

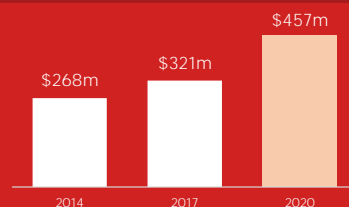
# LIMESTONE COAST

## Regional Profile



### OVERVIEW

- Currently the Limestone Coast contributes \$321 million to the December 2017 South Australian expenditure of \$6.6 billion.
- The Limestone Coast has achieved 70 per cent of their \$457 million 2020 target.



### Annual Visitor Summary December 2015 - December 2017

#### ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	323,000	226,000	549,000	45,000	594,000
%	59%	41%	92%	8%	100%
Nights	1,014,000	658,000	1,672,000	265,000	1,938,000
%	61%	39%	86%	14%	100%
Average Length of Stay	3	3	3	6	3
Domestic Day Trips					
Average Annual Day Trips to Limestone Coast					717,000

#### PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	296,000	171,000	102,000	29,000	594,000
%	50%	29%	17%	5%	100%
Nights	890,000	600,000	294,000	153,000	1,938,000
%	46%	31%	15%	8%	100%
Average Length of Stay	3	4	3	5	3
Expenditure					
Average Annual Expenditure					321,000,000

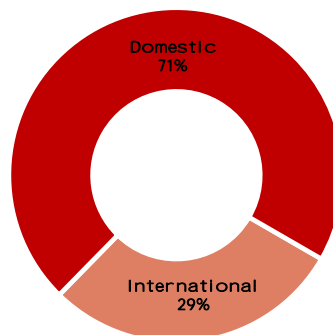
- 92 per cent of visitors are Domestic visitors and 8 per cent International visitors.
- Domestically 59 per cent of visitors are from within the state compared to 41 per cent from Interstate.
- 79 per cent of visitors to the Limestone Coast are Leisure visitors (Holiday + VFR).

#### LIMESTONE COAST TOURISM LISTINGS

Category	Limestone Coast
Accommodation	180
Attraction	86
Destination Information	6
Event	77
Food and Drink	36
General Services	2
Hire	3
Information Services	1
Journey	1
Tour	13
Grand Total	405

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

#### LIMESTONE COAST MEDIA COVERAGE



Source: Item Count - SATC Internal - 2017

# LIMESTONE COAST

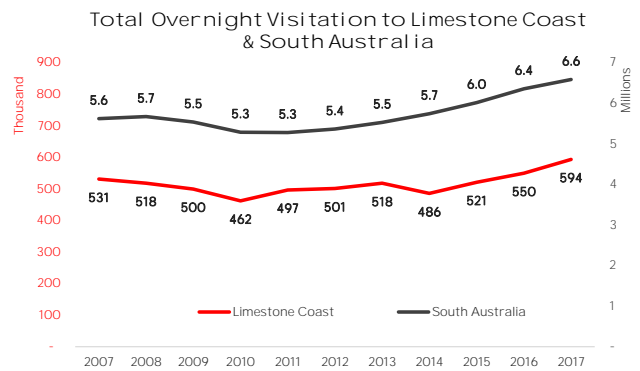
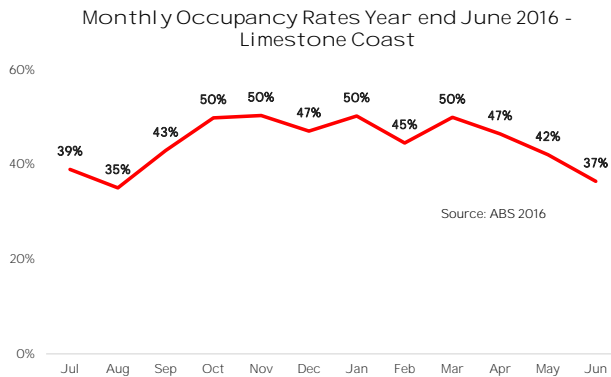
## Regional Profile



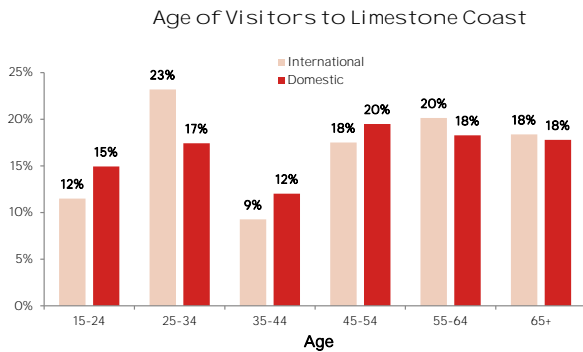
### ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	34
Rooms	1,005
Occupancy	45%
Takings	\$19,600,000

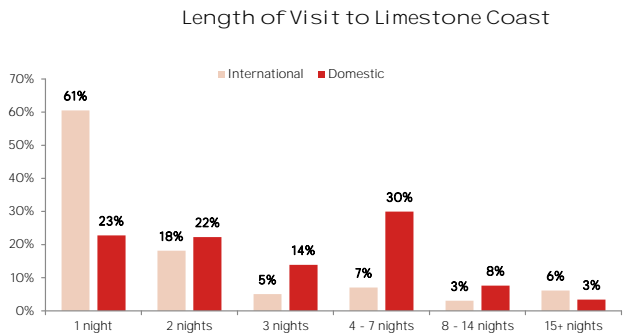
- Average occupancy for the year is 45 per cent over 34 establishments and 1,005 rooms.
- The peak months are October, November, January and March with occupancy at 50 per cent.
- The low point of the year comes in August where occupancy drops to 35 per cent.
- Occupancy through the winter months averages 37 per cent.



### VISITOR PROFILE



- International visitors peak in the 25-34 and the 55-64 age group at 23 and 20 per cent.
- For Domestic visitors there is a peak in the 45-54 at 20 per cent.



- 61 per cent of International visitors prefer to stay 1 night in the Limestone Coast.
- 45 per cent of Domestic visitors stay 1-2 nights.
- 30 per cent of Domestic visitors stay 4-7 nights

# LIMESTONE COAST

## Regional Profile



### DOMESTIC VISITOR PROFILE

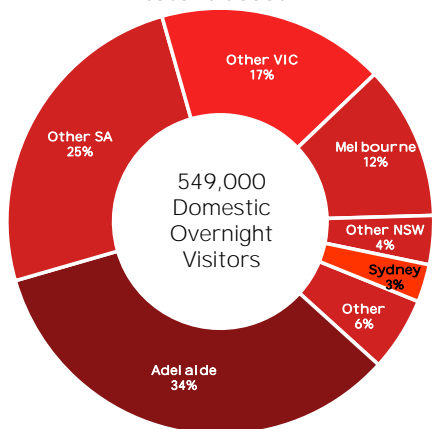
Purpose	Holiday	VFR	Other	Total
Visits	257,000	167,000	129,000	549,000
<b>%</b>	<b>47%</b>	<b>30%</b>	<b>23%</b>	<b>100%</b>
Nights	779,000	527,000	366,000	1,672,000
<b>%</b>	<b>47%</b>	<b>32%</b>	<b>22%</b>	<b>100%</b>
ALOS	3	3	3	3

### INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	39,000	4,000	3,000	45,000
<b>%</b>	<b>87%</b>	<b>9%</b>	<b>7%</b>	<b>100%</b>
Nights	111,000	73,000	81,000	265,000
<b>%</b>	<b>42%</b>	<b>28%</b>	<b>31%</b>	<b>100%</b>
ALOS	3	18	27	6

### VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Limestone Coast



Origin of International Visitors to Limestone Coast



- Regional South Australia contributes 25 per cent of visitors to the Limestone Coast. Adelaide visitors contribute 34 per cent.
- 29 per cent of visitors come from Victoria with its close proximity to the Limestone Coast.
- Internationally, 57 per cent of the visits to the Limestone Coast are from Europe, with the United Kingdom contributing 19 per cent, Germany 12 per cent.

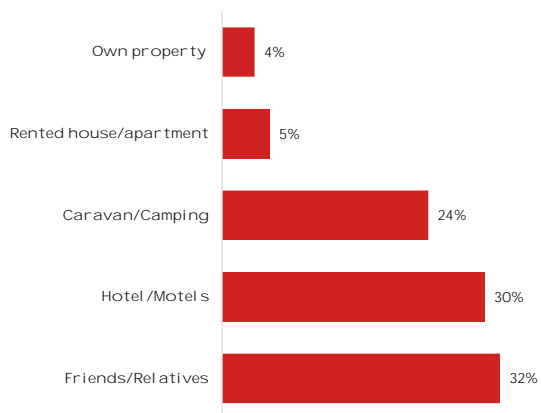
# LIMESTONE COAST

## Regional Profile

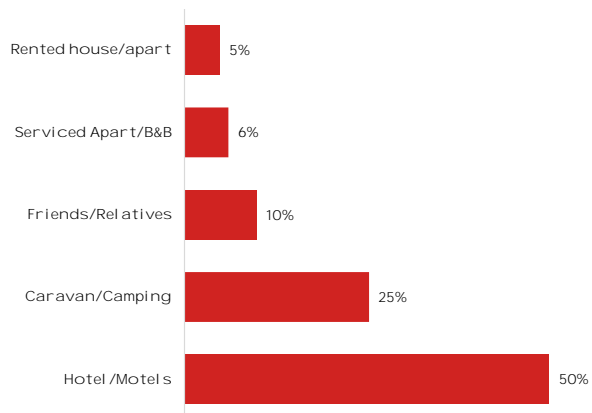


### VISITOR USE OF ACCOMMODATION

Accommodation used in Limestone Coast for Domestic Visitors



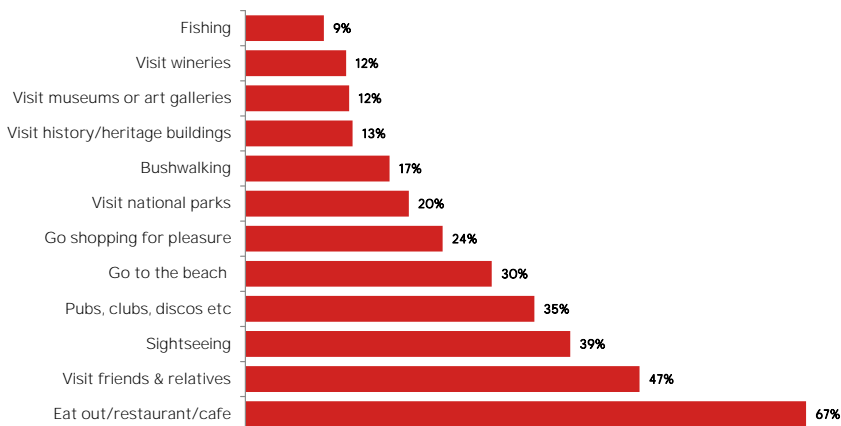
Accommodation used in Limestone Coast for International Visitors



- 62 per cent of Domestic visitor nights to the Limestone Coast are spent either in Friends or Relatives property, or Hotels and similar accommodation.
- Domestically, Caravan and camping is also popular with 24 per cent of visitors preferring this accommodation.
- 60 per cent of International visitors stay with Friends/Relative or in Hotels and similar accommodation.
- 25 per cent of International visitors prefer Caravan and camping.

### VISITOR ACTIVITIES

Domestic Visitor Activities in Limestone Coast



- The most popular activity when coming to the Limestone Coast is to Eat out or Dine at a restaurant and or cafe.
- Other popular activities include Going to the Beach, Bushwalking, Visiting the National Parks and Sightseeing.
- Visiting wineries are also important as an activity.

# LIMESTONE COAST

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### REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2016-17, the tourism industry contributed an estimated \$249 million to the Limestone Coast regional economy and directly employed approximately 1,900 people.

#### Employment

- 1,900 jobs for people employed directly by the tourism industry, 800 indirect jobs and a total employment impact of 2,800 people.

#### Tourism output

- \$219 million and \$271 million in direct and indirect tourism output, and \$490 million in total tourism output.

#### Gross Value Added (GVA)

- \$115 million and \$111 million in direct and indirect tourism GVA, and \$226 million in total tourism GVA.

#### Gross Regional Product (GRP)

- \$124 million and \$125 million in direct and indirect tourism GRP and \$249 million in total tourism GRP.

### REGIONAL INSIGHTS

#### Interstate & Intrastate

- Caves & craters of Naracoorte & Mount Gambier highly appealing.
- Offers a good range of experiences that the whole family can enjoy.
- Popular holiday destination for Victorians - Robe, Beach Port

#### International

- Enjoying the Great Ocean Road drive most popular.
- Mount Gambier and the Blue Lake also popular.

#### Regional Visitor Strategy Priorities

- To increase overnight visitor volumes from international and domestic markets and convert some existing day trippers to stay overnight.
- Being a predominantly self-drive visitor market, leveraging existing touring routes and promoting and developing hero tourism experiences and events that reflect the region's uniqueness will be key.

#### Accommodation

- The Limestone Coast has an over supply of 3 star accommodation and needs to upgrade these to 4 star.
- The regions needs to look at upgrading current stock not at increasing supply.

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 2017

**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 2015 to December 2017.  
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