



Limestone Coast Tourism Monthly Report

September 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 731 unique listings , providing an estimated capacity of 4,306 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:

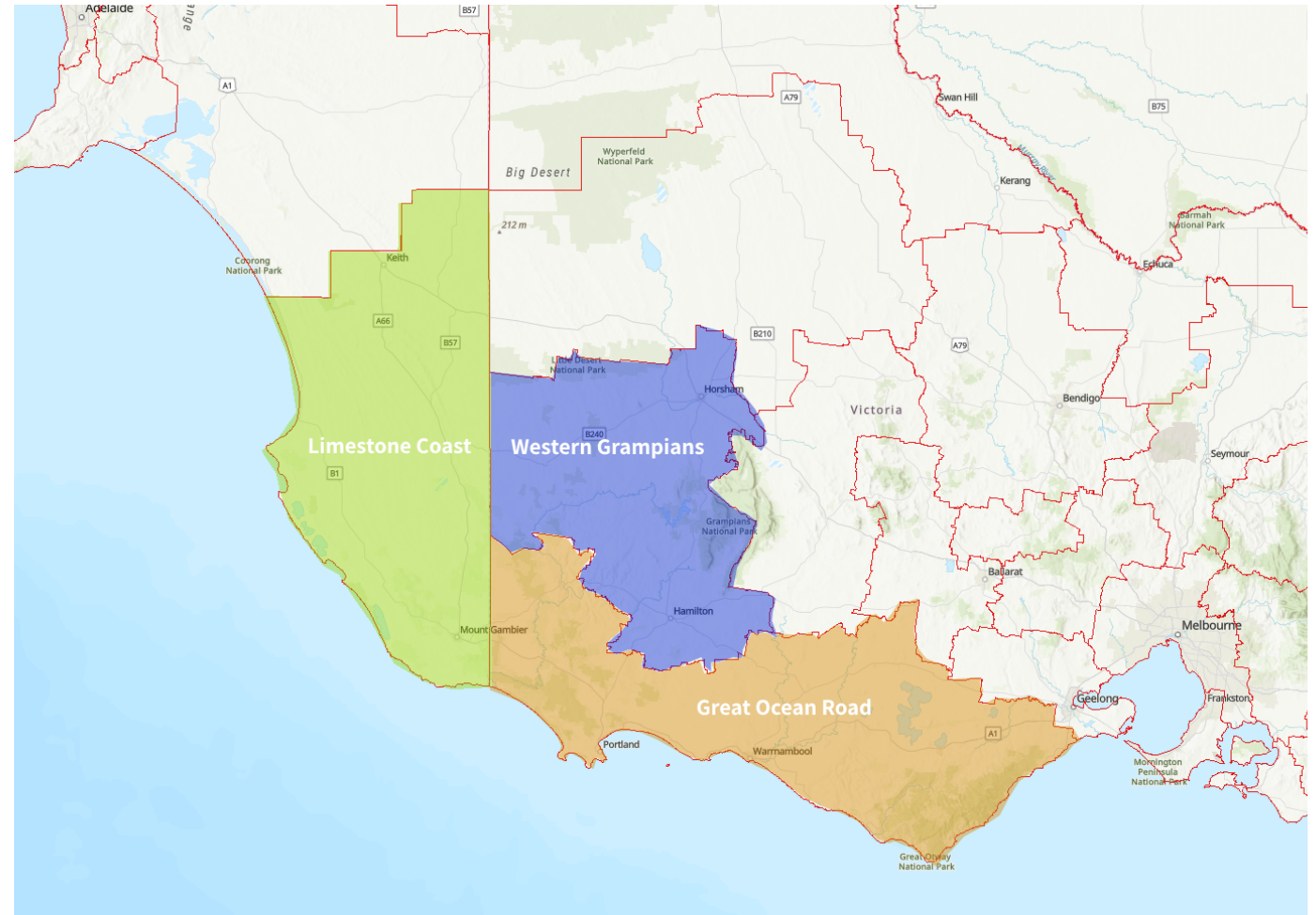
West Wimmera Shire,
Southern Grampians Shire,
Horsham Rural City

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 September 2023



Limestone Coast's monthly average occupancy level for September 2023 was 44%, which is a 12% decrease compared to last year in September 2022.



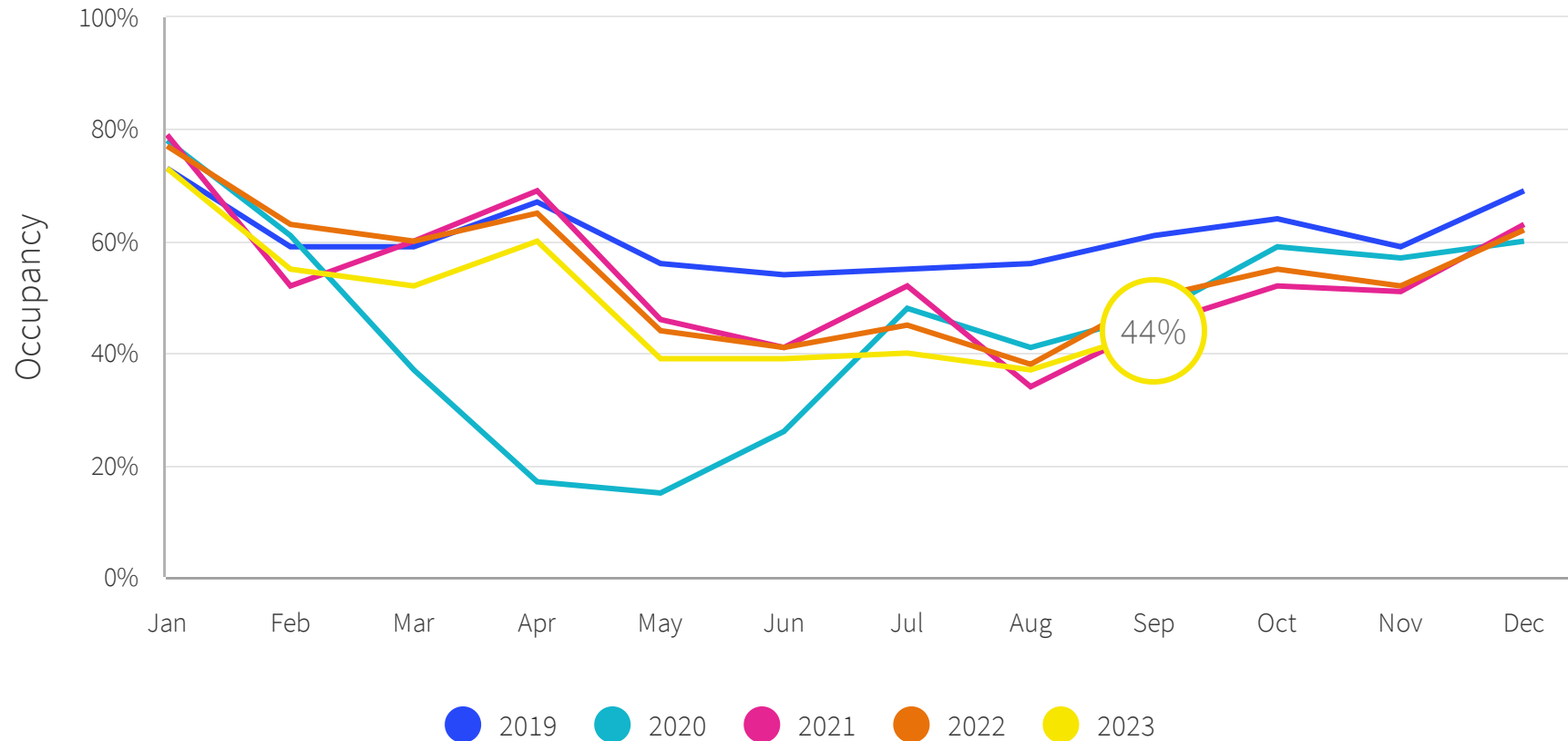
Length of stay in September 2023 was 3.2 days which is an 22% decrease compared to September 2022.



October's 2023 future occupancy is projected to be 37% which is a decrease of 24% when compared to October 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.



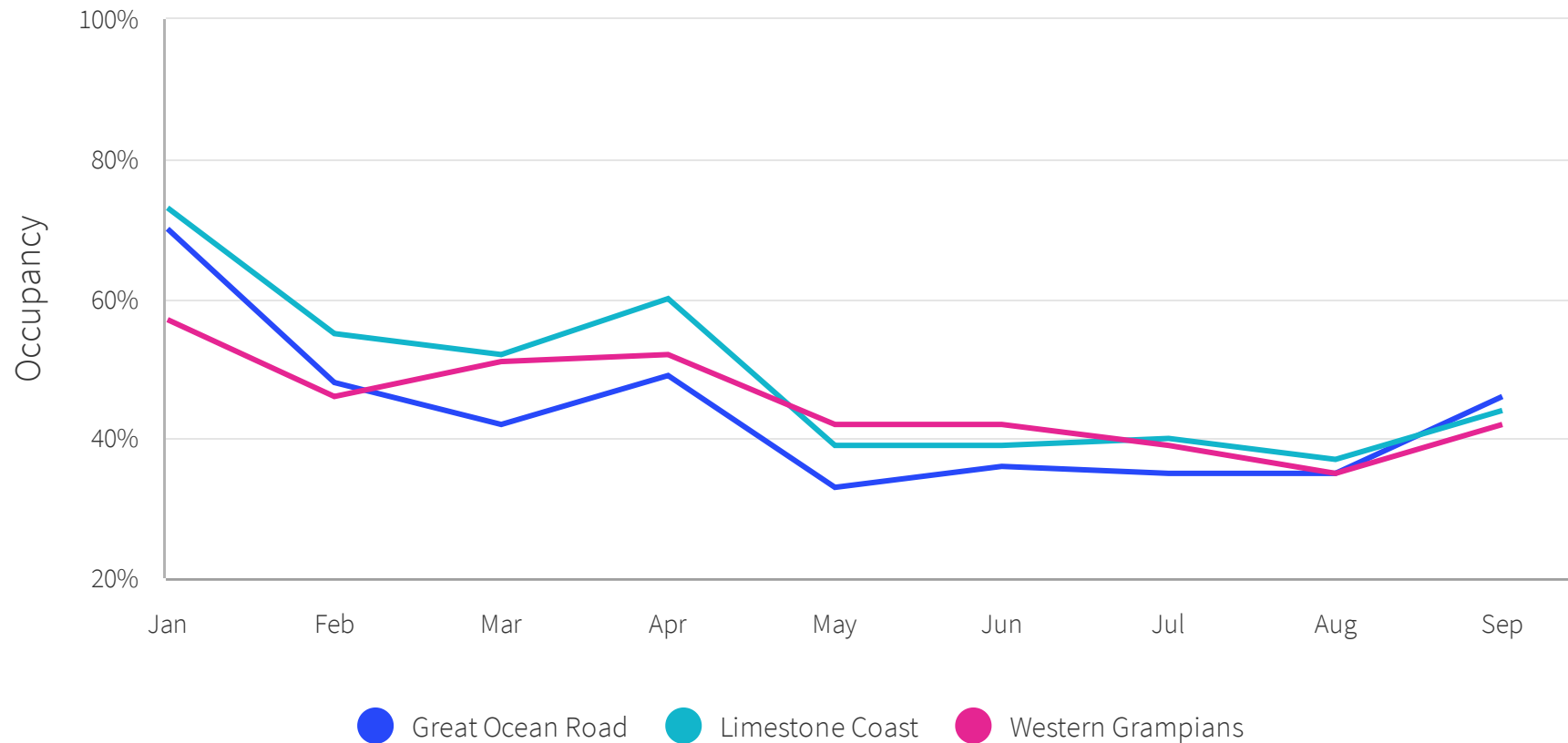
Accommodation Data

INSIGHT

Limestone Coast's monthly average occupancy level for September 2023 was 44%, which is a 12% decrease compared to last year in September 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.



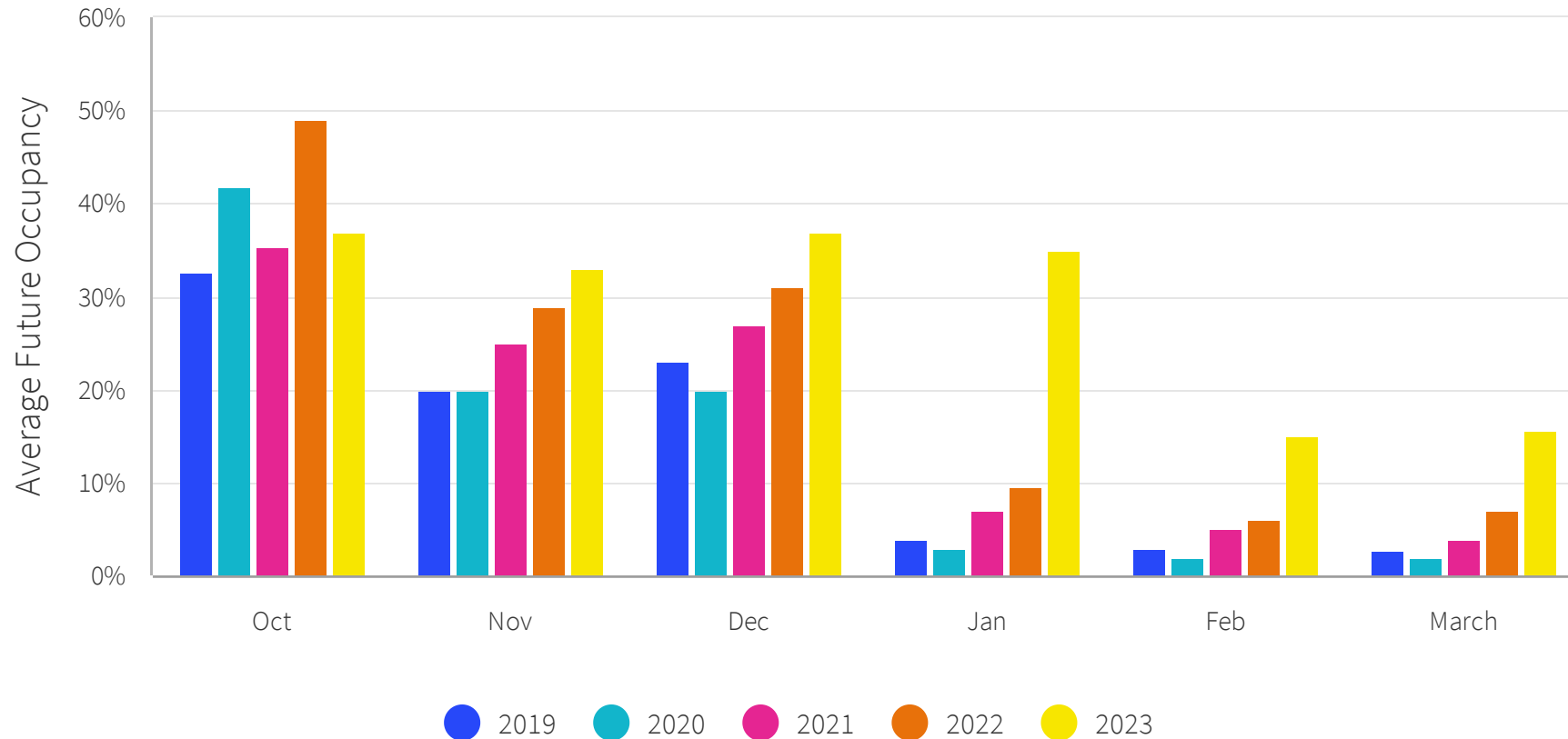
Accommodation Data

INSIGHT

Great Ocean Road had a marginally higher occupancy level for the month of September when compared to neighbouring regions.

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 previous years.



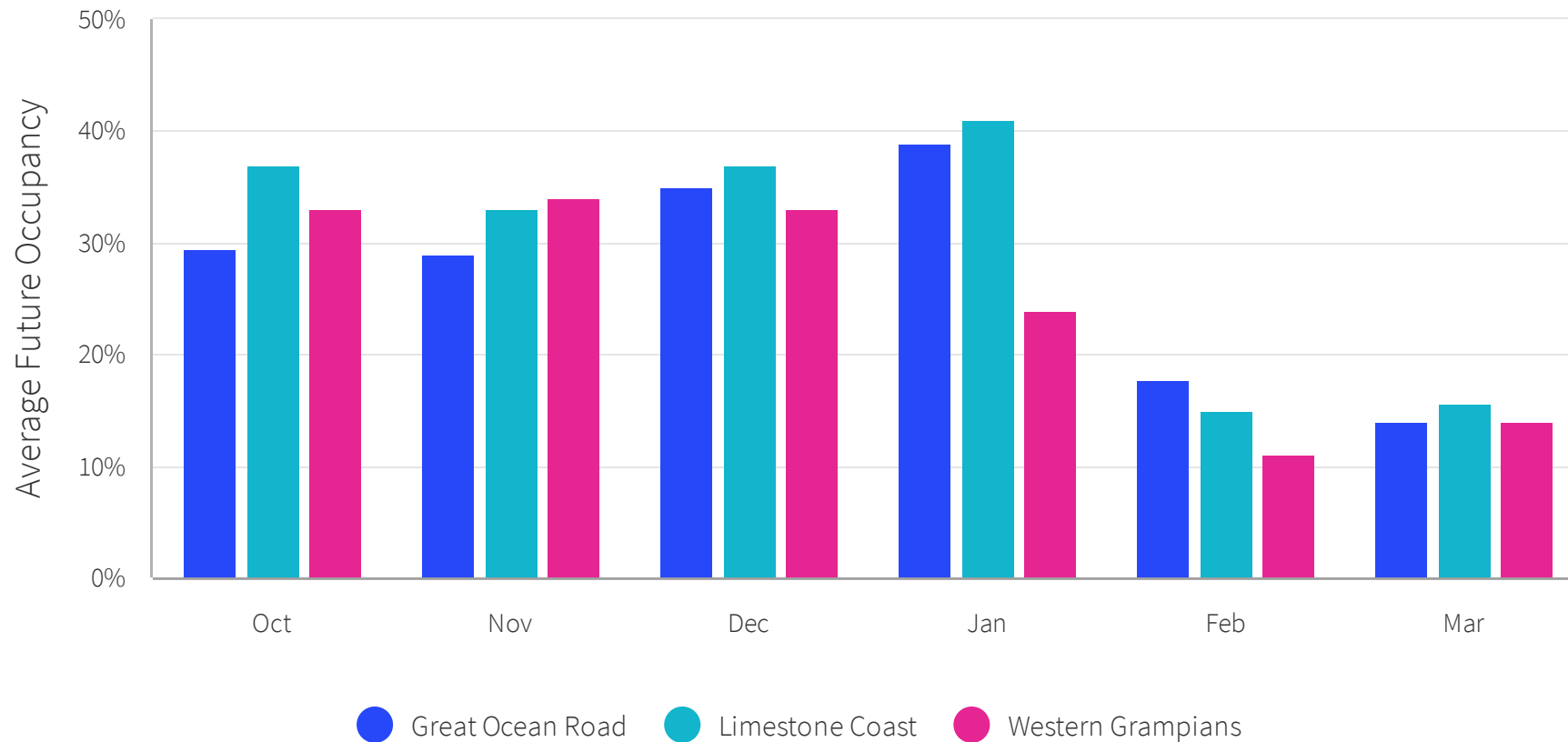
Accommodation Data

INSIGHT

October 2023 future occupancy is projected to be 37% which is a decrease of 25% when compared to October 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 previous years.



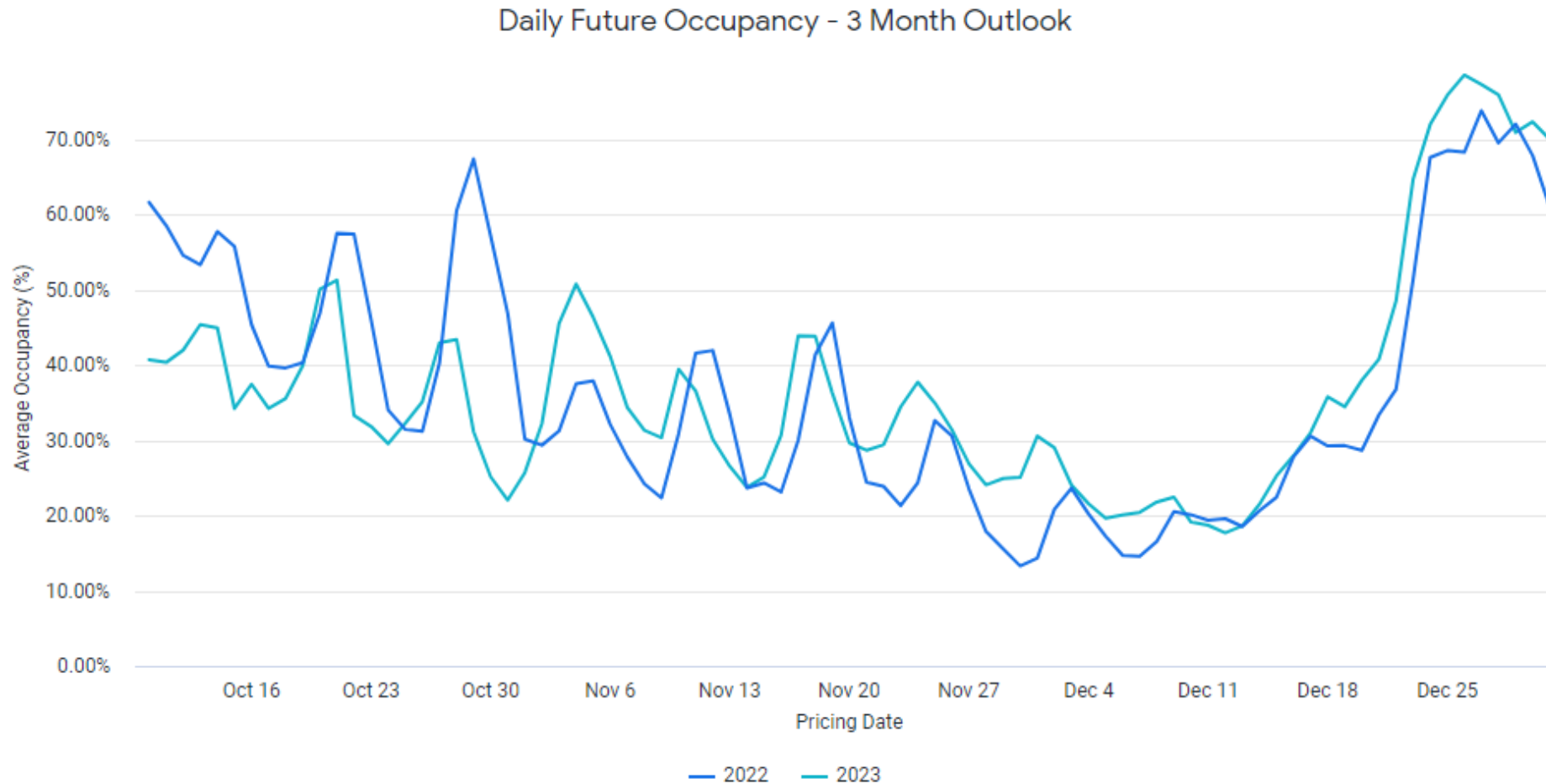
Accommodation Data

INSIGHT

According to projections, the Limestone coast is expected to have the highest occupancy rate amongst its neighbouring regions for the next four months, with Great Ocean Road expected to take over for February.

Daily Future Occupancy - 3 Month Outlook

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



Accommodation Data

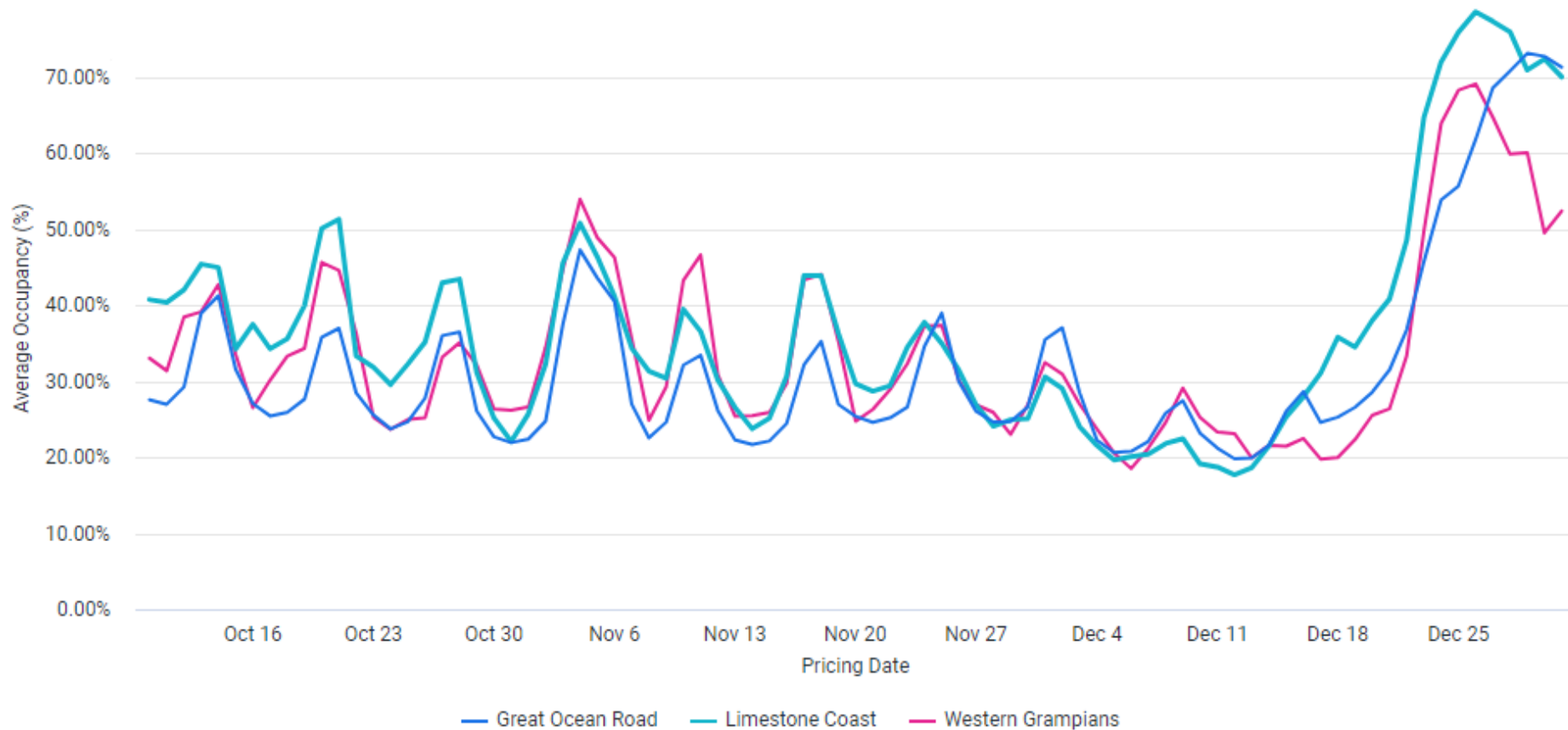
INSIGHT

The projected occupancy rates for October 2023 are expected to track lower than that of 2022 until mid-November. The Future Occupancy projects a busier November and December than 2022

Daily Future Occupancy - Region Comparison

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

Daily Future Occupancy - Region Comparison



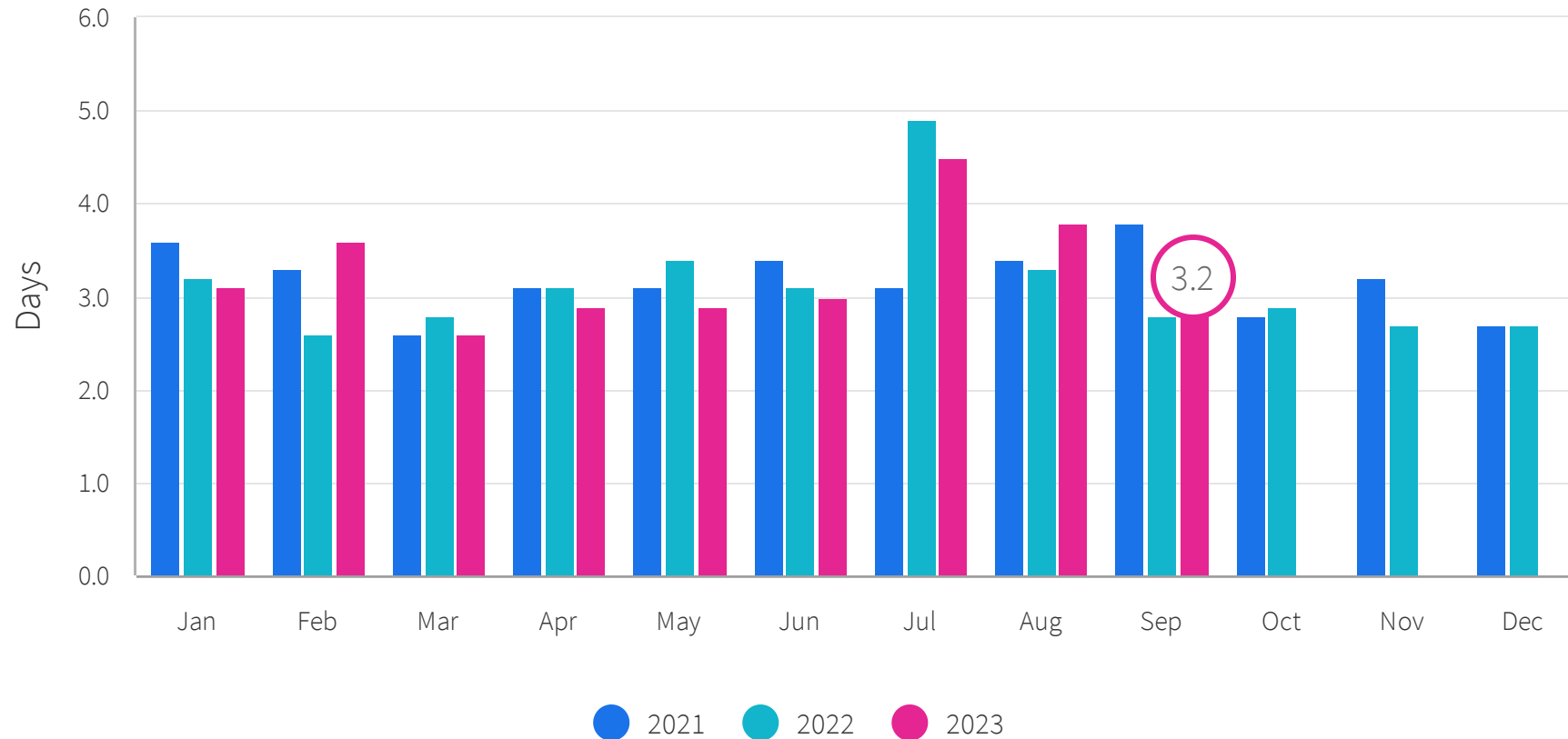
Accommodation Data

INSIGHT

Limestone Coast has the highest projected occupancy for the remainder of the year, with a dip in early November where Western Grampians currently sits higher.

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.



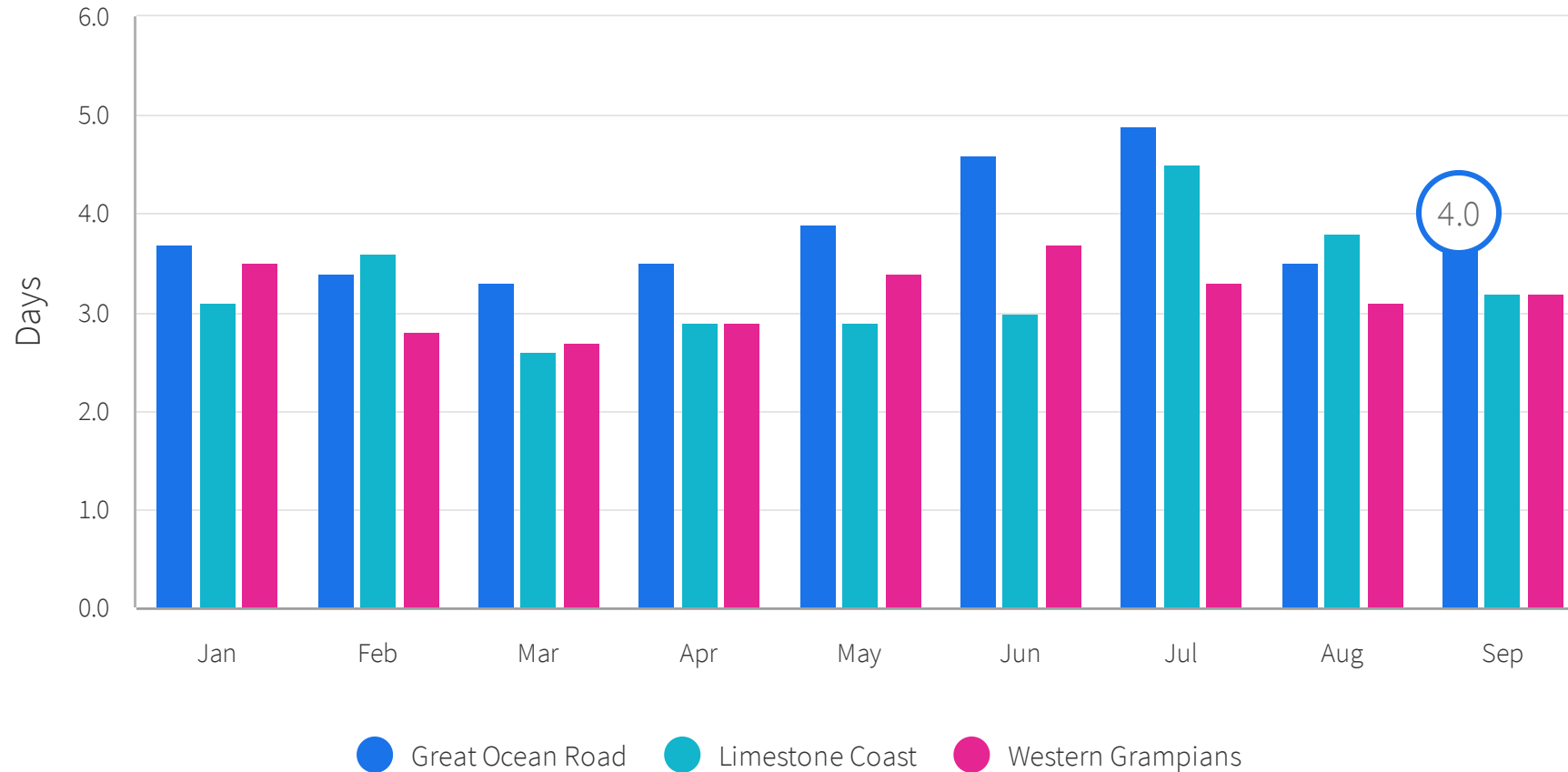
Accommodation Data

INSIGHT

Length of stay in September 2023 was 3.2 days which is a 15% increase compared to September 2022.

Length of Stay - Region Comparison

Length of stay is the amount of time that was booked at the accommodation.



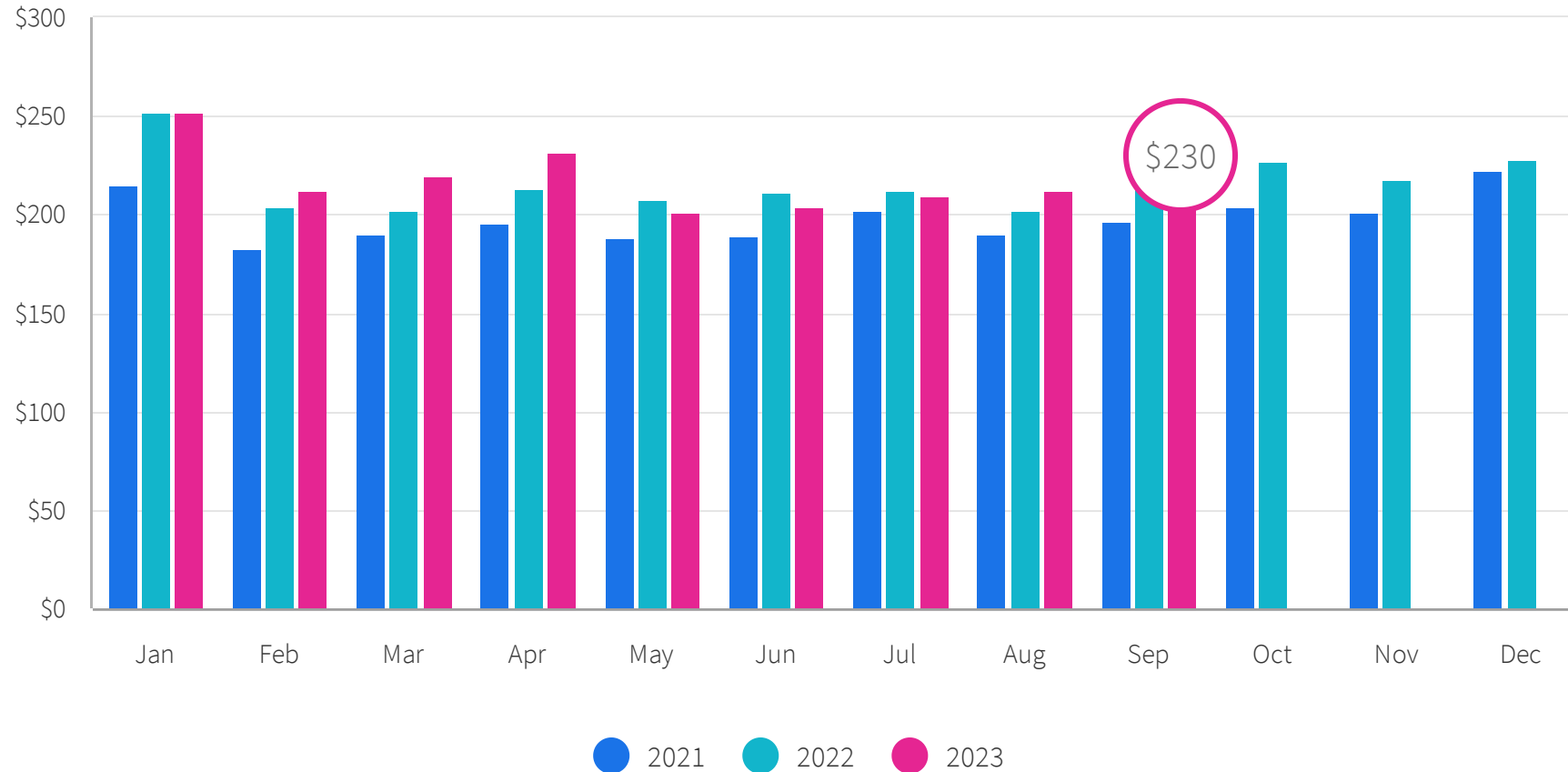
Accommodation Data

INSIGHT

Great Ocean Road had the highest length of stay in September. Both other regions trailed with 3.2 days, a difference of 20%.

Average Daily Rate

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



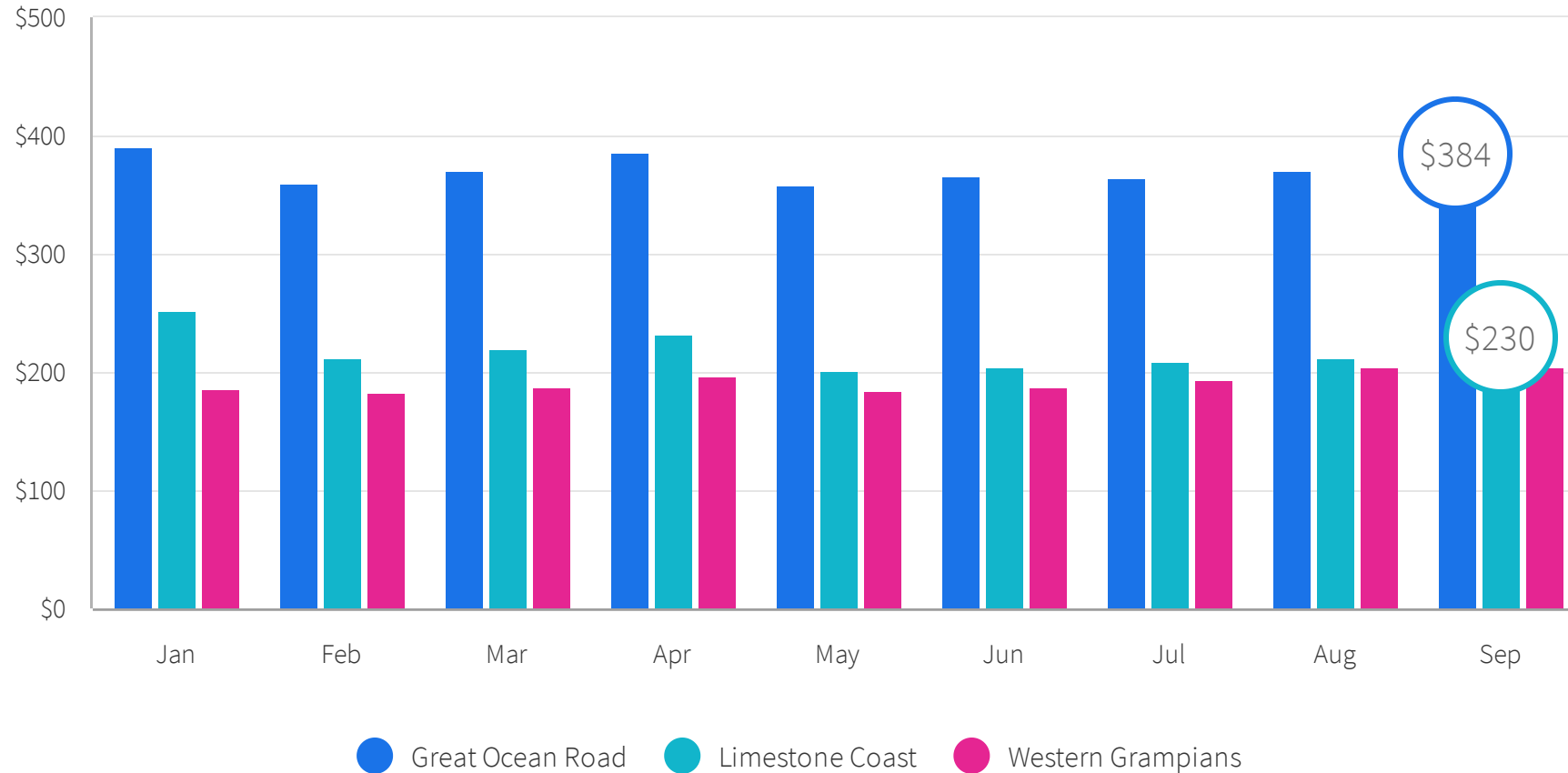
Accommodation Data

INSIGHT

Average daily rate for September 2023 was \$230, which is a 3.7% increase when compared to September 2022.

Average Daily Rate - Region Comparison

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



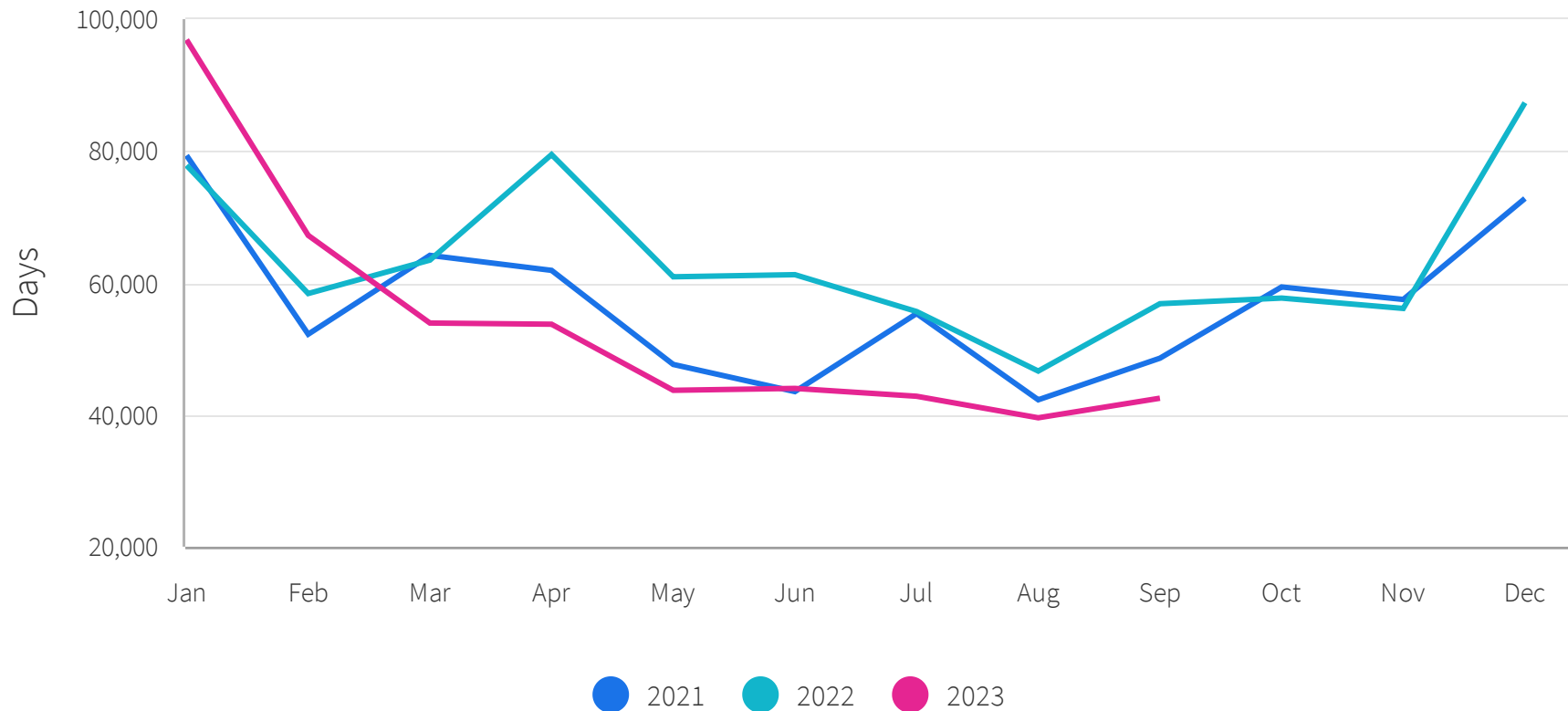
Accommodation Data

INSIGHT

Great Ocean Road had the highest ADR in the month of September 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.



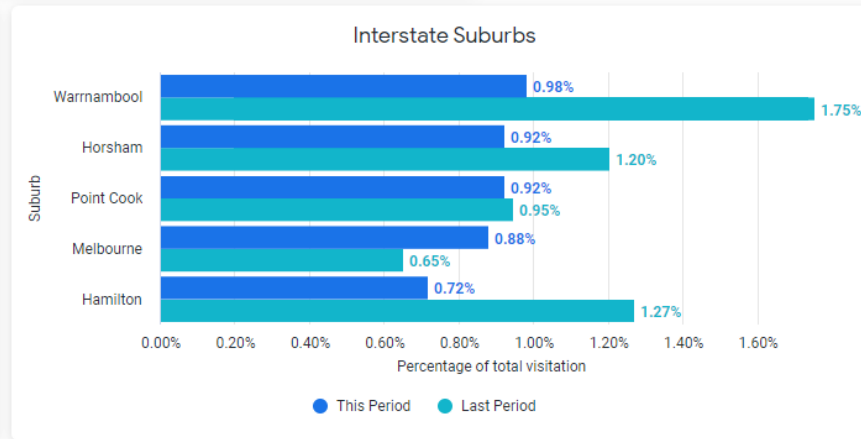
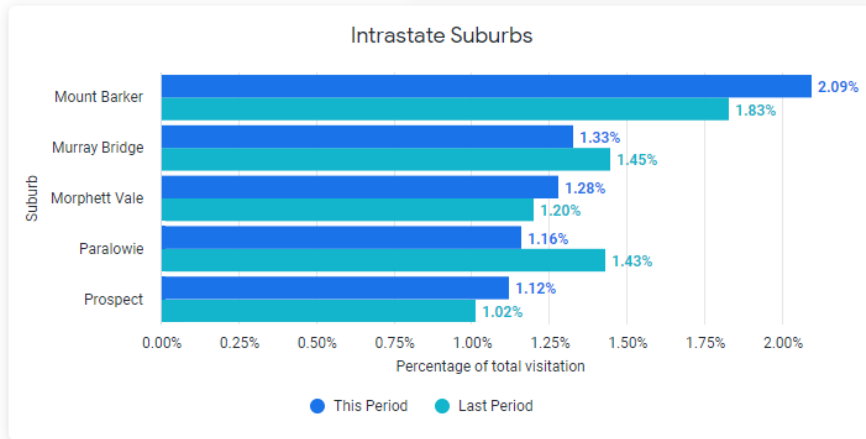
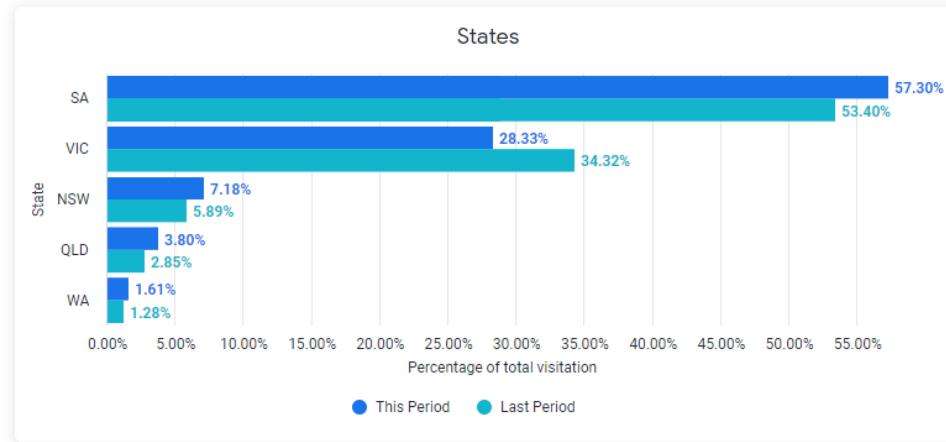
Accommodation Data, TRA and Mobility Data

INSIGHT

September 2023 had approximately 42,520 overnight visitors which is a decrease of 25% compared to September 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

September 2022 vs September 2023

Interstate visitation for the month of September 2023 was 42.7% which is a 7% increase when compared to September 2022.

Mount Barker had the highest intrastate visitation at 2.09%, a 14% increase compared to September 2022.

Warnambool was the biggest interstate suburb source market at 0.98%, which was a 44% decrease year on year.