



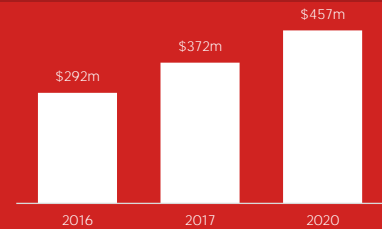
LIMESTONE COAST

Regional Profile December 2014-2016



OVERVIEW

- Currently the Limestone Coast contributes \$292 million to the December 2016 South Australian expenditure of \$5.8 billion.
- The Limestone Coast has achieved 64 per cent of their \$457 million 2020 target.



Annual Visitor Summary December 2014 - December 2016

ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Visits	313,000	192,000	505,000	45,000	550,000
%	62%	38%	92%	8%	100%
Nights	952,000	552,000	1,505,000	262,000	1,766,000
%	63%	37%	85%	15%	100%
Average Length of Stay	3.0	2.9	3.0	5.8	3.2

Day Trips

Average Annual Day Trips to Limestone Coast 708,000

PURPOSE

	Holiday	VFR	Business	Other	Total
Visits	264,000	160,000	101,000	29,000	550,000
%	48%	29%	18%	5%	100%
Nights	782,000	537,000	287,000	160,000	1,766,000
%	44%	30%	16%	9%	100%
Average Length of Stay	3.0	3.4	2.8	5.5	3.2

Expenditure

Average Annual Expenditure \$ 292,000,000

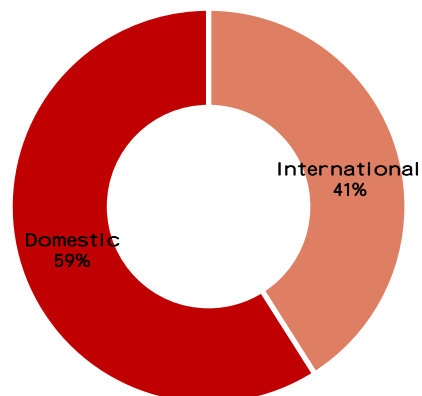
- 92 per cent of visitors are Domestic Visitors and 8 per cent International Visitors.
- Domestically 62 per cent are from within the state compared to 38 per cent from Interstate.
- 78 per cent of visitors to the Limestone Coast are Leisure Visitors (Holiday + VFR).

LIMESTONE COAST TOURISM LISTINGS

Category	Limestone Coast
Accommodation	213
Event	164
Attraction	146
Food and Drink	50
Tour	10
Information Services	9
Destination Information	5
Hire	3
Transport	2
Journey	1
General Services	1
Grand Total	604

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

LIMESTONE COAST MEDIA COVERAGE



Source: Item Count - SATC Internal - 2016

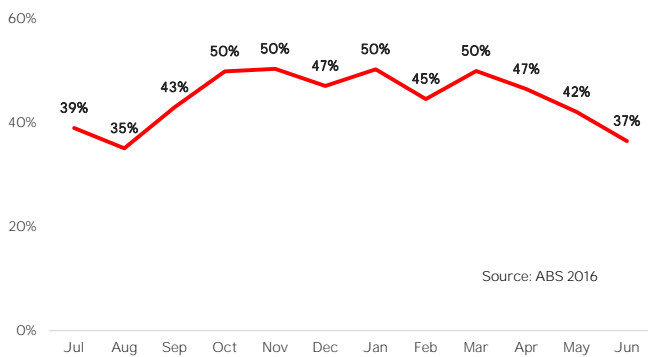


ACCOMMODATION SUPPLY

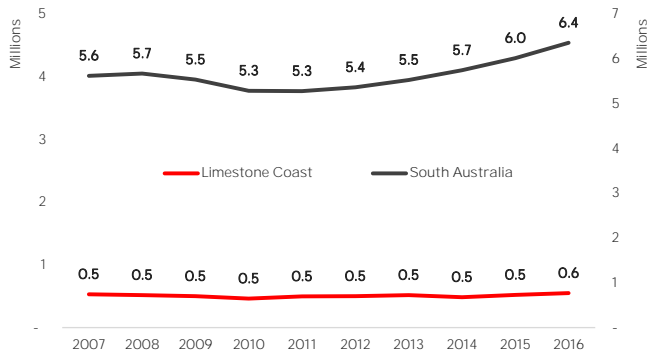
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	34
Rooms	1,005
Occupancy	45%
Takings	\$ 19,600,000

- 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.

Monthly Occupancy Rates Year end June 2016 - Limestone Coast

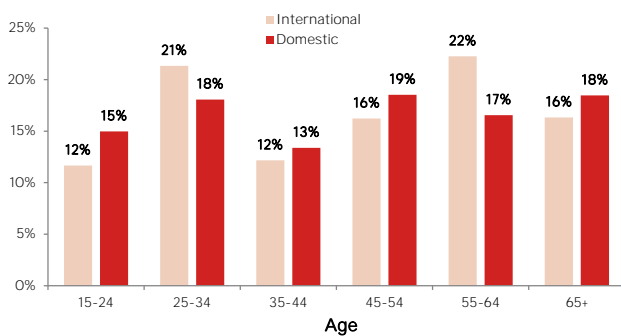


Total Overnight Visitation to Limestone Coast & South Australia



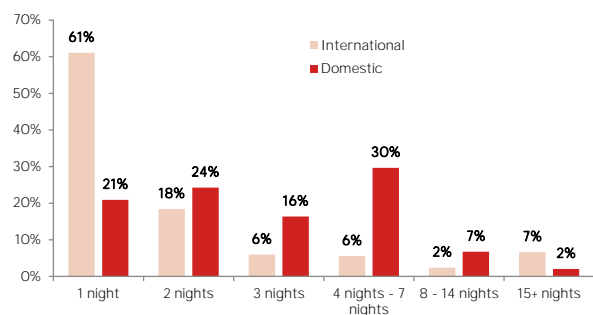
VISITOR PROFILE

Age of Visitors to Limestone Coast



- International Visitors peak in the 25-34 and the 55-64 age group at 21 and 22 per cent.
- For Domestic Visitors there is a peak in the 45-54 at 19 per cent.

Length of Visit to Limestone Coast



- 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



DOMESTIC VISITOR PROFILE

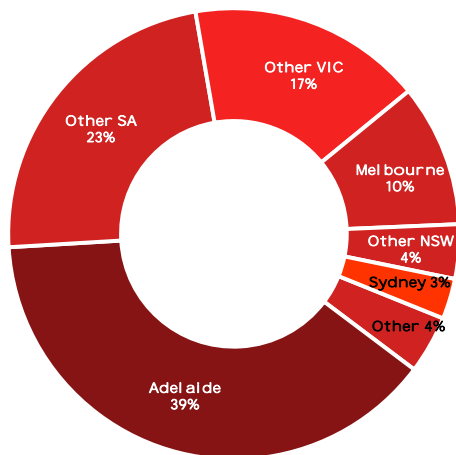
Purpose	Holiday	VFR	Other	Total
Visits	225,000	156,000	127,000	505,000
%	45%	31%	25%	100%
Nights	672,000	472,000	361,000	1,504,000
%	45%	31%	24%	100%
ALOS	3.0	3.0	2.8	3.0

INTERNATIONAL VISITOR PROFILE

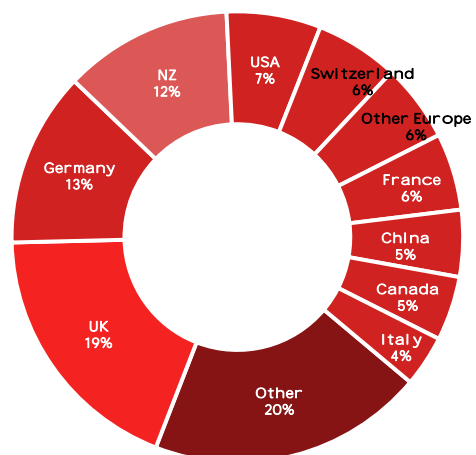
Purpose	Holiday	VFR	Other	Total
Visits	39,000	4,000	3,000	45,000
%	87%	9%	7%	100%
Nights	111,000	65,000	86,000	262,000
%	42%	25%	33%	100%
ALOS	2.8	16.3	28.7	5.8

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Limestone Coast



Origin of International Visitors to Limestone Coast

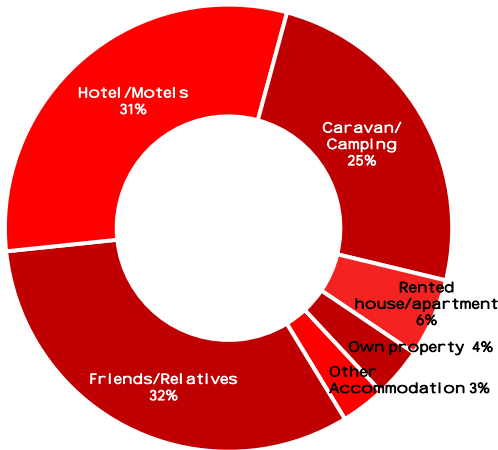


- Regional South Australia contributes 23 per cent of visitors to the Limestone Coast. Adelaide visitors contribute 39 per cent.
- 27 per cent of visitors come from Victoria with its close proximity to the Limestone Coast.
- Internationally, 58 per cent of the visits to the Limestone Coast are from Europe, with the United Kingdom contributing 19 per cent, Germany 13 per cent.

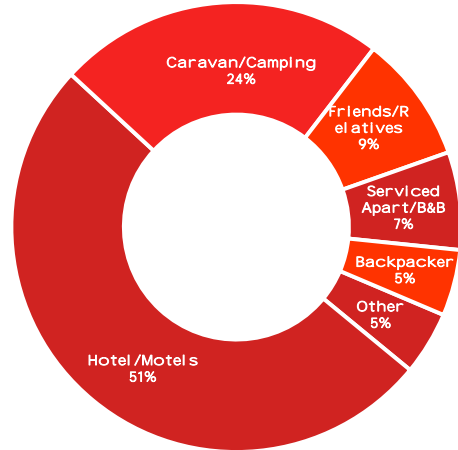


VISITOR USE OF ACCOMMODATION

Accommodation used in Limestone Coast for Domestic Visitors



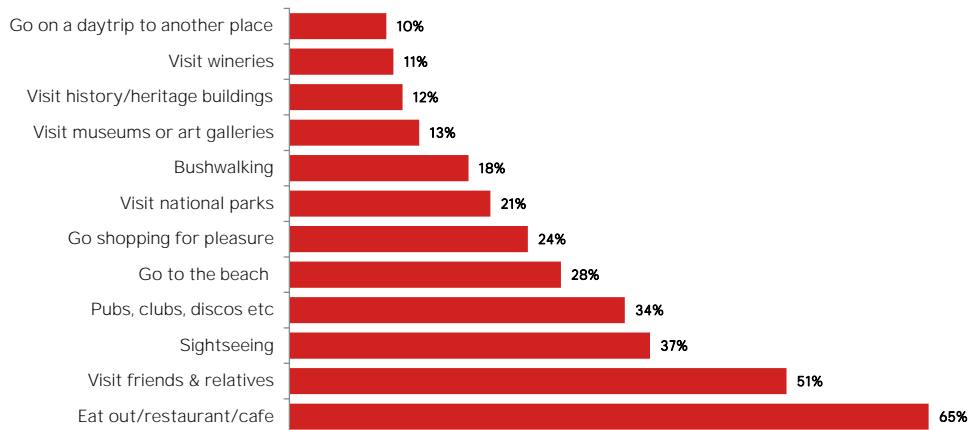
Accommodation used in Limestone Coast for International Visitors



- 63 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 25 per cent of visitors preferring this accommodation.
- 60 per cent of International Visitors stay with Friends/Relative or in Hotels and similar accommodation.
- 24 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.



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

- In 2013-14, the tourism industry contributed an estimated \$259 million to the Limestone Coast regional economy (6.7 per cent of gross regional product) and directly employed approximately 1,800 people (5.7 per cent of regional employment).

In 2013-14, the tourism activity on the Limestone Coast generated:

- \$195 million and \$318 million in direct and indirect tourism output, and \$513 million in total tourism output;
- \$102 million and \$128 million in direct and indirect tourism GVA, and \$230 million in total tourism GVA;
- \$110 million and \$149 million in direct and indirect tourism GRP and \$259 million in total tourism GRP; and
- 1,800 jobs for people employed directly by the tourism industry, 1,300 indirect jobs and a total employment impact of 3,100 people.

REGIONAL INSIGHTS

Interesting attractions but distance a factor.

Interstate & Intrastate

- Caves & craters of Naracoorte & Mount Gambier highly appealing.
- Offers a good range of experiences that the whole family can enjoy.
- Long perceived distances from Adelaide and between regional attractions the main detractor.

International

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

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 9 priority markets, with a sample of 500 per market.

Prepared by the South Australian Tourism Commission, December 2016

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 2014 to December 2016

Consumer Demand Product Testing - 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