

LIMESTONE COAST

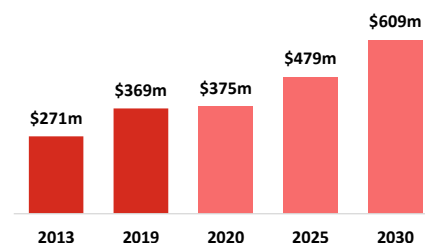
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE ANNUAL AVERAGE FOR THE 3 YEARS TO THE YEAR END DECEMBER 2019 AND RELATES TO DATA PRIOR TO COVID-19 RESTRICTIONS

- Currently the Limestone Coast contributes \$369 million to the December 2019 South Australian expenditure of \$8.1 billion.
- The Limestone Coast has achieved 98 per cent of their \$375 million 2020 target and 61 per cent of their 2030 target of \$609 million.



Annual Visitor Summary December 2017 - December 2019

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	355,000	289,000	644,000	44,000	688,000
%	55%	45%	94%	6%	100%
Nights	1,003,000	867,000	1,870,000	261,000	2,131,000
%	54%	46%	88%	12%	100%
Average Length of Stay	3	3	3	6	3
Domestic Day Trips					
Average Annual Day Trips to Limestone Coast					762,000

PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	337,000	192,000	126,000	40,000	688,000
%	49%	28%	18%	6%	100%
Nights	985,000	696,000	310,000	140,000	2,131,000
%	46%	33%	15%	7%	100%
Average Length of Stay	3	4	2	4	3
Expenditure					
Average Annual Expenditure	\$ 192,000,000	\$ 74,000,000	\$ 57,000,000	\$ 46,000,000	\$ 369,000,000

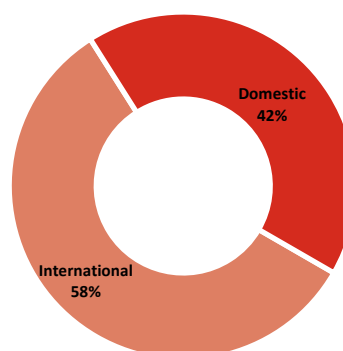
- 94 per cent of visitors are **Domestic** visitors and 6 per cent **International** visitors.
- Domestically** 55 per cent of visitors are from within the state compared to 45 per cent from Interstate.
- 77 per cent of visitors to the Limestone Coast are Leisure visitors (Holiday + VFR).

LIMESTONE COAST TOURISM LISTINGS

Category	Limestone Coast
Accommodation	157
Attraction	119
Food and Drink	70
Event	50
Destination Information	10
Tour	9
Information Services	7
General Services	5
Journey	1
Hire	1
Grand Total	429

Note: some listings have multiple categories of accommodation

LIMESTONE COAST MEDIA COVERAGE



Source: Advertising Space Rate - 2018

LIMESTONE COAST

REGIONAL PROFILE



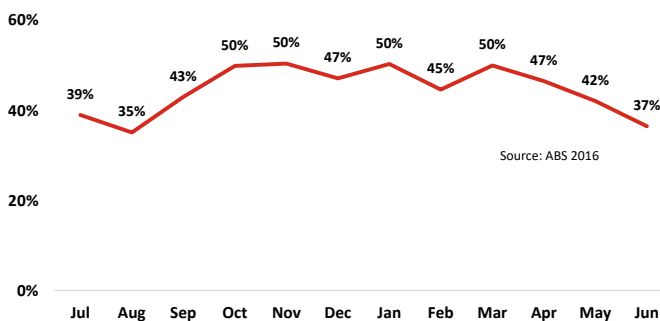
ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms

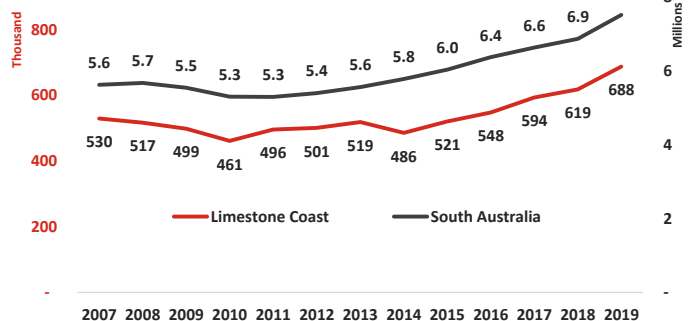
Establishments	34
Rooms	1,005
Occupancy	45%
Takings	\$19,600,000

- 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.

Monthly Occupancy Rates Year end June 2016 - Limestone Coast

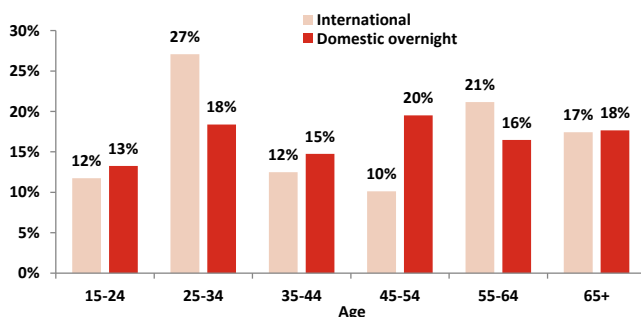


Total Overnight Visitation to Limestone Coast & South Australia



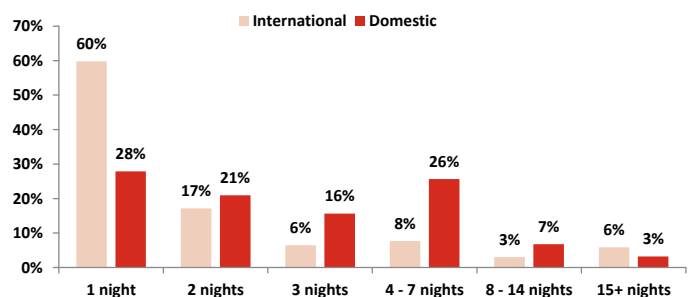
VISITOR PROFILE

Age of Visitors to Limestone Coast



- **International** visitors peak in the 25-34 and the 55-64 age group at 27 and 21 per cent.
- For **Domestic** visitors there is a peak in the 45-54 at 20 per cent.

Length of Visit to Limestone Coast



- 60 per cent of **International** visitors prefer to stay 1 night in the Limestone Coast.
- 49 per cent of **Domestic** visitors stay 1-2 nights.
- 26 per cent of **Domestic** visitors stay 4-7 nights.

LIMESTONE COAST

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DOMESTIC VISITOR PROFILE

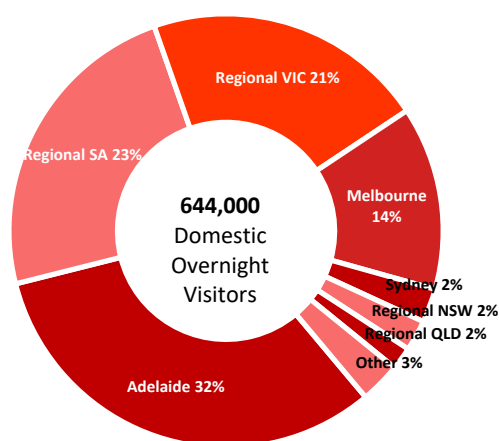
Purpose	Holiday	VFR	Other	Total
Visits	299,000	189,000	162,000	644,000
%	46%	29%	25%	100%
Nights	882,000	624,000	365,000	1,870,000
%	47%	33%	20%	100%
ALOS	3	3	2	3

INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	38,000	4,000	3,000	44,000
%	86%	9%	7%	100%
Nights	104,000	73,000	84,000	261,000
%	40%	28%	32%	100%
ALOS	3	18	28	6

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 32 per cent.
- 35 per cent of visitors come from Victoria with its close proximity to the Limestone Coast.
- Internationally**, 61 per cent of the visits to the Limestone Coast are from Europe, with the United Kingdom contributing 16 per cent, Germany 12 per cent.

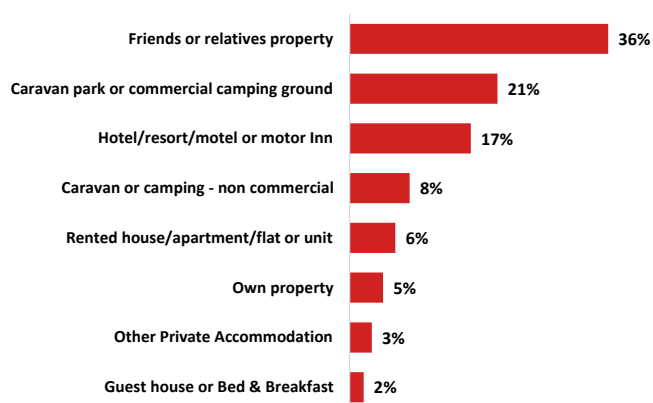
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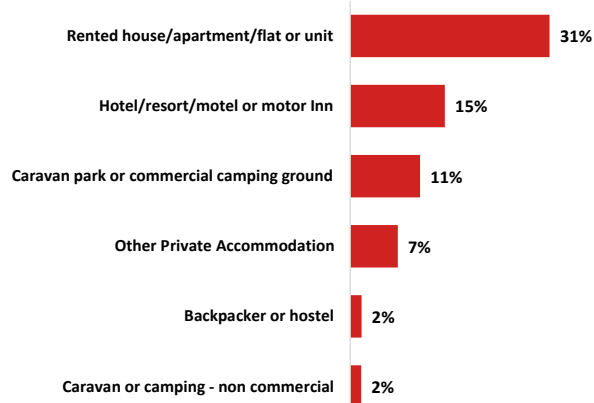


VISITOR USE OF ACCOMMODATION

Accommodation used in Limestone Coast for Domestic Visitors



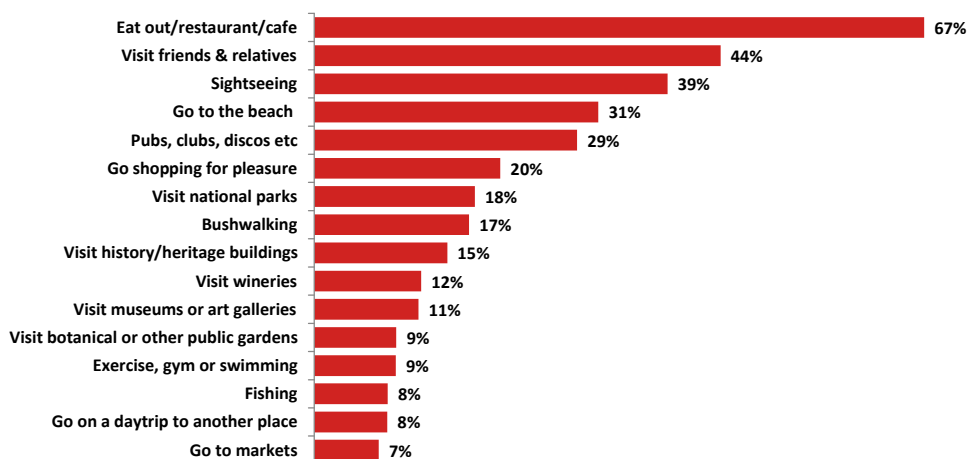
Accommodation used in Limestone Coast for International Visitors



- 53 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 29 per cent of visitors preferring this accommodation.
- 46 per cent of **International** visitors stay with Friends/Relative or in Hotels and similar accommodation.
- 31 per cent of **International** visitors prefer a rented house, apartment, flat or unit.

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 2017-18, the tourism industry contributed an estimated \$547 million to the Limestone Coast regional economy and directly employed approximately 2,100 people.

Employment

- 2,100 jobs for people employed directly by the tourism industry, 1000 indirect jobs and a total employment impact of 3,000 people.

Tourism output

- \$239 million and \$308 million in direct and indirect tourism output, and \$547 million in total tourism output.

Gross Value Added (GVA)

- \$127 million and \$128 million in direct and indirect tourism GVA, and \$255 million in total tourism GVA.

Gross Regional Product (GRP)

- \$136 million and \$147 million in direct and indirect tourism GRP and \$282 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.

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 2019

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 2017 to December 2019.
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. 86 35455001
Consumer Demand Product Testing Phase 1 - BDA Marketing

Tourism Champions Case Study

THE TASTING ROOM AT MAYURA STATION

Mayura Station, Limestone Coast

ABOUT THE TASTING ROOM AT MAYURA STATION

Mayura Station, home to award winning Wagyu beef, was the first pastoral lease in South Australia, established in 1845.

Current owners, the de Bruin family, have owned Mayura Station for 20 years and introduced the Tasting Room in 2011.

The Tasting Room offers a unique and interactive paddock to plate experience, taking guests on a journey of Wagyu beef.

BUSINESS GROWTH

Over the past 20 years Mayura Station has grown to be one of Australia's leading luxury beef brands.

70 per cent of visitors to the Tasting Room are local, with the other 30 per cent made up of travellers – people from the Eastern Seaboard as well as from the Asian markets.

The Tasting Room has been awarded the South Australian Tourism Award for Tourism Restaurants and Catering Services two years running – 2016 and 2017.

CHALLENGES

Located in a remote location can make it challenging to attract visitors. To overcome this, the team at Mayura Station have ramped up their communication strategy to ensure their product offering is communicated in the best way to potential visitors.

THE FUTURE

Looking to the future, Mayura Station will continue to offer visitors a unique and intimate paddock to plate experience with a focus on excellent customer service.

COMMUNITY IMPACT

The business is a proud supporter of the local community, with all supplies purchased from local businesses.

Mayura Station employs 30 locals in a variety of roles including chefs and front of house staff at the Tasting Room.

"Service excellence is unique for everybody and what we're doing at Mayura Station is providing the highest quality products and delivering them in a relaxed, country-style environment."

"We've found the South Australian Tourism Commission to be extremely supportive, internationally they promote us very well through networking and online platforms."

*Scott de Bruin,
Managing Director, Mayura Station*

SOUTH AUSTRALIAN TOURISM COMMISSION COLLABORATION

The SATC has been a great support in the public relations space, regularly including the Tasting Room on media family itineraries.

The SATC has also been instrumental in introducing the Tasting Room to the inbound tourist market and other tourism businesses that have allowed the Tasting Room to grow and evolve.

In 2018, the Tasting Room at Mayura Station featured in the SATC's Tasting Australia program as part of the Tasting Australia Airlines itinerary.



**Government
of South Australia**

South Australian
Tourism Commission