

# FLEURIEU PENINSULA

## REGIONAL PROFILE

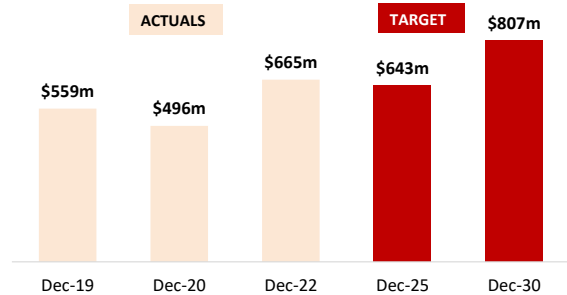


### OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2022

#### FLEURIEU PENINSULA

- Currently the Fleurieu Peninsula contributes \$665 million to the year end December 2022 South Australian expenditure of \$8.3 billion.
- The Fleurieu Peninsula has achieved 100 per cent of their 2025 target of \$643 million and 82 per cent of their 2030 target of \$807 million.



### ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2022

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
<b>Overnight Visits</b>	651,000	125,000	<b>776,000</b>	8,000	<b>783,000</b>
%	84%	16%	<b>99%</b>	1%	<b>100%</b>
<i>Share of Regional SA</i>	19%	12%	<b>17%</b>	15%	<b>17%</b>
<hr/>					
<b>% Across Regional SA</b>	<b>76%</b>	<b>22%</b>	<b>99%</b>	<b>1%</b>	<b>100%</b>
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>					
<b>Nights</b>	1,673,000	637,000	<b>2,310,000</b>	39,000	<b>2,348,000</b>
%	72%	28%	<b>98%</b>	2%	<b>100%</b>
<i>Share of Regional SA</i>	16%	12%	<b>15%</b>	5%	<b>14%</b>
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<b>% Across Regional SA</b>	<b>63%</b>	<b>32%</b>	<b>95%</b>	<b>5%</b>	<b>100%</b>
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>					
<b>Average Length of Stay</b>	2.6	5.1	<b>3.0</b>	4.9	<b>3.0</b>
<b>ALOS Regional SA</b>	3.0	5.1	<b>3.5</b>	16.1	<b>3.7</b>
<hr/>					
<b>Total Expenditure</b>					<b>\$665,000,000</b>
<b>Overnight Expenditure</b>	\$300,000,000	\$96,000,000	<b>\$396,000,000</b>	\$5,000,000	<b>\$400,000,000</b>
<b>Day Trip Expenditure</b>					<b>\$265,000,000</b>
<hr/>					
<b>Domestic Day Trips</b>					<b>2,670,000</b>

- The Fleurieu Peninsula saw 776,000 domestic overnight visitors for the year end December 2022.
- 84 per cent of overnight visitors were from intrastate and 16 per cent from interstate.
- The 651,000 intrastate overnight visitors stayed 1.7 million nights with an average length of stay of 2.6 nights.
- There were 125,000 interstate overnight visitors who stayed 637,000 nights with an average length of stay of 5.1 nights
- The region saw 8,000 international visitors with an average length of stay of 4.9 nights and spend of \$5 million.
- 2.7 million day trips were taken to the Fleurieu Peninsula for the year with spend of \$265 million.

ALOS = Average Length of Stay

# FLEURIEU PENINSULA

## REGIONAL PROFILE



PURPOSE					
	Holiday	VFR	Business	Other	Total
<b>Overnight Visits</b>	536,000	199,000	40,000	13,000	<b>783,000</b>
%	68%	25%	5%	2%	<b>100%</b>
<i>Share of Regional SA</i>	22%	17%	4%	9%	<b>17%</b>
<hr/>					
<i>% Across all regions</i>	53%	25%	19%	3%	<b>100%</b>

<b>Nights</b>	1,599,000	612,000	74,000	64,000	<b>2,348,000</b>
%	68%	26%	3%	3%	<b>100%</b>
<i>Share of Regional SA</i>	18%	17%	2%	10%	<b>14%</b>
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<i>% Across all regions</i>	54%	21%	20%	4%	<b>100%</b>

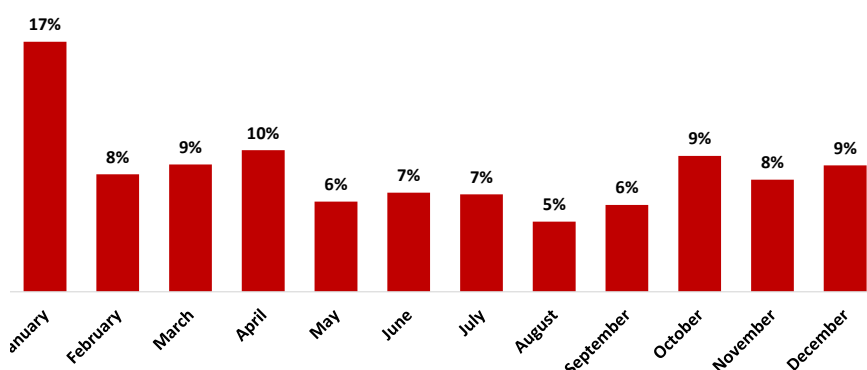
<b>Average Length of Stay</b>	3.0	3.1	1.9	4.9	<b>3.0</b>
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Expenditure					
<b>Annual Expenditure</b>	\$327,000,000	\$56,000,000	\$8,000,000	\$9,000,000	<b>\$400,000,000</b>
<b>Expenditure 2019</b>	\$216,000,000	\$62,000,000	\$7,000,000	\$14,000,000	<b>\$299,000,000</b>
<b>Av spend per night</b>	\$205	\$92	\$108	\$141	\$170
<b>Av spend per night Reg SA</b>	\$204	\$112	\$142	\$279	\$175
<b>Share of Regional SA</b>	3%	4%	0%	2%	<b>3%</b>

- 93 per cent of overnight visitors to the Fleurieu Peninsula are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$205 per night compared to VFR visitors who spend \$92 per night.
- Leisure overnight visitors spent \$383 million for the year, making up 96 per cent of all overnight expenditure.

### SEASONALITY

#### SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO FLEURIEU PENINSULA



- National Visitor Survey data shows us that in 2022 January, April and October are the strongest months for visitation in the Fleurieu Peninsula.
- January and April are busy with the school holidays.
- October is strong with the long weekend and school holidays.

Source: NVS year end December 2022

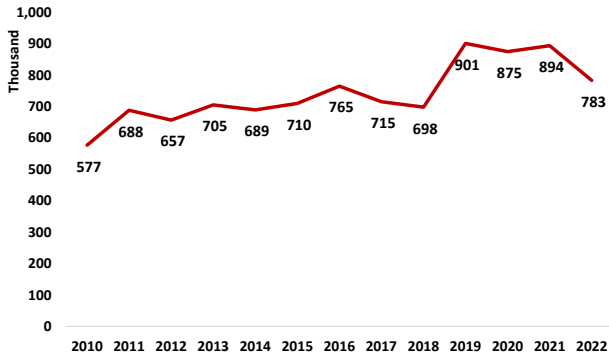
# FLEURIEU PENINSULA

## REGIONAL PROFILE

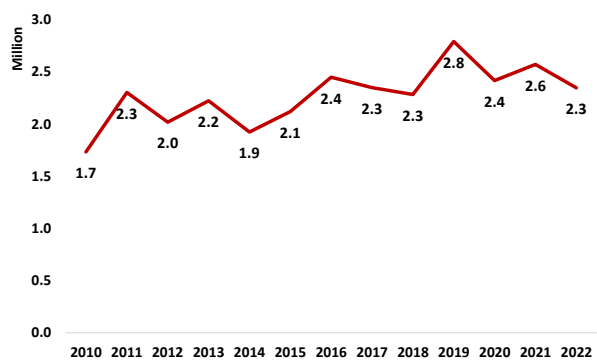


### TOTAL OVERNIGHT VISITATION 2010 - 2022

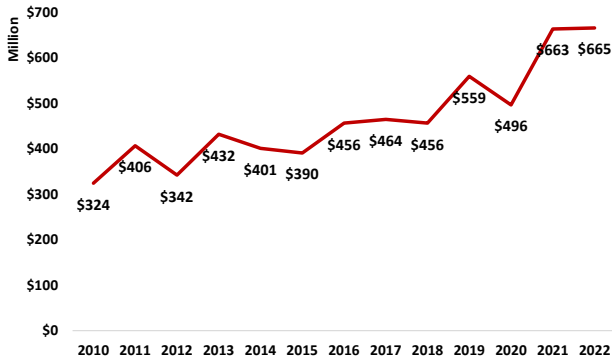
**VISITORS FLEURIEU PENINSULA 2010 - 2022 - International and Domestic**



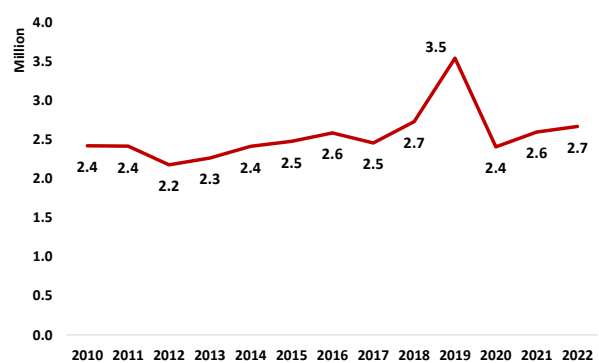
**NIGHTS FLEURIEU PENINSULA 2010 - 2022 - International and Domestic**



**TOTAL EXPENDITURE FLEURIEU PENINSULA 2010 - 2022 - International and Domestic**



**DAY TRIPS FLEURIEU PENINSULA 2010 - 2022 - 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-22	Change on Dec-19	Dec-22	Change on Dec-19
Adelaide	3,084,000	-21%	4,400,000,000	-3%
Adelaide Hills	155,000	-31%	225,000,000	9%
Barossa	319,000	1%	326,000,000	45%
Clare Valley	196,000	-4%	152,000,000	29%
Eyre Peninsula	500,000	-14%	503,000,000	-8%
Fleurieu Peninsula	783,000	-13%	665,000,000	19%
Flinders Ranges and Outback	835,000	-10%	576,000,000	12%
Kangaroo Island	171,000	-18%	187,000,000	-2%
Limestone Coast	622,000	-20%	441,000,000	5%
Murray River, Lakes and Coorong	381,000	-16%	201,000,000	-28%
Riverland	412,000	-4%	240,000,000	23%
Yorke Peninsula	602,000	1%	354,000,000	47%
Regional SA	4,568,000	-12%	3,980,000,000	12%
<b>South Australia</b>	<b>7,291,000</b>	<b>-15%</b>	<b>8,340,000,000</b>	<b>3%</b>

# FLEURIEU PENINSULA

## REGIONAL PROFILE



### FLEURIEU PENINSULA TOURISM LISTINGS

Category	# Listings
ACCOMM	408
RESTAURANT	158
ATTRACTION	145
TOUR	63
EVENT	53
DESTINFO	9
HIRE	8
GENSERVICE	5
INFO	5
JOURNEY	3
TRANSPORT	2
Grand Total	859

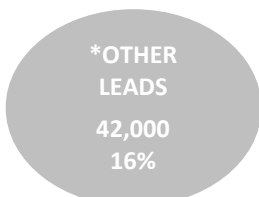
Note: some listings have multiple categories of accommodation  
 Source: Australian Tourism Data Warehouse  
 Categories above defined at - <https://tourism.sa.gov.au/support/atdw>

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](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)

**FLEURIEU PENINSULA  
 AUSTRALIAN TOURISM DATA WAREHOUSE  
 LEADS  
 254,000  
 YEAR END DECEMBER 2022**



#### TOP 5

- CABN JUDE
- TIMBA RTREET
- JETTY CARAVAN PARK NORMANVILLE
- ESCA AT NEST & NATURE
- NAIKO RETREAT

#### TOP 4

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

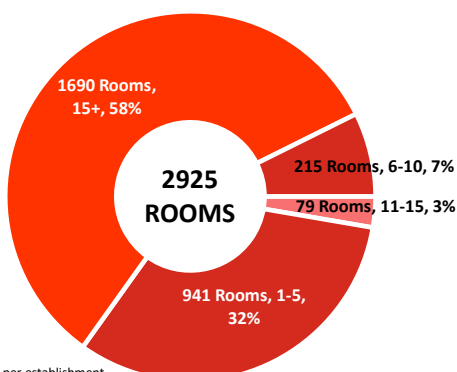
#### TOP 5

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

\* 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

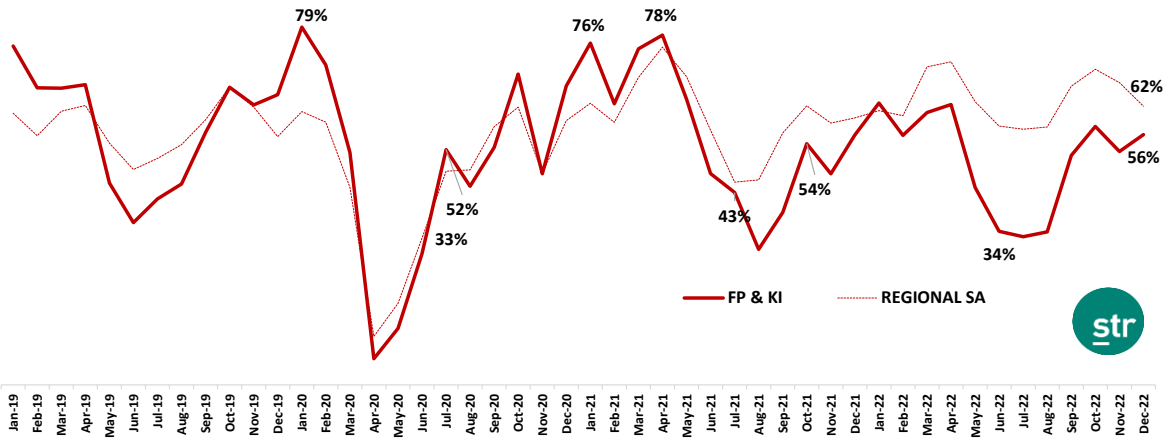
- Currently there are 408 establishments in the Fleurieu Peninsula that accommodate guests.
- These 408 establishments account for 2,925 rooms across the region.
- 58 per cent of rooms fall into establishment with 15 or more rooms.
- 32 per cent of rooms fall into the 1-5 room establishments.

# FLEURIEU PENINSULA REGIONAL PROFILE



## ACCOMMODATION STR

### ACCOMMODATION OCCUPANCY FP & KI

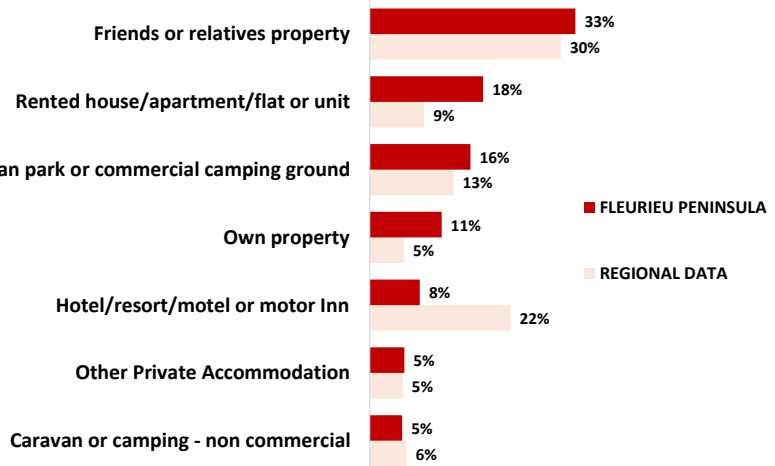


- The FP & KI regions include accommodation data for the Fleurieu Peninsula and Kangaroo Island. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the FP & KI regions was 57 per cent, this fell to 48 per cent in 2020, rose to 56 per cent in 2021 and fell in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

## VISITOR USE OF ACCOMMODATION

### ACCOMMODATION USED IN FLEURIEU PENINSULA FOR DOMESTIC VISITORS

- 33 per cent of domestic overnight visitor nights in the Fleurieu Peninsula are spent with Friends or Relatives compared to the SA regional average of 30 per cent.
- 8 per cent stayed in a Hotel/resort/motel or motor inn. This compares to the regional average of 22 per cent.
- Rented houses and Caravan and Camping are very popular on the Fleurieu Peninsula.



## TRANSPORT



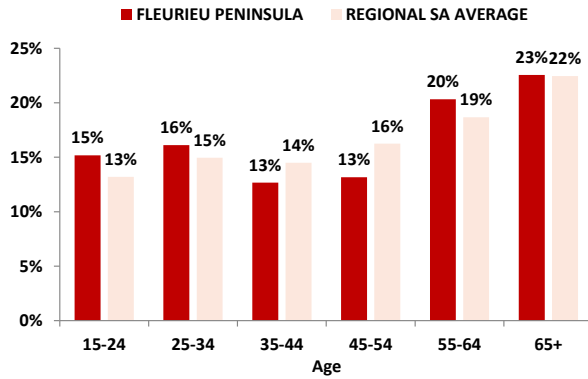
- The main method of transport used on trips to the Fleurieu Peninsula was a self drive vehicle.
- 95% of visitors used this type of transport.
- 4% of people used an aircraft.

# FLEURIEU PENINSULA REGIONAL PROFILE



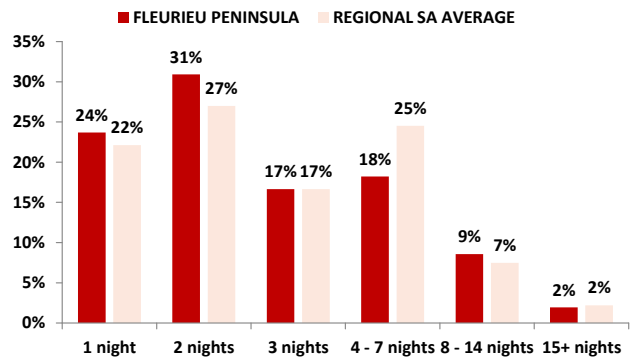
## VISITOR PROFILE

### AGE OF VISITORS TO FLEURIEU PENINSULA



- Overnight domestically there is a peak in the 15-24 and the 25-34 age group of 15 per cent and 16 per cent.
- Both age groups are above the regional average.

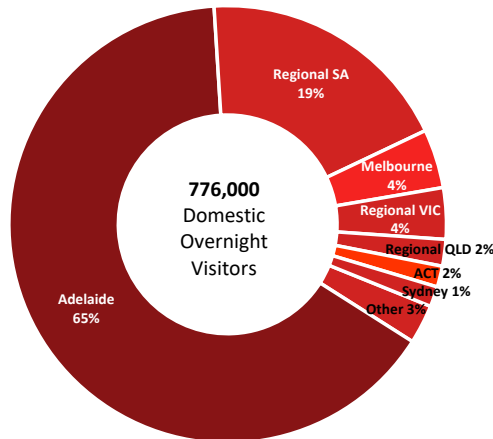
### LENGTH OF VISIT TO FLEURIEU PENINSULA



- 55 per cent of domestic overnight visitors like to stay 1-2 nights above the regional average of 49 per cent.
- 18 per cent like to stay between 4 and 7 days, below the regional average of 25 per cent.

## VISITOR ORIGIN

### ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO FLEURIEU PENINSULA

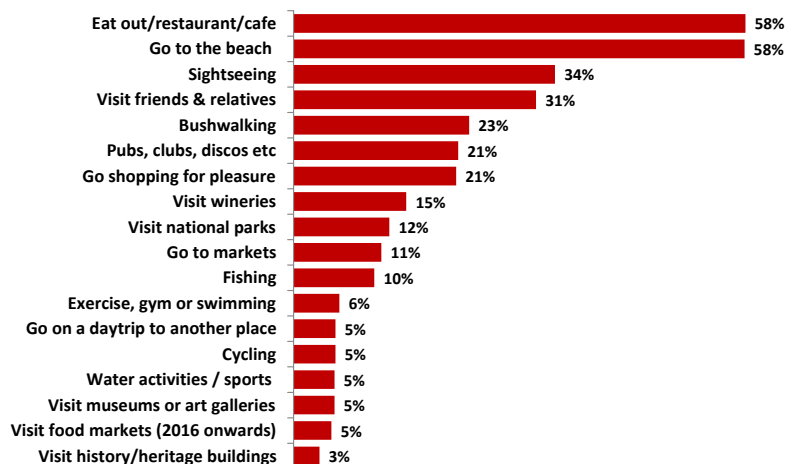


- Victoria at 8 per cent and New South Wales at 2 per cent are the Fleurieu Peninsula's biggest interstate overnight domestic markets.
- Regional South Australia contributes 19 per cent of visitors to the Fleurieu Peninsula.
- 65 per cent of visitors come from Adelaide.

## 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 going to the beach, visiting a friend or relative, go the beach, visiting wineries, bushwalking, visiting national parks, fishing and seeing the sights.

### DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN FLEURIEU PENINSULA



# FLEURIEU PENINSULA

## REGIONAL PROFILE



### REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2020-21, the tourism industry contributed an estimated \$751 million to the Fleurieu Peninsula regional economy and directly employed approximately 4,200 people.

#### Employment

- 4,200 jobs for people employed directly by the tourism industry, 1,600 indirect jobs and a total employment impact of 5,800 people.

#### Gross Value Added (GVA)

- \$202 million and \$173 million in direct and indirect tourism GVA, and \$375 million in total tourism GVA.

#### Gross Regional Product (GRP)

- \$224 million and \$217 million in direct and indirect tourism GRP and \$441 million in total tourism GRP.

#### Tourism Consumption

2020-21

**Tourism products** - directly consumed

- Cafes, restaurants and takeaway food services 37%
- Retail trade 19%
- Accommodation 13%
- Clubs, pubs, taverns and bars 7%
- Travel agency and tour operator services 7%
- Air, water and other transport 5%
- All other industries 4%
- Other sports and recreation services 2%

#### Tourism Employment

2020-21

**Tourism Industries** - 4,200 directly employed

- Takeaway and restaurant meals 19%
- Shopping (including gifts and souvenirs) 17%
- Fuel (petrol, diesel) 11%
- Travel agency and tour operator services 10%
- Accommodation services 7%
- Food products 7%
- Alcoholic beverages and other beverages 7%
- Long distance passenger transportation 6%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2021

### 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:

<b>Promote diversity of activities, particularly those that appeal to families</b>	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.
<b>Show how the region is set apart from the city</b>	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.
<b>Encourage longer visits</b>	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.
<b>Region appeals to...</b>	<ul style="list-style-type: none"> <li>— Relaxation seekers</li> <li>— Nature lovers</li> <li>— Beach only</li> <li>— Travelling with children</li> </ul>

Prepared by the South Australian Tourism Commission, December 2022

**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 2022.

**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