

LIMESTONE COAST

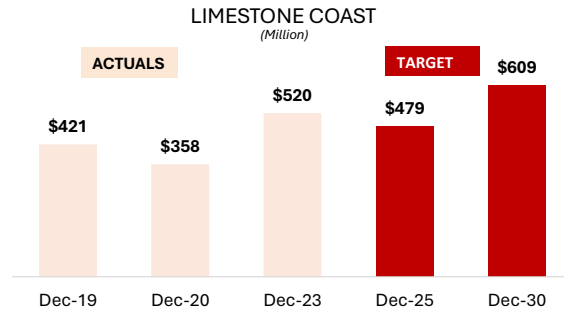
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2023

- Currently, the Limestone Coast contributes \$520 million to the year end December 2023 South Australian expenditure of \$10.1 billion.
- The Limestone Coast has achieved 100 per cent of their 2025 target of \$479 million and 85 per cent of their 2030 target of \$609 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2023

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	436,000	291,000	727,000	36,000	763,000
% of visits	57%	38%	95%	5%	100%
Share of Regional SA	9%	11%	10%	8%	10%
<hr/>					
% Across Regional SA	60%	35%	94%	6%	100%
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>					
Nights	1,029,000	835,000	1,864,000	187,000	2,051,000
% of nights	50%	41%	91%	9%	100%
Share of Regional SA	8%	7%	7%	1%	5%
<hr/>					
% Across Regional SA	33%	31%	65%	35%	100%
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>					
Average Length of Stay	2.4	2.9	2.6	5.2	2.7
ALOS Regional SA	2.8	4.6	3.5	32.0	5.1
<hr/>					
Total Expenditure					\$519,000,000
Overnight Expenditure	\$172,000,000	\$190,000,000	\$362,000,000	\$12,000,000	\$374,000,000
Day Trip Expenditure					\$145,000,000
<hr/>					
Domestic Day Trips					800,000

- The Limestone Coast saw 763,000 overnight visitors for the year end December 2023.
- 57 per cent of overnight visitors were from intrastate, 38 per cent from interstate and 5 per cent from overseas.
- The 436,000 intrastate overnight visitors stayed 1.0 million nights with an average length of stay of 2.4 nights.
- There were 291,000 interstate overnight visitors who stayed 835,000 nights with an average length of stay of 2.9 nights
- The region saw 36,000 international visitors with an average length of stay of 5.2 nights and spend of \$12 million.
- 800,000 day trips were taken to and within the Limestone Coast for the year with spend of \$145 million.

ALOS = Average Length of Stay

LIMESTONE COAST

REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	387,000	260,000	85,000	35,000	763,000
% of visits	51%	34%	11%	5%	100%
Share of Regional SA	12%	10%	5%	7%	10%
% Across all regions	41%	33%	21%	6%	100%

Nights	976,000	851,000	164,000	60,000	2,051,000
% of nights	48%	41%	8%	3%	100%
Share of Regional SA	8%	5%	3%	1%	5%
% Across all regions	31%	39%	15%	14%	100%

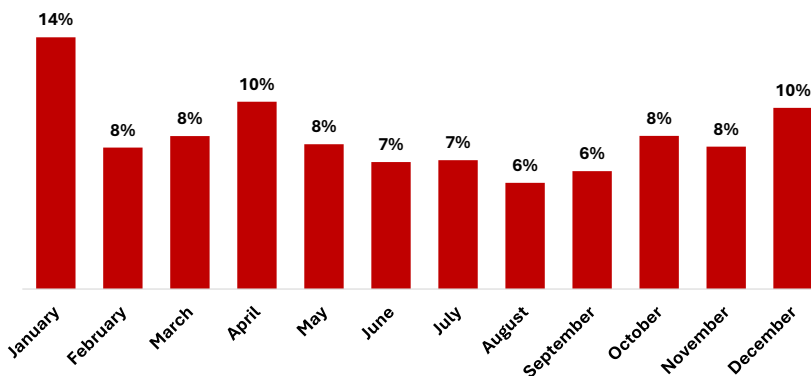
Average Length of Stay	2.5	3.3	1.9	1.7	2.7
-------------------------------	-----	-----	-----	-----	------------

Expenditure					
Annual Expenditure	\$212,000,000	\$90,000,000	\$38,000,000	\$34,000,000	\$374,000,000
Expenditure 2019	\$152,000,000	\$60,000,000	\$67,000,000	\$44,000,000	\$323,000,000
Av spend per night	\$217	\$106	\$232	\$567	\$182
Av spend per night Reg SA	\$224	\$109	\$155	\$297	\$181
Share of Regional SA	3%	5%	1.3%	2%	3%

- 85 per cent of overnight visitors to the Limestone Coast are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$217 per night compared to VFR visitors who spend \$106 per night.
- Leisure overnight visitors spent \$302 million for the year, making up 81 per cent of all overnight expenditure.
- There are 85,000 business visitors who stay 164,000 nights with spend of \$38 million.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO LIMESTONE COAST



- National Visitor Survey data shows us that in 2023 January, April and December are the strongest months for visitation on the Limestone Coast.
- January is the busiest month for the year with summer school holidays.
- April and October also strong with school holidays, Easter and the October long weekend.

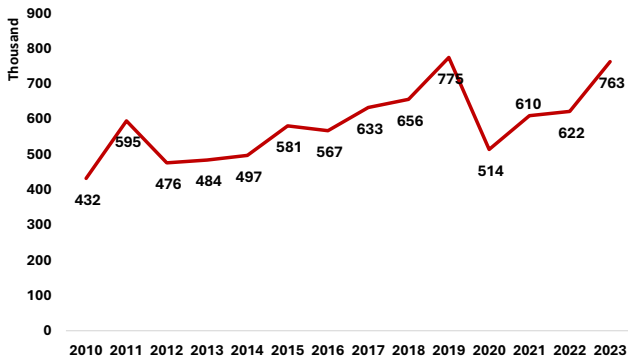
LIMESTONE COAST

REGIONAL PROFILE

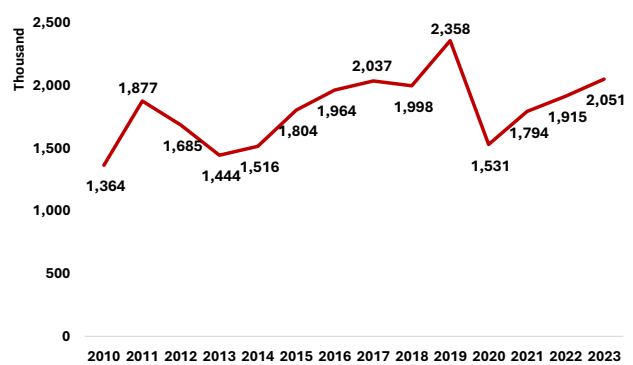


TOTAL OVERNIGHT VISITATION 2010 - 2022

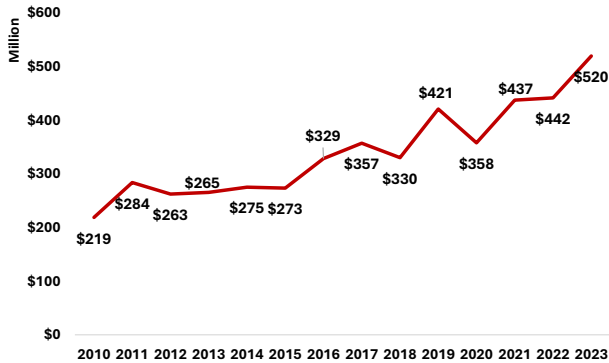
VISITORS LIMESTONE COAST 2010 - 2023 - International and Domestic



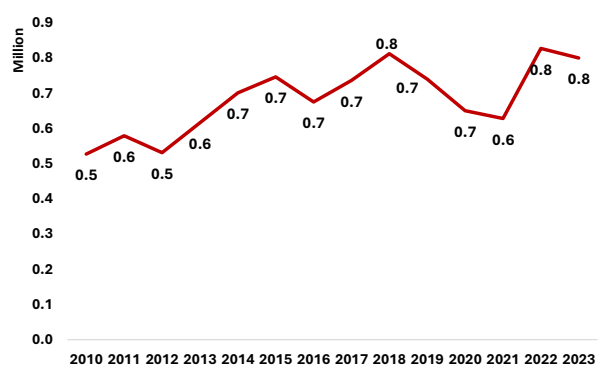
NIGHTS LIMESTONE COAST 2010 - 2023 - International and Domestic



TOTAL EXPENDITURE LIMESTONE COAST 2010 - 2023 - International and Domestic



DAY TRIPS LIMESTONE COAST 2010 - 2023 - 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-23	Change on Dec-19	Dec-23	Change on Dec-19
Adelaide	3,422,000	-13%	\$5,500,000,000	22%
Adelaide Hills	233,000	3%	\$293,000,000	42%
Barossa	343,000	8%	\$261,000,000	16%
Clare Valley	226,000	11%	\$191,000,000	62%
Eyre Peninsula	537,000	-8%	\$591,000,000	7%
Fleurieu Peninsula	868,000	-4%	\$837,000,000	50%
Flinders Ranges and Outback	761,000	-18%	\$610,000,000	19%
Kangaroo Island	205,000	-1%	\$280,000,000	47%
Limestone Coast	763,000	-2%	\$520,000,000	24%
Murray River, Lakes and Cooror	363,000	-20%	\$373,000,000	33%
Riverland	322,000	-25%	\$239,000,000	22%
Yorke Peninsula	530,000	-11%	\$384,000,000	60%
Regional SA	4,830,000	-7%	\$4,630,000,000	30%
South Australia	7,835,000	-9%	\$10,140,000,000	25%

LIMESTONE COAST

REGIONAL PROFILE



LIMESTONE COAST TOURISM LISTINGS

Category	# Listings
Accommodation	169
Attraction	167
Food & Drink	79
Event	59
Tour	16
General Services	9
Information Services	9
Destination Information	8
Journey	5
Hire	3
Grand Total	524

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)

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

LIMESTONE COAST AUSTRALIAN TOURISM DATA WAREHOUSE LEADS

99,000

YEAR END DECEMBER 2023

ACCOMMODATION LEADS

47,000
48%

FOOD & DRINK LEADS

8,000
8%

TOUR LEADS

2,000
2%

*OTHER LEADS

42,000
42%

TOP 5

- SEA VU CARAVAN PARK
- DISCOVERY PARKS ROBE
- BLUE LAKE HOLIDAY PARK
- BORDERTOWN CARAVAN PARK
- BEACHPORT CARAVAN PARK

TOP 5

- BELLWETHER WINERY
- THE TASTING ROOM AT MAYURA STATION
- THE BARN STEAKHOUSE
- ROBE TOWN BREWERY
- LITTLE RIPPA BREWING COMPANY

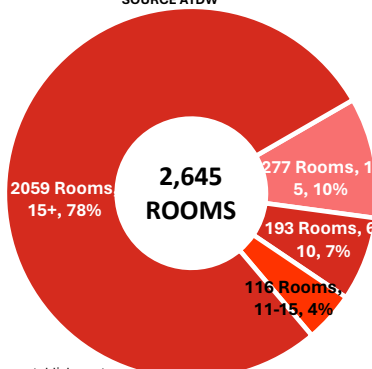
TOP 5

- COONAWARRA EXPERIENCES WINE TOURS
- PORT MACDONNELL FISHING CHARTERS
- KILSBY SINKHOLE TOURS
- TRACX
- ECHO FARM TOURS

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

ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS IN THE LIMESTONE COAST SOURCE ATDW



Rooms refers to rooms per establishment

- Currently there are 168 establishments on the Limestone Coast that accommodate guests.
- These 168 establishments account for 2,645 rooms across the region.
- 78 per cent of rooms fall into establishment with 15 or more rooms.
- 10 per cent of rooms fall into the 1-5 room establishments.

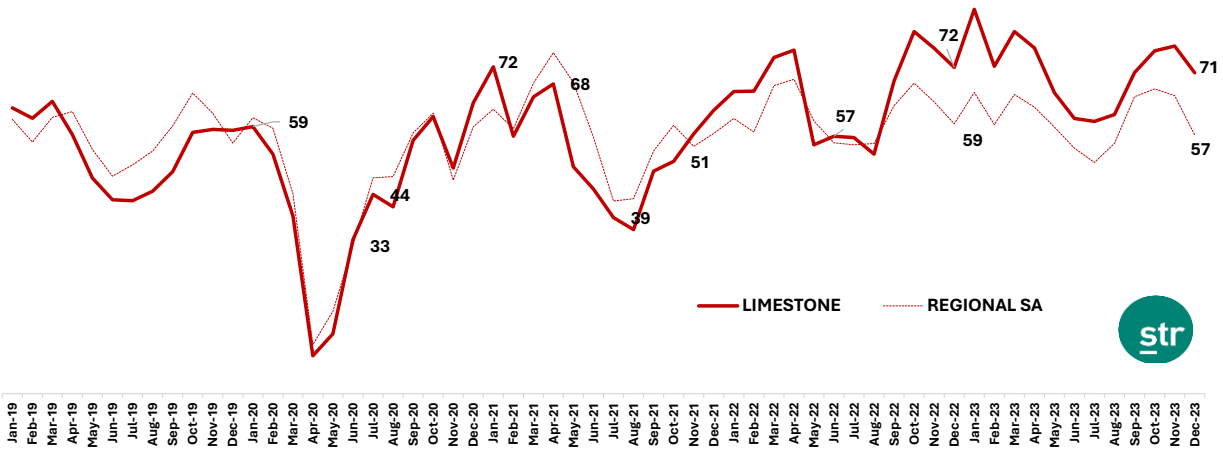
LIMESTONE COAST

REGIONAL PROFILE



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY LIMESTONE

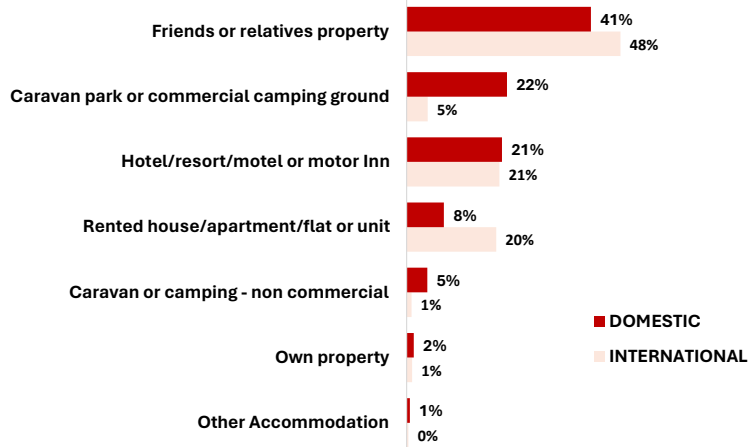


- In 2019 prior to COVID average occupancy for the Limestone Coast was 54 per cent, this fell to 43 per cent in 2020, rose to 54 per cent in 2021, 67 per cent in 2022 and 71 per cent in 2023.
- The Limestone Coast has performed very well in 2023, well above 2019.

VISITOR USE OF ACCOMMODATION

ACCOMMODATION USED IN LIMESTONE COAST FOR DOMESTIC AND INTERNATIONAL VISITORS

- 41 per cent of domestic overnight visitor nights in the Limestone Coast are spent with Friends or Relatives compared to the international average of 48 per cent.
- 21 per cent of domestic and 21 per cent of international visitors stayed in a Hotel/resort/motel or motor inn.
- 27 per cent of domestic visitors and 6 per cent of international visitors to the Limestone Coast stay in a caravan park.



TRANSPORT



- The main method of transport used on trips to the Limestone Coast was self drive.
- 95 per cent travel to the region is through self drive.

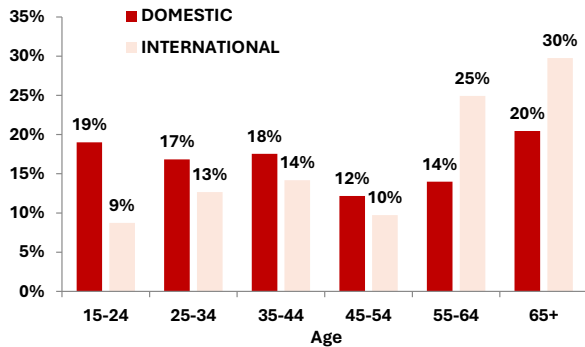
LIMESTONE COAST

REGIONAL PROFILE



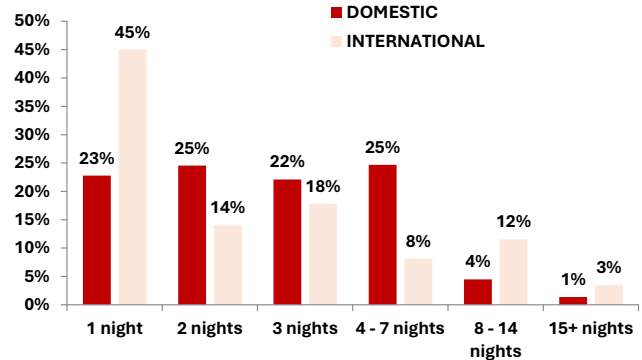
VISITOR PROFILE

AGE OF VISITORS TO LIMESTONE COAST



- In the domestic market the 65+ is the strongest age group with 20 per cent of visitors.
- The International market is also strongest for the 55+ age group with 55 per cent of all visits.

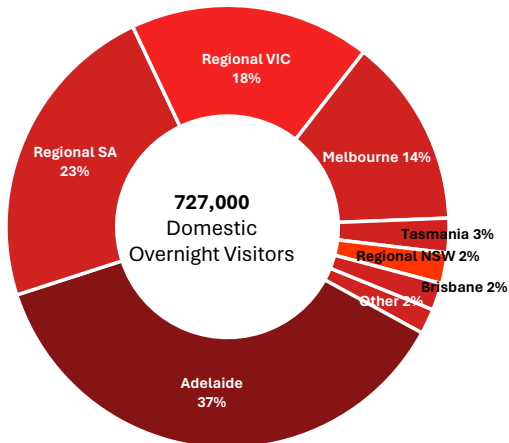
LENGTH OF VISIT TO LIMESTONE COAST



- 48 per cent of domestic overnight visitors like to stay 1 to 2 nights.
- 59 per cent of international visitors stay 1-2 nights.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO LIMESTONE COAST

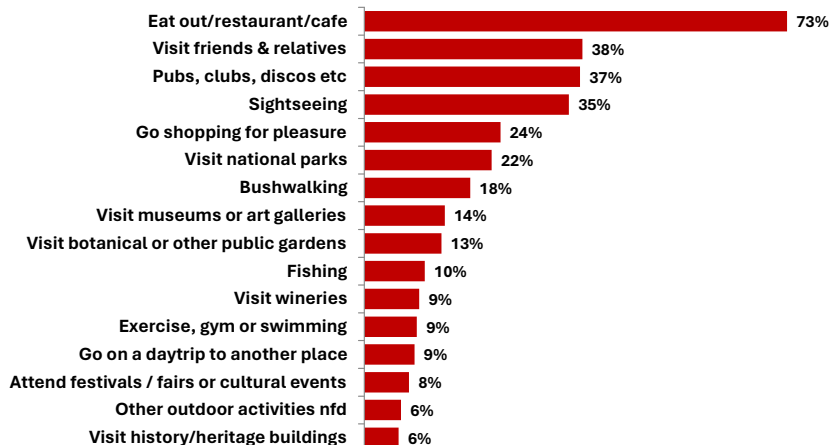


- Victoria at 32 per cent is the Limestone Coast's biggest interstate overnight domestic markets.
- Regional South Australia contributes 23 per cent of visitors to the Limestone Coast.
- 37 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

- The most popular activity when coming to the Limestone Coast is to eat out at a restaurant or cafe.
- Other popular activities include. Going to the beach, Sightseeing, Visiting national parks, Bushwalking, Visiting wineries, Visit friends and relatives and going to museums and art galleries.

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN LIMESTONE COAST



LIMESTONE COAST

REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2021-22, the tourism industry contributed an estimated \$419 million to the Limestone Coast regional economy and directly employed 2,000 people.

Employment

- 2,000 jobs for people employed directly by the tourism industry, 900 indirect jobs and a total employment impact of 2,900 people.

Gross Value Added (GVA)

- \$100 million and \$107 million in direct and indirect tourism GVA, and \$207 million in total tourism GVA.

Gross Regional Product (GRP)

- \$108 million and \$138 million in direct and indirect tourism GRP and \$246 million in total tourism GRP.

Tourism Consumption

2021-22 Tourism products - directly consumed	
• Takeaway and restaurant meals	19%
• Shopping (including gifts and souvenirs)	15%
• Fuel (petrol, diesel)	12%
• Long distance passenger transportation	11%
• Accommodation services	11%
• Food products	7%
• Alcoholic beverages and other beverages	7%
• Travel agency and tour operator services	6%

Tourism Employment

2021-22 Tourism Industries - 2,000 directly employed	
• Cafes, restaurants and takeaway food services	36%
• Retail trade	21%
• Accommodation	19%
• Clubs, pubs, taverns and bars	8%
• Air, water and other transport	5%
• Travel agency and tour operator services	4%
• All other industries	3%
• Other sports and recreation services	2%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2022

REGIONAL PERCEPTIONS REPORTING

- The Limestone Coast is known for its scenic views and array of family friendly outdoor attractions including the Blue Lake, caves, sand dunes and beaches.
- A challenge for this region is the distance it takes to drive there. Most would choose to drive rather than fly, therefore need to justify a longer stay to make their trip worthwhile.
- The region is also highly driven by seasonality with most of what's to offer seen as outdoor activities. Encouraging visitation in the cooler months is a key challenge for this region.

To drive increased visitation and expenditure, we recommend the Limestone Coast:

Create interesting itinerates for what to do along the way

Many see the drive to the Limestone coast as long and boring, particularly driving from Adelaide. Make the journey part of the holiday experience through interesting itinerates for the journey. Get in front of people before they are planning a holiday to ensure the Limestone Coast is in the consideration set for a more planned, extended holiday.

Promote activities/events suitable for the colder periods of the year

Showcase indoor experiences or wintertime events that could encourage visitation in those colder periods. Flight specials for off peak seasons may also encourage visitation in these colder months.

Make the longer stay look enticing

Given the distance from any major city, the Limestone Coast is seen as a destination that requires an extended trip to make it worth a traveller's while. Providing package deals or suggested itinerates could showcase the breadth of experiences on offer so that travellers can justify that longer stay.

Region appeals to...

- Adventurers
- Caravanners and campers
- Nature lovers
- Beach seekers
- Families

Prepared by the South Australian Tourism Commission, December 2023

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 2023.

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