



Limestone Coast Tourism Monthly Report

July 2023

Data Sources



The accommodation data in this report is sourced from various sharing economy platforms in the Limestone Coast, AirBNB, Booking.com, Tripadvisor and Stayz. The accommodation supply from these booking platforms is 744 unique listings , providing an estimated capacity of 4,337 visitors. Note the capacity excludes some operators who may not advertise on these platforms.

Mobility data is sourced from millions of opt in anonymous devices around Australia who have elected to share their location data via applications.

While Localis endeavours to ensure the methodologies and data used in this report are best practice and as accurate as possible, it is agreed and understood that the client accepts sole responsibility for how the data is used. Localis accepts no responsibility for any loss incurred as a result of using this data.

Region Comparisons

The regions below were used in the report to compare key metrics against Limestone Coast. Regions have been defined in accordance with the Australian Bureau of Statistics guidelines.

Regions:

Western Grampians - LGAs:

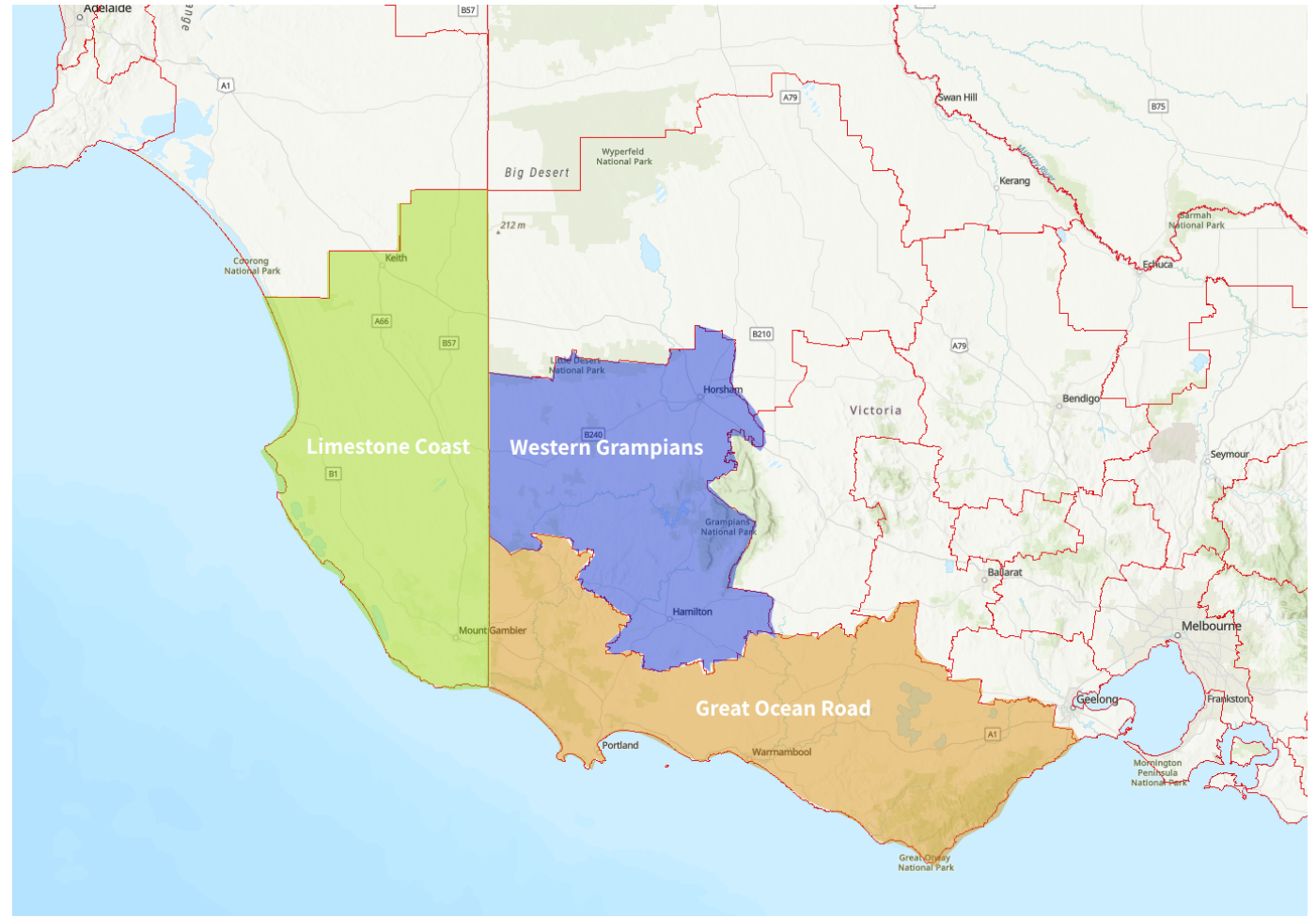
West Wimmera Shire,
Southern Grampians Shire,
Horsham Rural City

Great Ocean Road - LGAs:

Colac Otway Shire,
Corangamite Shire,
Glenelg Shire,
Moyne Shire,
Surf Coast Shire,
Warrnambool City

Limestone Coast - LGAs:

City of Mount Gambier,
DC of Robe,
Kingston DC,
Naracoorte Lucindale Council,
Tatiara DC,
The DC of Grant,
Wattle Range Council



Key Points from July 2023



Limestone Coast's monthly average occupancy level for July 2023 was 40%, which is a 6% decrease compared to last year in July 2022.



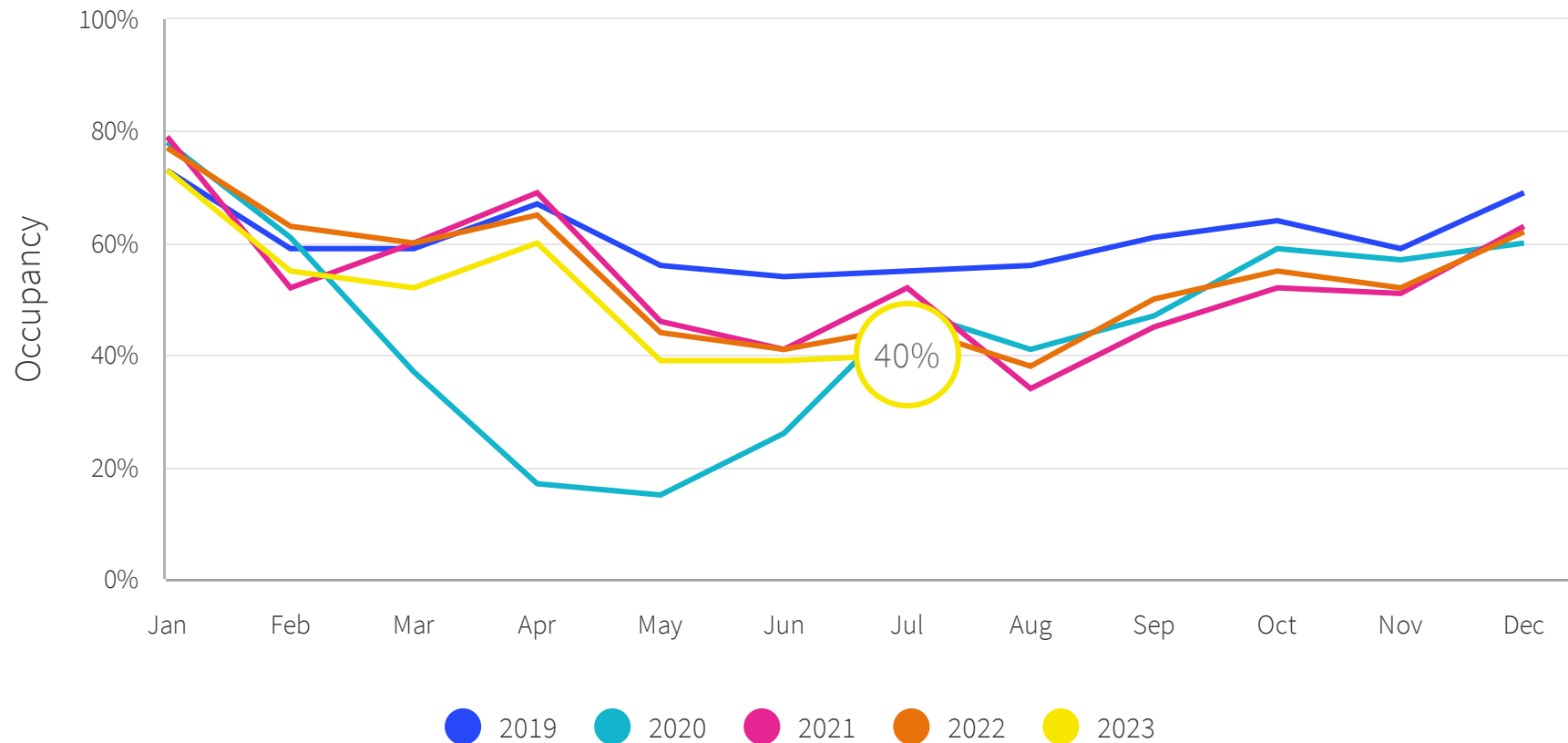
Length of stay in July 2023 was 4.5 days which is an 8% decrease compared to July 2023.



August 2023 future occupancy is projected to be 23.8% which is a decrease of 17% when compared to August 2022.

Average Occupancy Rate

The occupancy rate is the ratio between the number of occupied rooms and the number of rooms offered that are open.



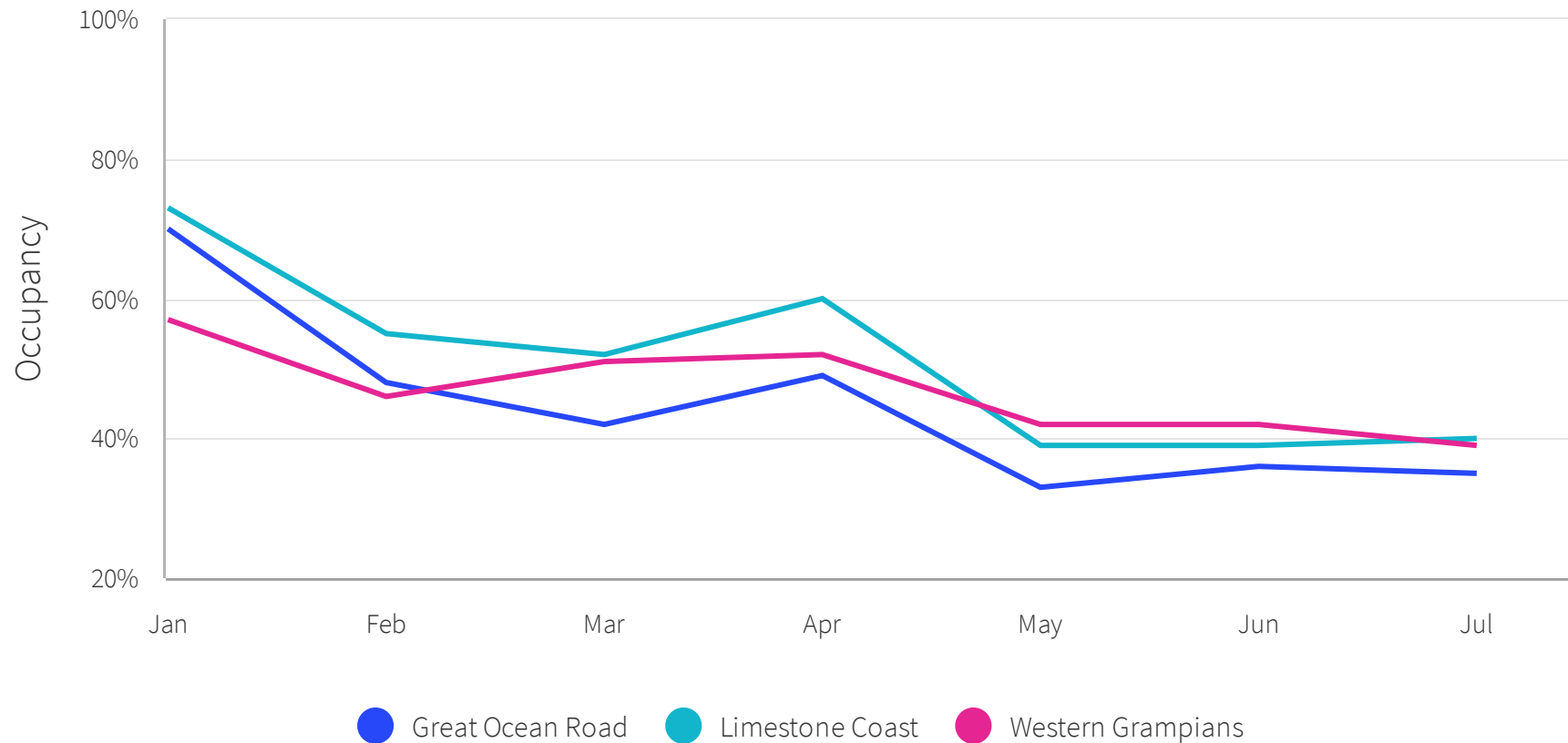
Accommodation Data

INSIGHT

Limestone Coast's monthly average occupancy level for July 2023 was 40%, which is a 6% decrease compared to last year in July 2022.

Average Occupancy Rate - Region Comparison

The occupancy rate is the ratio between the number of occupied rooms and the number of rooms offered that are open.



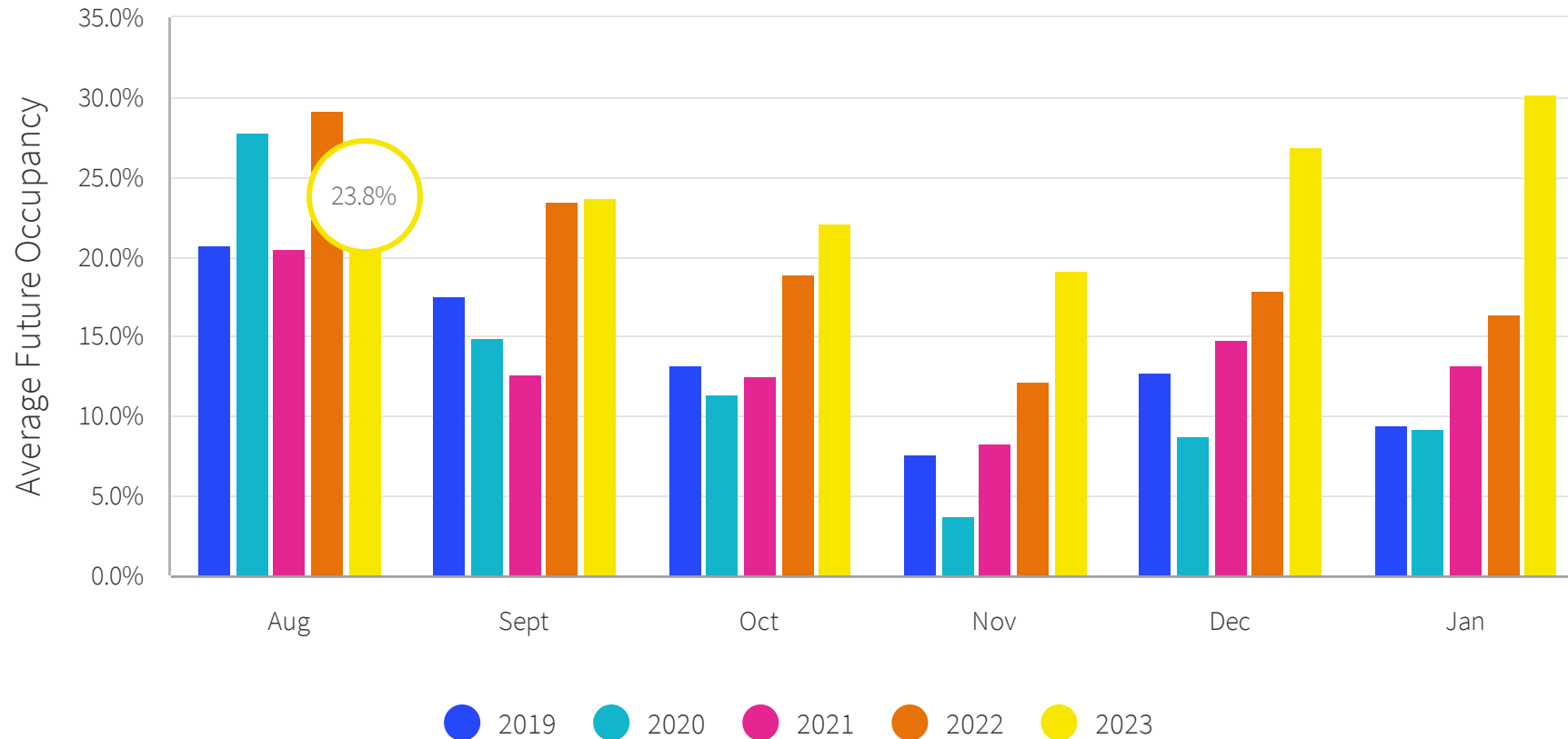
Accommodation Data

INSIGHT

For the past three months, Western Grampians has maintained a slight advantage in the occupancy rate competing closely with Limestone coast for the month of July.

Future Occupancy Rate

This graph shows monthly future occupancy for the next 6 months. You can also compare this to what the future bookings were for the same month in 2021 and 2019 at today's date in those years.



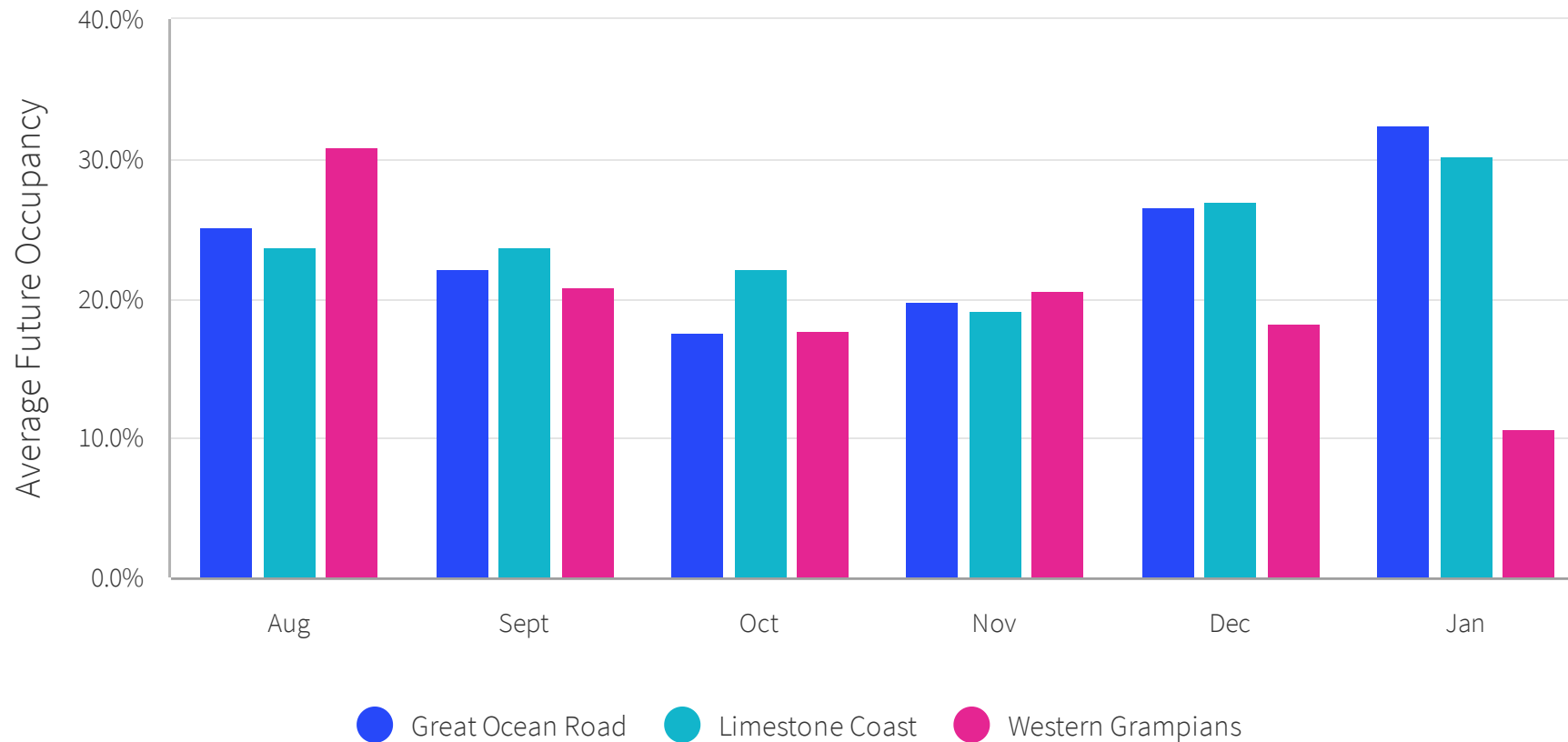
Accommodation Data

INSIGHT

August 2023 future occupancy is projected to be 23.8% which is a decrease of 17% when compared to August 2022.

Future Occupancy Rate - Region Comparison

This graph shows monthly future occupancy for the next 6 months. You can also compare this to what the future bookings were for the same month in 2021 and 2019 at today's date in those years.



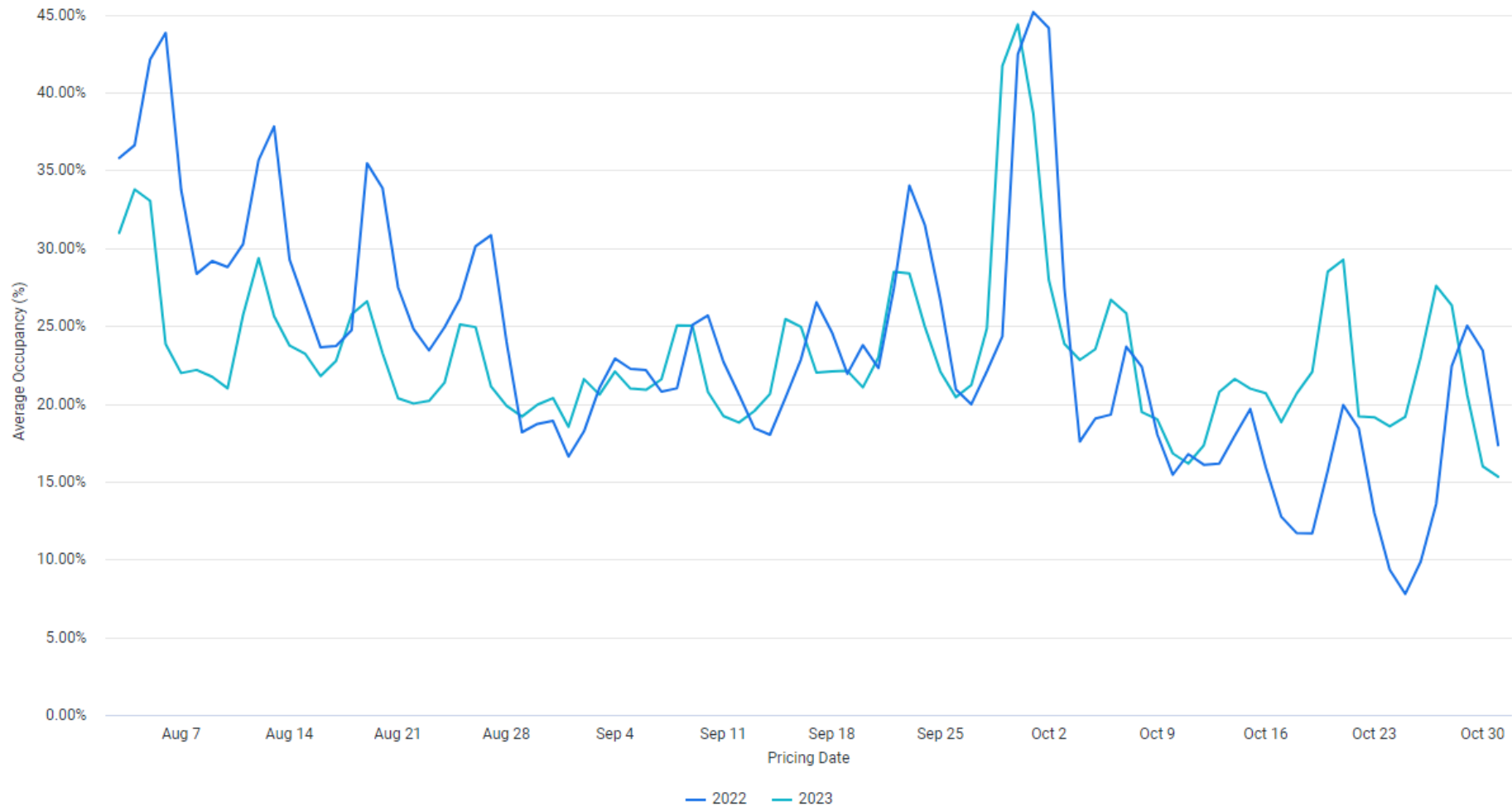
Accommodation Data

INSIGHT

According to projections, the Limestone coast and Western Grampians are expected to have the highest occupancy rate among the compared RTOs in the next four months with Great Ocean Road expected to surge in December.

Daily Future Occupancy - 3 Month Outlook

The graph below shows daily future occupancy over the next 3 months.



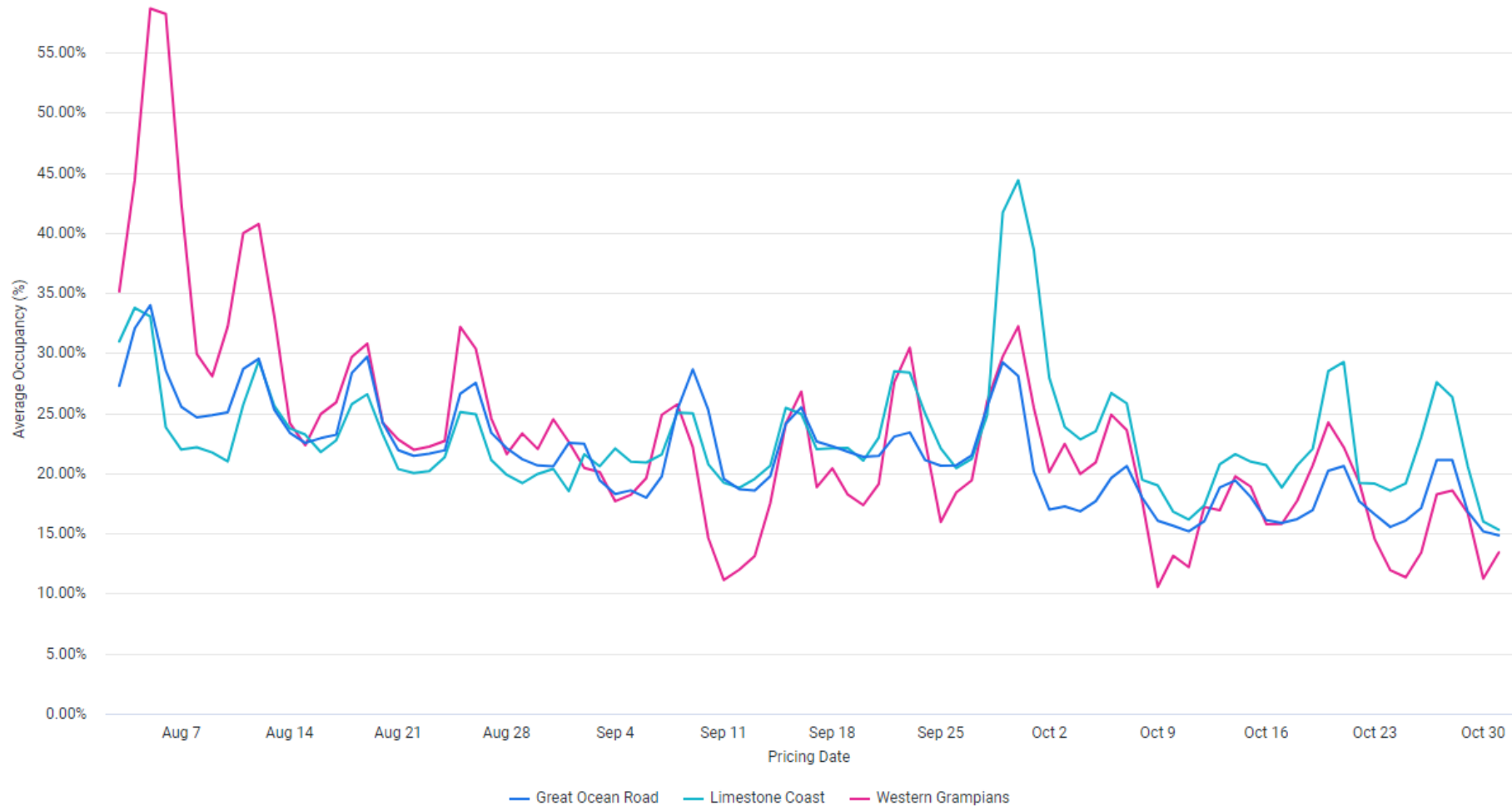
Accommodation Data

INSIGHT

The projected occupancy rates for the next three months of 2023 are expected to track slightly lower than that of 2022.

Daily Future Occupancy - Region Comparison

The graph below shows daily future occupancy over the next 3 months.



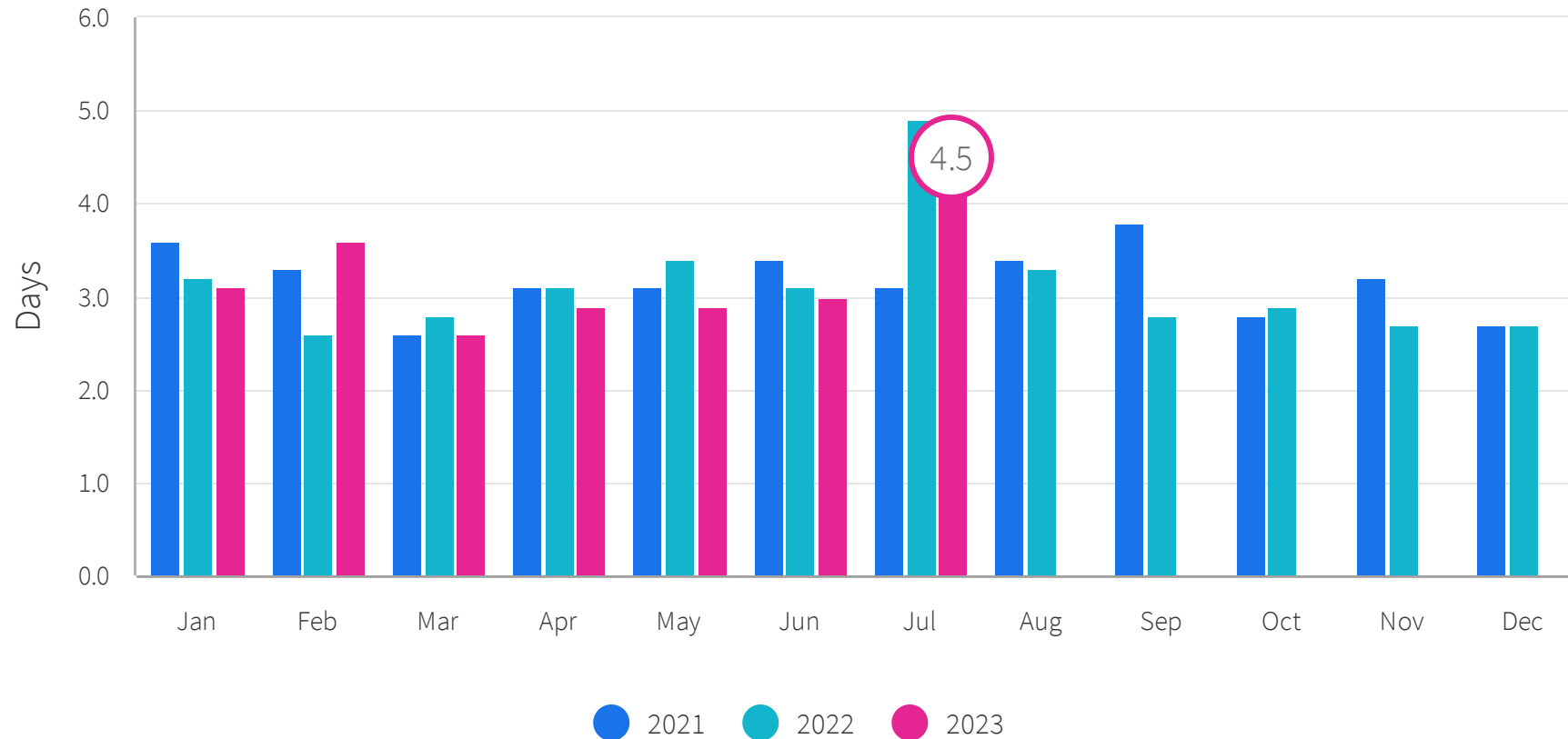
Accommodation Data

INSIGHT

Western Grampians has the highest projected occupancy for August with Limestone coast expected to surge in October.

Length of Stay

Length of stay is the amount of time that was booked at the accommodation. Note: Length of stay year ending 2022 as per Tourism Research Australia: 2.8 days.



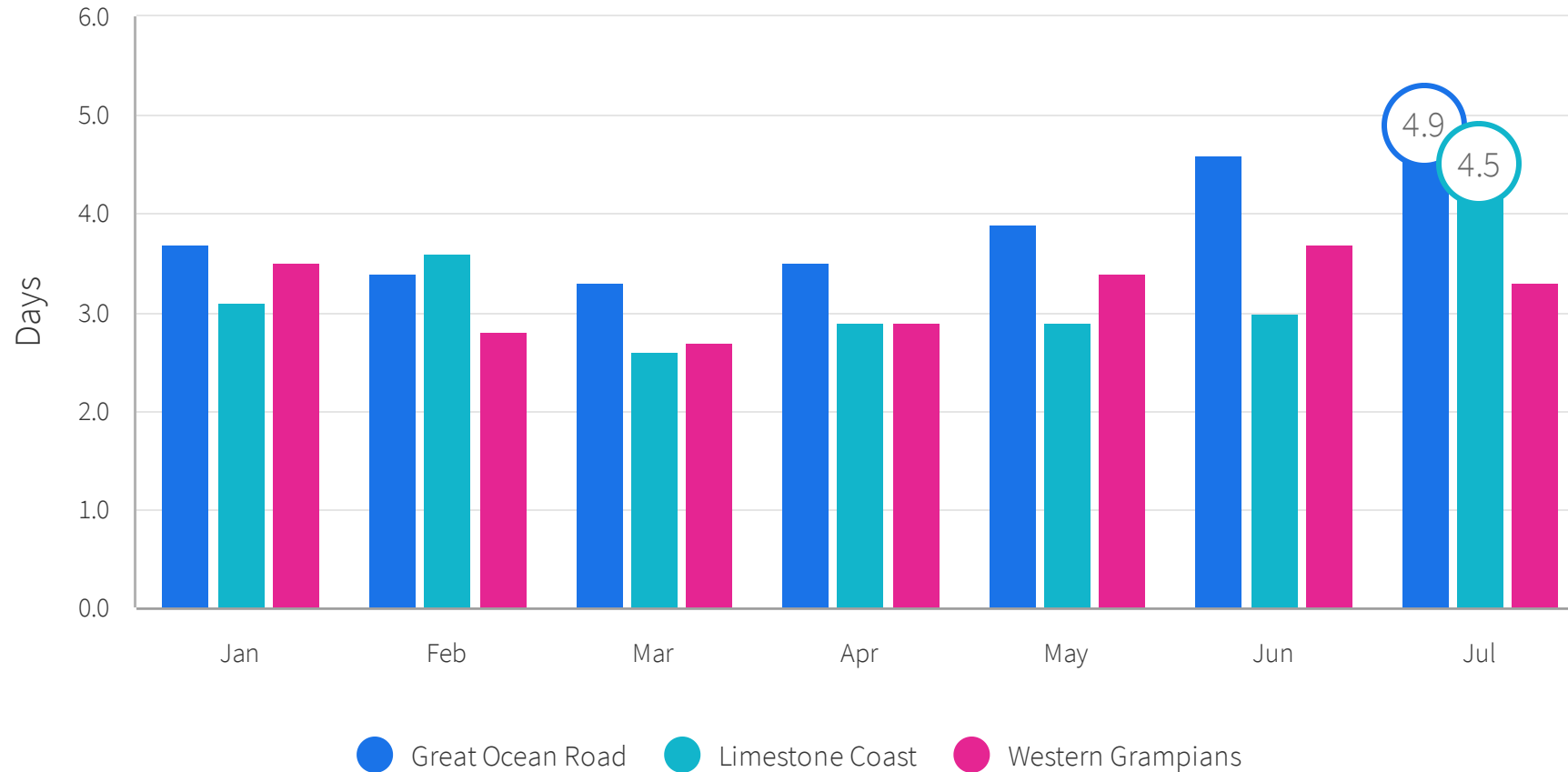
Accommodation Data

INSIGHT

Length of stay in July 2023 was 4.5 days which is an 8% decrease compared to July 2022.

Length of Stay - Region Comparison

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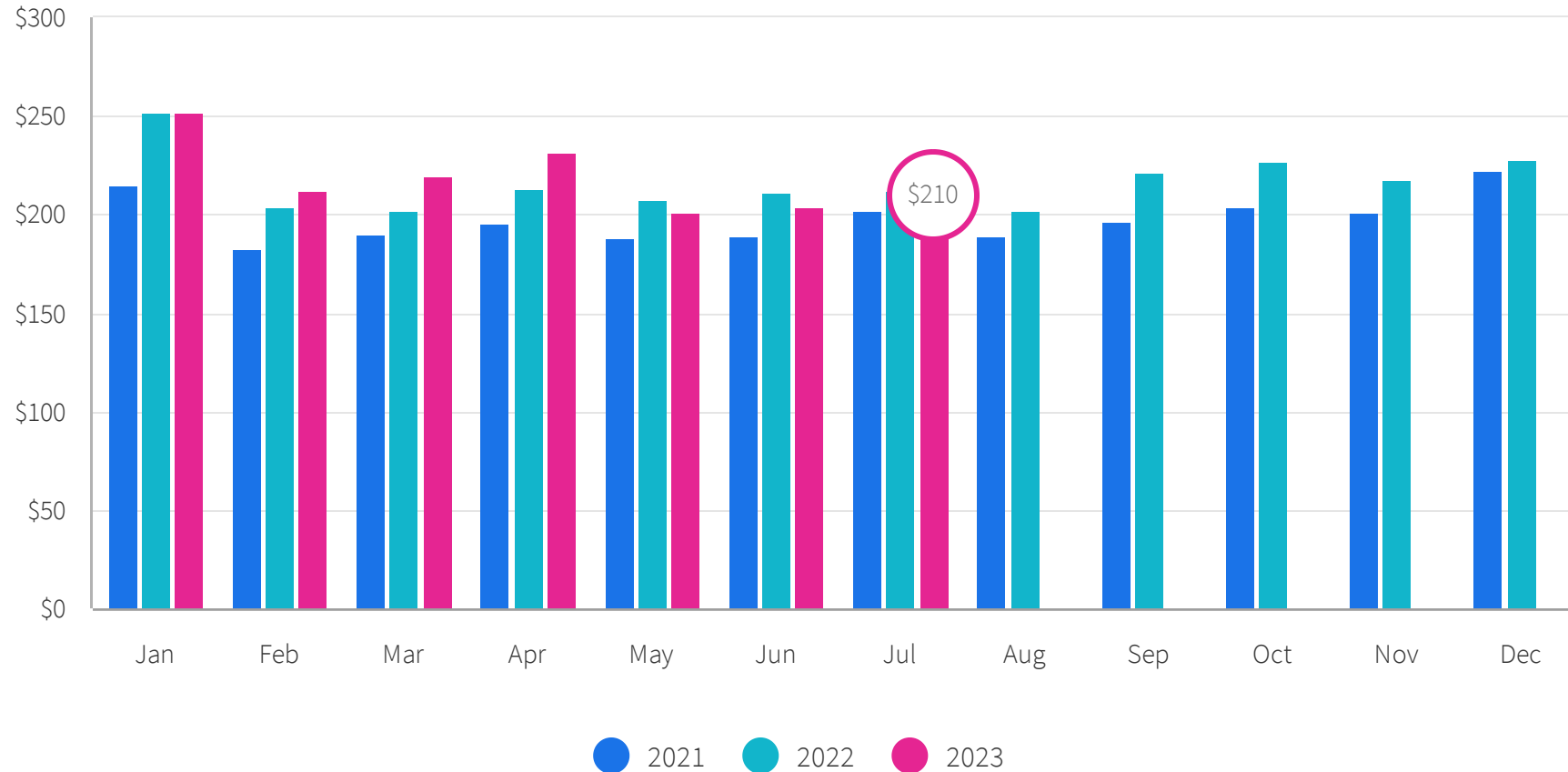
Accommodation Data

INSIGHT

Great Ocean Road had the highest length of stay in July, marginally trailing was Limestone coast with an approximate difference of 8%.

Average Daily Rate

The average daily rate (ADR) measures the average rental revenue earned for an occupied room per day.



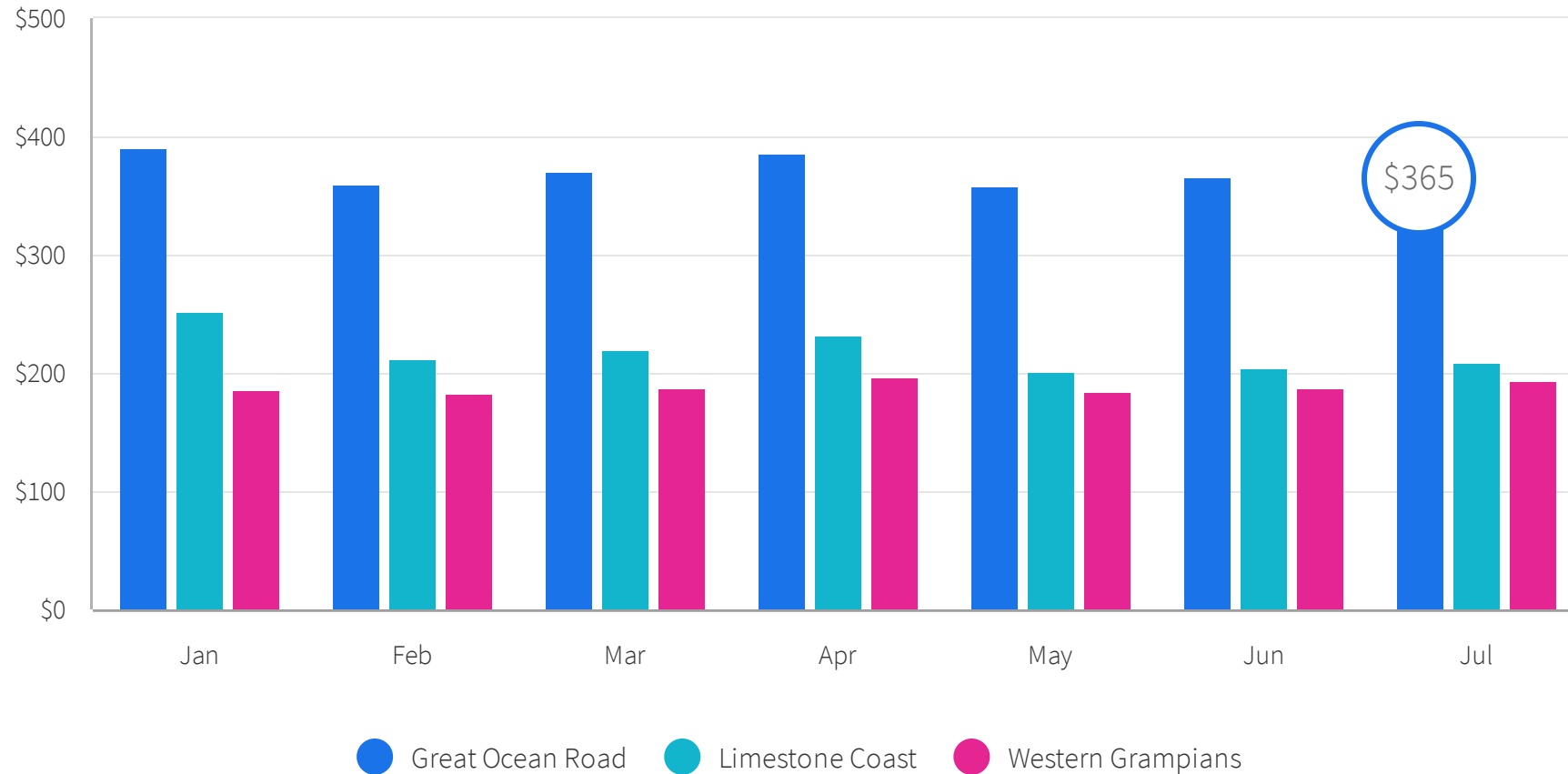
Accommodation Data

INSIGHT

Average daily rate for July 2023 was \$210, which is a increase of 1% when compared to July 2022.

Average Daily Rate - Region Comparison

The average daily rate (ADR) measures the average rental revenue earned for an occupied room per day.



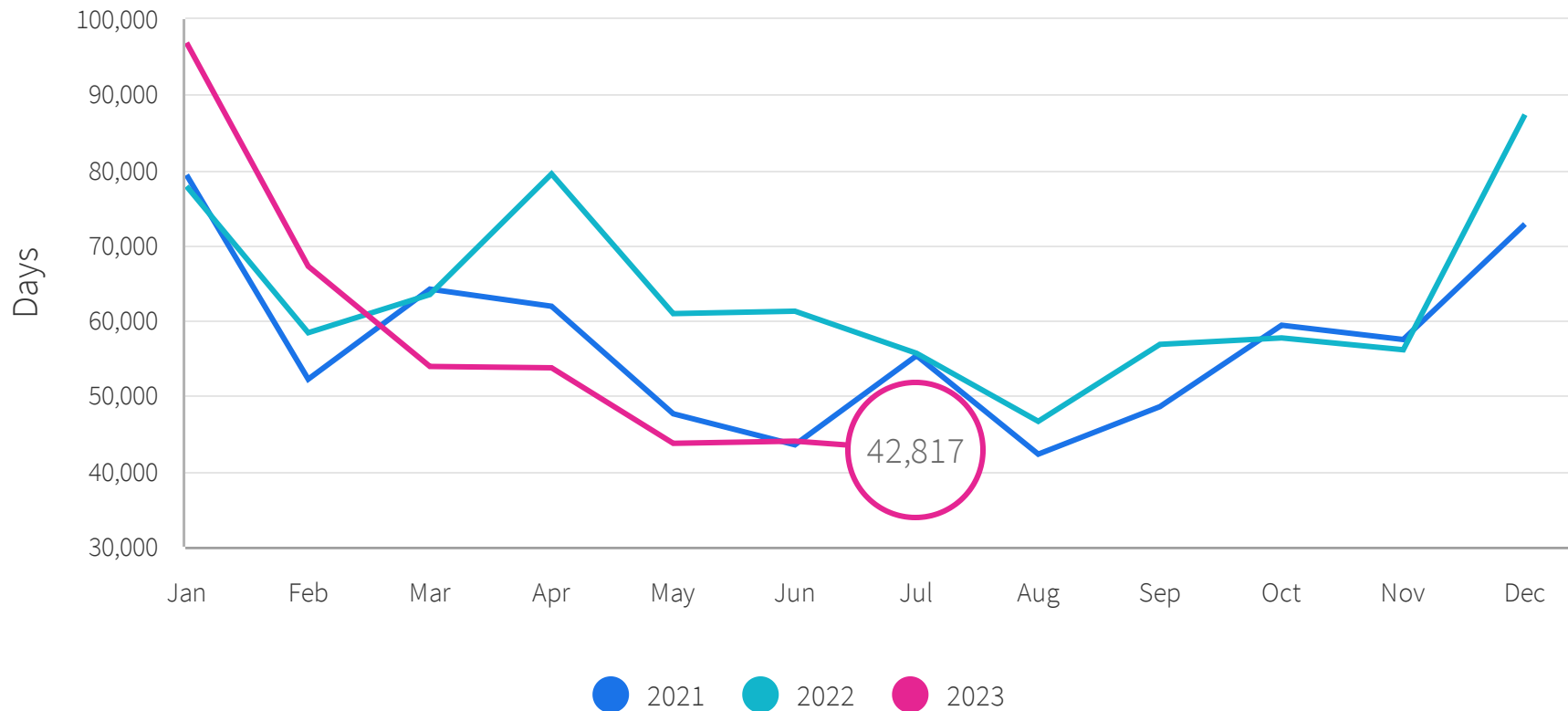
Accommodation Data

INSIGHT

Great Ocean Road had the highest ADR in the month of July 2023 when compared to Limestone Coast and Western Grampians.

Estimated Overnight Visitation

The below chart shows the total estimated overnight visitation to Limestone Coast. This methodology uses a combination of mobility data, occupancy data and Tourism Research Australia data. Note: Overnight visitation year ending December 2022 as per SATC RVS progress snapshot: 622k overnight visitors.



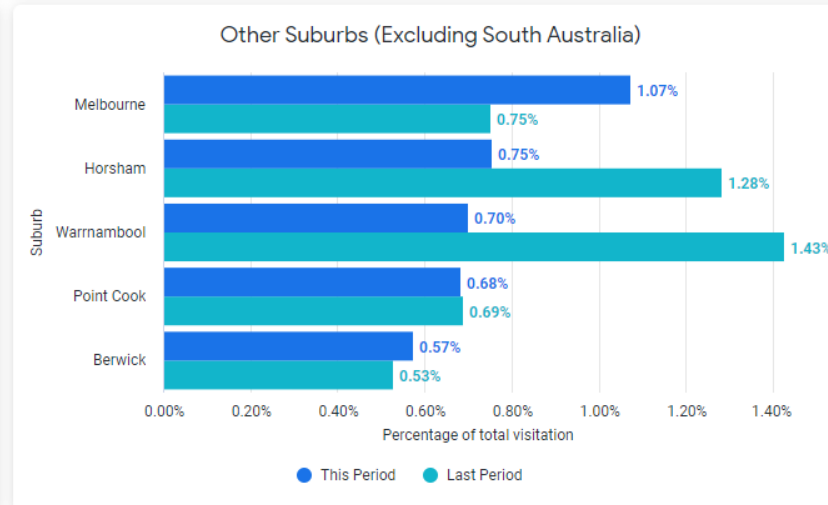
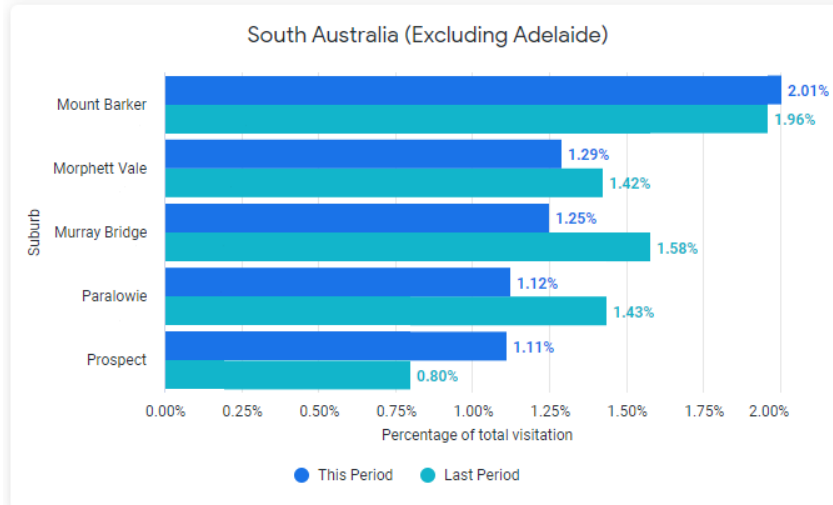
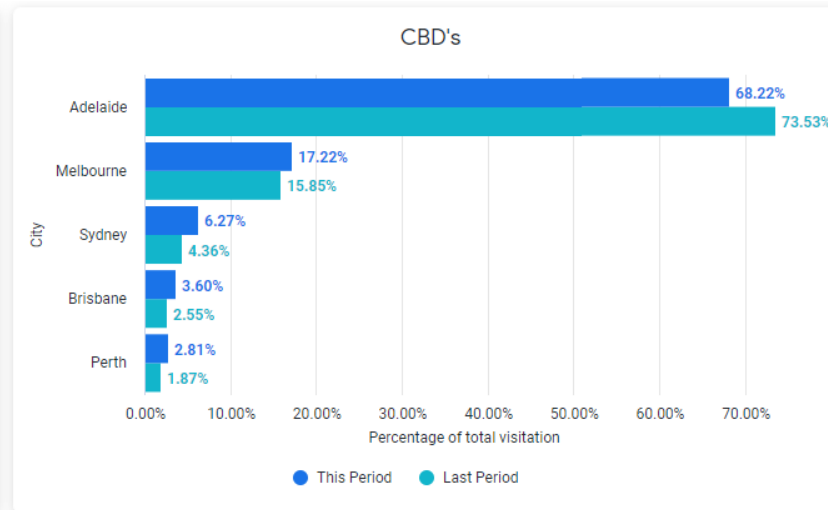
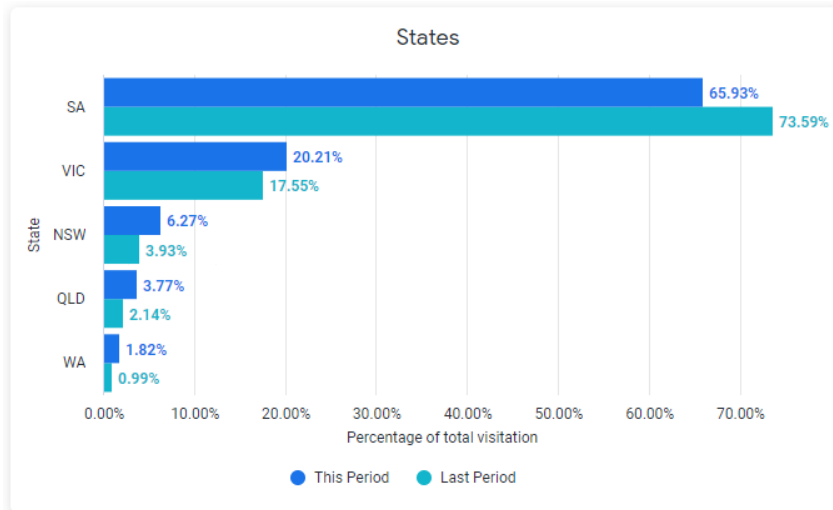
Accommodation Data,
TRA and Mobility Data

INSIGHT

July 2023 had approximately 42,817 overnight visitors which is a decrease of 23% compared to July 2022.

Interstate + Intrastate Source Markets

This section compares visitation to Limestone Coast by state, city, South Australian suburbs (excluding locals of LGA's in Limestone Coast) and interstate suburbs for the most recently completed month versus the same month last year.



Mobility Data

INSIGHT

July 2022 vs July 2023

Interstate visitation increased from 26% to 34% since the previous month.

Melbourne was the largest interstate CBD source market accounting for 17% of interstate visitation.

Of the suburbs in South Australia, Mount Barker accounted for 2% of total visitation, marginally more than July 2022

Melbourne was the interstate suburb with the highest visitation with a 28% increase compared to July 2022