

# FLEURIEU PENINSULA

## REGIONAL PROFILE

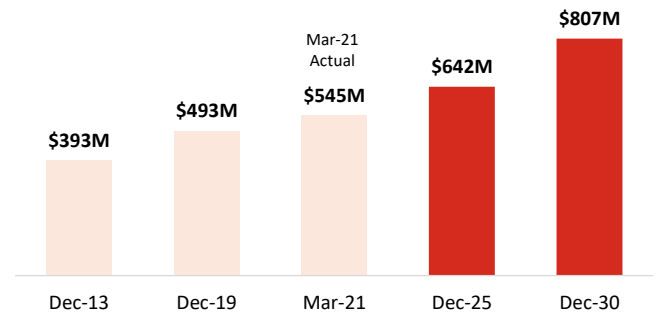


### OVERVIEW

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

#### FLEURIEU PENINSULA

- Currently the Fleurieu Peninsula contributes \$545 million to the year end March 2021 South Australian expenditure of \$4.4 billion.
- The Fleurieu Peninsula has achieved 85 per cent of their 2025 target of \$642 million and 68 per cent of their 2030 target of \$807 million.



#### ANNUAL VISITOR SUMMARY YEAR END MARCH 2021

ORIGIN						
	Intrastate	Interstate	Total Domestic	International	Total	
<b>Overnight Visits</b>	830,000	79,000	<b>909,000</b>	-	<b>909,000</b>	
%	91%	9%	<b>100%</b>	0%	<b>100%</b>	
% Across all regions	90%	10%	<b>100%</b>	0%	<b>100%</b>	
Share of Regional SA	22%	18%	<b>22%</b>	0%	<b>22%</b>	
<b>Nights</b>	2,136,000	370,000	<b>2,506,000</b>	0%	<b>2,506,000</b>	
%	85%	15%	<b>100%</b>	0%	<b>100%</b>	
% Across all regions	82%	18%	<b>100%</b>	0%	<b>100%</b>	
Share of Regional SA	18%	14%	<b>17%</b>	0%	<b>17%</b>	
<b>ALOS</b>	2.6	4.7	<b>2.8</b>	-	<b>2.8</b>	
<b>ALOS Regional SA</b>	3.2	6.0	<b>3.5</b>	-	<b>3.5</b>	
<b>Total Expenditure</b>					<b>\$545,000,000</b>	
Overnight Expenditure	\$292,000,000	\$56,000,000	<b>\$348,000,000</b>	\$0	<b>\$348,000,000</b>	
Day Trip Expenditure					<b>\$197,000,000</b>	
<b>Domestic Day Trips</b>					<b>2,486,000</b>	

- The Fleurieu Peninsula saw 909,000 domestic overnight visitors for the year end March 2021.
- 91 per cent of overnight visitors were from intrastate and 9 per cent from interstate.
- The 830,000 intrastate overnight visitors stayed 2.1 million nights with an average length of stay of 2.6 nights.
- There were 79,000 interstate overnight visitors who stayed 370,000 nights with an average length of stay of 4.7 nights.
- There have been no international arrivals with the borders closed.
- 2.5 million day trips were taken to the Fleurieu Peninsula for the year with spend of \$197 million.

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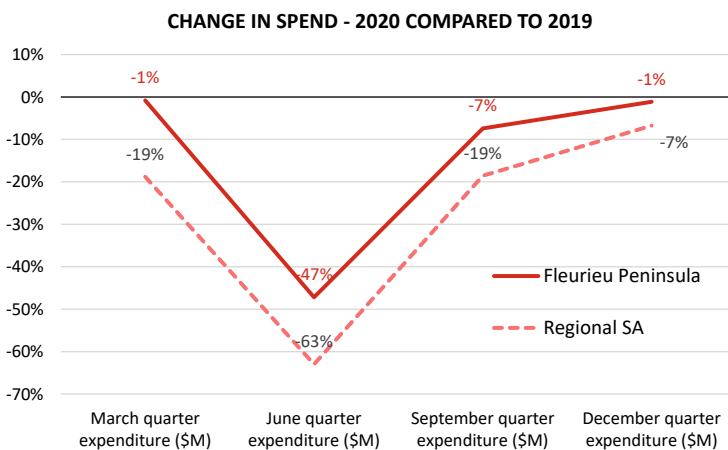


### PURPOSE

	Holiday	VFR	Business	Other	Total
<b>Overnight Visits</b>	601,000	217,000	69,000	23,000	<b>909,000</b>
%	66%	24%	8%	3%	<b>100%</b>
% Across all regions	56%	22%	18%	5%	<b>100%</b>
Share of Regional SA	22%	18%	22%	0%	<b>22%</b>
<b>Nights</b>	1,746,000	532,000	176,000	53,000	<b>2,506,000</b>
%	70%	21%	7%	2%	<b>100%</b>
% Across all regions	58%	18%	20%	3%	<b>100%</b>
Share of Regional SA	20%	20%	6%	11%	<b>17%</b>
<b>Average Length of Stay</b>	2.9	2.5	2.6	2.3	<b>2.8</b>
<b>Expenditure</b>					
Annual Expenditure	\$271,000,000	\$50,000,000	\$12,000,000	\$15,000,000	<b>\$348,000,000</b>
Av spend per night	\$155	\$94	\$68	\$283	<b>\$139</b>
Av spend per night Regional SA	\$213	\$126	\$132	\$511	<b>\$191</b>
Share of Regional SA	22%	23%	6%	11%	<b>19%</b>

- 90 per cent of overnight visitors to the Fleurieu Peninsula are leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$155 per night compared to VFR visitors who spend \$94 per night.
- Leisure overnight visitors spent \$321 million for the year, making up 92% of all overnight expenditure.

### SPEND 2020 VERSUS 2019



- March quarter 2020 prior to COVID-19 was down 1 per cent on the March quarter in 2019.
- The Fleurieu Peninsula saw expenditure fall 47 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 7 per cent on 2019.
- The December 2020 quarter was back to pre COVID levels, down 1 per cent compared to the December quarter in 2019.

# FLEURIEU PENINSULA

## REGIONAL PROFILE



### FLEURIEU PENINSULA TOURISM LISTINGS

Category	# Listings
ACCOMMODATION	374
RESTAURANT	138
ATTRACTION	111
TOUR	53
EVENT	26
DESTINATION INFORMATION	18
HIRE	9
INFORMATION	5
GENERAL SERVICE	3
JOURNEY	1
TRANSPORT	1
<b>Grand Total</b>	<b>739</b>

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](https://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)

Note: some listings have multiple categories of accommodation  
Source: Australian Tourism Data Warehouse  
Categories above defined at - <https://tourism.sa.gov.au/support/atdw>

### FLEURIEU PENINSULA AUSTRALIAN TOURISM DATA WAREHOUSE LEADS

# 332,000

YEAR END MARCH 2021

ACCOMMODATION  
LEADS  
243,000  
55%

FOOD & DRINK  
LEADS  
27,000  
8%

TOUR  
LEADS  
20,000  
6%

\*OTHER  
LEADS  
42,000  
13%

#### TOP 5

- BEACH HUTS MIDDLETON
- TENT ON A HILL
- MARION HOLIDAY PARK
- BEACHSIDE HOLIDAY PARK
- NRMA VICTOR HARBOR BEACHFRONT HOLIDAY PARK

#### TOP 5

- STAR OF GREECE
- CORIOLE VINEYARDS AND GATHER AT CORIOLE RESTAURANT
- THE CURRANT SHED
- RED POLES CAFE AND RESTAURANT
- PIZZATECA

#### TOP 5

- THE BIG DUCK BOAT TOURS
- SPIRIT OF THE COORONG
- WAITPINGA FARM QUAD BIKE ADVENTURES
- HIGH COUNTRY TRAILS HORSE RIDING ON NORMANVILLE BEACH
- MAXWELL WINES

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

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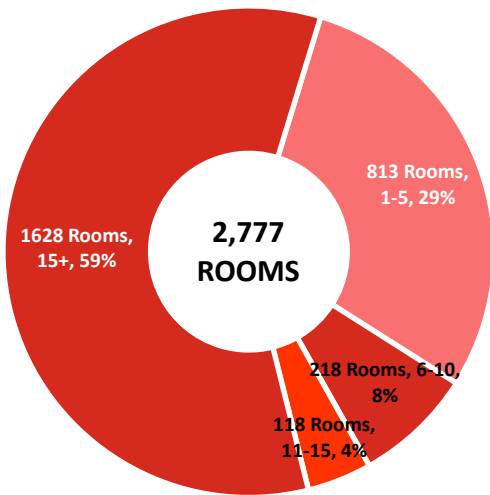
## REGIONAL PROFILE



### ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

#### ROOMS IN THE FLEURIEU PENINSULA

SOURCE ATDW



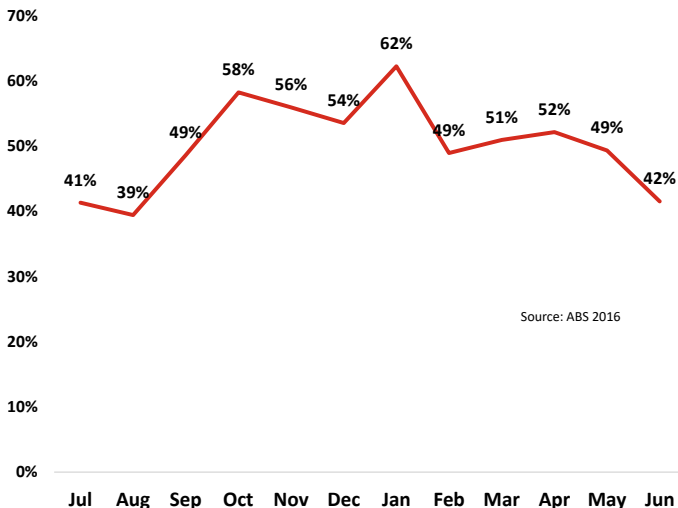
- Currently there are 374 establishments in the Fleurieu Peninsula that accommodate guests.
- These 374 establishments account for 2,777 rooms ranging from 1 room to over 50.
- 59 per cent of rooms fall into establishment with 15 or more rooms.
- 29 per cent of rooms fall into the 1-5 room establishments.

#### ACCOMMODATION SUPPLY

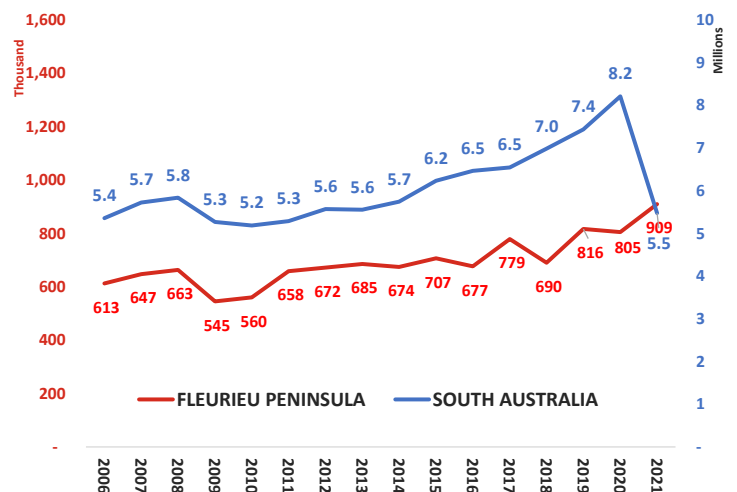
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	16
Rooms	504
Occupancy	50%
Takings	\$11,900,000

- 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



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.

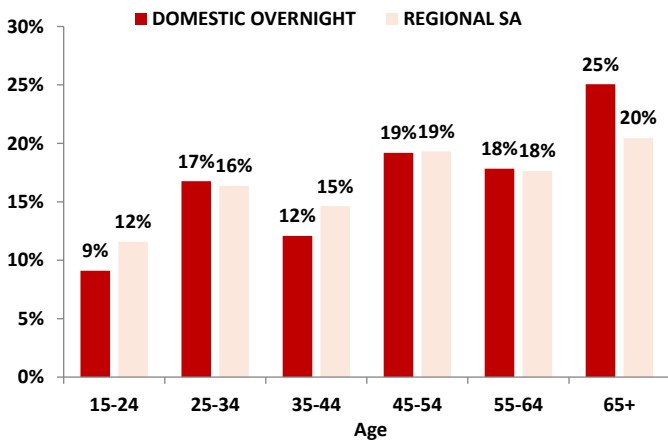
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## REGIONAL PROFILE



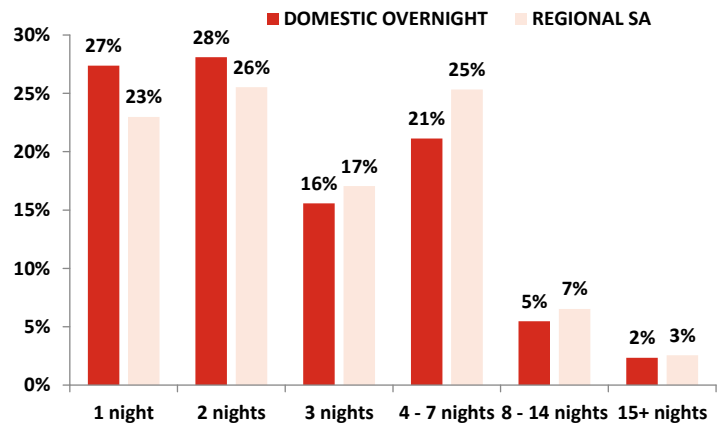
### VISITOR PROFILE

AGE OF VISITORS TO FLEURIEU PENINSULA



- Domestically there is a peak in 65+ age group at 25 per cent above the regional average of 20 per cent.
- Prior to COVID-19 the 65+ age group accounted for 17 per cent of visitors.

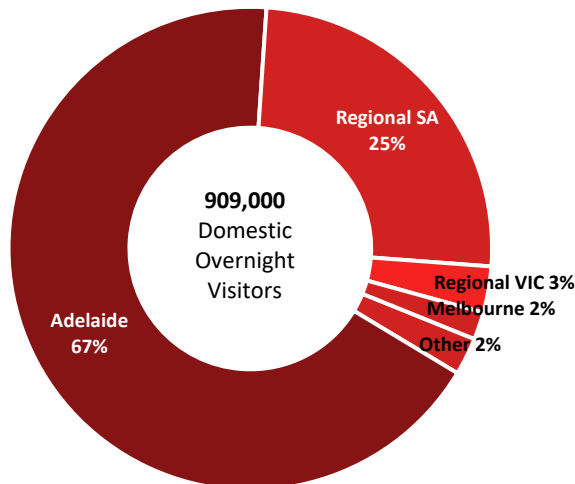
LENGTH OF VISIT TO FLEURIEU PENINSULA



- 55 per cent of visitors prefer to stay between 1 to 2 nights, above the regional average of 49 per cent and in line with the pre COVID length of stay.
- 21 per cent of domestic visitors like to stay 4 to 7 nights.

### VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO FLEURIEU PENINSULA



- Victoria and Sydney each accounted for 5 per cent and 2 per cent of visitors to the Fleurieu Peninsula. Pre COVID Victoria, at 9 per cent and New South Wales at 4 per cent, were the Fleurieu Peninsula's biggest interstate markets.
- Regional South Australia contributes 25 per cent of visitors to the Fleurieu Peninsula.
- 67 per cent of visitors come from Adelaide, however prior to COVID this was 61 per cent.

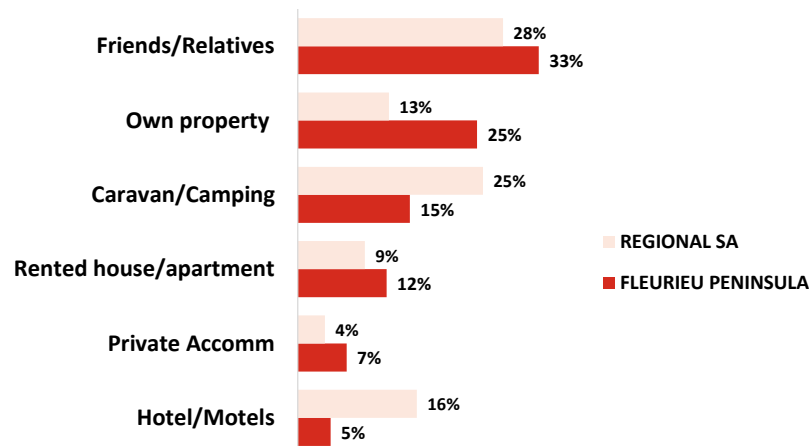
# FLEURIEU PENINSULA

## REGIONAL PROFILE



### VISITOR USE OF ACCOMMODATION

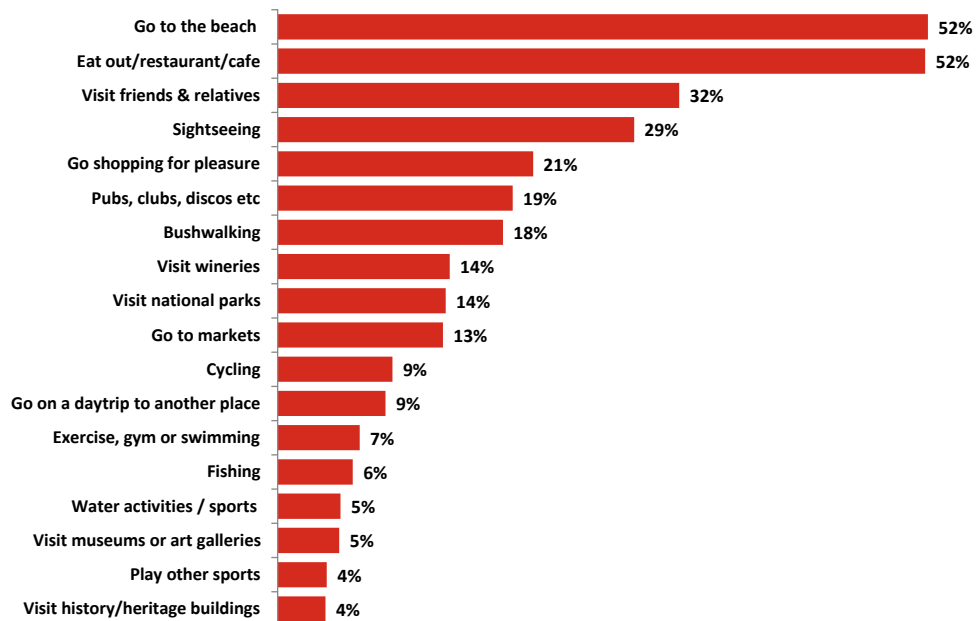
#### ACCOMMODATION USED IN FLEURIEU PENINSULA FOR DOMESTIC VISITORS



- 33 per cent of domestic visitor nights in the Fleurieu Peninsula are spent either in Friends or Relatives property. This is above the regional average of 28 per cent.
- Only 5% of nights are spent in hotel/motel accommodation.
- The Fleurieu Peninsula under indexes for Hotels/Motels, but over indexes for staying in you own property when compared to regional South Australia.

### VISITOR ACTIVITIES

#### DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN FLEURIEU PENINSULA



- The most popular activities when coming to the Fleurieu Peninsula are going to the beach and eating out.
- Other popular activities include visiting friends and relatives, sightseeing, bush walking, visiting wineries, visiting national parks and going to markets.

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## REGIONAL PROFILE



### REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2019-20, the tourism industry contributed an estimated \$668 million to the Fleurieu Peninsula regional economy and directly employed approximately 3,700 people.

#### Employment

- 3,700 jobs for people employed directly by the tourism industry, 1,200 indirect jobs and a total employment impact of 4,800 people.

#### Gross Value Added (GVA)

- \$185 million and \$160 million in direct and indirect tourism GVA, and \$345 million in total tourism GVA.

#### Gross Regional Product (GRP)

- \$196 million and \$204 million in direct and indirect tourism GRP and \$401 million in total tourism GRP.

#### Tourism Consumption

2019–20

*Tourism products* - directly consumed

- 16% Takeaway and restaurant meals
- 15% Shopping (including gifts and souvenirs)
- 14% Long distance passenger transportation
- 12% Fuel (petrol, diesel)
- 9% Travel agency and tour operator services
- 6% Alcoholic beverages and other beverages
- 6% Food products
- 6% Accommodation services

#### Tourism Employment

2019–20

*Tourism Industries* - 3,700 directly employed

- 42% - 1524 - Cafes, restaurants and takeaway food services
- 16% - 584 - Retail trade
- 11% - 410 - Accommodation
- 8% - 289 - Clubs, pubs, taverns and bars
- 6% - 212 - Travel agency and tour operator services
- 6% - 203 - Air, water and other transport

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

### 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.

Prepared by the South Australian Tourism Commission, March 2021

**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 March 2021.

Consumer Demand Product Testing Phase 1 - BDA 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.

**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  
Consumer Demand Product Testing Phase 1 - BDA Marketing