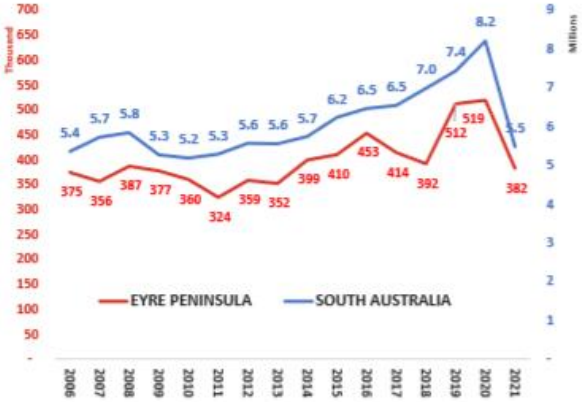
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	26
Rooms	987
Occupancy	50%
Takings	$21,300,000

- Average occupancy for the year is 50 per cent over 26 establishments and 987 rooms.
- The peak month for the year is October with occupancy of 53 per cent.
- Low point of the year comes in the Winter months with occupancy on average dropping to 48 per cent.

MONTHLY OCCUPANCY RATES YEAR END JUNE 2016 - EYRE PENINSULA



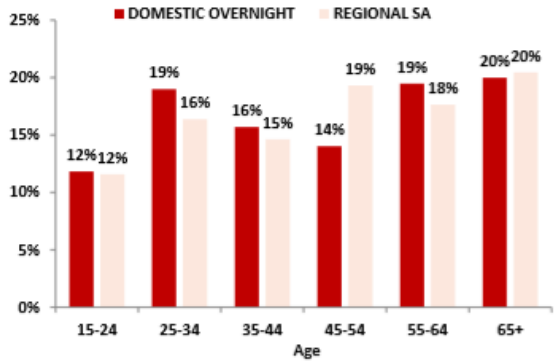
TOTAL OVERNIGHT VISITATION TO EYRE PENINSULA & SOUTH AUSTRALIA



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.

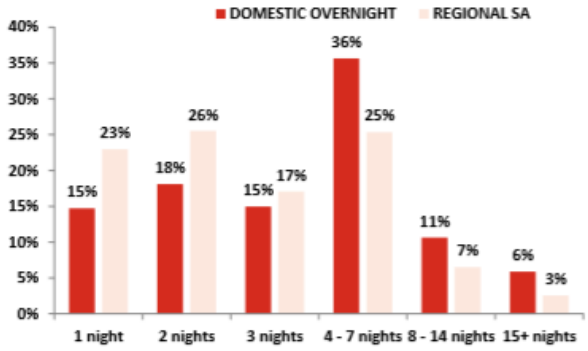
VISITOR PROFILE

AGE OF VISITORS TO EYRE PENINSULA



- Domestically there is a peak in 25-34 age group at 19 per cent.
- Growth has come from the 35-44 age group where we see 16 per cent of visitors, this is up on the prior year result of 13 per cent.

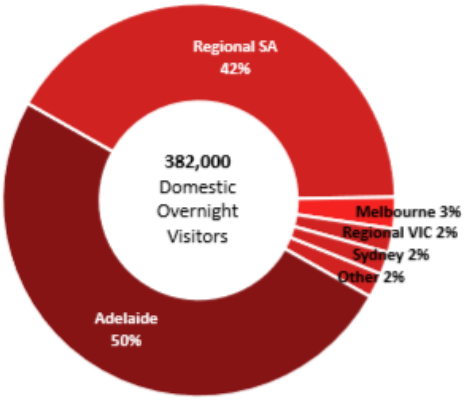
LENGTH OF VISIT TO EYRE PENINSULA



- 36 per cent of visitors prefer to stay between 4 and 7 nights, above the regional average and also higher than the previous year of 31 per cent.
- 33 per cent of Domestic visitors like to stay 1 to 2 nights, well below the regional South Australian average of 49 per

VISITOR ORIGIN

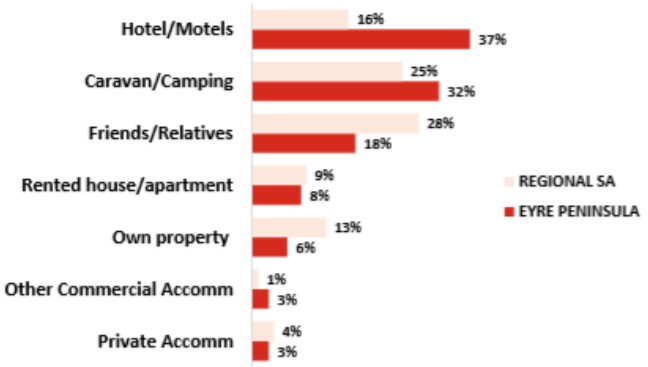
ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO EYRE PENINSULA



- Victoria and Sydney each accounted for 5 per cent and 2 per cent of visitors to the Eyre Peninsula. Pre COVID Western Australia at 9 per cent and Victoria at 7 per cent were the Eyre Peninsula's biggest Interstate Markets
- Regional South Australia contributes 42 per cent of visitors to the Eyre Peninsula.
- 50 per cent of visitors come from Adelaide, however prior to COVID this was 34 per cent.

VISITOR USE OF ACCOMMODATION

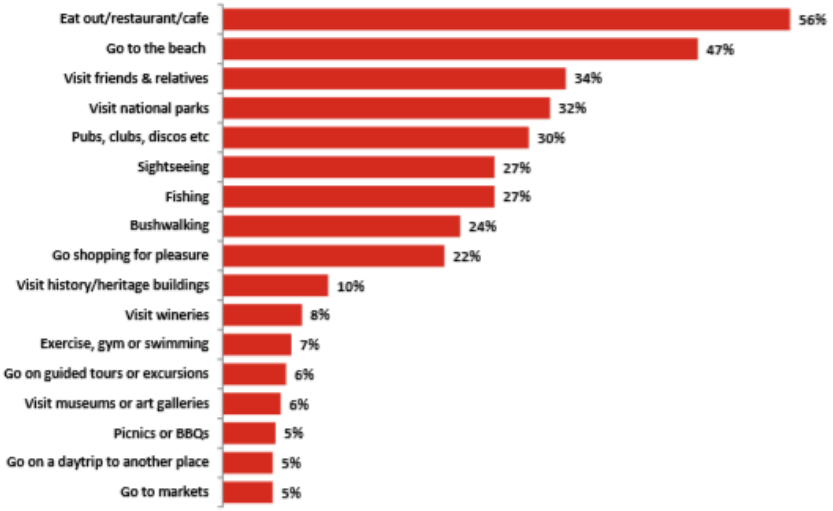
ACCOMMODATION USED IN EYRE PENINSULA FOR DOMESTIC VISITORS



- 55 per cent of domestic visitor nights in the Eyre Peninsula are spent in Hotels or motels. Pre Covid Hotels and Motels accounted for 18 per cent of nights.
- The Eyre Peninsula over indexes for Caravan and Camping when compared to regional South Australia.
- 18 per cent of visitors stayed in a friend or relatives property, below the regional South Australian average of 28 per cent.

VISITOR ACTIVITIES

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN EYRE PENINSULA



- The most popular activity when coming to the Eyre Peninsula is eating out at a restaurant or cafe.
- Other popular activities include going to the beach, visiting national parks, sight seeing, fishing, bush walking, visiting friends and relatives and visiting wineries.

REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2019-20, the tourism industry contributed an estimated $376 million to the Eyre Peninsula regional economy and directly employed approximately 2,000 people.

Employment

- 2,000 jobs for people employed directly by the tourism industry, 700 indirect jobs and a total employment impact of 2,700 peo ple.

Gross Value Added (GVA)

- $122 million and $90 million in direct and indirect tourism GVA, and $212 million in total tourism GVA.

Gross Regional Product (GRP)

- $130 million and $115 million in direct and indirect tourism GRP and $245 million in total tourism GRP.

Tourism Consumption

2019–20
Tourism products - directly consumed

- 17% Long distance passenger transportation
- 16% Takeaway and restaurant meals
- 13% Shopping (including gifts and souvenirs)
- 11% Fuel (petrol, diesel)
- 10% Travel agency and tour operator services
- 7% Accommodation services
- 6% Food products

Tourism Employment

2019–20
Tourism Industries - 2,000 directly employed

- 32% - 642 -Cafes, restaurants and takeaway food services
- 16% - 319 - Retail trade
- 15% - 309 - Accommodation
- 9% - 184 -Travel agency and tour operator services
- 8% - 157 - Air, water and other transport
- 6% - 124- Clubs, pubs, taverns and bars
- 4% - 84 - Road transport and transport equipment rental

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

REGIONAL INSIGHTS

Interstate

- Coast and seafood the cornerstones of appeal.
- Unique experiences around interaction with aquatic wildlife very appealing.

Intrastate

- Similar appeals to interstate with marine wildlife, scenery and seafood all clear winners.

International

- Viewing and engaging with local wildlife (both sea and land) hold strong appeal for the Eyre Peninsula.
- Uncrowded beaches also appeal.
- Dining on seafood higher for the eastern markets.

Regional Visitor Strategy Priorities

- The opportunity for the Eyre Peninsula is to capitalise on its pristine nature, immersive wildlife experiences and coastal li festyle, to drive increased overnight stays from international and domestic visitors.
- The region needs to promote these competitive strengths.

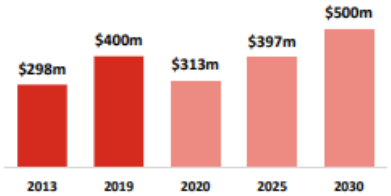
Source: https://www.tourism.sa.gov.au/regions/eyre-peninsula

Figure 4 Eyre Peninsula Regional Visitor Profile (YE Dec 2019)

OVERVIEW

ALL DATA BASED ON THE ANNUAL AVERAGE FOR THE 3 YEARS TO THE YEAR END DECEMBER 2019 AND RELATES TO DATA PRIOR TO COVID-19 RESTRICTIONS

- Currently the Eyre Peninsula contributes $400 million to the December 2019 South Australian expenditure of $8.1 billion.
- The Eyre Peninsula has achieved their $313 million 2020 target and 80 per cent of their 2030 target of $500 million.



Annual Visitor Summary December 2017 - December 2019

ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	332,000	118,000	**450,000**	20,000	**470,000**
%	**74%**	**26%**	**96%**	**4%**	**100%**
Nights	1,194,000	617,000	**1,811,000**	151,000	**1,961,000**
%	**66%**	**34%**	**92%**	**8%**	**100%**
Average Length of Stay	4	5	**4**	8	**4**
Domestic Day Trips					
Average Annual Day Trips to Eyre Peninsula					**524,000**

PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	208,000	122,000	**117,000**	29,000	**470,000**
%	**44%**	**26%**	**25%**	**6%**	**100%**
Nights	953,000	514,000	**398,000**	96,000	**1,961,000**
%	**49%**	**26%**	**20%**	**5%**	**100%**
Average Length of Stay	5	4	**3**	3	**4**
Expenditure					
Average Annual Expenditure	$ 192,000,000	$ 44,000,000	$ 94,000,000	$ 70,000,000	**$ 400,000,000**

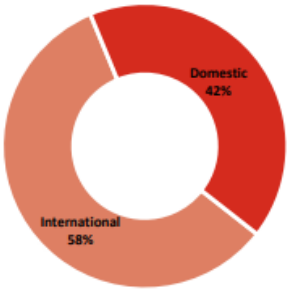
- 96 per cent of the Eyre Peninsula visitors are **Domestic** visitors and 4 per cent are **International** visitors.
- **Domestically**, 74 per cent of visitors are from within the state compared to 26 per cent from Interstate.

EYRE PENINSULA TOURISM LISTINGS

Category	Eyre Peninsula
Accommodation	125
Attraction	88
Tour	33
Food and Drink	20
Event	16
General Services	10
Destination Information	6
Information Services	3
Hire	3
Grand Total	304

Note: some listings have multiple categories of accommodation
Source: Australian Tourism Data Warehouse

EYRE PENINSULA MEDIA COVERAGE

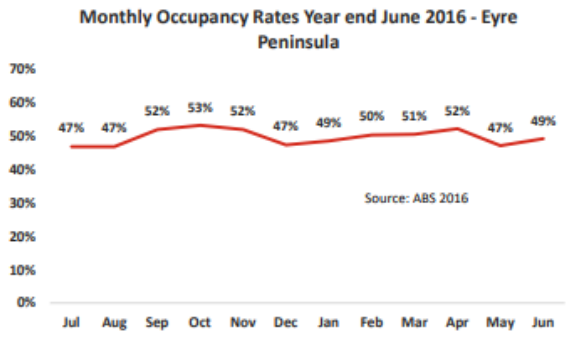


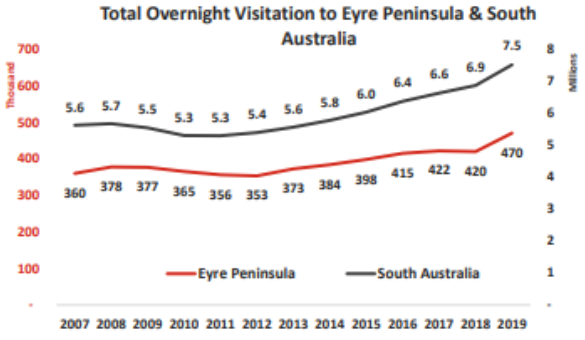
Source: Advertising Space Rate - 2018

ACCOMMODATION SUPPLY

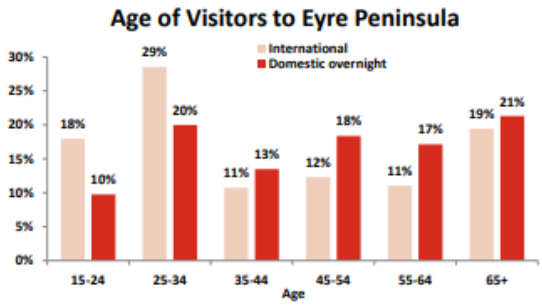
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	26
Rooms	987
Occupancy	50%
Takings	$21,300,000

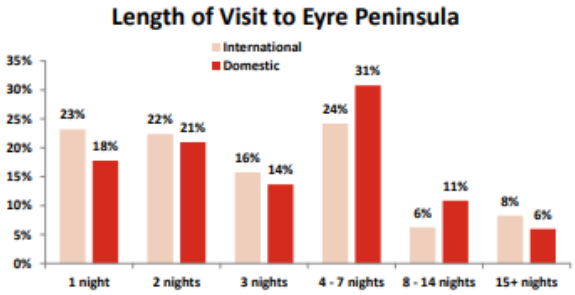
- Average occupancy for the year is 50 per cent over 26 establishments and 987 rooms.
- The peak month for the year is October with occupancy of 53 per cent.
- Low point of the year comes in the Winter months with occupancy on average dropping to 48 per cent.





VISITOR PROFILE





- **International** visitors peak in the 25-34 age group at 29 per cent.
- **Domestically** age is pretty consistent, with 56 per cent of visitors over the age of 45.

- 47 per cent of **International** visitors prefer to stay 1 - 2 nights on the Eyre Peninsula.
- 26 per cent of **Domestic** visitors stay between 4-7 nights.

DOMESTIC VISITOR PROFILE

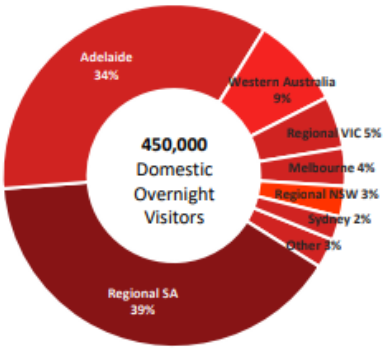
Purpose	Holiday	VFR	Other	Total
Visits	192,000	119,000	145,000	450,000
%	**43%**	**26%**	**32%**	**100%**
Nights	891,000	459,000	460,000	1,811,000
%	**49%**	**25%**	**25%**	**100%**
ALOS	5	4	3	4

INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	17,000	3,000	1,000	20,000
%	**85%**	**15%**	**5%**	**100%**
Nights	61,000	55,000	35,000	151,000
%	**40%**	**36%**	**23%**	**100%**
ALOS	4	18	35	8

VISITOR ORIGIN

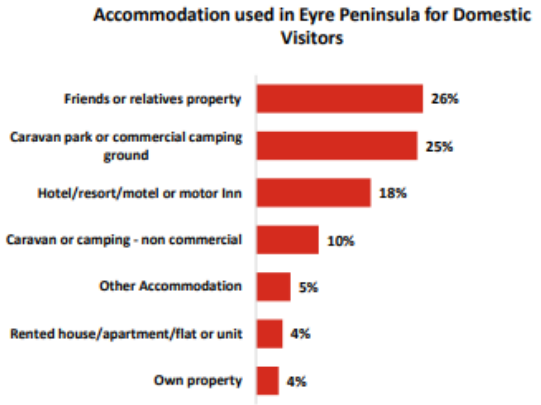
Origin of Domestic Overnight Visitors to Eyre Peninsula

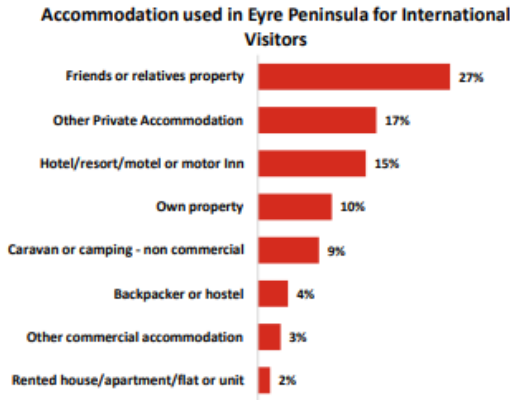


Origin of International Visitors to Eyre Peninsula

- Western Australia at 9 per cent and Victoria at 7 per cent are the Eyre Peninsula's biggest Interstate Markets.
- Regional South Australia contributes 39 per cent of visitors to the Eyre Peninsula and Adelaide contributes 34 per cent of the visitors.
- **Internationally**, Europeans contribute 58 per cent of visits to the Eyre Peninsula, with the United Kingdom contributing 22 per cent and Germany 13 per cent.
- The United States of America contributed 11 per cent and New Zealand 7 per cent of visitors to the Eyre Peninsula.

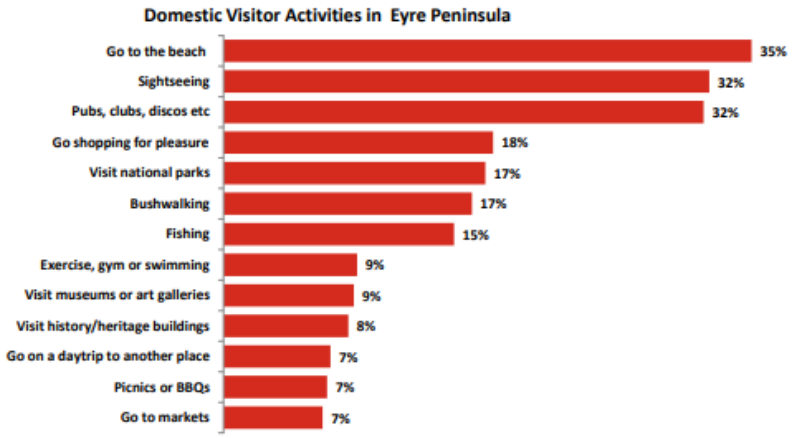
VISITOR USE OF ACCOMMODATION





- 44 per cent of **Domestic** visitor nights in the Eyre Peninsula are spent either with Friends or Relatives or in Hotels and similar accommodation.
- **Domestically**, Caravan and Camping is also popular with 35 per cent of visitors preferring this accommodation.
- 12 per cent of **International** visitors to the Eyre Peninsula prefer Caravan and Camping accommodation.
- 42 per cent of **International** visitors stay with Friends or Relatives or in a Hotel/Motel.

VISITOR ACTIVITIES



- The most popular activity when coming to the Eyre Peninsula is to eat out or visits friend or relatives.
- Other popular activities include going to the beach, visiting wineries, going to the markets and undertaking cultural experiences.

REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2017-18, the tourism industry contributed an estimated $412 million to the Eyre Peninsula regional economy and directly employed approximately 1,700 people.

Employment

- 1,700 jobs for people employed directly by the tourism industry, 600 indirect jobs and a total employment impact of 2,300 peo ple.

Tourism output

- $206 million and $207 million in direct and indirect tourism output, and $412 million in total tourism output.

Gross Value Added (GVA)

- $110 million and $88 million in direct and indirect tourism GVA, and $198 million in total tourism GVA.

Gross Regional Product (GRP)

- $117 million and $100 million in direct and indirect tourism GRP and $217 million in total tourism GRP.

REGIONAL INSIGHTS

Interstate

- Coast and seafood the cornerstones of appeal.
- Unique experiences around interaction with aquatic wildlife very appealing.

Intrastate

- Similar appeals to interstate with marine wildlife, scenery and seafood all clear winners.

International

- Viewing and engaging with local wildlife (both sea and land) hold strong appeal for the Eyre Peninsula.
- Uncrowded beaches also appeal.
- Dining on seafood higher for the eastern markets.

Regional Visitor Strategy Priorities

- The opportunity for the Eyre Peninsula is to capitalise on its pristine nature, immersive wildlife experiences and coastal li festyle, to drive increased overnight stays from international and domestic visitors.

Source: South Australia Tourism Commission