

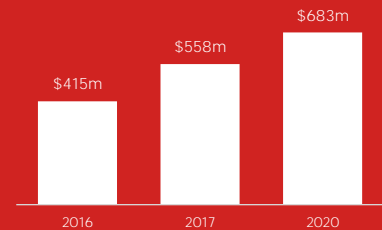
FLEURIEU PENINSULA

Regional Profile December 2014-2016



OVERVIEW

- Currently the Fleurieu Peninsula contributes \$415 million to the December 2016 South Australian expenditure of \$5.8 billion.
- The Fleurieu Peninsula has achieved 61 per cent of their \$683 million 2020 target.



Annual Visitor Summary December 2014 - December 2016

ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Visits	569,000	130,000	699,000	21,000	721,000
%	81%	19%	97%	3%	100%
Nights	1,488,000	467,000	1,954,000	203,000	2,157,000
%	76%	24%	91%	9%	100%
Average Length of Stay	2.6	3.6	2.8	9.7	3.0

Day Trips

Average Annual Day Trips to Fleurieu Peninsula **2,494,000**

PURPOSE

	Holiday	VFR	Business	Other	Total
Visits	414,000	218,000	59,000	31,000	721,000
%	57%	30%	8%	4%	100%
Nights	1,275,000	633,000	158,000	92,000	2,157,000
%	59%	29%	7%	4%	100%
Average Length of Stay	3.1	2.9	2.7	3.0	3.0

Expenditure
Average Annual Expenditure **\$ 415,000,000**

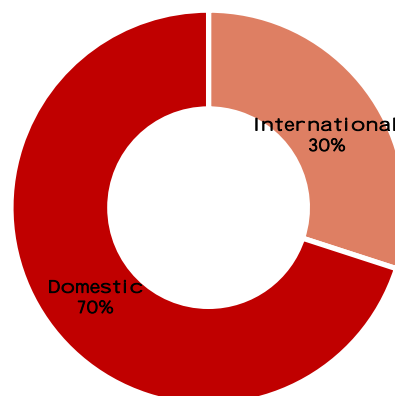
- 97 per cent of visitors are Domestic Visitors and 3 per cent International Visitor.
- Domestically, 81 per cent are from within the state compared to 19 per cent from Interstate.
- 88 per cent of visitors to the Fleurieu Peninsula are Leisure visitors (Holiday + VFR).

FLEURIEU PENINSULA TOURISM LISTINGS

Category	Fleurieu Peninsula
Accommodation	430
Event	270
Food and Drink	142
Attraction	131
Tour	41
Information Services	4
Hire	3
Transport	2
General Services	2
Grand Total	1025

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

FLEURIEU PENINSULA MEDIA COVERAGE



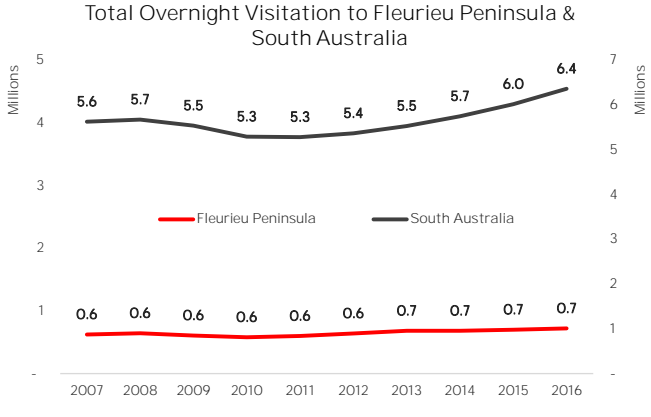
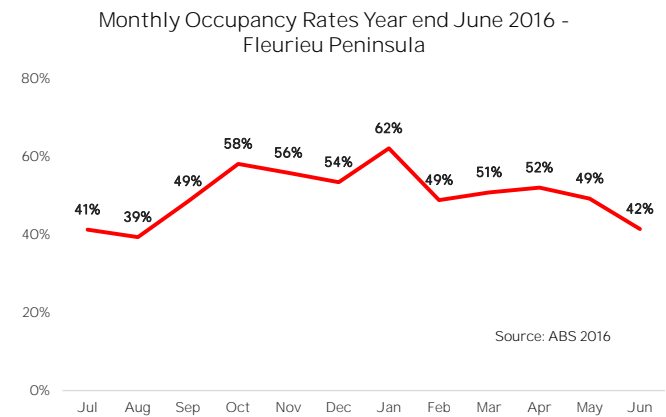
Source: Item Count - SATC Internal - 2016



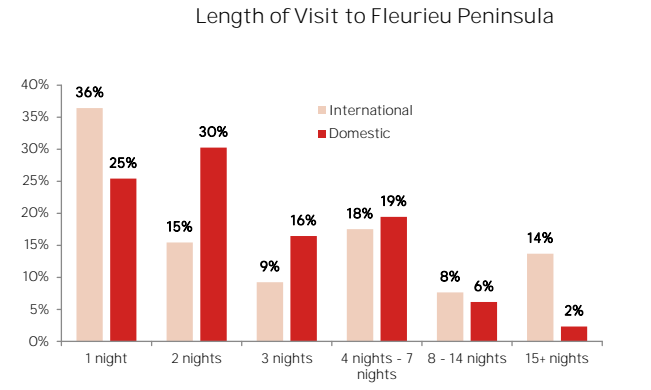
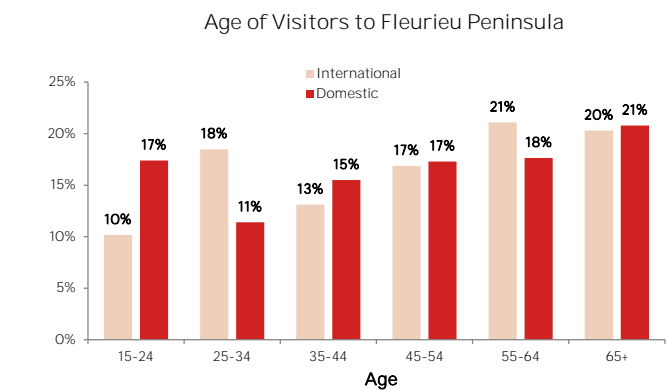
ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	16
Rooms	504
Occupancy	50%
Takings	\$ 11,900,000

- Average occupancy for the year is 50 per cent over 16 establishment and 504 rooms.
- The peak months are October and January with occupancy of 58 per cent and 62 per cent respectively.
- Low point of the year comes in August with occupancy on average dropping to 39 per cent.



VISITOR PROFILE



- International Visitors peak in the 55-64 age group at 21 per cent.
- Domestic Visitors to the Fleurieu Peninsula peak in the 65+ age group at 21 per cent.
- 36 per cent of International Visitors prefer to stay 1 night on the Fleurieu Peninsula.
- 55 per cent of Domestic Visitors prefer to stay 1 or 2 nights.

FLEURIEU PENINSULA

Regional Profile December 2014-2016



Government of South Australia
South Australian Tourism Commission

DOMESTIC VISITOR PROFILE

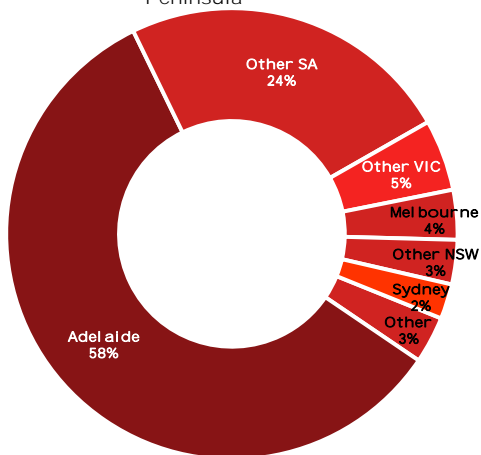
Purpose	Holiday	VFR	Other	Total
Visits	398,000	212,000	90,000	699,000
%	57%	30%	13%	100%
Nights	1,216,000	526,000	212,000	1,955,000
%	62%	27%	11%	100%
ALOS	3.1	2.5	2.4	2.8

INTERNATIONAL VISITOR PROFILE

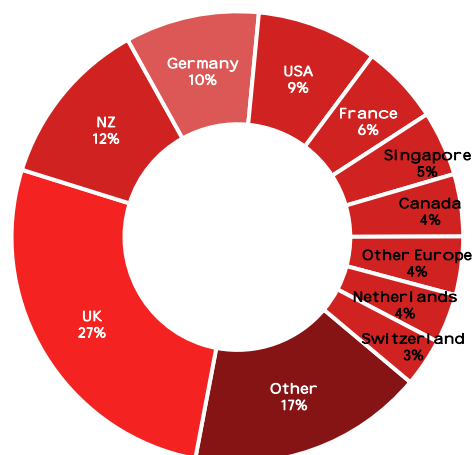
Purpose	Holiday	VFR	Other	Total
Visits	15,000	6,000	np	21,000
%	71%	29%	np	100%
Nights	58,000	106,000	38,000	203,000
%	29%	52%	19%	100%
ALOS	3.9	17.7	np	9.7

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Fleurieu Peninsula



Origin of International Visitors to Fleurieu Peninsula

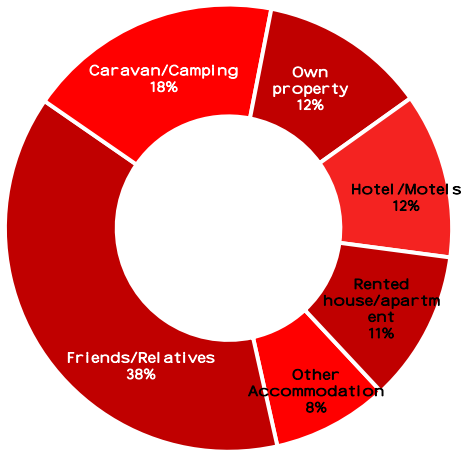


- Victoria, at 9 per cent and New South Wales at 5 per cent, are the Fleurieu Peninsula's biggest Interstate Markets.
- Regional South Australia contributes 24 per cent of visitors to the Fleurieu Peninsula.
- Adelaide visitors contribute 58 per cent of the visitors to the Fleurieu Peninsula.
- Internationally, Europeans contribute 58 per cent of the visits to the Fleurieu Peninsula, with the United Kingdom contributing 27 per cent and Germany 10 per cent.
- 12 per cent of visitors to the Fleurieu Peninsula are from New Zealand.

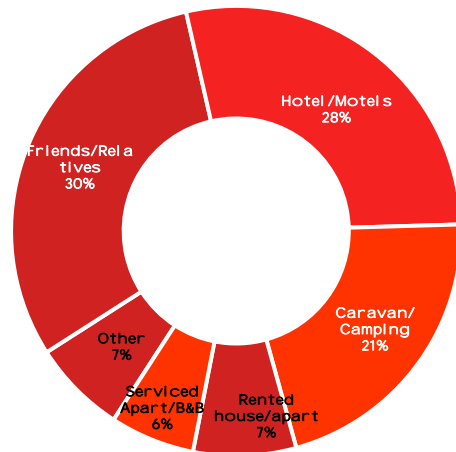


VISITOR USE OF ACCOMMODATION

Accommodation used in Fleurieu Peninsula for Domestic Visitors



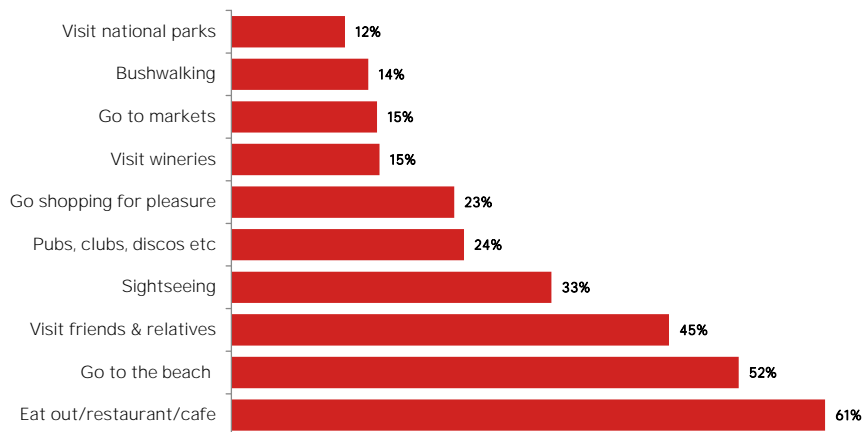
Accommodation used in Fleurieu Peninsula for International Visitors



- 50 per cent of Domestic Visitor nights in the Fleurieu Peninsula are spent either with Friends or Relatives or in Hotels and similar accommodation.
- Domestically, Caravan and Camping is also popular with 18 per cent of visitors preferring this accommodation.
- 58 per cent of International Visitors stay in Hotels and similar accommodation or with Friends or Relatives.
- 21 per cent of International Visitors to the Fleurieu Peninsula prefer Caravan and Camping.

VISITOR ACTIVITIES

Domestic Visitor Activities in Fleurieu Peninsula



- The most popular activity when coming to the Fleurieu Peninsula is to Eat out or Dine at a restaurant and or cafe.
- Other popular activities include Going to the beach, Fishing, and Going the markets.



- In 2013-14, the tourism industry contributed an estimated \$360 million to the Fleurieu Peninsula regional economy (15.9 per cent of gross regional product) and employed approximately 2,100 people (9.5 per cent of regional employment).

In 2013-14, the tourism activity in Fleurieu Peninsula generated:

- \$219 million and \$518 million in direct and indirect tourism output, and \$737 million in total tourism output;
- \$108 million and \$212 million in direct and indirect tourism GVA, and \$320 million in total tourism GVA;
- \$113 million and \$247 million in direct and indirect tourism GRP and \$360 million in total tourism GRP; and
- 2,100 jobs for people employed directly by the tourism industry, 2,100 indirect jobs and a total employment impact of 4,200 people.

REGIONAL INSIGHTS

- Variety of activities is the spice of the Fleurieu.

Interstate

- The variety is key to appeal with coast, food & wine, wildlife and a range of activities combining strongly.
- All in a package close to Adelaide.
- A good fit for a relaxing holiday.
- Minimal negative sentiment.

Intrastate

- The best of SA, just down the road.
- Diversity of appeals the main drawcard for intrastate as well, well known and understood.
- Accessibility seals the deal.
- No distinct negatives apparent.

International

- People like the proximity of the Fleurieu Peninsula to Adelaide.

Appeal data is from the consumer surveying conducted for the SATC by BDA Marketing Planning. Sample of 800 interstate travellers and 400 interstate travellers, followed by eight focus groups in Adelaide, Sydney and Melbourne. Comments relating to International appeal are sourced from the Consumer Demand Project run by Tourism Australia in 9 priority markets, with a sample of 500 per market.

Prepared by the South Australian Tourism Commission, December 2016

Sources Unless otherwise stated, all data in this report is from the International Visitor and National Visitor Surveys (IVS and NVS) Conducted by Tourism Research Australia. These Sources are based on sample surveys and as with all sample surveys, are subject to sampling errors. Caution is required in interpreting some estimates, in particular, regional estimates can be affected by small sample sizes and can be subject to a high level of sampling error. Regional data should accordingly be used with a high level of caution and treated as being for indicative purposes only. Data refers to visitors 15 years and over. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from December 2014 to December 2016
Notes and Abbreviations Totals may not add to 100% due to rounding. VFR: Visiting Friends and Relatives. np: Not Published due to small sample size. ALOS: Average Length of Stay
 ABS: Survey of Tourism Accommodation. Hotels, Motels, Guest houses and Serviced Apartments with 15 or more rooms. Cat. No. 86 35455001