

LIMESTONE COAST

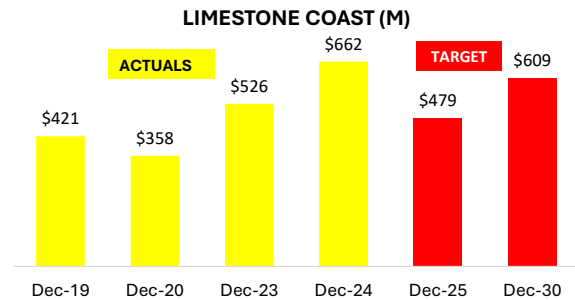
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2024

- Currently, the Limestone Coast contributes \$662 million to the year end December 2024 South Australian expenditure of \$9.8 billion.
- The Limestone Coast has achieved 100 per cent of their 2025 target of \$479 million and 100 per cent of their 2030 target of \$609 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2024

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	398,000	377,000	775,000	32,000	807,000
% of visits	49%	47%	96%	4%	100%
Share of Regional SA	12%	34%	17%	24%	17%
% Across Regional SA					
	73%	24%	97%	3%	100%
% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international					
Nights	1,080,000	916,000	1,995,000	267,000	2,263,000
% of nights	48%	40%	88%	12%	100%
Share of Regional SA	11%	19%	14%	10%	13%
% Across Regional SA					
	57%	28%	85%	15%	100%
% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international					
Average Length of Stay	2.7	2.4	2.6	8.3	2.8
ALOS Regional SA	2.9	4.2	3.2	19.8	3.7
Total Expenditure					\$662,000,000
Overnight Expenditure	\$249,000,000	\$192,000,000	\$441,000,000	\$16,000,000	\$457,000,000
Day Trip Expenditure					\$205,000,000
Domestic Day Trips					656,000

- The Limestone Coast saw 807,000 overnight visitors for the year end December 2024.
- 49 per cent of overnight visitors were from intrastate, 47 per cent from interstate and 4 per cent from overseas.
- The 398,000 intrastate overnight visitors stayed 1.1 million nights with an average length of stay of 2.7 nights.
- There were 377,000 interstate overnight visitors who stayed 916,000 nights with an average length of stay of 2.4 nights
- The region saw 32,000 international visitors with an average length of stay of 8.3 nights and spend of \$16 million.
- 656,000 day trips were taken to and within the Limestone Coast for the year with spend of \$205 million.

ALOS = Average Length of Stay

LIMESTONE COAST

REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	436,000	155,000	168,000	54,000	807,000
% of visits	54%	19%	21%	7%	100%
Share of Regional SA	18%	14%	19%	18%	17%
% Across all regions	53%	24%	19%	7%	100%

Nights	1,199,000	571,000	299,000	192,000	2,263,000
% of nights	53%	25%	13%	8%	100%
Share of Regional SA	14%	14%	10%	13%	13%
% Across all regions	49%	25%	17%	9%	100%

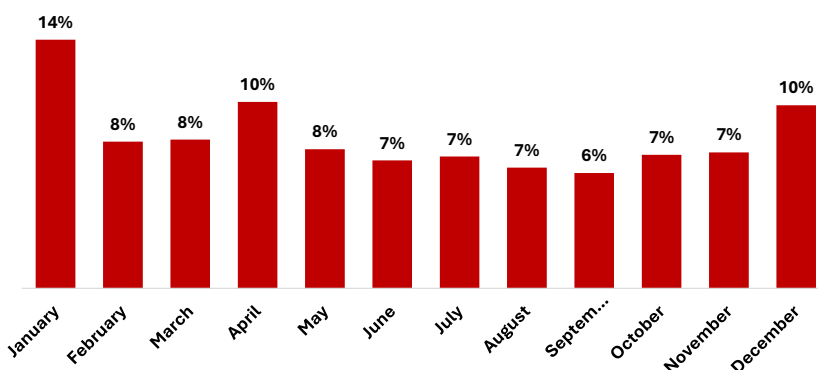
Average Length of Stay	2.8	3.7	1.8	3.6	2.8
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Expenditure					
Annual Overnight Exp	\$244,000,000	\$52,000,000	\$88,000,000	\$73,000,000	\$457,000,000
Expenditure 2019	\$152,000,000	\$60,000,000	\$67,000,000	\$44,000,000	\$323,000,000
Av spend per night	\$204	\$91	\$294	\$380	\$202
Av spend per night Reg SA	\$190	\$103	\$176	\$218	\$169
Share of Regional SA	3%	5%	1.3%	2%	3%

- 65 per cent of overnight visitors to the Limestone Coast are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$204 per night compared to VFR visitors who spend \$91 per night.
- Leisure overnight visitors spent \$296 million for the year, making up 65 per cent of all overnight expenditure.
- There are 168,000 business visitors who stay 299,000 nights with spend of \$88 million .

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO LIMESTONE COAST



- National Visitor Survey data shows us that in 2024 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.

Source: NVS year end December 2024

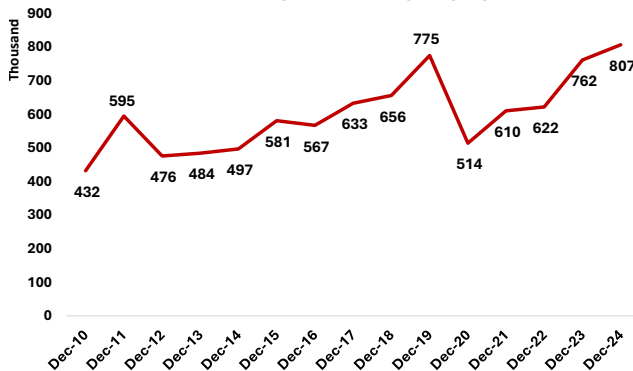
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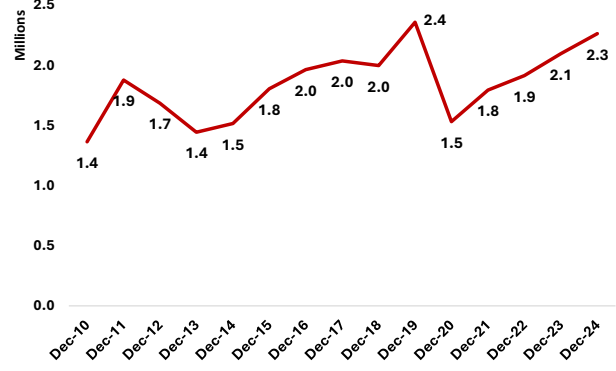


TOTAL OVERNIGHT VISITATION 2010 - 2024

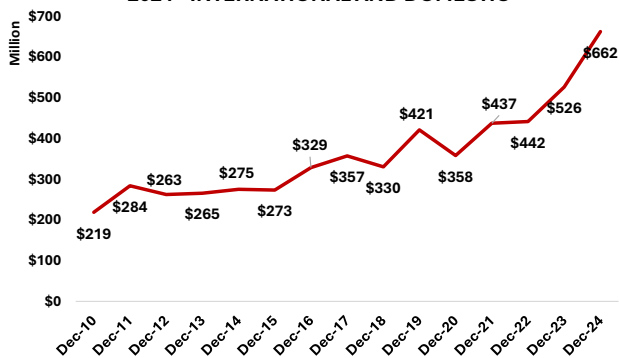
VISITORS LIMESTONE COAST 2010 - 2024 - INTERNATIONAL AND DOMESTIC



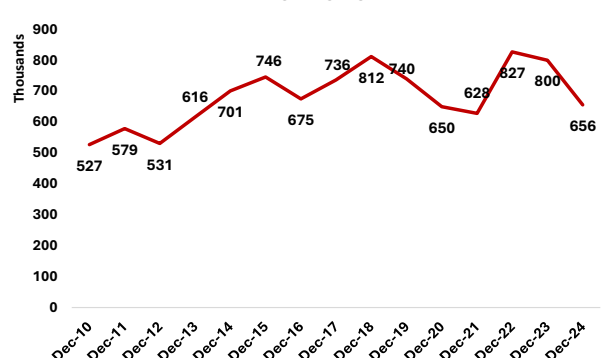
NIGHTS LIMESTONE COAST 2010 - 2024 - INTERNATIONAL AND DOMESTIC



TOTAL EXPENDITURE LIMESTONE COAST 2010 - 2024 - INTERNATIONAL AND DOMESTIC



DAY TRIPS LIMESTONE COAST 2010 - 2024 - 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-24	Change on Dec-19	Dec-24	Change on Dec-19
Adelaide	3,933,000	0%	\$5,800,000,000	29%
Adelaide Hills	200,000	-12%	\$192,000,000	-7%
Barossa	244,000	-23%	\$287,000,000	27%
Clare Valley	222,000	9%	\$162,000,000	38%
Eyre Peninsula	455,000	-22%	\$455,000,000	-17%
Fleurieu Peninsula	727,000	-19%	\$519,000,000	-7%
Flinders Ranges and Outback	699,000	-25%	\$603,000,000	17%
Kangaroo Island	182,000	-12%	\$197,000,000	4%
Limestone Coast	807,000	4%	\$662,000,000	57%
Murray River, Lakes and Coorong	396,000	-12%	\$223,000,000	-20%
Riverland	464,000	8%	\$236,000,000	21%
Yorke Peninsula	620,000	4%	\$358,000,000	49%
Regional SA	4,615,000	-11%	\$3,950,000,000	11%
South Australia	8,034,000	-6%	\$9,800,000,000	21%

LIMESTONE COAST

REGIONAL PROFILE



LIMESTONE COAST TOURISM LISTINGS

Category	# Listings
ATTRACTION	179
ACCOMM	152
RESTAURANT	86
EVENT	79
TOUR	22
DESTINFO	15
GENSERVICE	10
INFO	9
JOURNEY	6
HIRE	6
TRANSPORT	1
Grand Total	565

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

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

193,000
YEAR END DECEMBER 2024

ACCOMMODATION LEADS

101,000
52%

FOOD & DRINK LEADS

15,000
8%

TOUR LEADS

4,000
2%

*OTHER LEADS

73,000
38%

TOP 5

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

TOP 5

- THE TASTING ROOM AT MAYURA STATION
- ROBE TOWN BREWERY
- BELLWETHER WINERY
- MOUNT GAMBIER COMMUNITY RSL
- THE BARN STEAKHOUSE

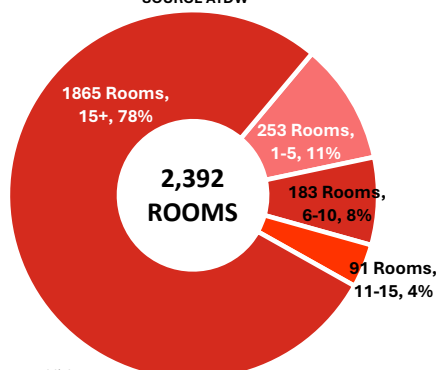
TOP 5

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

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

ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS ON THE LIMESTONE COAST SOURCE ATDW



Rooms refers to rooms per establishment

- Currently there are 151 establishments on the Limestone Coast that accommodate guests.
- These 151 establishments account for 2,392 rooms across the region.
- 78 per cent of rooms fall into establishment with 15 or more rooms.
- 11 per cent of rooms fall into the 1-5 room establishments.

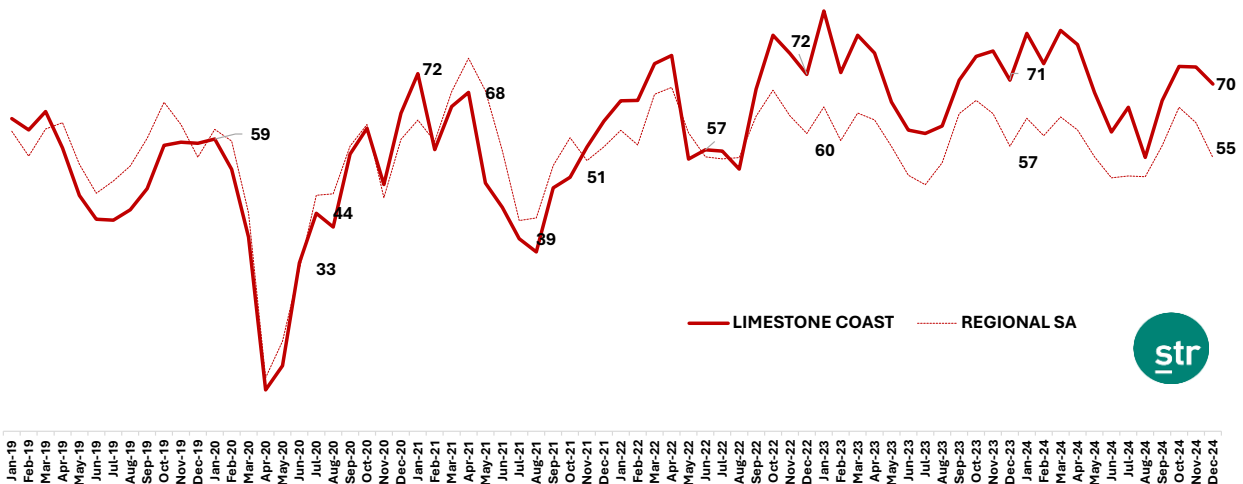
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ACCOMMODATION STR

ACCOMMODATION OCCUPANCY LIMESTONE COAST

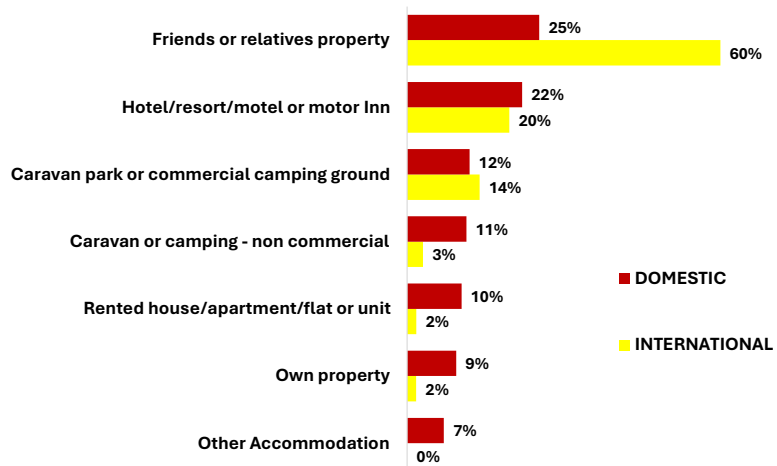


- In 2019 prior to COVID average occupancy for the Limestone Coast was 54 per cent, this fell to 43 per cent in 2020, rose to 54 per cent in 2021, 67 per cent in 2022, 71 per cent in 2023 and 70 per cent in 2024.

VISITOR USE OF ACCOMMODATION

ACCOMMODATION USED IN LIMESTONE COAST FOR DOMESTIC VISITORS

- 25 per cent of domestic overnight visitor nights in the Limestone Coast are spent with Friends or Relatives compared to the international average of 60 per cent.
- 22 per cent of domestic and 20 per cent of international visitors stayed in a Hotel/resort/motel or motor inn.
- 23 per cent of domestic visitors and 17 per cent of international visitors to the Limestone Coast stay in a caravan park.



TRANSPORT - DOMESTIC OVERNIGHT



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

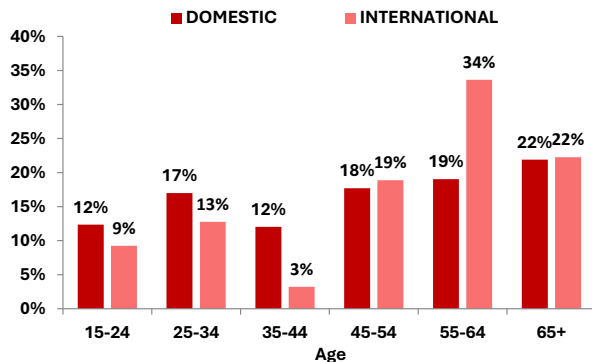
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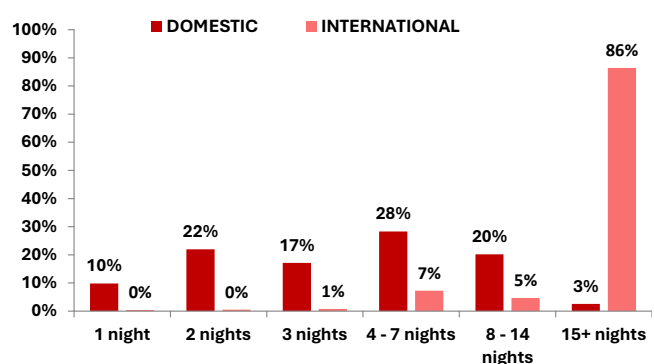
VISITOR PROFILE

AGE OF VISITORS TO LIMESTONE COAST



- In the domestic market the 65+ is the strongest age group with 22 per cent of visitors.
- The International market is also strongest for the 55+ age group with 56 per cent of all visits.

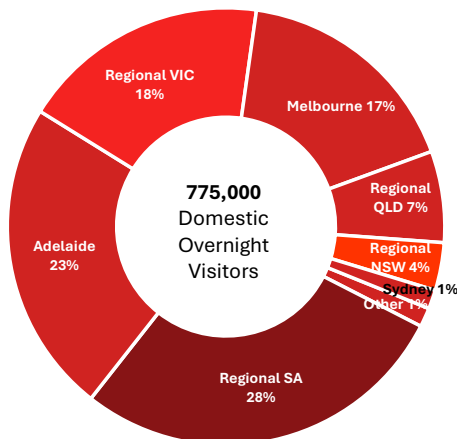
LENGTH OF VISIT TO LIMESTONE COAST



- 28 per cent of domestic overnight visitors like to stay 4 to 7 nights.
- 91 per cent of international visitors stay greater than 8 nights, with 86 per cent staying greater than 15+ nights.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO LIMESTONE COAST

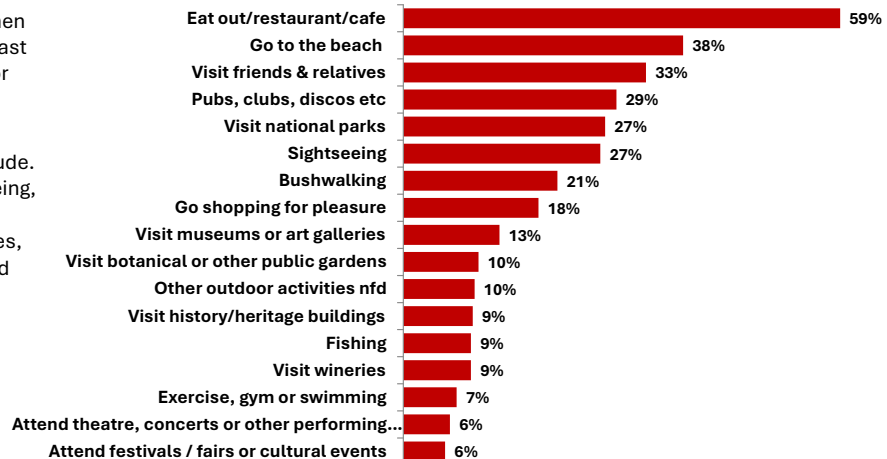


- Victoria at 35 per cent is the Limestone Coast's biggest interstate overnight domestic markets.
- Regional South Australia contributes 28 per cent of visitors to the Limestone Coast.
- 23 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN LIMESTONE COAST

- 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.



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REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2023-24, the tourism industry contributed an estimated \$587 million to the Limestone Coast regional economy and directly employed 2,100 people.

Employment

- 2,100 jobs for people employed directly by the tourism industry, 1,100 indirect jobs and a total employment impact of 3,200 people.

Gross Value Added (GVA)

- \$144 million and \$151 million in direct and indirect tourism GVA, and \$295 million in total tourism GVA.

Gross Regional Product (GRP)

- \$168 million and \$185 million in direct and indirect tourism GRP and \$353 million in total tourism GRP.

Tourism Consumption

2023-24

Tourism products - directly consumed

- Takeaway and restaurant meals 17%
- Long distance passenger transportation 15%
- Fuel (petrol, diesel) 13%
- Shopping (including gifts and souvenirs) 11%
- Accommodation services 9%
- Actual and imputed rent on dwellings 8%
- Food products 6%
- Alcoholic beverages and other beverages 6%

Tourism Employment

2023-24

Tourism Industries - 2,100 directly employed

- Cafes, restaurants and takeaway food services 35%
- Retail trade 23%
- Accommodation 19%
- Clubs, pubs, taverns and bars 7%
- Road transport and transport equipment rental 4%
- Air, water and other transport 3%
- All other industries 3%
- Education and training 2%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2024

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 2024

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 2024.

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