

LIMESTONE COAST

REGIONAL PROFILE

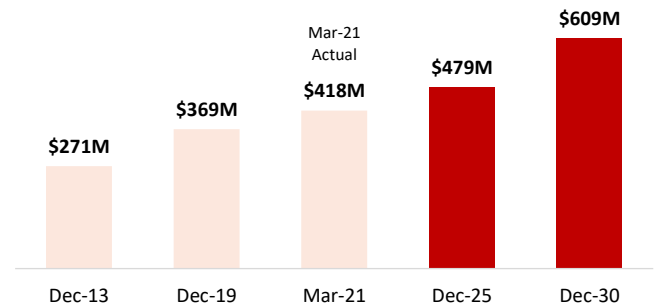


OVERVIEW

ALL DATA BASED ON THE YEAR END MARCH 2021 - FULL YEARS WORTH OF COVID AFFECTED DATA

LIMESTONE COAST

- Currently Limestone Coast contributes \$418 million to the year end March 2021 South Australian expenditure of \$4.4 billion.
- The Limestone Coast has achieved 87 per cent of their 2025 target of \$418 million and 69 per cent of their 2030 target of \$609 million.



ANNUAL VISITOR SUMMARY YEAR END MARCH 2021

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	457,000	138,000	596,000	-	596,000
%	77%	23%	100%	0%	100%
% Across all regions	90%	10%	100%	0%	100%
Share of Regional SA	12%	32%	14%	0%	14%
Nights	1,375,000	421,000	1,796,000	-	1,796,000
%	77%	23%	100%	0%	100%
% Across all regions	82%	18%	100%	0%	100%
Share of Regional SA	11%	16%	12%	0%	12%
ALOS	3.0	3.1	3.0	-	3.0
ALOS Regional SA	3.2	6.0	3.5	-	3.5
Total Expenditure					\$418,000,000
Overnight Expenditure	\$209,000,000	\$84,000,000	\$293,000,000	\$0	\$293,000,000
Day Trip Expenditure					\$125,000,000
Domestic Day Trips					677,000

- Limestone Coast saw 596,000 domestic overnight visitors for the year end March 2021.
- 77 per cent of overnight visitors were from intrastate and 23 per cent from interstate.
- The 457,000 overnight intrastate visitors stayed 1.4 million nights with an average length of stay of 3.0 nights.
- There were 138,000 overnight interstate visitors who stayed 421,000 nights with an average length of stay of 3.1 nights
- There have been no international arrivals with the borders closed.
- 677,000 day trips were taken to Limestone Coast for the year with spend of \$125 million.

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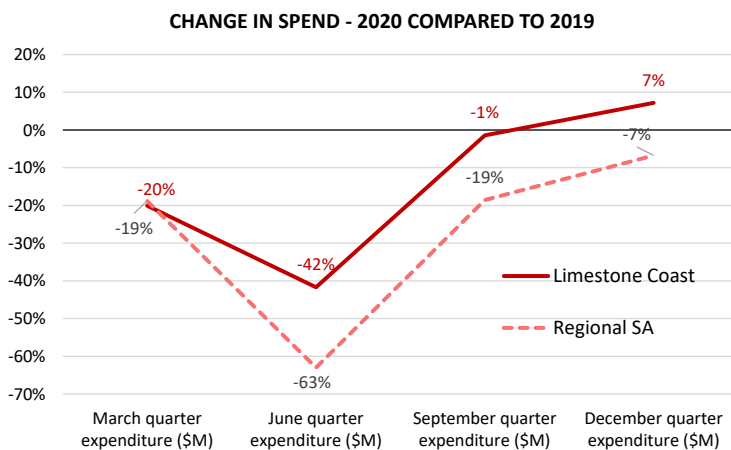


PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	278,000	140,000	152,000	31,000	596,000
%	47%	23%	26%	5%	100%
% Across all regions	56%	22%	18%	5%	100%
Share of Regional SA	12%	32%	14%	0%	14%
Nights	957,000	366,000	417,000	57,000	1,796,000
%	53%	20%	23%	3%	100%
% Across all regions	58%	18%	20%	3%	100%
Share of Regional SA	11%	14%	14%	12%	12%
Average Length of Stay	3.4	2.6	2.7	1.8	3.0
Expenditure					
Annual Expenditure	\$171,000,000	\$39,000,000	\$63,000,000	\$19,000,000	\$293,000,000
Av spend per night	\$179	\$107	\$151	\$333	\$163
Av spend per night Regional SA	\$213	\$126	\$132	\$511	\$191
Share of Regional SA	14%	13%	18%	17%	15%

- 70 per cent of overnight visitors to the Limestone Coast are leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$179 per night compared to VFR visitors who spend \$107 per night.
- Holiday visitors spent \$171 million for the year and Leisure Visitors \$39 million, making up 72 per cent of total overnight expenditure.

SPEND 2020 VERSUS 2019



- March quarter 2020 prior to COVID-19 was down 20 per cent on the March quarter in 2019.
- The Limestone Coast saw expenditure fall 42 per cent for the June quarter in 2020 compared to June quarter in 2019.
- The September quarter saw a recovery from June, however still down 1 per cent on 2019.
- The December 2020 quarter was above the pre COVID levels, up 7 per cent compared to the December quarter in 2019.

LIMESTONE COAST

REGIONAL PROFILE



LIMESTONE COAST TOURISM LISTINGS

Category	# Listings
ACCOMMODATION	202
ATTRACTION	166
RESTAURANT	78
EVENT	51
TOUR	15
DESTINATION INFORMATION	12
GENERAL SERVICE	7
INFORMATION	7
JOURNEY	1
HIRE	1
Grand Total	540

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

102,000

YEAR END MARCH 2021

ACCOMMODATION LEADS

68,000
67%

FOOD & DRINK LEADS

6,000
6%

TOUR LEADS

1,600
2%

*OTHER LEADS

26,000
26%

TOP 5

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

TOP 5

- THE TASTING ROOM AT MAYURA STATION
- MOUNT GAMBIER COMMUNITY RSL
- ROBE TOWN BREWERY
- CALEDONIAN INN ROBE
- FARMERS LEAP WINES CELLAR DOOR

TOP 5

- REEF 2 RIDGE MT GAMBIER
- COONAWARRA DISCOVERY
- COONAWARRA EXPERIENCES
- PORT MACDONNELL FISHING CHARTERS
- MOUNT VINE TOURISM

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

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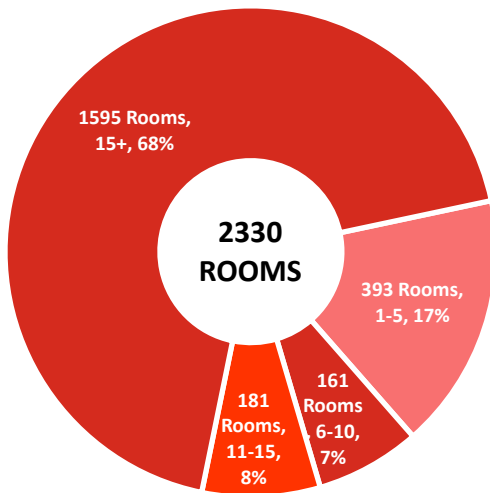
REGIONAL PROFILE



ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS IN THE LIMESTONE COAST

SOURCE ATDW



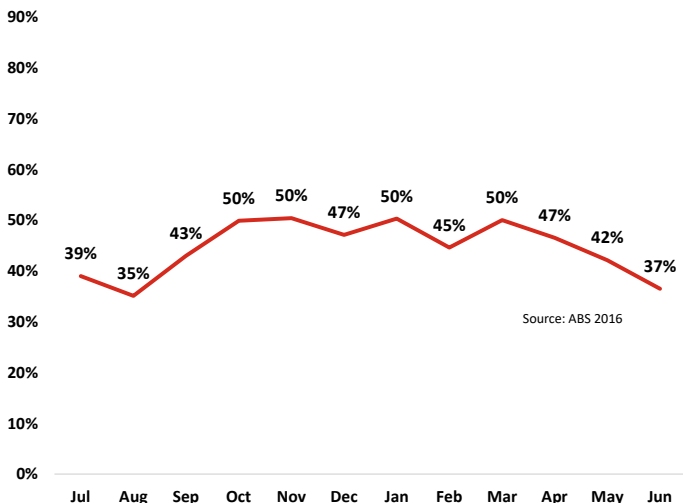
- Currently there are 202 establishments in Limestone Coast that accommodate guests.
- These 202 establishments account for 2330 rooms ranging from 1 room to over 50.
- 68 per cent of rooms fall into establishment with 15 or more rooms.
- 17 per cent of rooms fall into the 1-5 room establishments.

ACCOMMODATION SUPPLY

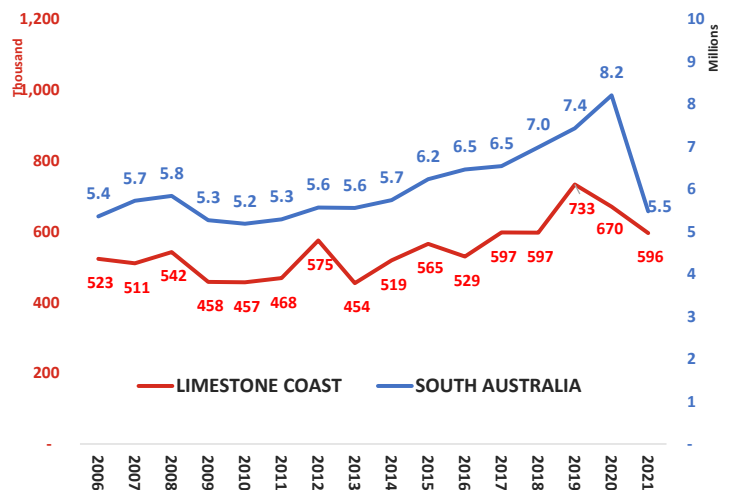
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	34
Rooms	1,005
Occupancy	45%
Takings	\$19,600,000

- 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



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.

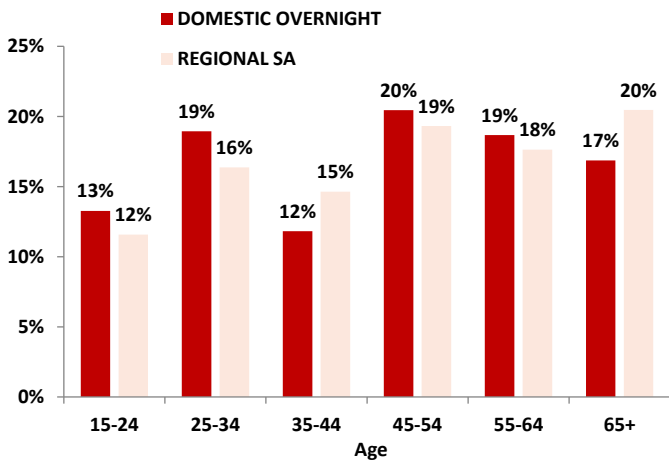
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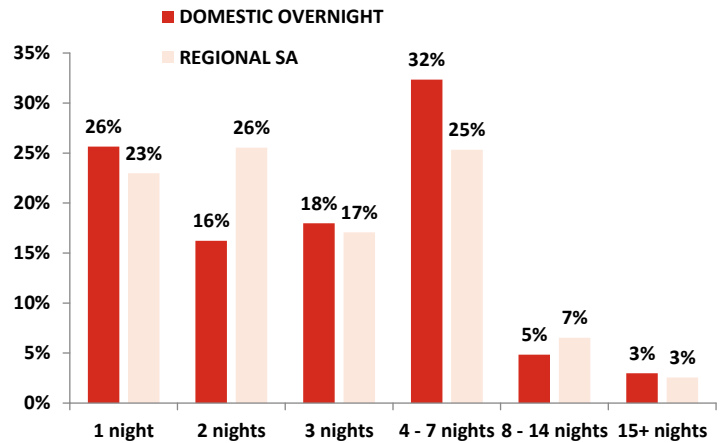
VISITOR PROFILE

AGE OF VISITORS TO LIMESTONE COAST



- Domestically there is a peak in 45-54 age group at 20 per cent above the regional average of 19 per cent.
- The 35-44 and the 65+ age group both under index when compared to regional SA.

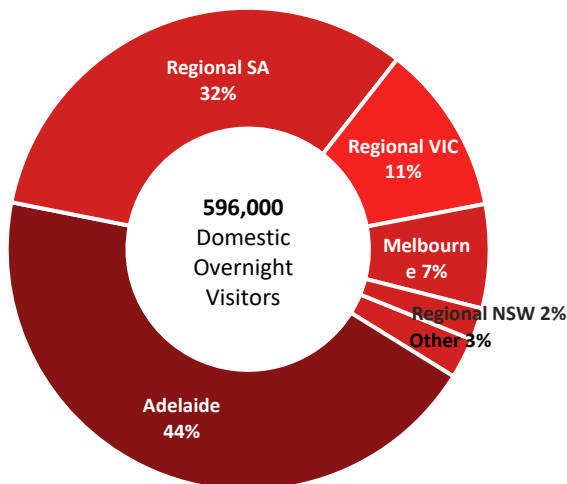
LENGTH OF VISIT TO LIMESTONE COAST



- 32 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.
- 42 per cent of domestic visitors like to stay 1-2 nights.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO LIMESTONE COAST



- Melbourne and regional Victoria together accounted for 18 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 32 per cent of visitors to the Limestone Coast.
- 44 per cent of visitors come from Adelaide, however prior to COVID this was 32 per cent.

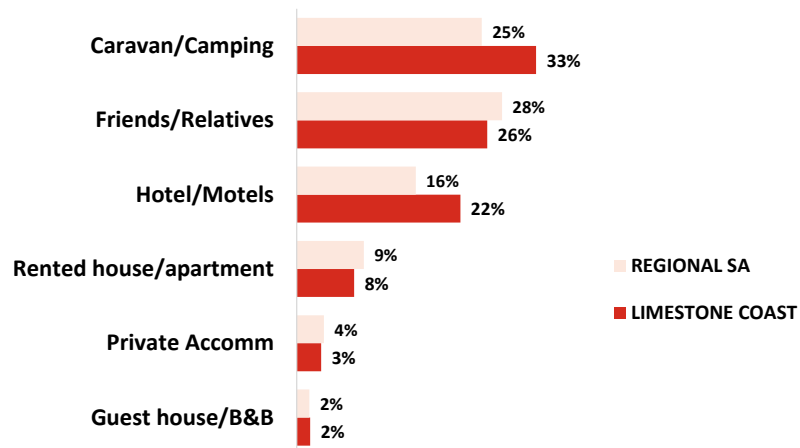
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VISITOR USE OF ACCOMMODATION

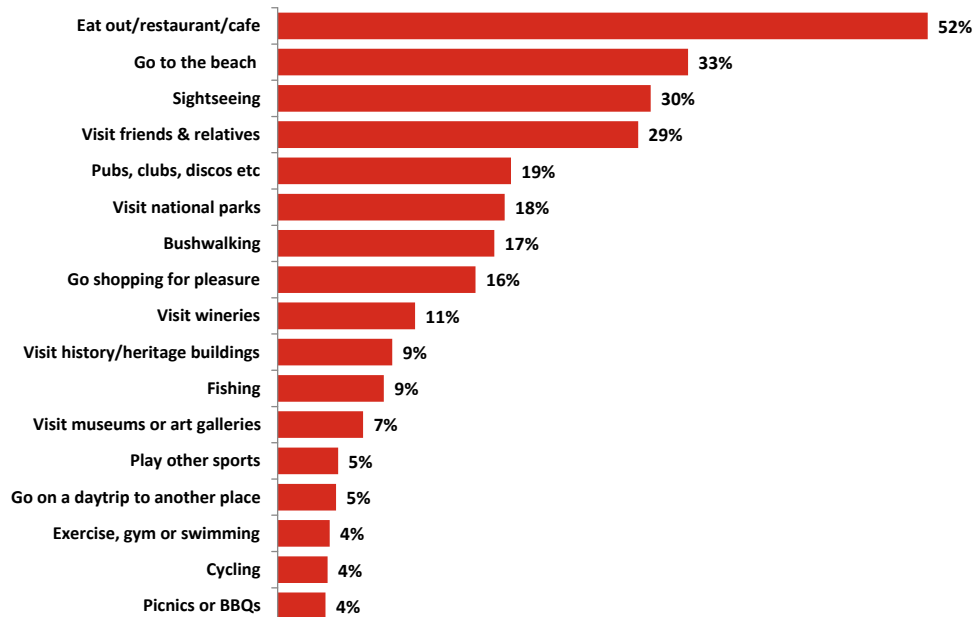
ACCOMMODATION USED IN LIMESTONE COAST FOR DOMESTIC VISITORS



- 48 per cent of domestic visitor nights are spent in Hotels/Motels or with friends or relatives.
- 33 per cent of people prefer to Caravan and Camp, above the regional average of 25 per cent.
- Pre COVID-19 - 36 per cent of visitor nights were spent in a friend or relatives property.

VISITOR ACTIVITIES

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN LIMESTONE COAST



- 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 buildings.

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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 regions needs to look at upgrading current stock not at increasing supply.

Prepared by the South Australian Tourism Commission, March 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 March 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. 86 35455001

Consumer Demand Product Testing Phase 1 - BDA Marketing