

LIMESTONE COAST

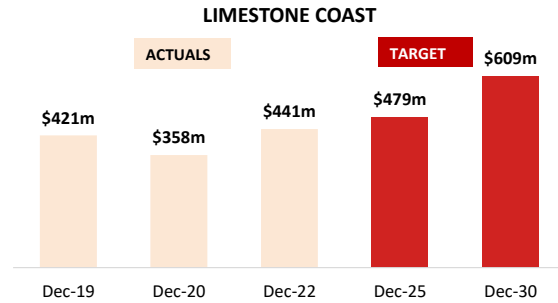
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2022

- Currently the Limestone Coast contributes \$441 million to the year end December 2022 South Australian expenditure of \$8.3 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 2022

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	314,000	295,000	609,000	13,000	622,000
%	52%	48%	98%	2%	100%
<i>Share of Regional SA</i>	9%	29%	13%	25%	14%
<hr/>					
% Across Regional SA	76%	22%	99%	1%	100%
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>					
Nights	942,000	792,000	1,735,000	181,000	1,915,000
%	54%	46%	91%	9%	100%
<i>Share of Regional SA</i>	9%	15%	11%	22%	11%
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% Across Regional SA	63%	32%	95%	5%	100%
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>					
Average Length of Stay	3.0	2.7	2.8	13.9	3.1
ALOS Regional SA	3.0	5.1	3.5	16.1	3.7
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Total Expenditure					\$441,000,000
Overnight Expenditure	\$168,000,000	\$130,000,000	\$298,000,000	\$4,000,000	\$301,000,000
Day Trip Expenditure					\$140,000,000
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Domestic Day Trips					827,000

- The Limestone Coast saw 609,000 domestic overnight visitors for the year end December 2022.
- 52 per cent of overnight visitors were from intrastate and 48 per cent from interstate.
- The 314,000 intrastate overnight visitors stayed 942,000 nights with an average length of stay of 3.0 nights.
- There were 295,000 interstate overnight visitors who stayed 792,000 nights with an average length of stay of 2.7 nights
- The region saw 13,000 international visitors with an average length of stay of 13.9 nights and spend of \$4 million.
- 827,000 day trips were taken to the Limestone Coast for the year with spend of \$140 million.

ALOS = Average Length of Stay

LIMESTONE COAST

REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	346,000	159,000	96,000	27,000	622,000
%	56%	26%	15%	4%	100%
<i>Share of Regional SA</i>	14%	14%	11%	18%	14%
<i>% Across all regions</i>	53%	25%	19%	3%	100%

Nights	1,020,000	481,000	260,000	154,000	1,915,000
%	53%	25%	14%	8%	100%
<i>Share of Regional SA</i>	11%	13%	8%	23%	11%
<i>% Across all regions</i>	54%	21%	20%	4%	100%

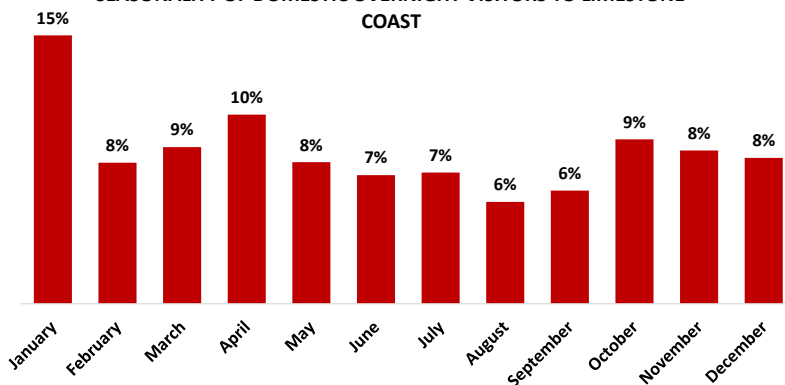
Average Length of Stay	2.9	3.0	2.7	5.7	3.1
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Expenditure					
Annual Expenditure	\$185,000,000	\$49,000,000	\$46,000,000	\$22,000,000	\$301,000,000
Expenditure 2019	\$152,000,000	\$60,000,000	\$67,000,000	\$44,000,000	\$323,000,000
Av spend per night	\$181	\$102	\$177	\$143	\$157
Av spend per night Reg SA	\$204	\$112	\$142	\$279	\$175
Share of Regional SA	3%	4%	0%	2%	3%

- 81 per cent of overnight visitors to the Limestone Coast are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$181 per night compared to VFR visitors who spend \$102 per night.
- Leisure overnight visitors spent \$234 million for the year, making up 78 per cent of all overnight expenditure.
- There are 96,000 business visitors who stay 260,000 nights with spend of \$46 million.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO LIMESTONE COAST



- National Visitor Survey data shows us that in 2022 January, April and October 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.

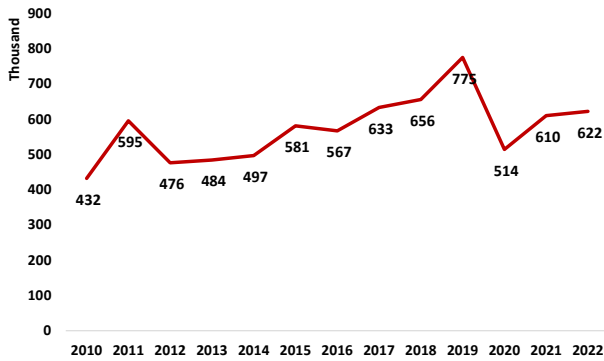
LIMESTONE COAST

REGIONAL PROFILE

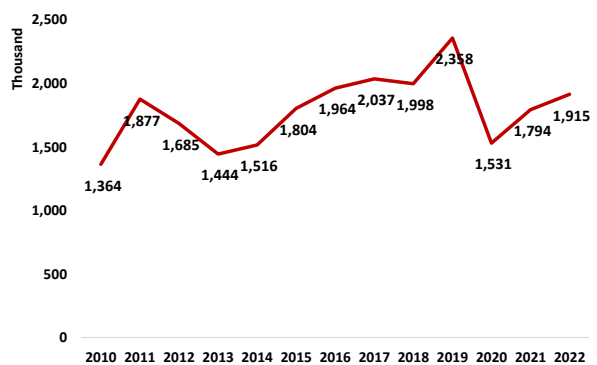


TOTAL OVERNIGHT VISITATION 2010 - 2022

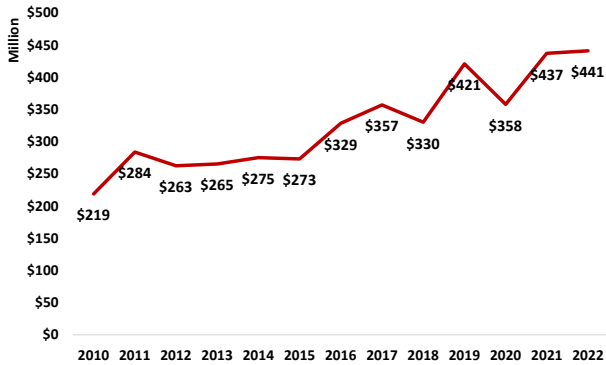
VISITORS LIMESTONE COAST 2010 - 2022 - International and Domestic



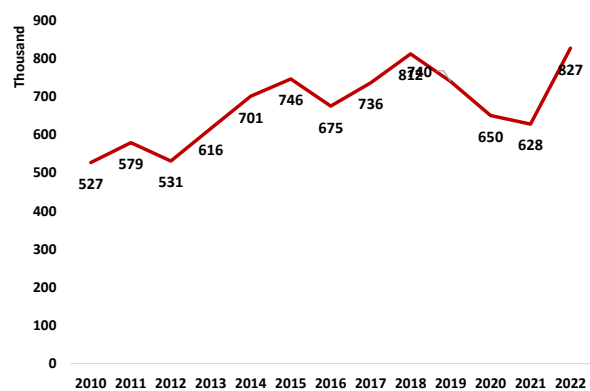
NIGHTS LIMESTONE COAST 2010 - 2022 - International and Domestic



TOTAL EXPENDITURE LIMESTONE COAST 2010 - 2022 - International and Domestic



DAY TRIPS LIMESTONE COAST 2010 - 2022 - 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-22	Change on Dec-19	Dec-22	Change on Dec-19
Adelaide	3,084,000	-21%	\$4,400,000,000	-3%
Adelaide Hills	155,000	-31%	\$225,000,000	9%
Barossa	319,000	1%	\$326,000,000	45%
Clare Valley	196,000	-4%	\$152,000,000	29%
Eyre Peninsula	500,000	-14%	\$503,000,000	-8%
Fleurieu Peninsula	783,000	-13%	\$665,000,000	19%
Flinders Ranges and Outback	835,000	-10%	\$576,000,000	12%
Kangaroo Island	171,000	-18%	\$187,000,000	-2%
Limestone Coast	622,000	-20%	\$441,000,000	5%
Murray River, Lakes and Coorong	381,000	-16%	\$201,000,000	-28%
Riverland	412,000	-4%	\$240,000,000	23%
Yorke Peninsula	602,000	1%	\$354,000,000	47%
Regional SA	4,568,000	-12%	\$3,980,000,000	12%
South Australia	7,291,000	-15%	\$8,340,000,000	3%

LIMESTONE COAST

REGIONAL PROFILE



LIMESTONE COAST TOURISM LISTINGS

Category	# Listings
ATTRACTION	167
ACCOMM	163
RESTAURANT	67
EVENT	54
TOUR	14
INFO	9
GENSERVICE	8
DESTINFO	8
HIRE	2
JOURNEY	1
Grand Total	493

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
104,000
YEAR END DECEMBER 2022**

**ACCOMMODATION
LEADS
54,000
53%**

**FOOD & DRINK
LEADS
8,000
8%**

**TOURS
LEADS
2,200
2%**

***OTHER
LEADS
39,000
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

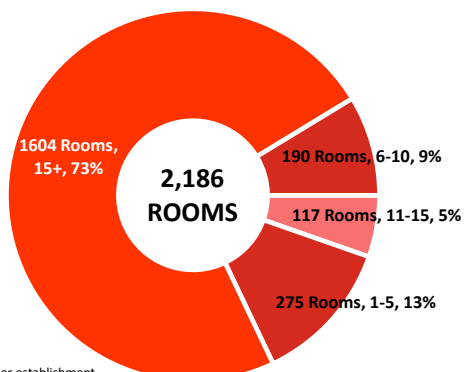
TOP 5

- 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 IN THE LIMESTONE COAST - SOURCE ATDW



- Currently there are 163 establishments on the Limestone Coast that accommodate guests.
- These 163 establishments account for 2,186 rooms across the region.
- 73 per cent of rooms fall into establishment with 15 or more rooms.
- 13 per cent of rooms fall into the 1-5 room establishments.

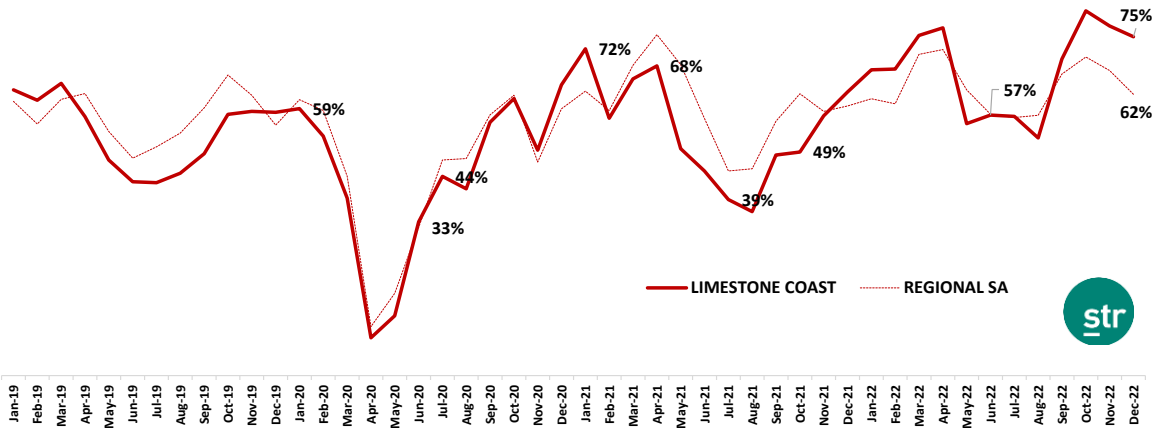
Rooms refers to rooms per establishment

LIMESTONE COAST REGIONAL PROFILE



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY LIMESTONE COAST

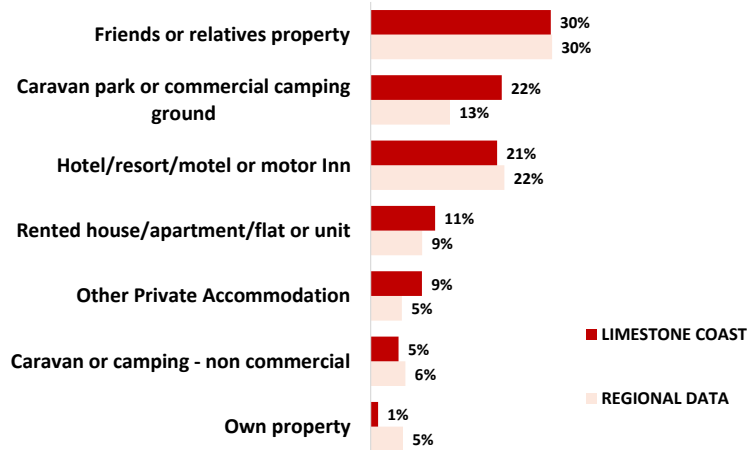


- In 2019 prior to COVID average occupancy for the Limestone Coast was 54 per cent, this fell to 43 per cent in 2020, rose to 54 per cent in 2021 and rose again in 2022 to 67 per cent.
- The Limestone Coast has performed very well in 2022, well above 2019.

VISITOR USE OF ACCOMMODATION

ACCOMMODATION USED IN LIMESTONE COAST FOR DOMESTIC VISITORS

- 30 per cent of domestic overnight visitor nights to the Limestone Coast are spent in a friend or relatives property to the SA regional average of 30 per cent.
- 21 per cent stayed in a Hotel/resort/motel or motor inn. This compares to the regional average of 22 per cent.
- 22 per cent stay in a Caravan park or commercial camping ground compared to the regional average of 13 per cent.



TRANSPORT



- The main method of transport used on trips to the Limestone Coast was self drive.
- 3 per cent travel to the region by aircraft.

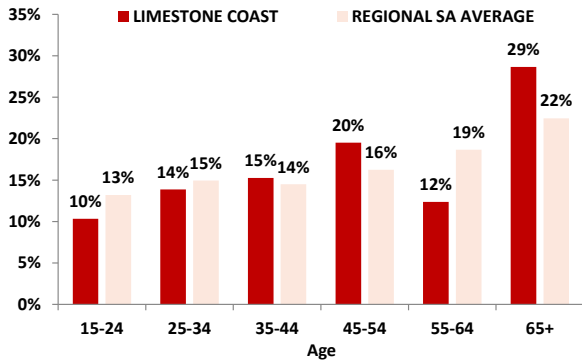
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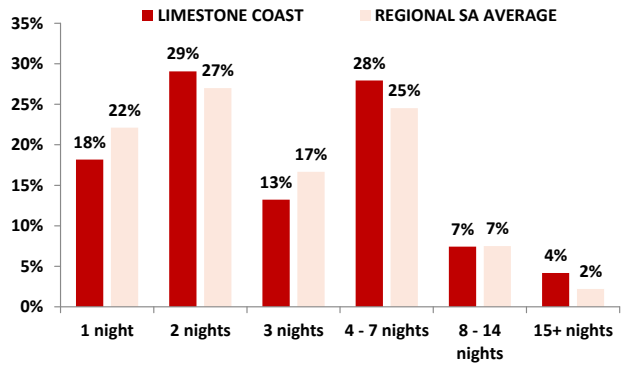


VISITOR PROFILE

AGE OF VISITORS TO LIMESTONE COAST



LENGTH OF VISIT TO LIMESTONE COAST

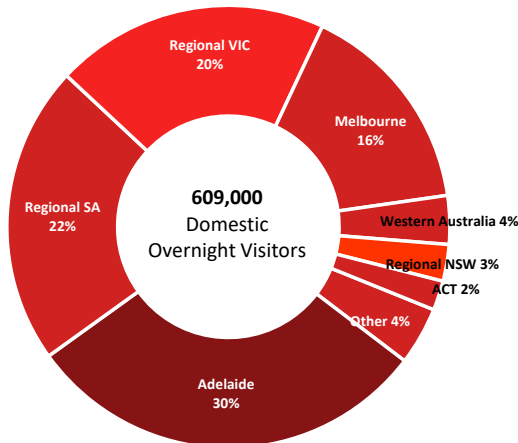


- Overnight domestically there is a peak in the 65+ age group of 29 per cent compared to the regional average of 22 per cent.
- The 45-54 age group at 20 per cent was above the regional average of 16 per cent.

- 28 per cent of domestic overnight visitors like to stay 4-7 nights above the regional average of 25 per cent.
- 29 per cent like to stay 2 nights, above the regional average of 27 per cent.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO LIMESTONE COAST

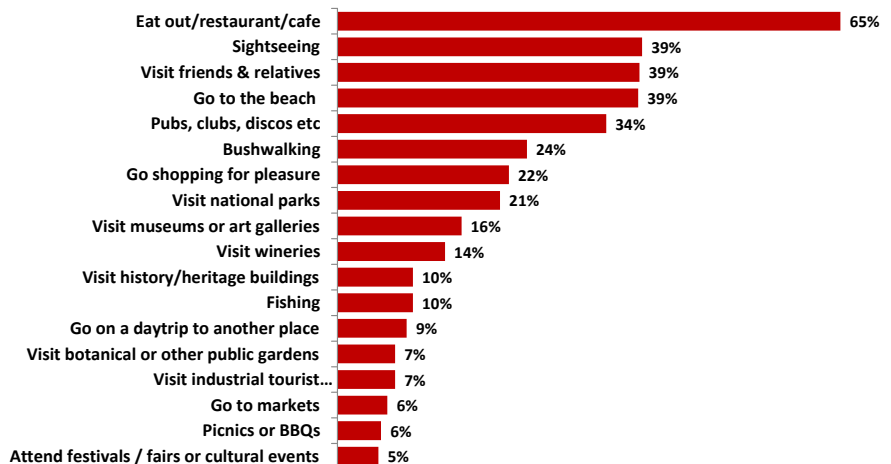


- Victoria at 36 per cent is the Limestone Coast's biggest interstate overnight domestic markets.
- Regional South Australia contributes 22 per cent of visitors to the Limestone Coast.
- 42 per cent of visitors come from Adelaide.

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 2020-21, the tourism industry contributed an estimated \$542 million to the Limestone Coast regional economy and directly employed approximately 2,700 people.

Employment

- 2,700 jobs for people employed directly by the tourism industry, 1,200 indirect jobs and a total employment impact of 3,900 people.

Gross Value Added (GVA)

- \$148 million and \$131 million in direct and indirect tourism GVA, and \$279 million in total tourism GVA.

Gross Regional Product (GRP)

- \$164 million and \$165 million in direct and indirect tourism GRP and \$329 million in total tourism GRP.

Tourism Consumption

2020–21

Tourism products - directly consumed

- Takeaway and restaurant meals 19%
- Shopping (including gifts and souvenirs) 15%
- Travel agency and tour operator services 11%
- Fuel (petrol, diesel) 10%
- Accommodation services 8%
- Food products 7%
- Long distance passenger transportation 7%
- Alcoholic beverages and other beverages 7%

Tourism Employment

2020–21

Tourism Industries - 2,700 directly employed

- Cafes, restaurants and takeaway food services 27%
- Retail trade 25%
- Accommodation 14%
- Travel agency and tour operator services 10%
- All other industries 6%
- Clubs, pubs, taverns and bars 5%
- Air, water and other transport 4%
- Road transport and transport equipment rental 4%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2021

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 2022

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. Un less otherwise stated, all data refers to the year end December 2022.

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 Intra-state participants (70% metro, 30% regional), — 20 Inter-state 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