

FLEURIEU PENINSULA

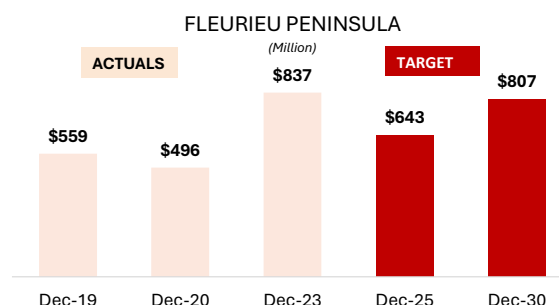
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2023

- Currently, the Fleurieu Peninsula contributes \$837 million to the year end December 2023 South Australian expenditure of \$10.1 billion.
- The Fleurieu Peninsula has achieved 100 per cent of their 2025 target of \$643 million and their 2030 target of \$807 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2023

ORIGIN						
	Intrastate	Interstate	Total Domestic	International	Total	
Overnight Visits	719,000	122,000	841,000	27,000	868,000	
% of visits	83%	14%	97%	3%	100%	
<i>Share of Regional SA</i>	15%	4%	11%	6%	11%	
<hr/>						
% Across Regional SA	60%	35%	94%	6%	100%	
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>						
Nights	1,880,000	444,000	2,324,000	336,000	2,660,000	
% of nights	71%	17%	87%	13%	100%	
<i>Share of Regional SA</i>	14%	4%	9%	2%	7%	
<hr/>						
% Across Regional SA	33%	31%	65%	35%	100%	
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>						
Average Length of Stay	2.6	3.6	2.8	12.4	3.1	
ALOS Regional SA	2.8	4.6	3.5	32.0	5.1	
<hr/>						
Total Expenditure					\$836,000,000	
Overnight Expenditure	\$93,000,000	\$401,000,000	\$494,000,000	\$30,000,000	\$524,000,000	
Day Trip Expenditure					\$312,000,000	
<hr/>						
Domestic Day Trips					2,834,000	

- The Fleurieu Peninsula saw 868,000 overnight visitors for the year end December 2023.
- 83 per cent of domestic overnight visitors were from intrastate, 14 per cent from interstate and 3 per cent from overseas.
- The 719,000 intrastate overnight visitors stayed 1.9 million nights with an average length of stay of 2.6 nights.
- There were 122,000 interstate overnight visitors who stayed 444,000 nights with an average length of stay of 3.6 nights
- The region saw 27,000 international visitors with an average length of stay of 12.4 nights and spend of \$30 million.
- 2.8 million day trips were taken to the Fleurieu Peninsula for the year with spend of \$312 million.

ALOS = Average Length of Stay

FLEURIEU PENINSULA

REGIONAL PROFILE

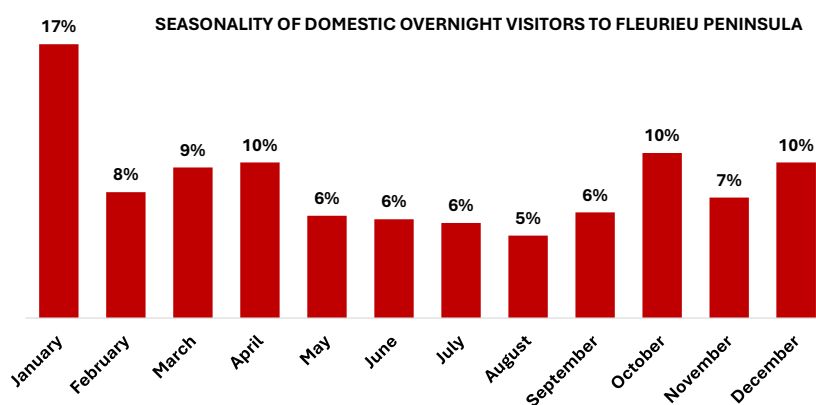


PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	567,000	250,000	48,000	4,000	868,000
% of visits	65%	29%	6%	0%	100%
Share of Regional SA	18%	10%	3%	1%	11%
<hr/>					
% Across all regions	41%	33%	21%	6%	100%
<hr/>					
Nights	1,697,000	789,000	104,000	70,000	2,660,000
% of nights	64%	30%	4%	3%	100%
Share of Regional SA	14%	5%	2%	1%	7%
<hr/>					
% Across all regions	31%	39%	15%	14%	100%
<hr/>					
Average Length of Stay	3.0	3.2	2.2	17.5	3.1
<hr/>					
Expenditure					
Annual Expenditure	\$388,000,000	\$77,000,000	\$30,000,000	\$28,000,000	\$524,000,000
Expenditure 2019	\$216,000,000	\$62,000,000	\$7,000,000	\$14,000,000	\$299,000,000
Av spend per night	\$229	\$98	\$288	\$400	\$197
Av spend per night Reg SA	\$224	\$109	\$155	\$297	\$181
Share of Regional SA	3%	5%	1.3%	2%	3%

- 94 per cent of overnight visitors to the Fleurieu Peninsula are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$229 per night compared to VFR visitors who spend \$98 per night.
- Leisure overnight visitors spent \$465 million for the year, making up 89 per cent of all overnight expenditure.

VFR = Visiting friends and relatives

SEASONALITY



National Visitor Survey data shows us that January, April, October and December are the strongest months for visitation in the Fleurieu Peninsula.

January, October and December are busy with the school holidays and the long weekend in October.

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

Winter slowed with the cooler months.

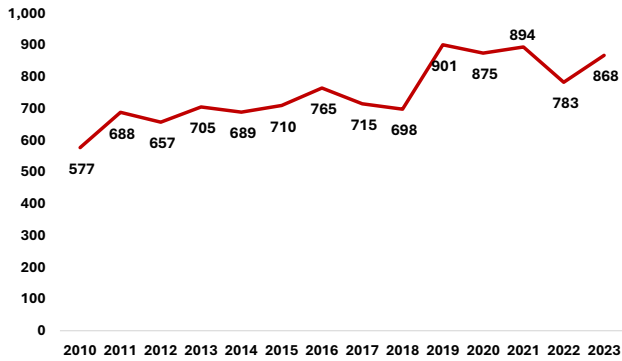
FLEURIEU PENINSULA

REGIONAL PROFILE

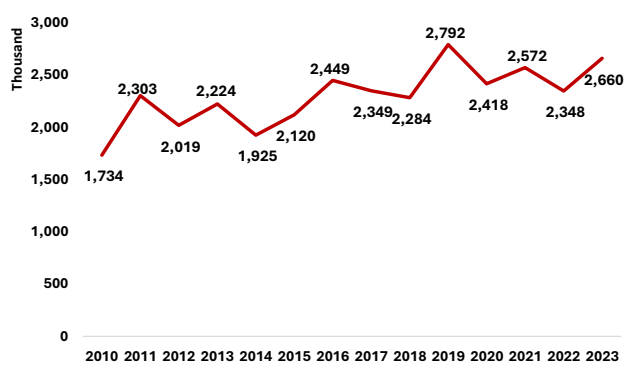


TOTAL OVERNIGHT VISITATION 2010 - 2022

VISITORS FLEURIEU PENINSULA 2010 - 2023 - International and Domestic



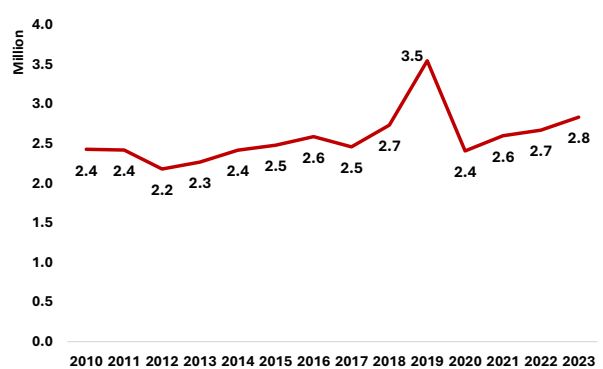
NIGHTS FLEURIEU PENINSULA 2010 - 2023 - International and Domestic



TOTAL EXPENDITURE FLEURIEU PENINSULA 2010 - 2023 - International and Domestic



DAY TRIPS FLEURIEU PENINSULA 2010 - 2023 - Domestic



Note: Fluctuations can occur in visitation data due to small sample sizes. Prior regional profiles used data averaged over three years to smooth these fluctuations.

Regions	Visits		Expenditure	
	Dec-23	Change on Dec-19	Dec-23	Change on Dec-19
Adelaide	3,422,000	-13%	\$5,500,000,000	22%
Adelaide Hills	233,000	3%	\$293,000,000	42%
Barossa	343,000	8%	\$261,000,000	16%
Clare Valley	226,000	11%	\$191,000,000	62%
Eyre Peninsula	537,000	-8%	\$591,000,000	7%
Fleurieu Peninsula	868,000	-4%	\$837,000,000	50%
Flinders Ranges and Outback	761,000	-18%	\$610,000,000	19%
Kangaroo Island	205,000	-1%	\$280,000,000	47%
Limestone Coast	763,000	-2%	\$520,000,000	24%
Murray River, Lakes and Coorong	363,000	-20%	\$373,000,000	33%
Riverland	322,000	-25%	\$239,000,000	22%
Yorke Peninsula	530,000	-11%	\$384,000,000	60%
Regional SA	4,830,000	-7%	\$4,630,000,000	30%
South Australia	7,835,000	-9%	\$10,140,000,000	25%

FLEURIEU PENINSULA

REGIONAL PROFILE



FLEURIEU PENINSULA TOURISM LISTINGS

Category	# Listings
Accommodation	413
Food & Drink	164
Attraction	144
Event	68
Tour	67
Destination Information	9
Hire	7
General Services	5
Information Services	5
Journey	3
Transport	2
Grand Total	887

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)

FLEURIEU PENINSULA AUSTRALIAN TOURISM DATA WAREHOUSE LEADS

146,000

YEAR END DECEMBER 2023

ACCOMMODATION LEADS

59,000
40%

FOOD & DRINK LEADS

34,000
23%

TOUR LEADS

17,000
12%

*OTHER LEADS

36,000
25%

TOP 5

- ESCA AT NEST & NATURE
- CABN JUDE
- TIMBA RTREET
- WEEMILAH LUXURY RETREAT
- ACORN NOOK

TOP 5

- THE D'ARENBERG CUBE
- DOWN THE RABBIT HOLE
CELLAR DOOR & RESTAURANT
- STAR OF GREECE
- CORIOLE VINEYARDS CELLAR
DOOR AND RESTAURANT
- THE CURRANT SHED

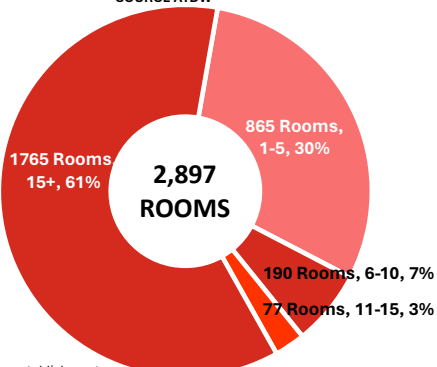
TOP 5

- THE BIG DUCK BOAT TOURS
- SPIRIT OF THE COORONG
- WAITPINGA FARM QUAD BIKE
ADVENTURES
- KANGAROO ISLAND SEALINK
TOURS AND PACKAGES
- ADELAIDE JETSKI TOURS

* Other refers to leads for events, destination information, attractions, general services, hire and transport

ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS IN THE FLEURIEU PENINSULA SOURCE ATDW



Rooms refers to rooms per establishment

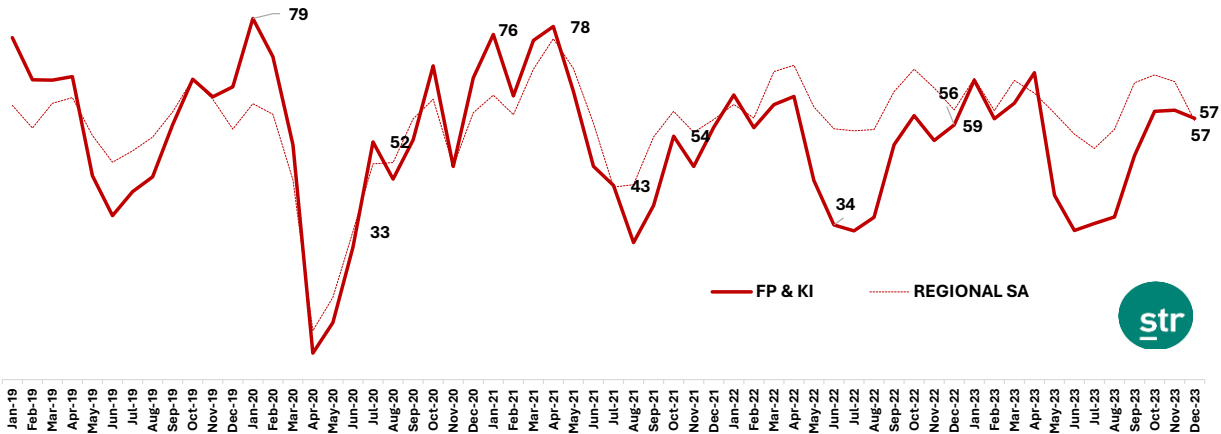
- Currently there are 395 establishments in the Fleurieu Peninsula that accommodate guests.
- These 395 establishments account for 2,897 rooms across the region.
- 61 per cent of rooms fall into establishment with 15 or more rooms.
- 30 per cent of rooms fall into the 1-5 room establishments.

FLEURIEU PENINSULA REGIONAL PROFILE



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY FP & KI

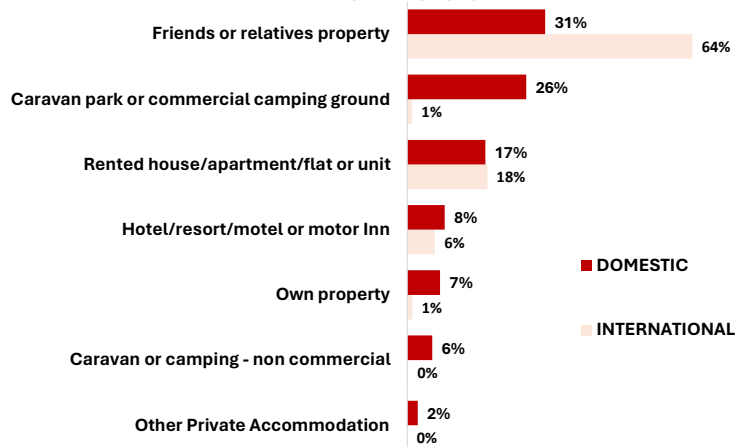


- The FP & KI regions include accommodation data for the Fleurieu Peninsula and Kangaroo Island. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the FP & KI regions was 57 per cent, this fell to 48 per cent in 2020, rose to 56 per cent in 2021, fell in 2022 to 50 per cent and at the year end 2023 was 52 per cent.

VISITOR USE OF ACCOMMODATION

ACCOMMODATION USED IN FLEURIEU PENINSULA FOR DOMESTIC AND INTERNATIONAL VISITORS

- 31 per cent of domestic overnight visitor nights in the Fleurieu Peninsula are spent with Friends or Relatives compared to the international average of 64 per cent.
- 8 per cent of domestic visitors stayed in a Hotel/resort/motel or motor inn. This compares to the international average of 6 per cent.
- 32 per cent of domestic visitors to the Fleurieu Peninsula stay in a caravan park.



TRANSPORT



- The main method of transport used on trips to the Fleurieu Peninsula was a self drive vehicle.
- 94 per cent of visitors used this type of transport.
- 4 per cent of people used an aircraft to get to the region.

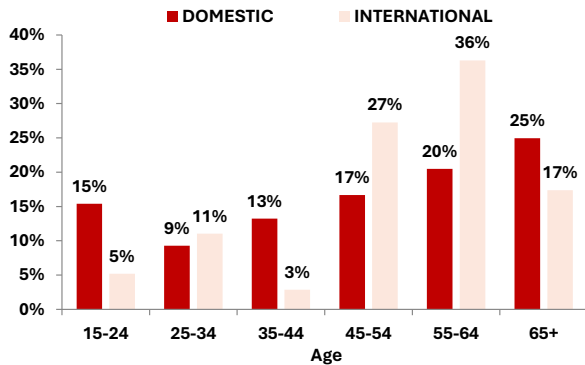
FLEURIEU PENINSULA

REGIONAL PROFILE



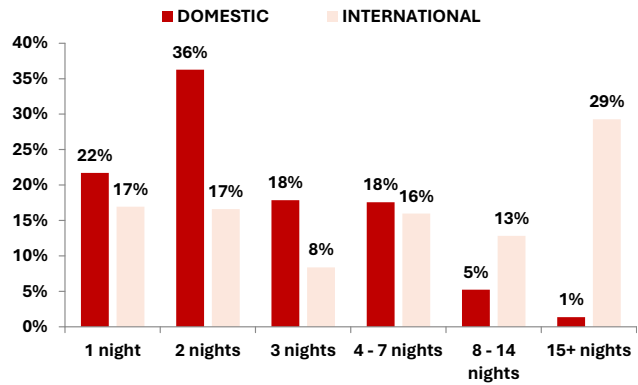
VISITOR PROFILE

AGE OF VISITORS TO FLEURIEU PENINSULA



- In the domestic market there is an overrepresentation in the 35-54 and the 65+ age groups.
- There is an overrepresentation of international travellers in the 45-64 age range.

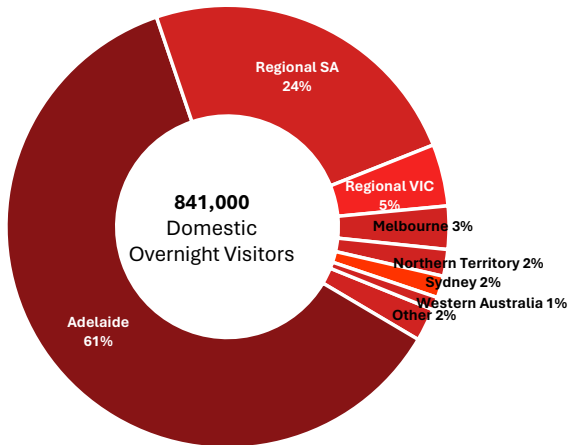
LENGTH OF VISIT TO FLEURIEU PENINSULA



- 58 per cent of domestic overnight visitors like to stay 1 to 2 nights.
- 29 per cent of international visitors stay 15+ nights, this would be skewed by employment.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO FLEURIEU PENINSULA

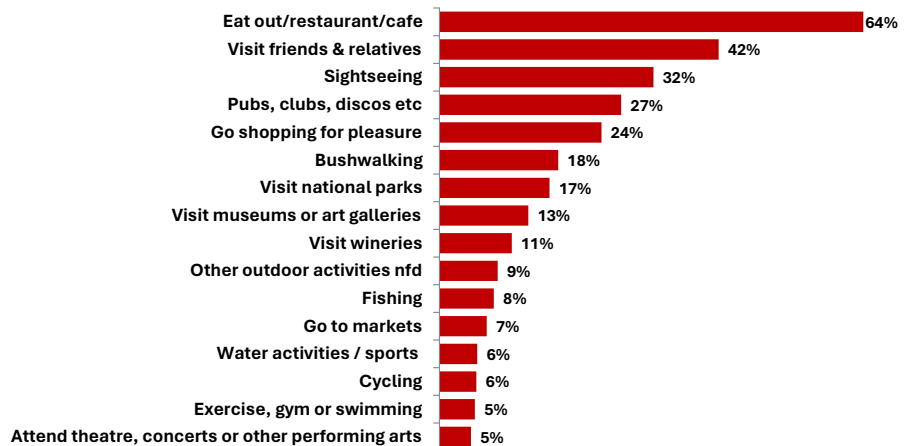


- Victoria at 8 per cent and NSW at 3 per cent are the Fleurieu Peninsula biggest interstate overnight domestic markets.
- Regional South Australia contributes 24 per cent of visitors to the Fleurieu Peninsula.
- 61 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

- The most popular activity when coming to the Fleurieu Peninsula is to eat out at a restaurant or cafe.
- Other popular activities include visiting a friend or relative, visiting wineries, bushwalking, visiting national parks, going to markets and seeing the sights.

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN FLEURIEU PENINSULA



FLEURIEU PENINSULA

REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2021-22, the tourism industry contributed an estimated \$694 million to the Fleurieu Peninsula regional economy and directly employed approximately 4,000 people.

Employment

- 4,000 jobs for people employed directly by the tourism industry, 1,300 indirect jobs and a total employment impact of 5,300 people.

Gross Value Added (GVA)

- \$163 million and \$166 million in direct and indirect tourism GVA, and \$329 million in total tourism GVA.

Gross Regional Product (GRP)

- \$176 million and \$214 million in direct and indirect tourism GRP and \$390 million in total tourism GRP.

Tourism Consumption

2021-22	
Tourism products - directly consumed	
• Takeaway and restaurant meals	20%
• Shopping (including gifts and souvenirs)	18%
• Fuel (petrol, diesel)	13%
• Long distance passenger transportation	10%
• Accommodation services	9%
• Food products	7%
• Alcoholic beverages and other beverages	7%
• Travel agency and tour operator services	5%

Tourism Employment

2021-22	
Tourism Industries - 4,000 directly employed	
• Cafes, restaurants and takeaway food services	47%
• Retail trade	14%
• Clubs, pubs, taverns and bars	10%
• Accommodation	16%
• Travel agency and tour operator services	3%
• All other industries	2%
• Other sports and recreation services	2%
• Air, water and other transport	5%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2022

REGIONAL PERCEPTIONS REPORTING

- The Fleurieu Peninsula is perceived to have diverse offerings that appeal to a wide variety of visitors.
- While the Fleurieu Peninsula was perceived as a somewhat family friendly holiday destination, the association with wine was a barrier to its attractiveness to families.
- Particularly for intrastate travellers, the Fleurieu Peninsula was seen as too close to Adelaide to feel like a holiday destination.
- Some even mentioned that it felt quite suburban and therefore not a location that they would visit for more than a day trip or a weekend.

To drive increased visitation and expenditure, we recommend the Fleurieu Peninsula:

Promote diversity of activities, particularly those that appeal to families	Despite there being many offerings besides wine, there is still a perception that this region would not be appropriate for families. Increasing promotion of outdoor activities such as beach, wildlife, and other nature based activities could challenge this perception and make the region more appealing for families.
Show how the region is set apart from the city	Particularly for those who live in the city, demonstrate how the Fleurieu Peninsula is different. This could be through accommodation offerings, festivals and events, and activities that you couldn't get in the city.
Encourage longer visits	Given the proximity to the city, there is a view that this region is more suited to a day trip or a weekend away from the city. As with the above point, positioning this region as very different from the city, emphasising the range of activities that include relaxing and recharging could encourage longer stays, particularly for intrastate visitors.
Region appeals to...	<ul style="list-style-type: none"> – Relaxation seekers – Nature lovers – Beach only – Travelling with children

Prepared by the South Australian Tourism Commission, December 2023

Sources Unless otherwise stated, all data in this report is from the International Visitor and National Visitor Surveys (IVS and NVS) conducted by Tourism Research Australia. These Sources are based on sample surveys and as with all sample surveys, are subject to sampling errors. Caution is required in interpreting some estimates, in particular, regional estimates can be affected by small sample sizes and can be subject to a high level of sampling error. Regional data should accordingly be used with a high level of caution and treated as being for indicative purposes only. Data refers to visitors 15 years and over. Unless otherwise stated, all data refers to the year end December 2023.

Regional Perceptions Testing - June 2022 - 3-day, online bulletin board (OBB) Approx. 40 mins of content per person, per day.

Participants were recruited as follows: – 22 Intrastate participants (70% metro, 30% regional), – 20 Interstate participants (Melbourne, Regional VIC and Sydney)

A mix of age (18-44 and 45-69) and gender was achieved across participants. Participants were willing travellers, non-rejectors of travelling to/within SA, and did not live in the region they were recruited to explore (for intrastate).

Notes and Abbreviations Totals may not add to 100% due to rounding. VFR: Visiting Friends and Relatives. np: Not Published due to small sample size. ALOS: Average Length of Stay