

FLEURIEU PENINSULA

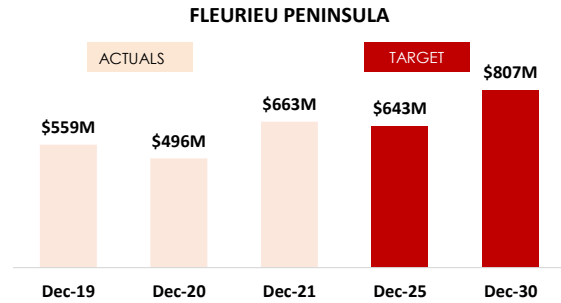
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2021

- Currently the Fleurieu Peninsula contributes \$663 million to the year end December 2021 South Australian expenditure of \$6.2 billion.
- The Fleurieu Peninsula has achieved their 2025 target of \$643 million and 82 per cent of their 2030 target of \$807 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2021

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	761,000	132,000	893,000	-	894,000
%	85%	15%	100%	0%	100%
<i>Share of Regional SA</i>	16%	9%	15%	0%	15%
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<i>% Across Regional SA</i>	76%	23%	100%	0%	100%
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Nights	2,069,000	503,000	2,571,000	-	2,572,000
%	80%	20%	100%	0%	100%
<i>Share of Regional SA</i>	15%	6%	11%	0%	11%
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<i>% Across Regional SA</i>	60%	38%	98%	2%	100%
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Average Length of Stay	2.7	3.8	2.9	-	2.9
ALOS Regional SA	3.0	6.2	3.7	-	3.8
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Total Expenditure					\$663,000,000
Overnight Expenditure	\$330,000,000	\$103,000,000	\$433,000,000	\$0	\$433,000,000
Day Trip Expenditure					\$230,000,000
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Domestic Day Trips					2,600,000

- The Fleurieu Peninsula saw 893,000 domestic overnight visitors for the year end December 2021.
- 85 per cent of overnight visitors were from intrastate and 15 per cent from interstate.
- The 761,000 intrastate overnight visitors stayed 2.1 million nights with an average length of stay of 2.7 nights.
- There were 132,000 interstate overnight visitors who stayed 503,000 nights with an average length of stay of 3.8 nights
- There have been limited international arrivals with borders closed.
- 2.6 million day trips were taken to the Fleurieu Peninsula for the year with spend of \$230 million.

ALOS = Average Length of Stay

FLEURIEU PENINSULA

REGIONAL PROFILE



PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	590,000	216,000	79,000	9,000	894,000
%	66%	24%	9%	1%	100%
<i>Share of Regional SA</i>	20%	13%	7%	2%	15%
<i>% Across all regions</i>	49%	28%	18%	8%	100%

Nights	1,880,000	515,000	160,000	17,000	2,572,000
%	73%	20%	6%	1%	100%
<i>Share of Regional SA</i>	16%	9%	4%	1%	11%
<i>% Across all regions</i>	50%	26%	17%	8%	100%

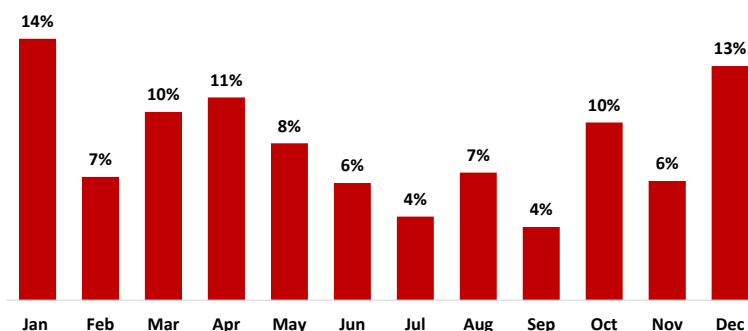
Average Length of Stay	3.2	2.4	2.0	1.9	2.9
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Expenditure					
Annual Expenditure	\$336,000,000	\$62,000,000	\$26,000,000	\$9,000,000	\$433,000,000
Expenditure 2019	\$216,000,000	\$62,000,000	\$7,000,000	\$14,000,000	\$299,000,000
Av spend per night	\$179	\$120	\$163	\$529	\$168
Av spend per night Reg SA	\$154	\$58	\$84	\$80	\$112
Share of Regional SA	15%	11%	5%	2%	11%

- 90 per cent of overnight visitors to the Fleurieu Peninsula are either on holiday or visiting friends and relatives.
- Overnight holiday visitors on average spend \$179 per night compared to VFR visitors who spend \$120 per night.
- Leisure overnight visitors spent \$398 million for the year, making up 92 per cent of all overnight expenditure.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO FLEURIEU PENINSULA



Source: NVS year end December 2021

- National Visitor Survey data shows us that January, April, October and December are the strongest months for visitation in the Fleurieu Peninsula.
- January is busy with the summer school holidays.
- April is busy with Easter and School holidays.
- December is strong on the back of the holidays.
- Visitation slows in the Winter.

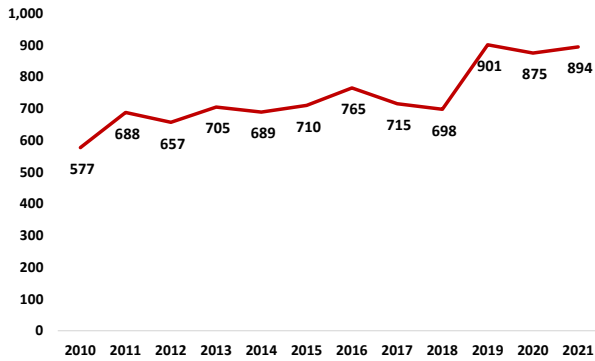
FLEURIEU PENINSULA

REGIONAL PROFILE

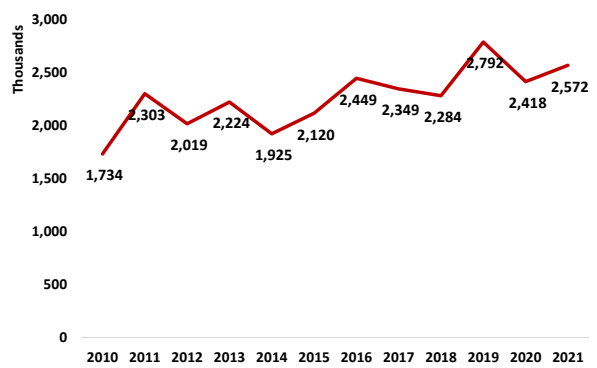


TOTAL OVERNIGHT VISITATION 2010 - 2021

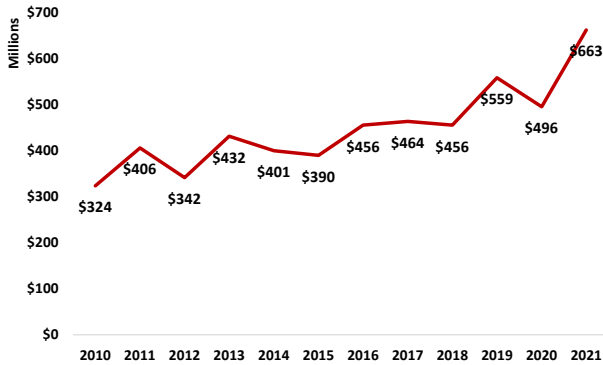
VISITORS FLEURIEU PENINSULA 2010 - 2021 - INTERNATIONAL AND DOMESTIC



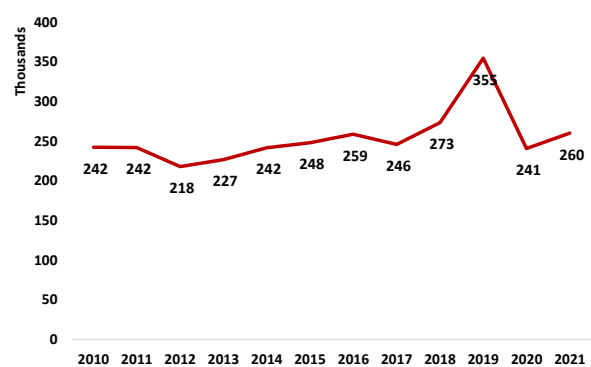
NIGHTS FLEURIEU PENINSULA 2010 - 2021 - INTERNATIONAL AND DOMESTIC



TOTAL EXPENDITURE FLEURIEU PENINSULA 2010 - 2021 - INTERNATIONAL AND DOMESTIC



DAY TRIPS FLEURIEU PENINSULA 2010 - 2021 - 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-21	Change on Dec-19	Dec-21	Change on Dec-19
Adelaide	1,982,000	-49%	2,549,700,000	-44%
Adelaide Hills	184,000	-18%	204,500,000	-1%
Barossa	230,000	-28%	291,600,000	29%
Clare Valley	282,000	38%	171,700,000	46%
Eyre Peninsula	482,000	-17%	488,400,000	-11%
Fleurieu Peninsula	894,000	-1%	662,900,000	19%
Flinders Ranges and Outback	638,000	-31%	359,700,000	-30%
Kangaroo Island	189,000	-9%	238,500,000	25%
Limestone Coast	610,000	-21%	438,600,000	4%
Murray River, Lakes and Coorong	391,000	-13%	211,200,000	-25%
Riverland	345,000	-20%	231,600,000	19%
Yorke Peninsula	620,000	4%	279,500,000	16%
Regional SA	4,424,000	-14%	3,601,600,000	1%
South Australia	6,077,000	-29%	6,151,300,000	-24%

FLEURIEU PENINSULA REGIONAL PROFILE



FLEURIEU PENINSULA TOURISM LISTINGS

Category	# Listings
Accommodation	354
Food and Drink	181
Attraction	140
Tour	61
Event	41
Destination Information	8
Hire	8
Information Services	5
General Services	5
Transport	2
Journey	1
Grand Total	806

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
306,000
YEAR END DECEMBER 2021**

ACCOMMODATION
LEADS
206,000
67%

FOOD & DRINK
LEADS
30,000
10%

TOUR
LEADS
30,000
10%

*OTHER
LEADS
40,000
13%

TOP 4

- BEACH HUTS MIDDLETON
- CABN JUDE
- CABN CHLOE BLEWITT SPRINGS
- NAIKO RETREAT

TOP 5

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

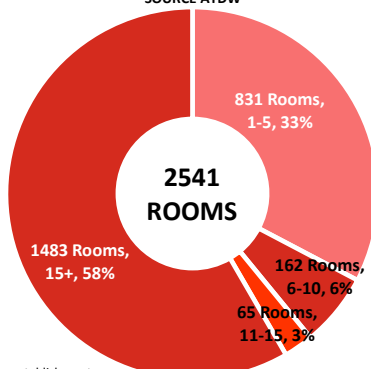
TOP 5

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

* 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



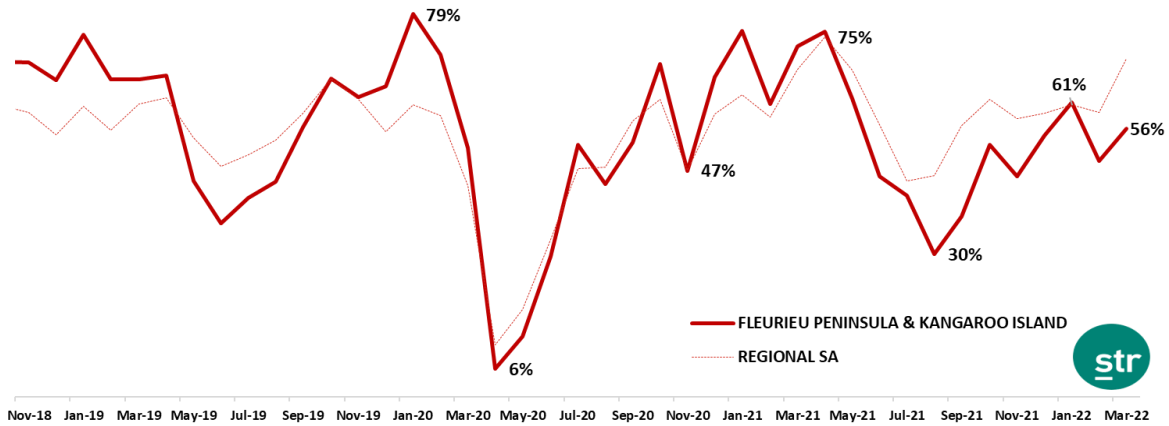
- Currently there are 350 establishments in the Fleurieu Peninsula that accommodate guests.
- These 350 establishments offer in total 2,541 rooms across the region.
- 58 per cent of rooms fall into establishment with 15 or more rooms. This includes Caravan Parks.
- 33 per cent of rooms fall into the 1-5 room establishments.

Rooms refers to rooms per establishment



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY FLEURIEU PENINSULA & KANGAROO ISLAND

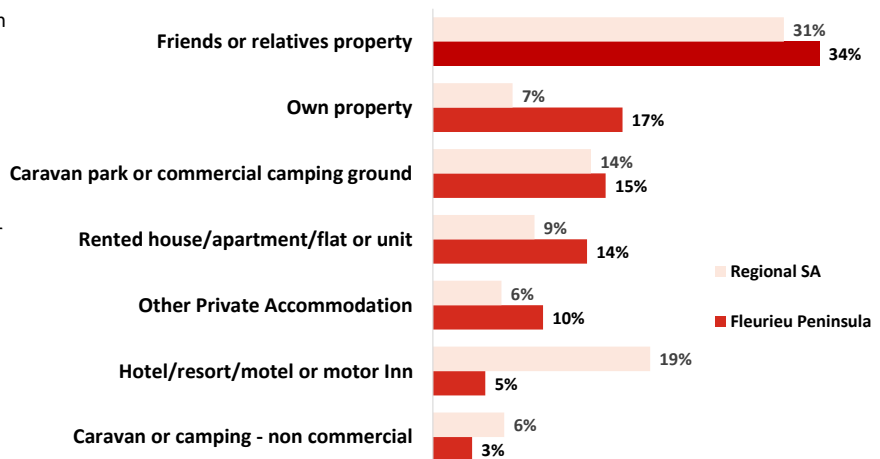


- The Fleurieu Peninsula and Kangaroo Island accommodation data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Fleurieu Peninsula and Kangaroo Island was 57 per cent, this fell to 48 per cent in 2020, rose to 54 per cent in 2021 and for the first 3 month of 2022 the average is 55 per cent.

VISITOR USE OF ACCOMMODATION

ACCOMMODATION USED IN FLEURIEU PENINSULA FOR DOMESTIC VISITORS

- 34 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 31 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.



TRANSPORT

TRANSPORT FLEURIEU PENINSULA DECEMBER 2021



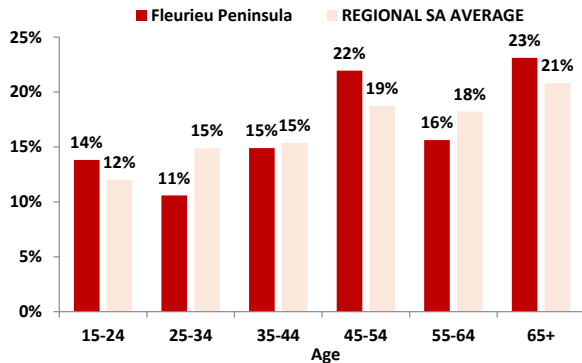
- The main method of transport used for Fleurieu Peninsula was a self drive vehicle.
- 97 per cent of visitors used this type of transport.
- 3 per cent of people used another form of transport, this included helicopters, buses etc.

FLEURIEU PENINSULA REGIONAL PROFILE



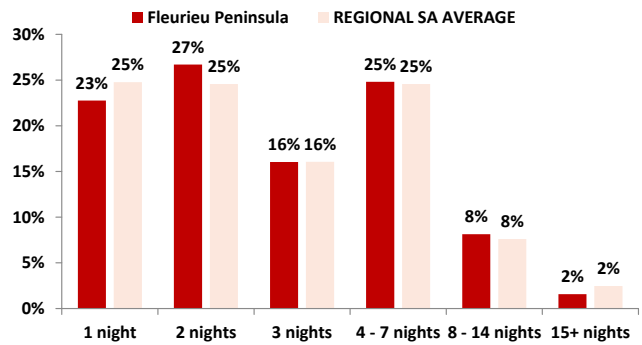
VISITOR PROFILE

AGE OF VISITORS TO FLEURIEU PENINSULA



- The 45-54 and the 65+ age groups both over index for the Fleurieu Peninsula when compared to the average across all regions.
- 11 per cent of visitors are in the 25-34 age group, below the regional average of 15 per cent.

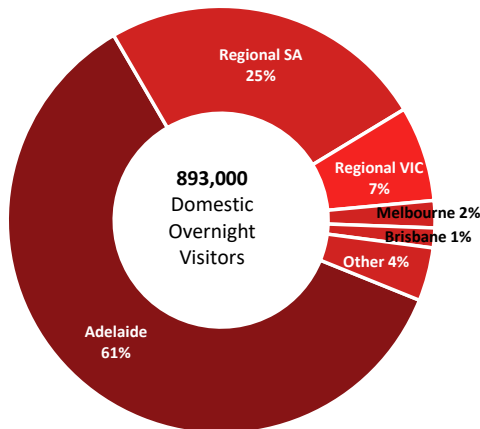
LENGTH OF VISIT TO FLEURIEU PENINSULA



- 50 per cent of visitors prefer to stay between 1 to 2 nights, in line with the regional average of 50 per cent.
- 25 per cent of domestic visitors like to stay 4 to 7 nights.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO FLEURIEU PENINSULA

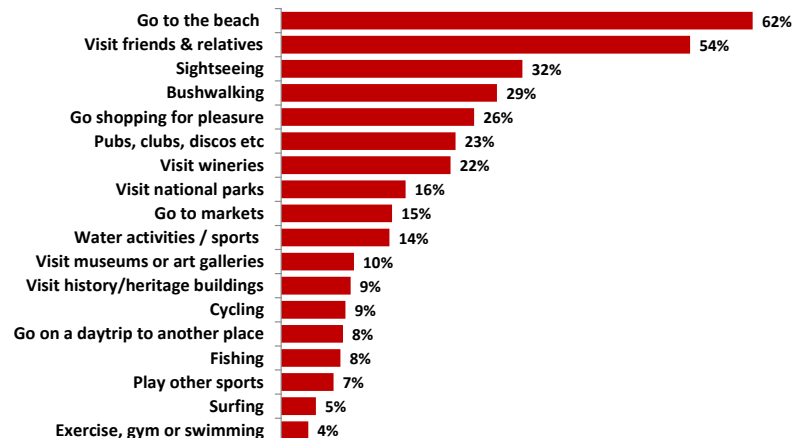


- Victoria at 9 per cent and New South Wales at 2 per cent are the Fleurieu Peninsula's biggest interstate overnight domestic markets.
- Regional South Australia contributes 25 per cent of visitors to the Fleurieu Peninsula's.
- 61 per cent of visitors come from Adelaide.

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.





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.
- Food, drink, coast, proximity to access to Kangaroo Island and travelling from Melbourne to Adelaide were key factors for international travel into Fleurieu Peninsula.

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, December 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 December 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 ConsumerDemand 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. 885455001
Consumer Demand Product Testing Phase 1 - BDA Marketing