

FLEURIEU PENINSULA

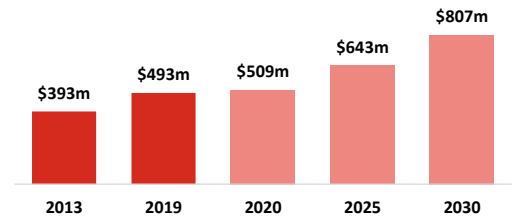
REGIONAL PROFILE



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 Fleurieu Peninsula contributes \$493 million to the December 2019 South Australian expenditure of \$8.1 billion.
- The Fleurieu Peninsula has achieved 97 per cent of their \$509 million 2020 target and 61 per cent of the 2030 target of \$807 million.



Annual Visitor Summary December 2017 - December 2019

| ORIGIN | | | | | |
|--------------------------|------------|------------|----------------|---------------|--------------|
| | Intrastate | Interstate | Total Domestic | International | Total visits |
| Overnight Visits | 606,000 | 139,000 | 744,000 | 27,000 | 771,000 |
| % | 81% | 19% | 96% | 4% | 100% |
| Nights | 1,496,000 | 725,000 | 2,221,000 | 254,000 | 2,475,000 |
| % | 67% | 33% | 90% | 10% | 100% |
| Average Length of Stay | 2 | 5 | 3 | 9 | 3 |
| Domestic Day Trips | | | | | 2,912,000 |
| International Day Trips* | | | | | 95,000 |

| PURPOSE | | | | | |
|----------------------------|----------------|----------------|---------------|---------------|----------------|
| | Holiday | VFR | Business | Other | Total |
| Overnight Visits | 518,000 | 205,000 | 28,000 | 23,000 | 771,000 |
| % | 67% | 27% | 4% | 3% | 100% |
| Nights | 1,492,000 | 815,000 | 71,000 | 97,000 | 2,475,000 |
| % | 60% | 33% | 3% | 4% | 100% |
| Average Length of Stay | 3 | 4 | 3 | 4 | 3 |
| Expenditure | | | | | |
| Average Annual Expenditure | \$ 346,000,000 | \$ 100,000,000 | \$ 23,000,000 | \$ 24,000,000 | \$ 493,000,000 |

- 96 per cent of visitors are **Domestic** visitors and 4 per cent **International** visitors.
- **Domestically**, 81 per cent of visitors are from within the state compared to 19 per cent from Interstate.
- 94 per cent of visitors to the Fleurieu Peninsula are Leisure visitors (Holiday + VFR).
- On average 2.9 million day trips are taken to the Fleurieu Peninsula each year, with an extra 95,000 **international** day trips.

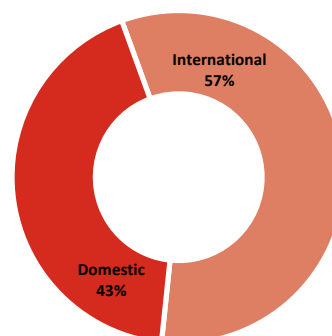
* International visitors counted as taking "International Day Trips" are also counted at the location of their overnight stay. Therefore, while they are visible as "feet on the ground" they cannot be added to the international visitor total for the region.

FLEURIEU PENINSULA TOURISM LISTINGS

| Category | Fleurieu Peninsula |
|-------------------------|--------------------|
| Accommodation | 406 |
| Food and Drink | 103 |
| Attraction | 85 |
| Event | 71 |
| Tour | 41 |
| Destination Information | 16 |
| Hire | 10 |
| General Services | 6 |
| Information Services | 5 |
| Grand Total | 743 |

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

FLEURIEU PENINSULA MEDIA COVERAGE



Source: Advertising Space Rate - 2018

FLEURIEU PENINSULA

REGIONAL PROFILE



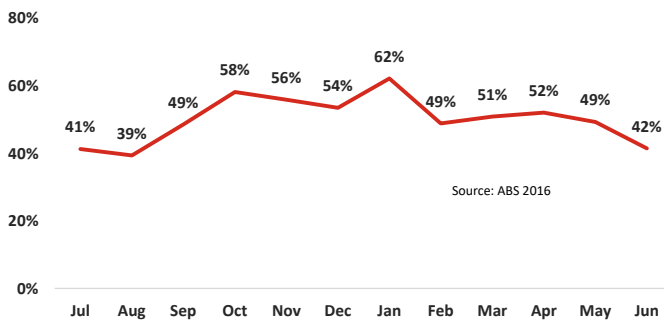
ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms

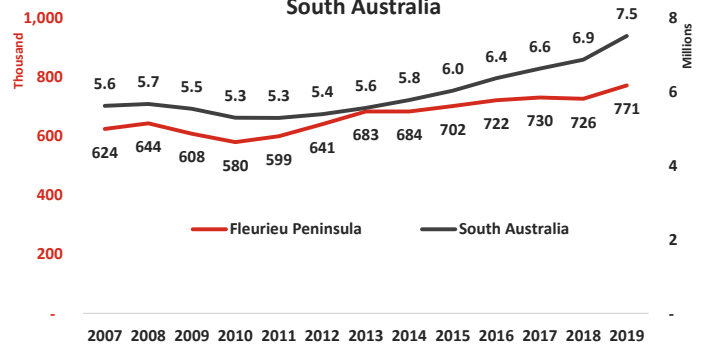
| | |
|----------------|--------------|
| Establishments | 16 |
| Rooms | 504 |
| Occupancy | 50% |
| Takings | \$11,900,000 |

- 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.

Monthly Occupancy Rates Year end June 2016 - Fleurieu Peninsula

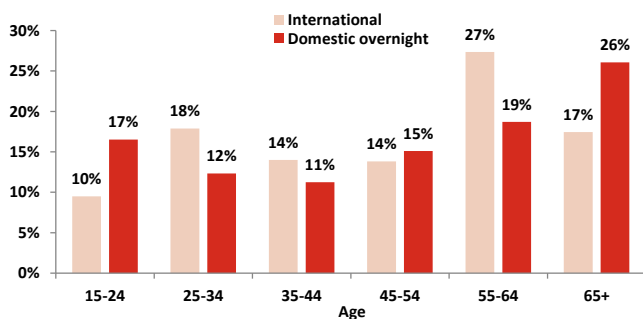


Total Overnight Visitation to Fleurieu Peninsula & South Australia



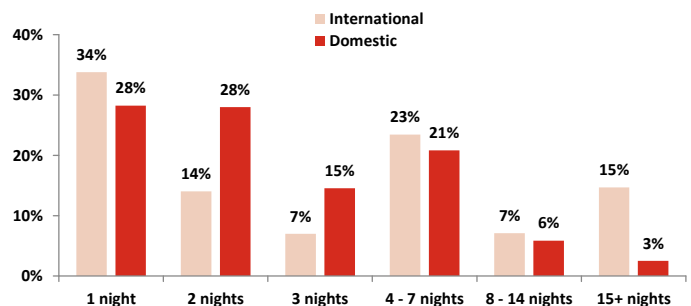
VISITOR PROFILE

Age of Visitors to Fleurieu Peninsula



- **International** visitors peak in the 55-64 age group at 27 per cent.
- **Domestic** visitors to the Fleurieu Peninsula peak in the 65+ age group at 26 per cent.

Length of Visit to Fleurieu Peninsula



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

FLEURIEU PENINSULA

REGIONAL PROFILE



DOMESTIC VISITOR PROFILE

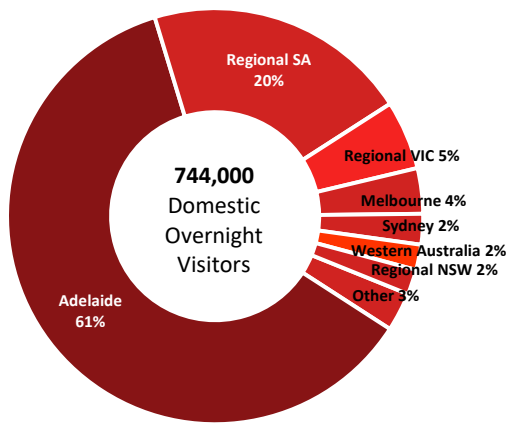
| Purpose | Holiday | VFR | Other | Total |
|---------|-----------|---------|---------|-----------|
| Visits | 502,000 | 194,000 | 50,000 | 744,000 |
| % | 67% | 26% | 7% | 100% |
| Nights | 1,419,000 | 665,000 | 137,000 | 2,221,000 |
| % | 64% | 30% | 6% | 100% |
| ALOS | 3 | 3 | 3 | 3 |

INTERNATIONAL VISITOR PROFILE

| Purpose | Holiday | VFR | Other | Total |
|---------|---------|---------|--------|---------|
| Visits | 16,000 | 10,000 | np | 27,000 |
| % | 59% | 37% | np | 100% |
| Nights | 73,000 | 149,000 | 31,000 | 254,000 |
| % | 29% | 59% | 12% | 100% |
| ALOS | 5 | 15 | np | 9 |

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 4 per cent, are the Fleurieu Peninsula's biggest Interstate markets.
- Regional South Australia contributes 20 per cent of visitors to the Fleurieu Peninsula.
- Adelaide visitors contribute 61 per cent of the visitors to the Fleurieu Peninsula.
- **Internationally**, Europeans contribute 63 per cent of the visits to the Fleurieu Peninsula, with the United Kingdom contributing 25 per cent and Germany 12 per cent.
- 9 per cent of visitors to the Fleurieu Peninsula are from the USA.

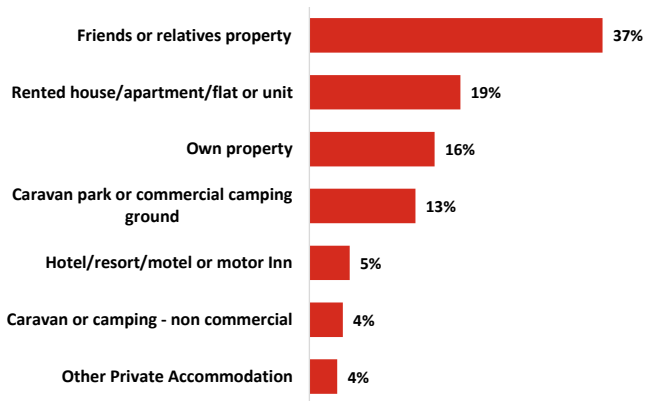
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REGIONAL PROFILE

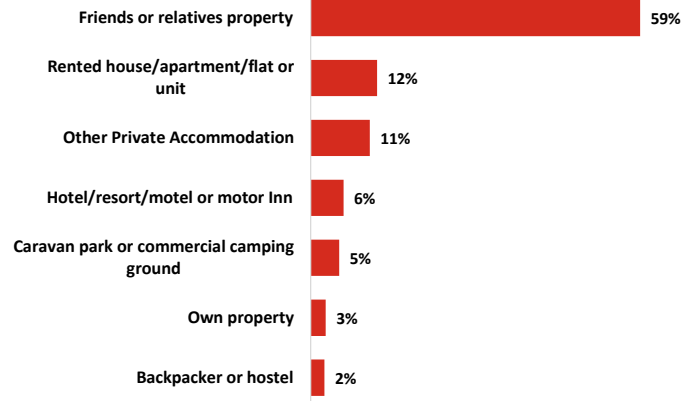


VISITOR USE OF ACCOMMODATION

Accommodation used in Fleurieu Peninsula for Domestic Visitors



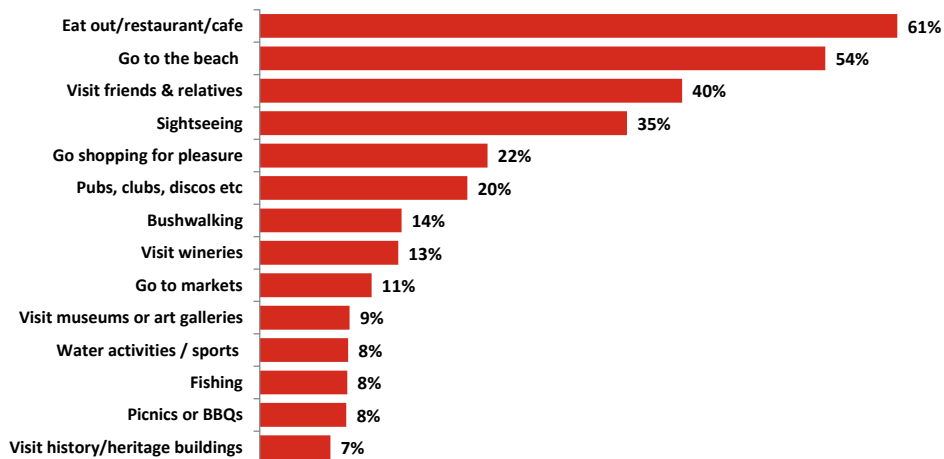
Accommodation used in Fleurieu Peninsula for International Visitors



- 42 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 13 per cent of visitors preferring this accommodation.
- 65 per cent of **International** visitors stay in Hotels and similar accommodation or with Friends or Relatives.
- 23 per cent of **International** visitors to the Fleurieu Peninsula stay in a rented apartment or private accommodation.

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, Visiting wineries and Going the markets.

FLEURIEU PENINSULA

REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2017-18, the tourism industry contributed an estimated \$744 million to the Fleurieu Peninsula regional economy and directly employed approximately 3,300 people.

Employment

- 3,300 jobs for people employed directly by the tourism industry, 1,300 indirect jobs and a total employment impact of 4,600 people.

Tourism output

- \$343 million and \$401 million in direct and indirect tourism output, and \$744 million in total tourism output.

Gross Value Added (GVA)

- \$179 million and \$173 million in direct and indirect tourism GVA, and \$352 million in total tourism GVA.

Gross Regional Product (GRP)

- \$193 million and \$198 million in direct and indirect tourism GRP and \$391 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.

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 2019

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 2017 to December 2019.
Consumer Demand Product Testing Phase 1 - BDA Marketing

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



RED POLES

MCLAREN VALE, FLEURIEU PENINSULA

ABOUT RED POLES

- Red Poles opened in 2005 as a bed and breakfast, small café and art gallery.
- Today, Red Poles offers an art gallery, fully licensed restaurant, a bed and breakfast, weddings and private functions, art workshops and is the cellar door for Vale Brewing craft beers.
- The business also offers a variety of live performances, community events and school holiday programs.

BUSINESS GROWTH

- In the last four year Red Poles has seen enormous growth.
- In 2005, Red Poles employed two people, in 2017 the business employs a regular staff every week of 15.
- Currently, the art gallery at Red Poles now exhibits up to 500 artists a year compared to 50 artists in the early years of the business.

CHALLENGES

- A challenge faced by Red Poles is to be able to maintain consistency and quality of what's on offer as the business continues to grow.
- Recognising the changing face of tourism in the digital age was a challenge that Red Poles overcame by hiring a staff member to update the Red Poles website and create an online presence for the business across social media channels.

THE FUTURE

- Into the future, Red Poles is focussed on becoming the best destination for food, wine, ale and art in the Fleurieu Peninsula.
- 2017 will see the introduction of an Indigenous Art Hub at Red Poles that will feature Indigenous art exhibitions and workshops with Indigenous artists. This project is believed to be the first for the Fleurieu Peninsula.
- Red Poles will also open a new cellar door in 2017 which will represent multiple wineries within the McLaren Vale region.

COMMUNITY IMPACT

- Majority of staff at Red Poles live locally in the Fleurieu Peninsula region.
- As an art gallery and live performance venue, Red Poles gives local artists and performers an opportunity to showcase their work to diverse audiences.
- Workshops, school holiday programs and community events encourage local participation, bringing the community together.
- Red Poles works with local tour operators on a regular basis and tries to use local produce wherever possible in the restaurant.

SOUTH AUSTRALIAN TOURISM COMMISSION COLLABORATION

- The SATC team provided support through the Touring Routes project – including Red Poles on the Epicurean Way touring route.
- Red Poles also receives many journalists and trade members each year as part of SATC's familiarisation program.

WWW.REDPOLES.COM.AU

"The Fleurieu Peninsula is a fantastic region for local produce and I think it's really important for us to focus on that local produce wherever we can.

"The thing that drives me every day is my passion for where I work and that I get to focus on the things I love most – family, food, wine and art – and they are all part of Red Poles. That will drive me forwards for hopefully many more years to come."

Ros Miller, Owner, Red Poles



WWW.TOURISM.SA.GOV.AU