

# LIMESTONE COAST

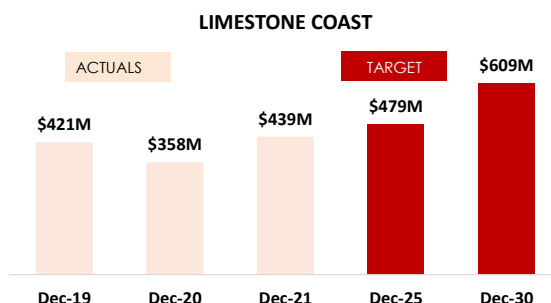
## REGIONAL PROFILE



### OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2021

- Currently Limestone Coast contributes \$439 million to the year end December 2021 South Australian expenditure of \$6.2 billion.
- The Limestone Coast has achieved 92 per cent of their 2025 target of \$479 million and 72 per cent of their 2030 target of \$609 million.



### ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2021

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
<b>Overnight Visits</b>	379,000	231,000	<b>610,000</b>	-	<b>610,000</b>
%	62%	38%	<b>100%</b>	0%	<b>100%</b>
<i>Share of Regional SA</i>	8%	16%	<b>10%</b>	0%	<b>10%</b>
<hr/>					
<i>% Across Regional SA</i>	76%	23%	<b>100%</b>	0%	<b>100%</b>
<hr/>					
<b>Nights</b>	1,183,000	611,000	<b>1,794,000</b>	8,000	<b>1,802,000</b>
%	66%	34%	<b>100%</b>	0%	<b>100%</b>
<i>Share of Regional SA</i>	9%	7%	<b>8%</b>	2%	<b>8%</b>
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<i>% Across Regional SA</i>	60%	38%	<b>98%</b>	2%	<b>100%</b>
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<b>Average Length of Stay</b>	3.1	2.6	<b>2.9</b>	-	<b>3.0</b>
<b>ALOS Regional SA</b>	3.0	6.2	<b>3.7</b>	-	<b>3.8</b>
<hr/>					
<b>Total Expenditure</b>					<b>\$439,000,000</b>
<b>Overnight Expenditure</b>	\$208,000,000	\$120,000,000	<b>\$328,000,000</b>	\$0	<b>\$330,000,000</b>
<b>Day Trip Expenditure</b>					<b>\$109,000,000</b>
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<b>Domestic Day Trips</b>					<b>628,000</b>

- Limestone Coast saw 610,000 domestic overnight visitors for the year end December 2021.
- 62 per cent of overnight visitors were from intrastate and 38 per cent from interstate.
- The 379,000 overnight intrastate visitors stayed 1.2 million nights with an average length of stay of 3.1 nights.
- There were 231,000 overnight interstate visitors who stayed 611,000 nights with an average length of stay of 2.6 nights
- There have been no international arrivals with the borders closed.
- 628,000 day trips were taken to or within the Limestone Coast for the year with spend of \$109 million.
- 94 per cent of these day trips were taken within the region.

# LIMESTONE COAST

## REGIONAL PROFILE



### PURPOSE

	Holiday	VFR	Business	Other	Total
<b>Overnight Visits</b>	336,000	161,000	84,000	36,000	<b>610,000</b>
%	55%	26%	14%	6%	<b>100%</b>
<i>Share of Regional SA</i>	11%	10%	8%	8%	<b>10%</b>
<i>% Across all regions</i>	49%	28%	18%	8%	<b>100%</b>

<b>Nights</b>	1,004,000	458,000	287,000	53,000	<b>1,802,000</b>
%	56%	25%	16%	3%	<b>100%</b>
<i>Share of Regional SA</i>	9%	8%	7%	3%	<b>8%</b>
<i>% Across all regions</i>	50%	26%	17%	8%	<b>100%</b>

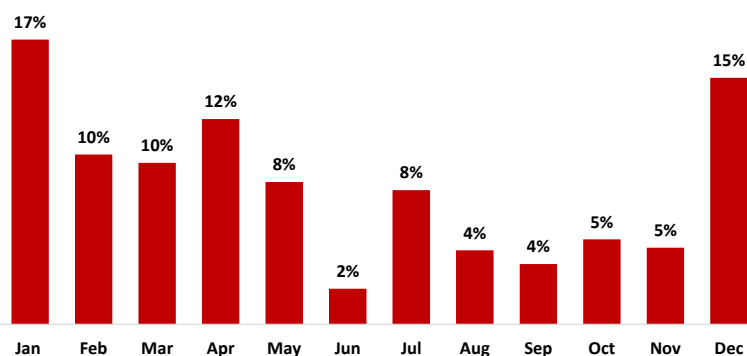
<b>Average Length of Stay</b>	3.0	2.8	3.4	1.5	<b>3.0</b>
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Expenditure					
<b>Annual Expenditure</b>	\$208,000,000	\$52,000,000	\$49,000,000	\$21,000,000	<b>\$330,000,000</b>
<b>Expenditure 2019</b>	\$152,000,000	\$60,000,000	\$67,000,000	\$44,000,000	<b>\$323,000,000</b>
<b>Av spend per night</b>	\$207	\$114	\$171	\$396	<b>\$183</b>
<b>Av spend per night Reg SA</b>	\$154	\$58	\$84	\$80	<b>\$112</b>
<b>Share of Regional SA</b>	9%	6%	6%	5%	<b>7%</b>

- 81 per cent of overnight visitors to the Limestone Coast are leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$207 per night compared to VFR visitors who spend \$114 per night.
- Holiday visitors spent \$208 million for the year and VFR \$52 million, making up 79 per cent of total overnight expenditure.

### SEASONALITY

#### SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO LIMESTONE COAST



- National Visitor Survey data shows us that January, April and December are the strongest months for visitation in the Limestone Coast.
- January and December are popular with the school/summer holidays.
- April is busy with Easter, ANZAC day and the school holidays.

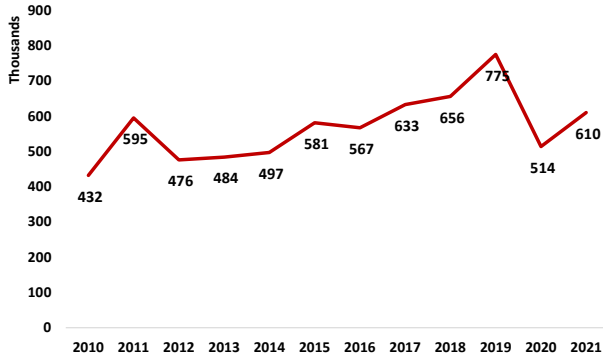
# LIMESTONE COAST

## REGIONAL PROFILE

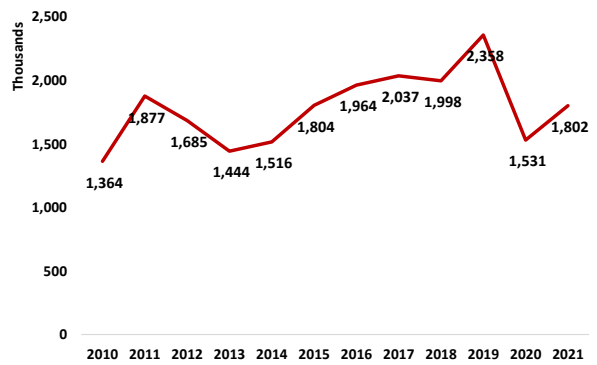


### TOTAL OVERNIGHT VISITATION 2010 - 2021

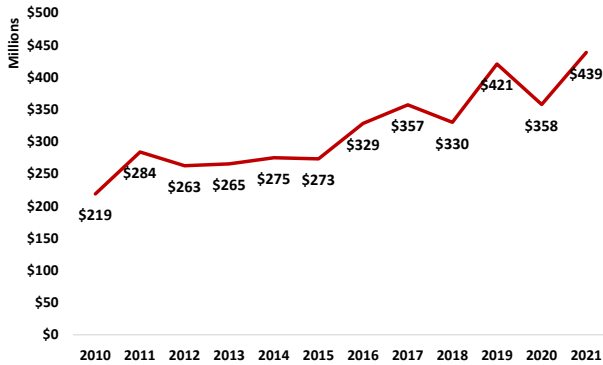
**VISITORS LIMESTONE COAST 2010 - 2021 - INTERNATIONAL AND DOMESTIC**



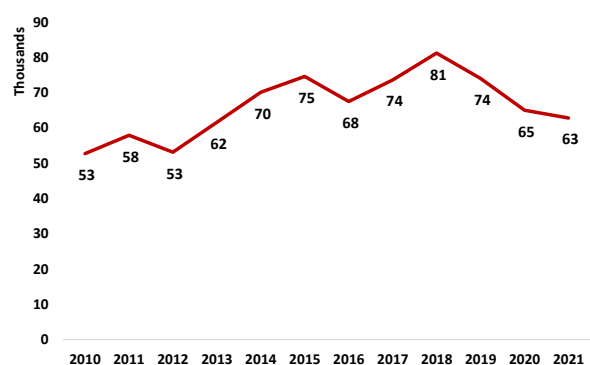
**NIGHTS LIMESTONE COAST 2010 - 2021 - INTERNATIONAL AND DOMESTIC**



**TOTAL EXPENDITURE LIMESTONE COAST 2010 - 2021 - INTERNATIONAL AND DOMESTIC**



**DAY TRIPS LIMESTONE COAST 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%
<b>South Australia</b>	<b>6,077,000</b>	<b>-29%</b>	<b>6,151,275,792</b>	<b>-24%</b>

# LIMESTONE COAST

## REGIONAL PROFILE



### LIMESTONE COAST TOURISM LISTINGS

Category	# Listings
Accommodation	187
Attraction	161
Food and Drink	67
Event	46
Tour	13
Destination Information	9
Information Services	8
General Services	5
Hire	2
Journey	1
Grand Total	499

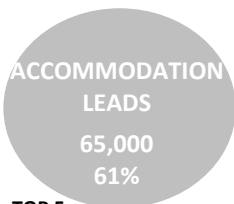
Note: some listings have multiple categories of accommodation  
 Source: Australian Tourism Data Warehouse  
 Categories above defined at - <https://tourism.sa.gov.au/support/atdw>

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)

**LIMESTONE COAST**  
**AUSTRALIAN TOURISM DATA WAREHOUSE**  
**LEADS**  
**106,000**  
**YEAR END DECEMBER 2021**



#### TOP 5

- BELLWETHER WINES
- DISCOVERY PARKS ROBE
- COONAWARRA BUSH HOLIDAY PARK
- KINGSTON FORESHORE CARAVAN PARK
- BORDERTOWN CARAVAN PARK



#### TOP 5

- THE TASTING ROOM AT MAYURA STATION
- MOUNT GAMBIER COMMUNITY RSL
- ROBE TOWN BREWERY
- HOLLICK ESTATES
- WYNN'S COONAWARRA CELLAR DOOR



#### TOP 5

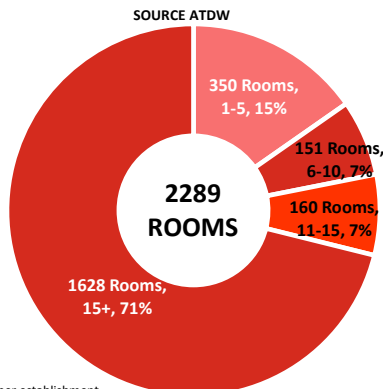
- COONAWARRA DISCOVERY
- TRACX ROBE TOURS
- PORT MACDONNELL FISHING CHARTERS
- COONAWARRA EXPERIENCES
- REEF 2 RIDGE MT GAMBIER



\* 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



Rooms refer to rooms per establishment

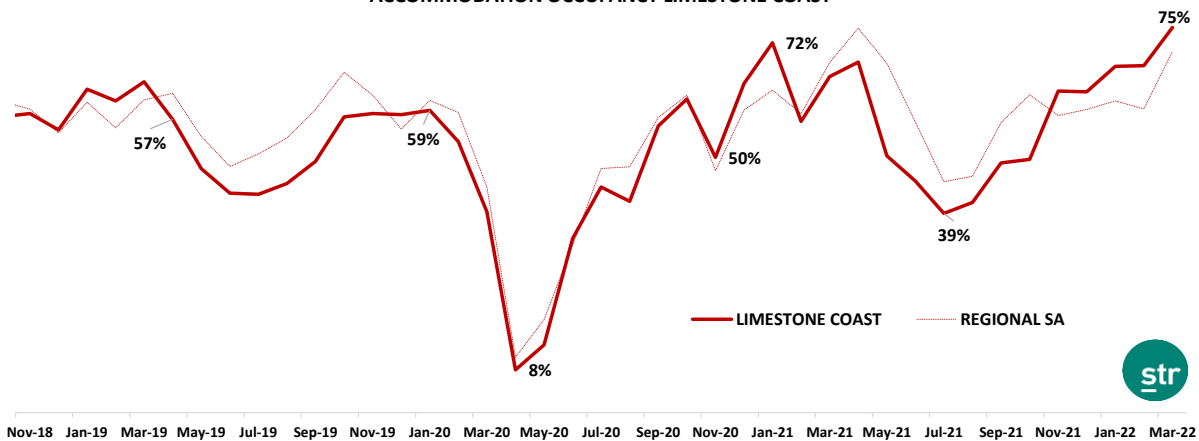
- Currently there are 186 establishments in the Limestone Coast that accommodate guests.
- These 186 establishments account for 2,289 rooms across the region.
- 71 per cent of rooms fall into establishment with 15 or more rooms.
- 15 per cent of rooms fall into the 1-5 room establishments.

# LIMESTONE COAST REGIONAL PROFILE



## ACCOMMODATION STR

### ACCOMMODATION OCCUPANCY LIMESTONE COAST

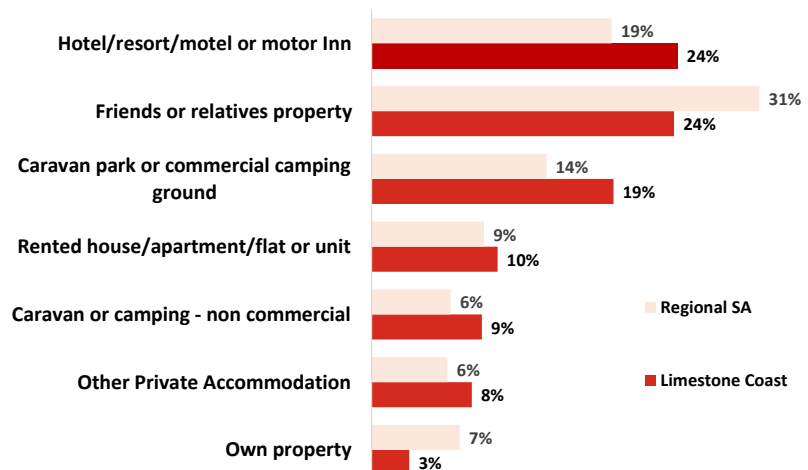


- In 2019 prior to COVID average occupancy for the Limestone Coast was 54 per cent, this fell to 43 per cent in 2020, rose to 55 per cent in 2021 and for the first 3 months of 2022 the average is 70 per cent.
- The region relies heavily on Victoria and with the borders reopening occupancy has seen a steep rise in 2022.

## VISITOR USE OF ACCOMMODATION

- 48 per cent of domestic visitor nights are spent in Hotels/Motels or with friends or relatives.
- 28 per cent of people prefer to Caravan and Camp, above the regional average of 20 per cent.
- Pre COVID-19 - 36 per cent of visitor nights were spent in a friend or relatives property.

### ACCOMMODATION USED IN LIMESTONE COAST FOR DOMESTIC VISITORS



## TRANSPORT

### TRANSPORT LIMESTONE COAST DECEMBER 2021



- The main method of transport used for Limestone Coast was a self drive vehicle.
- 99 per cent of visitors used this type of transport.
- The road trip market service this market well.

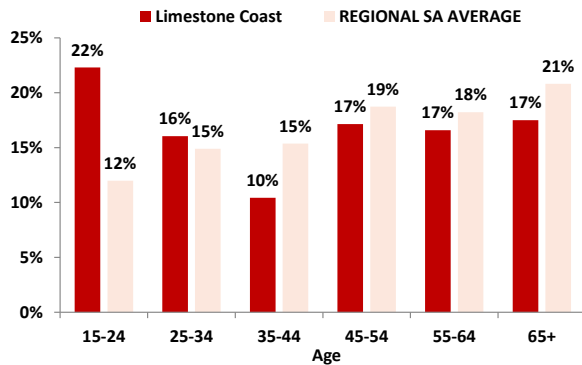
# LIMESTONE COAST

## REGIONAL PROFILE



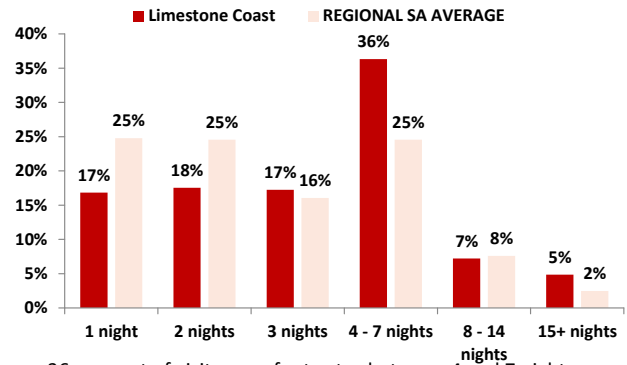
### VISITOR PROFILE

#### AGE OF VISITORS TO LIMESTONE COAST



- Domestically there is a peak in 15-34 age group at 38 per cent above the regional average of 27 per cent.
- The 35-44 and the 65+ age group both under index when compared to regional SA.

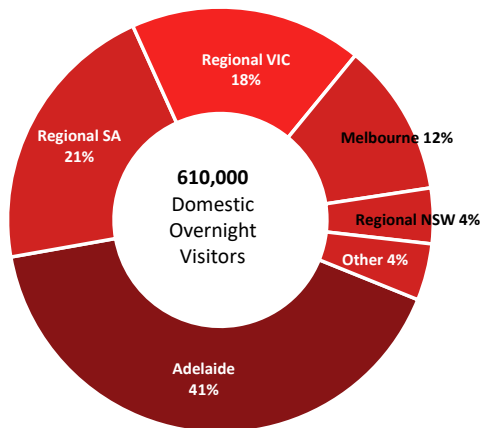
#### LENGTH OF VISIT TO LIMESTONE COAST



- 36 per cent of visitors prefer to stay between 4 and 7 nights, well above the regional average. This compares to pre COVID-19 where 26 per cent of visitors stayed 4 to 7 nights.
- 35 per cent of domestic visitors like to stay 1-2 nights, well below the regional SA average.

### VISITOR ORIGIN

#### ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO LIMESTONE COAST

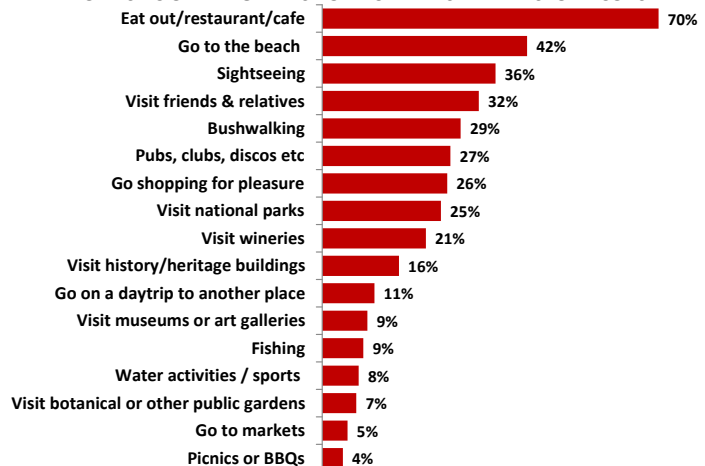


- Melbourne and regional Victoria together accounted for 30 per cent of visitors to the Limestone Coast. Pre COVID Melbourne and regional Victoria accounted for 35 per cent of visitors to the Limestone Coast, their biggest interstate markets.
- Regional South Australia contributes 21 per cent of visitors to the Limestone Coast.
- 41 per cent of visitors come from Adelaide, however prior to COVID this was 32 per cent.

### VISITOR ACTIVITIES

- The most popular activities when coming to the Limestone Coast are eating out.
- Other popular activities include going to the beach, sightseeing, visiting friends and relatives, visiting national parks, bush walking, visiting wineries and visit history/heritage

#### DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN LIMESTONE COAST



# LIMESTONE COAST

## REGIONAL PROFILE



### REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2019-20, the tourism industry contributed an estimated \$439 million to the Limestone Coast a regional economy and directly employed approximately 2,100 people.

#### Employment

- 2,100 jobs for people employed directly by the tourism industry, 800 indirect jobs and a total employment impact of 2,900 people.

#### Gross Value Added (GVA)

- \$124 million and \$110 million in direct and indirect tourism GVA, and \$234 million in total tourism GVA.

#### Gross Regional Product (GRP)

- \$132 million and \$140 million in direct and indirect tourism GRP and \$272 million in total tourism GRP.

#### Tourism Consumption

2019–20

*Tourism products* - directly consumed

- 16% Long distance passenger transportation
- 15% Takeaway and restaurant meals
- 12% Shopping (including gifts and souvenirs)
- 10% Fuel (petrol, diesel)
- 9% Travel agency and tour operator services
- 8% Accommodation services
- 6% Food products
- 6% Alcoholic beverages and other beverages

#### Tourism Employment

2019–20

*Tourism Industries* - 2,100 directly employed

- 29% - 618 - Cafes, restaurants and takeaway food services
- 22% - 467 - Retail trade
- 13% - 286 - Accommodation
- 8% - 169 - Travel agency and tour operator services
- 6% - 121 - Clubs, pubs, taverns and bars
- 5% - 113 - Road transport and transport equipment rental

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2020

### REGIONAL INSIGHTS

#### Interstate & Intrastate

- Caves and craters of Naracoorte and 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 region needs to look at upgrading current stock not at increasing supply.

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 Consumer Demand 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. 8635455001  
Consumer Demand Product Testing Phase 1 - BDA Marketing