

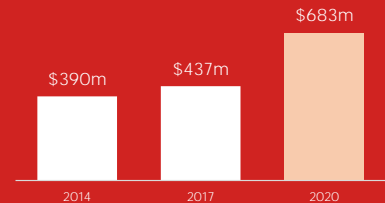
# FLEURIEU PENINSULA

## Regional Profile



### OVERVIEW

- Currently the Fleurieu Peninsula contributes \$437 million to the December 2017 South Australian expenditure of \$6.6 billion.
- The Fleurieu Peninsula has achieved 64 per cent of their \$683 million 2020 target.



### Annual Visitor Summary December 2015 - December 2017

#### ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	569,000	138,000	707,000	23,000	730,000
%	80%	20%	97%	3%	100%
Nights	1,486,000	570,000	2,056,000	245,000	2,301,000
%	72%	28%	89%	11%	100%
Average Length of Stay	3	4	3	11	3
Domestic Day Trips					2,518,000
International Day Trips*					95,000

#### PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	438,000	216,000	55,000	23,000	730,000
%	60%	30%	8%	3%	100%
Nights	1,335,000	728,000	155,000	83,000	2,301,000
%	58%	32%	7%	4%	100%
Average Length of Stay	3	3	3	4	3
Expenditure					
Average Annual Expenditure					437,000,000

- 97 per cent of visitors are Domestic visitors and 3 per cent International visitors.
- Domestically, 80 per cent of visitors are from within the state compared to 20 per cent from Interstate.
- 90 per cent of visitors to the Fleurieu Peninsula are Leisure visitors (Holiday + VFR).
- On average 2.5 million day trips are taken to the Fleurieu Peninsula each year, with an extra 95,000 international day trips.

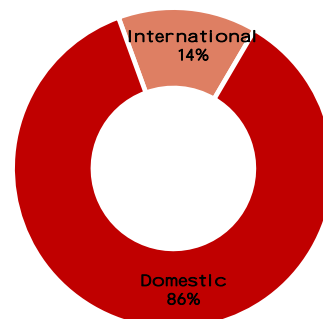
\*International visitors counted as taking 'International Day Trips' are also counted at the location of their overnight stay. Therefore, while they are visible as 'feet on the ground' they cannot be added to the international visitor total for the region.

#### FLEURIEU PENINSULA TOURISM LISTINGS

Category	Fleurieu Peninsula
Accommodation	341
Attraction	96
Destination Information	5
Event	128
Food and Drink	109
General Services	3
Hire	5
Tour	35
Grand Total	722

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

#### FLEURIEU PENINSULA MEDIA COVERAGE



Source: Item Count - SATC Internal - 2017

# FLEURIEU PENINSULA

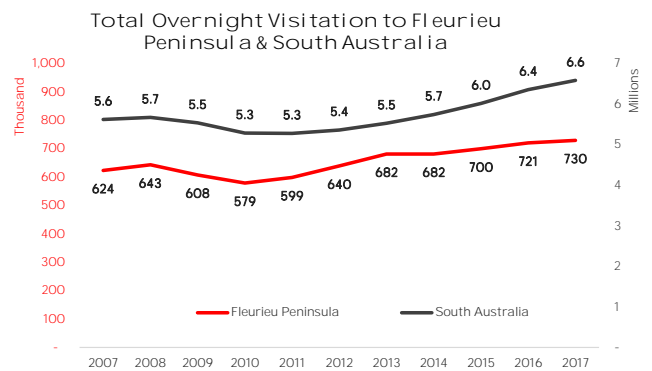
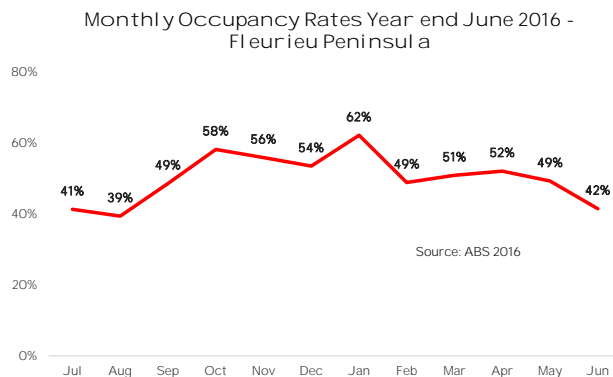
## Regional Profile



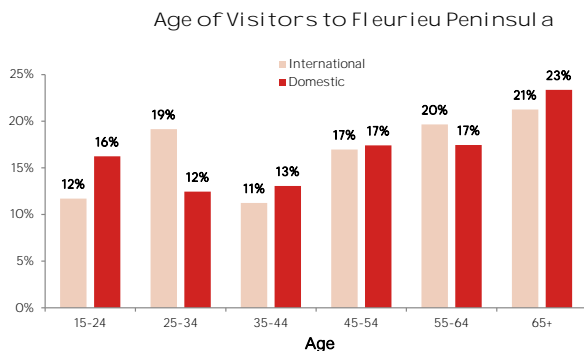
### ACCOMMODATION SUPPLY

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

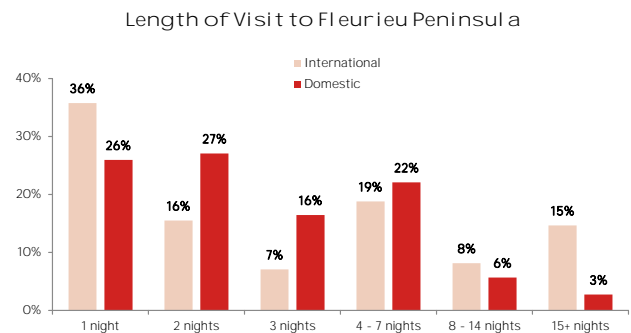
- Average occupancy for the year is 50 per cent over 16 establishments and 504 rooms.
- The peak months are October and January with occupancy of 58 per cent and 62 per cent respectively.
- Low point of the year comes in August with occupancy on average dropping to 39 per cent.



### VISITOR PROFILE



- International visitors peak in the 65+ age group at 21 per cent.
- Domestic visitors to the Fleurieu Peninsula peak in the 65+ age group at 23 per cent.



- 36 per cent of International visitors prefer to stay 1 night on the Fleurieu Peninsula.
- 53 per cent of Domestic visitors prefer to stay 1 or 2 nights.

# FLEURIEU PENINSULA

## Regional Profile

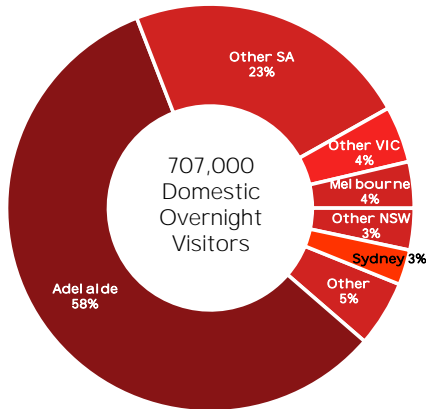


DOMESTIC VISITOR PROFILE					
Purpose	Holiday	VFR	Other	Total	
Visits	422,000	210,000	77,000	707,000	
%	60%	30%	11%	100%	
Nights	1,272,000	601,000	182,000	2,056,000	
%	62%	29%	9%	100%	
ALOS	3	3	2	3	

INTERNATIONAL VISITOR PROFILE					
Purpose	Holiday	VFR	Other	Total	
Visits	16,000	7,000	np	23,000	
%	70%	30%	np	100%	
Nights	63,000	127,000	55,000	245,000	
%	26%	52%	22%	100%	
ALOS	4	18	np	11	

### VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Fleurieu Peninsula



Origin of International Visitors to Fleurieu Peninsula



- Victoria, at 8 per cent and New South Wales at 6 per cent, are the Fleurieu Peninsula's biggest Interstate markets.
- Regional South Australia contributes 23 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 26 per cent and Germany 10 per cent.
- 10 per cent of visitors to the Fleurieu Peninsula are from New Zealand.

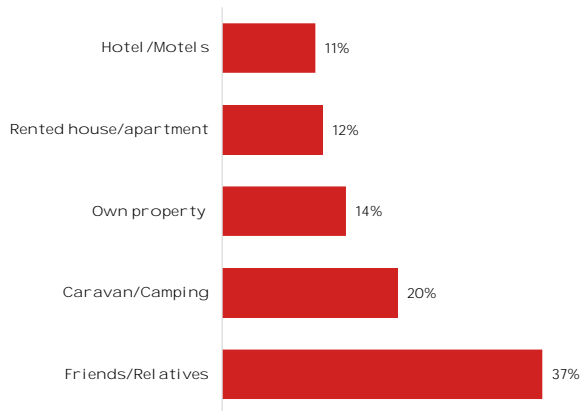
# FLEURIEU PENINSULA

## Regional Profile

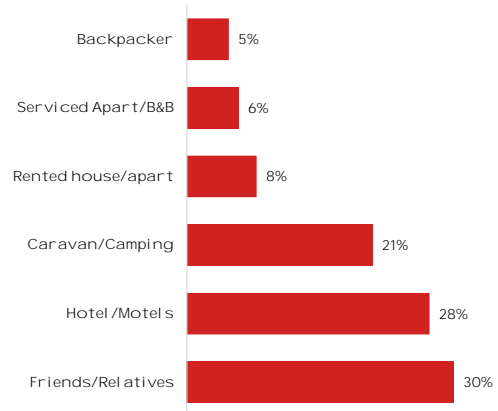


### VISITOR USE OF ACCOMMODATION

Accommodation used in Fleurieu Peninsula for Domestic Visitors



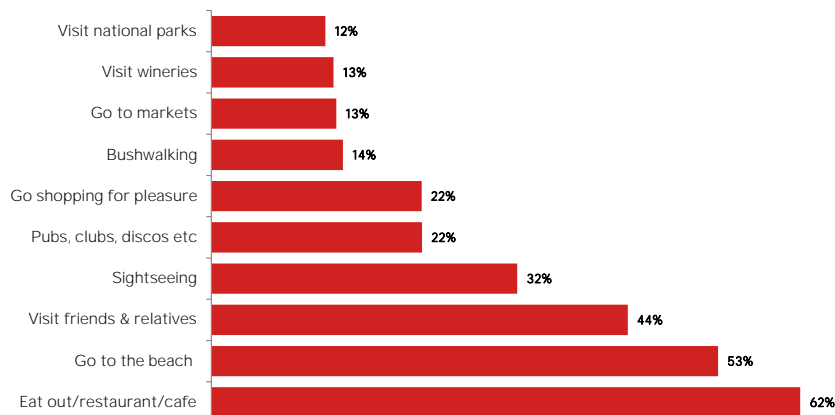
Accommodation used in Fleurieu Peninsula for International Visitors



- 48 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 20 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.

# FLEURIEU PENINSULA

## Regional Profile



### REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2016-17, the tourism industry contributed an estimated \$347 million to the Fleurieu Peninsula regional economy and directly employed approximately 3,100 people.

#### Employment

- 3,100 jobs for people employed directly by the tourism industry, 1,100 indirect jobs and a total employment impact of 4,200 people.

#### Tourism output

- \$319 million and \$350 million in direct and indirect tourism output, and \$669 million in total tourism output.

#### Gross Value Added (GVA)

- \$168 million and \$148 million in direct and indirect tourism GVA, and \$316 million in total tourism GVA.

#### Gross Regional Product (GRP)

- \$180 million and \$167 million in direct and indirect tourism GRP and \$347 million in total tourism GRP.

### REGIONAL INSIGHTS

#### 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.

#### Intrastate

- The best of South Australia, just down the road.
- Diversity of appeals the main drawcard for intrastate as well, well known and understood.
- Accessibility seals the deal.

#### International

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

#### Regional Visitor Strategy Priorities

- The key priorities for the Fleurieu Peninsula are to encourage year-round visitation and drive visitor yield.
- The aim is to grow spend from day-trippers as well as convert some day-trips into overnight stays.
- Levers for this include events, accommodation improvements, product development and marketing.

Appeal data is from the consumer surveying conducted for the SATC by BDA Marketing Planning. Sample of 800 interstate travellers and 400 interstate travellers, followed by eight focus groups in Adelaide, Sydney and Melbourne. Comments relating to International appeal are sourced from the Consumer Demand Project run by Tourism Australia in 11 priority markets, with a sample of 1,600 per market.

Prepared by the South Australian Tourism Commission, December 2017

**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 2015 to December 2017.

**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. 8635455001. Consumer Demand Product Testing Phase 1 - BDA Marketing