



Limestone Coast Tourism - Monthly Report

November 2023

Data Sources



The accommodation data in this report is sourced from various sharing economy platforms in the Limestone Coast, such as AirBNB, Booking.com, Tripadvisor and Stayz. The accommodation supply from these booking platforms is 855 unique listings , providing an estimated capacity of 5,047 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:

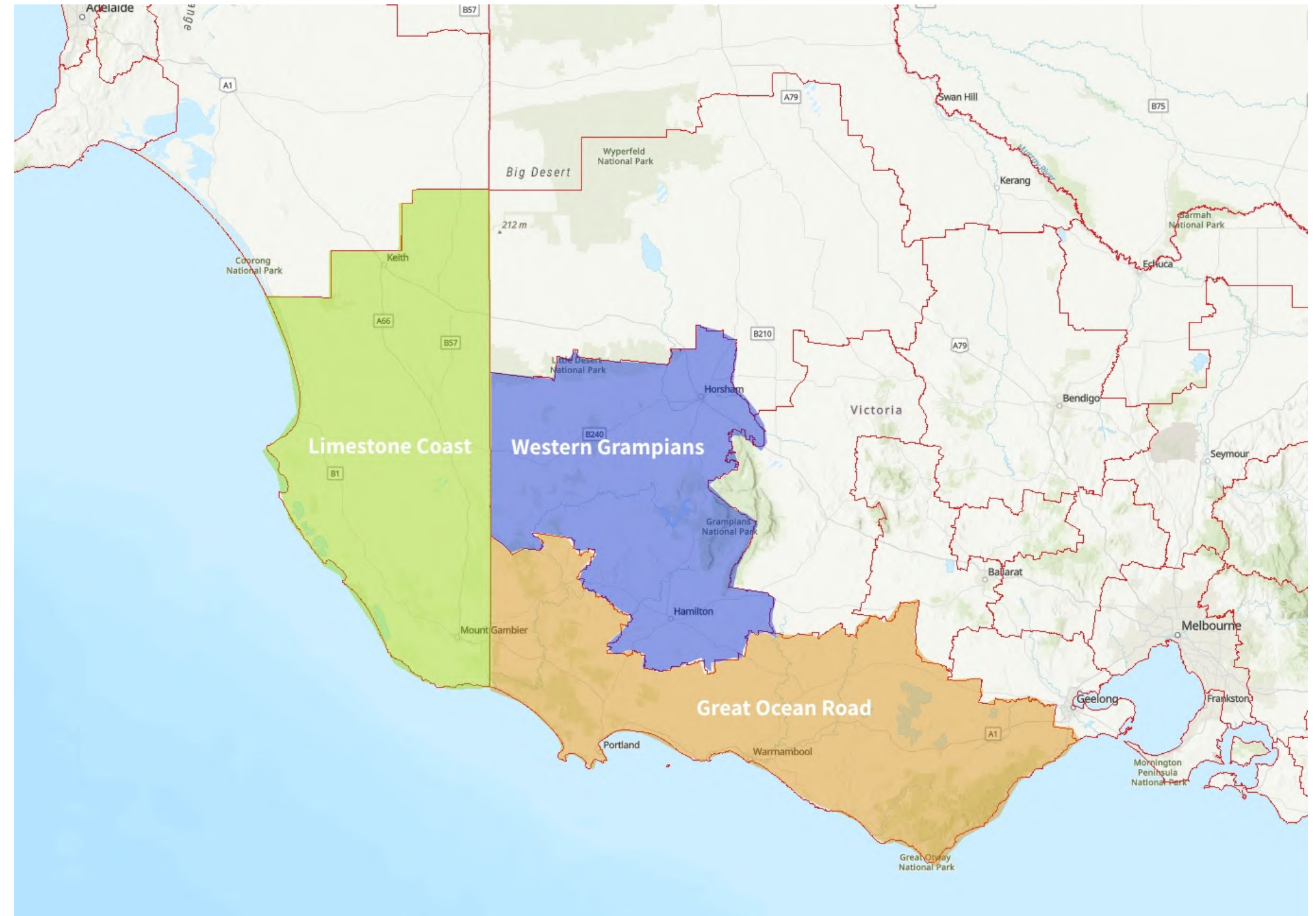
West Wimmera Shire,
Southern Grampians Shire,
Horsham Rural City

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



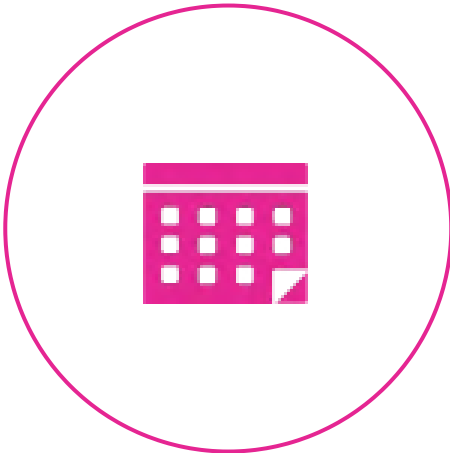
Key Points from November 2023



Limestone Coast's monthly average occupancy rate for November 2023 was 45%, which is a 13.5% decrease compared to November 2022.



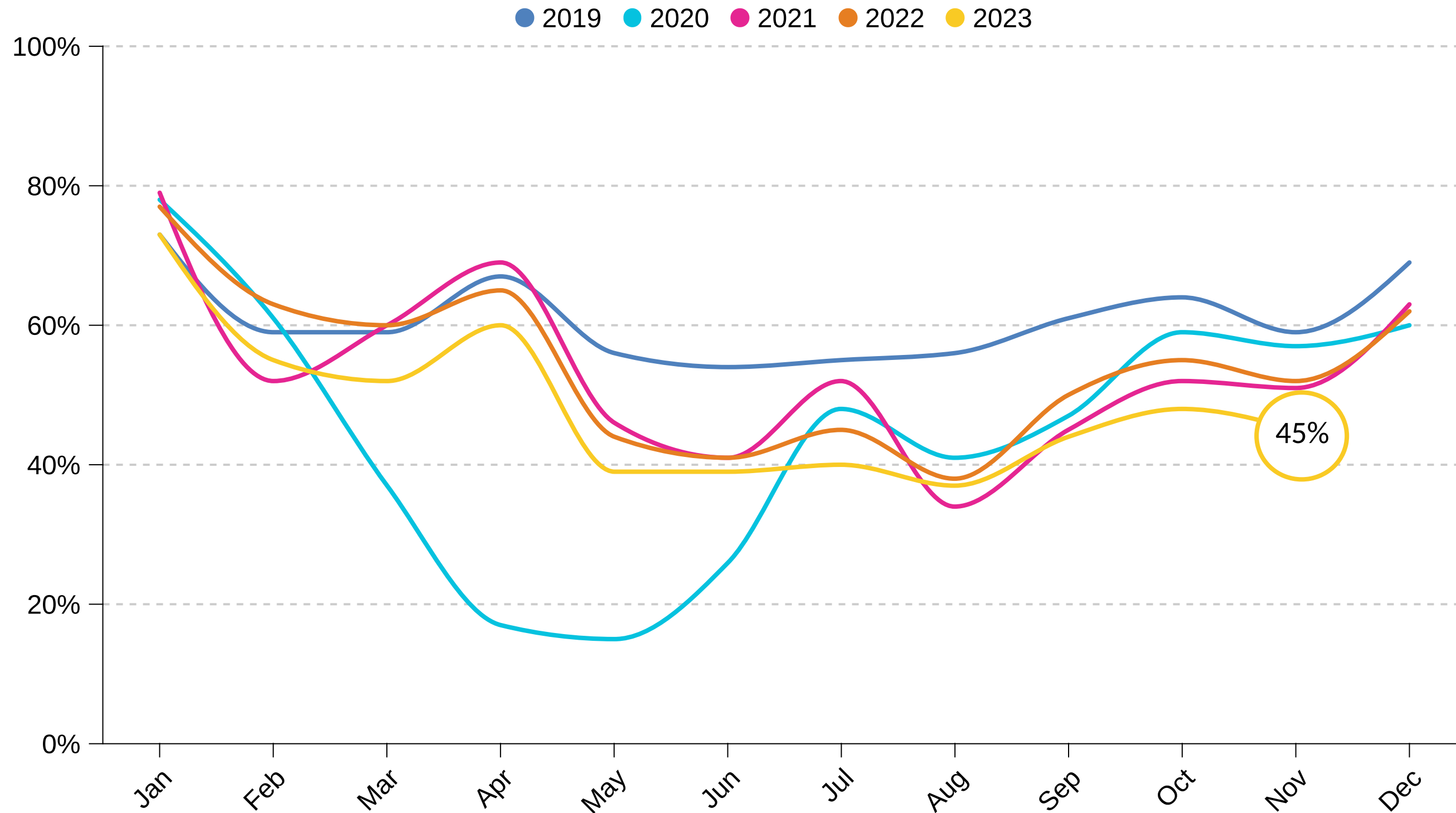
Length of stay in November 2023 was 3.0 days which is a 11% increase compared to November 2022.



December 2023 future occupancy is projected to be 52% which is a decrease of 11% when compared to December 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.



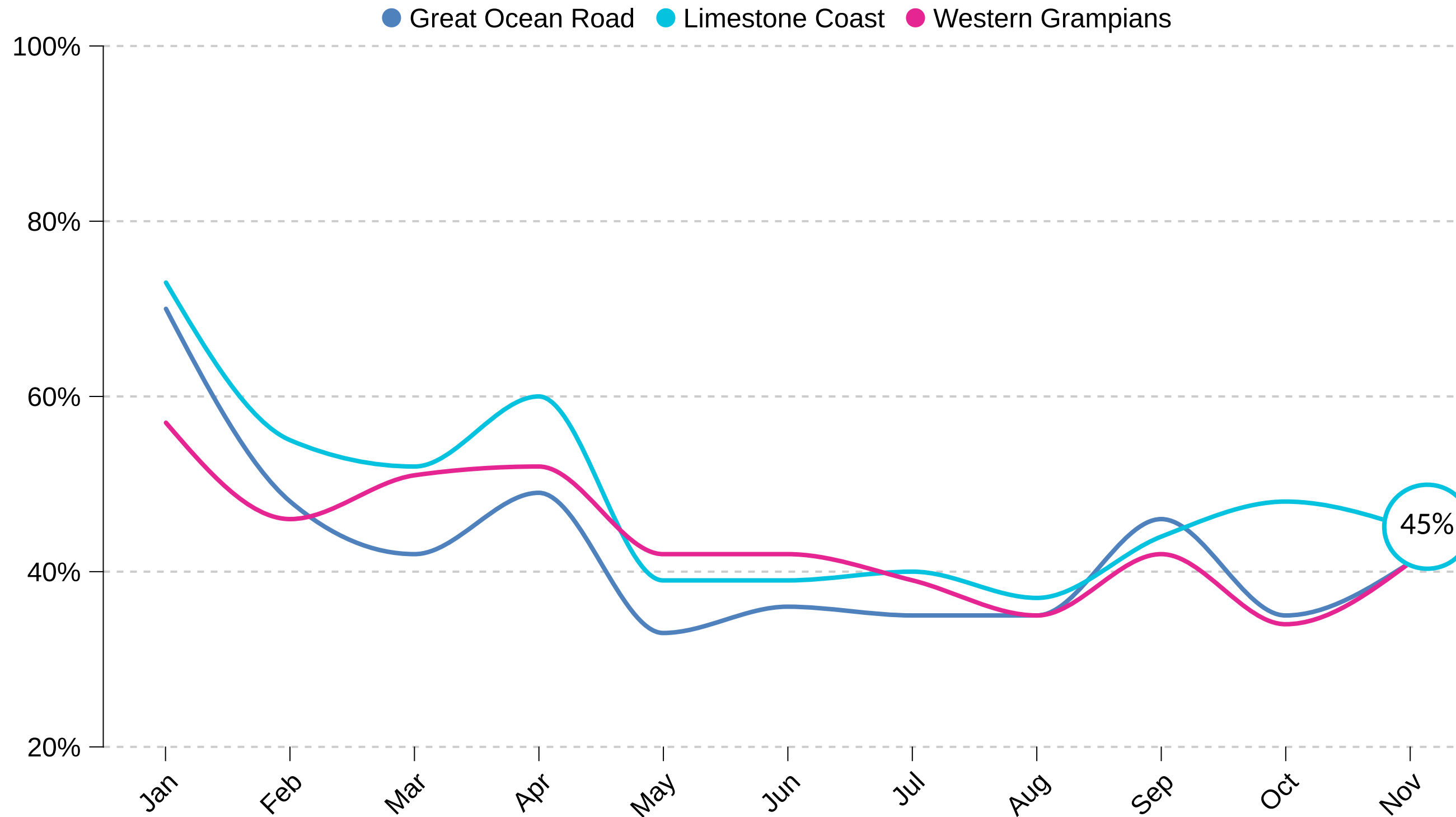
Accommodation Data

INSIGHT

Limestone Coast's monthly average occupancy rate for November 2023 was 45%, which is a 13.5% decrease compared to November 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.



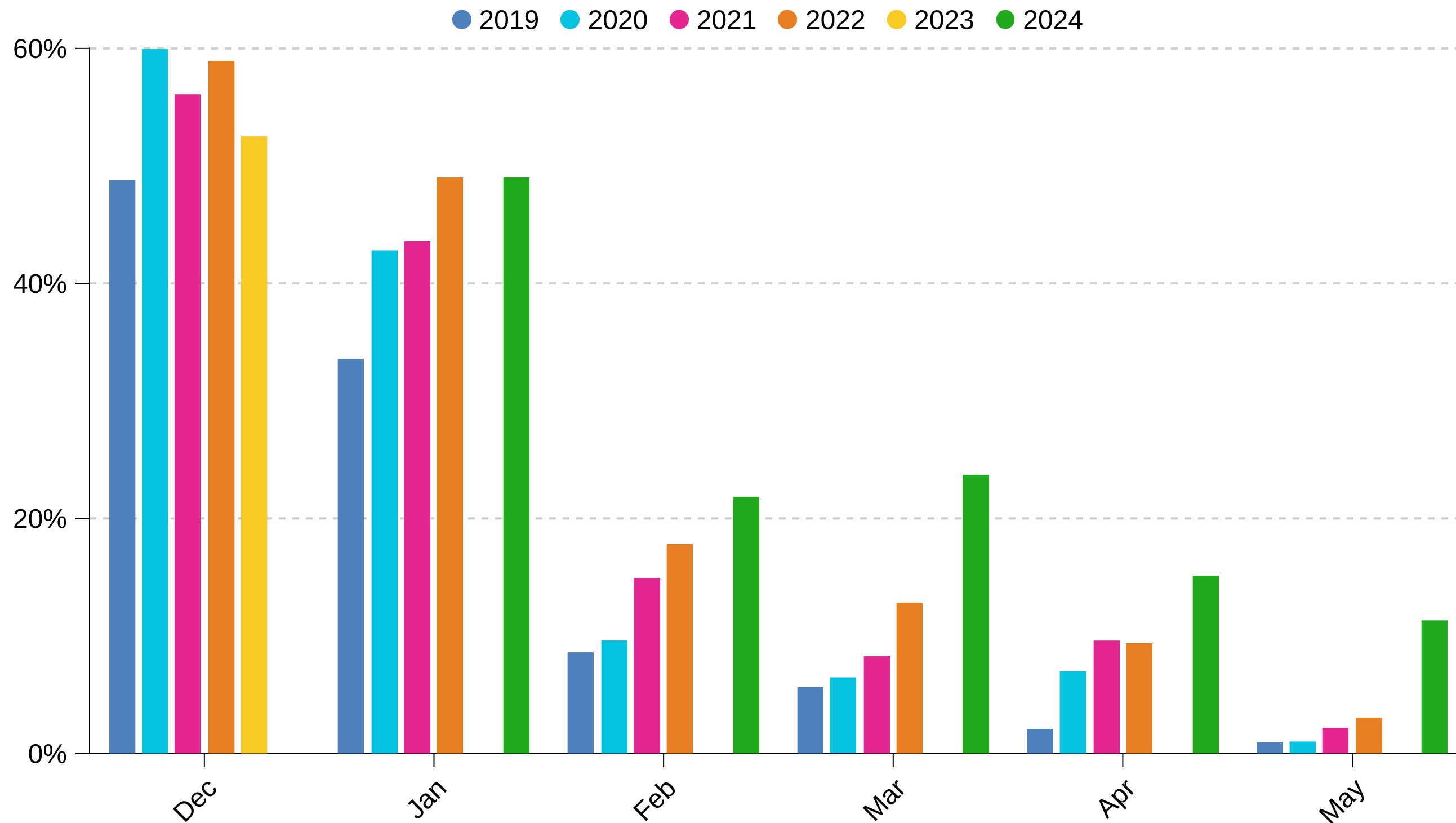
Accommodation Data

INSIGHT

Limestone Coast had a higher occupancy level for the month of November 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.



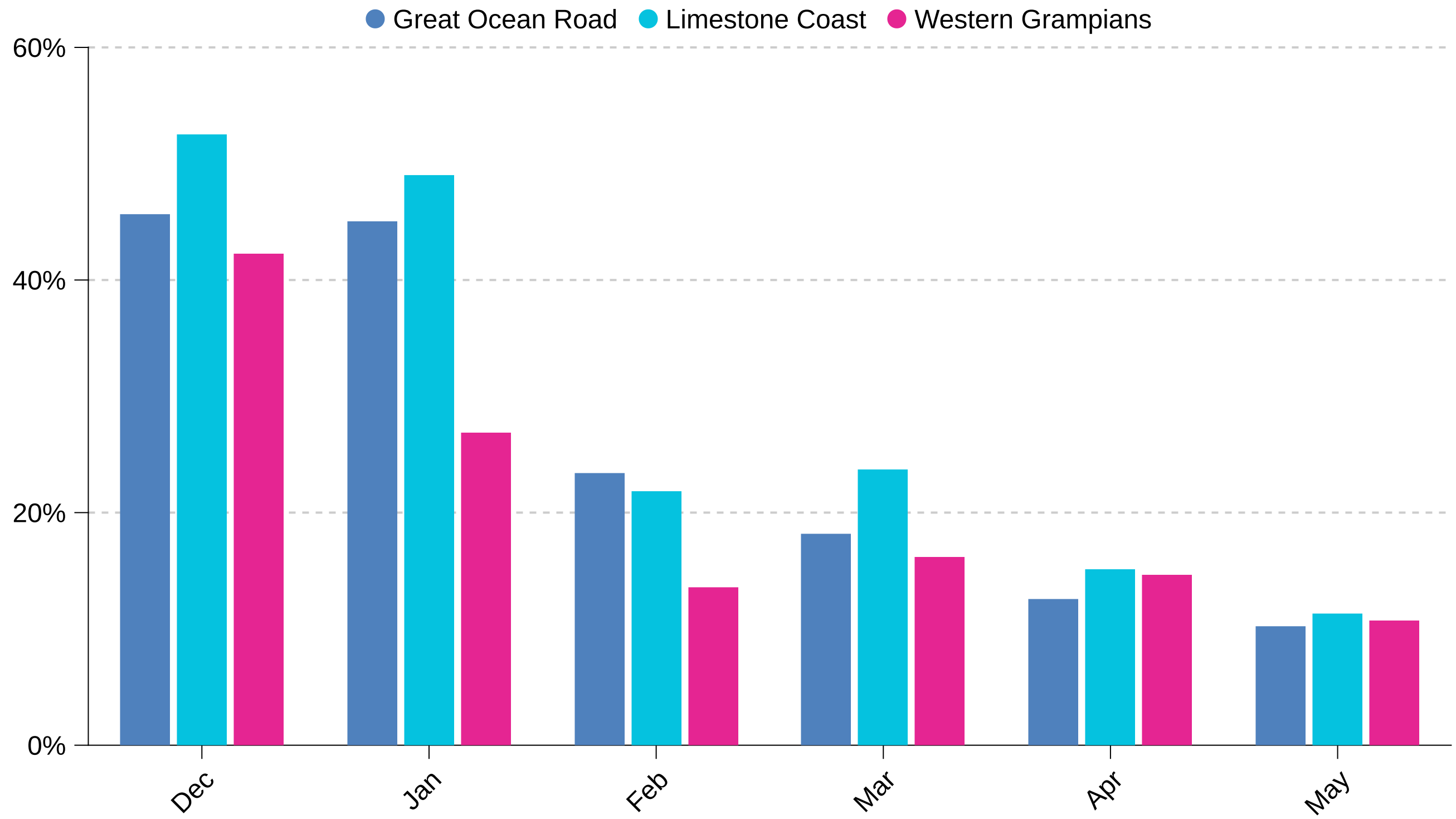
Accommodation Data

INSIGHT

December 2023 future occupancy is projected to be 52% which is a decrease of 11% when compared to December 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.



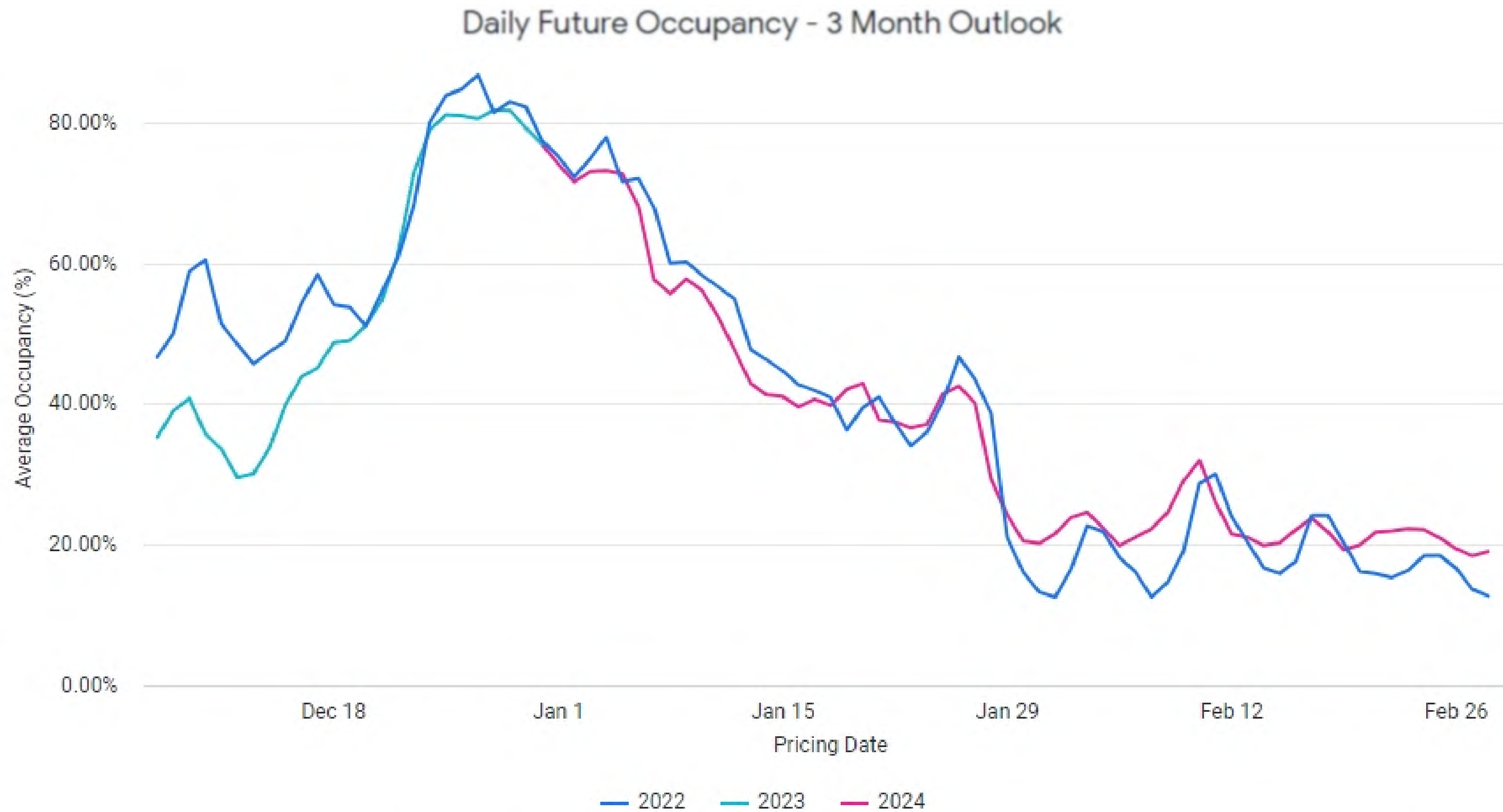
Accommodation Data

INSIGHT

According to projections, the Limestone coast is expected to have the highest occupancy rate amongst its neighbouring regions for December and January, 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

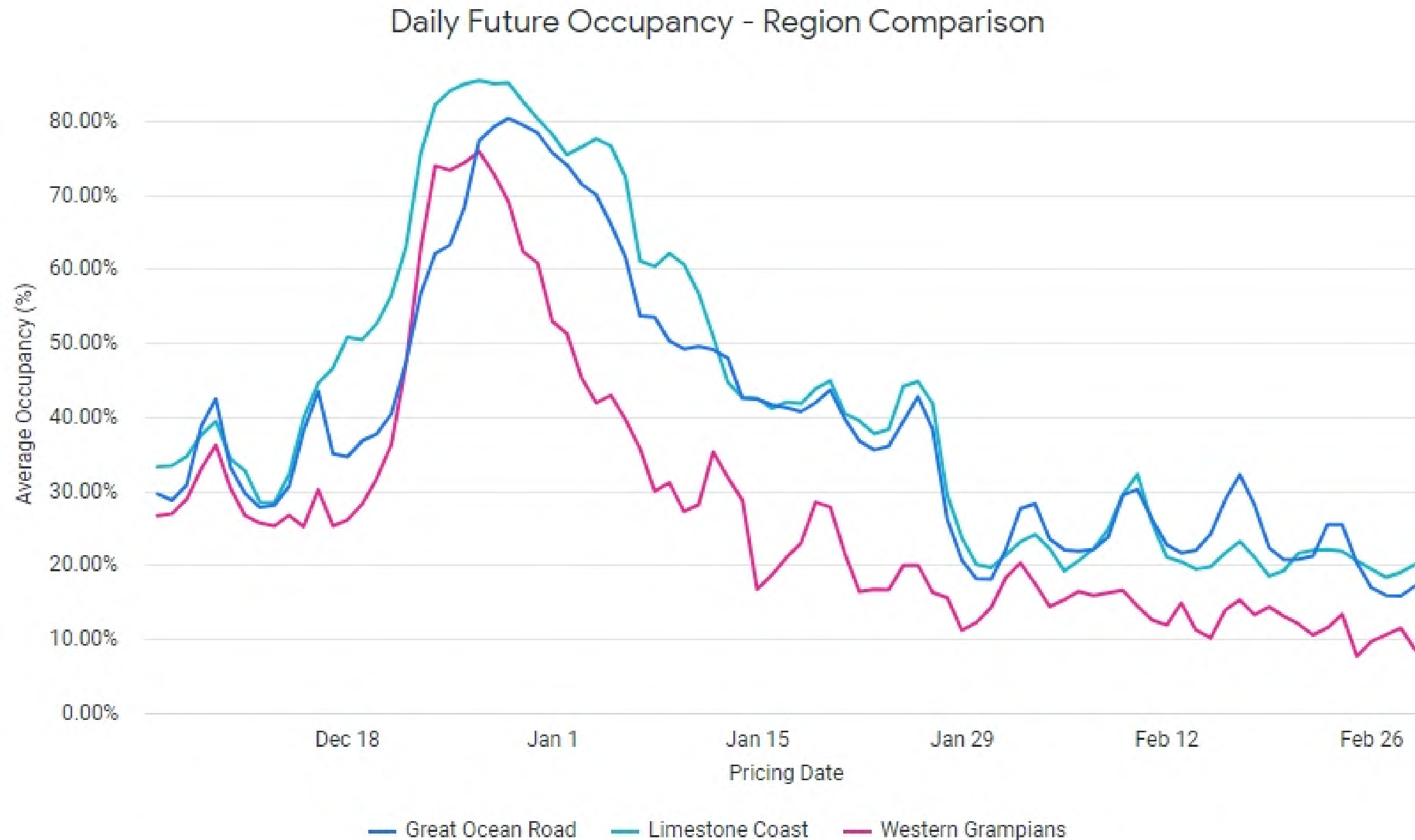
INSIGHT

Limestone Coast's Future Occupancy is showing a lower start to December, and a spike towards the Christmas and New Years Period (Dec 24th to Jan 2nd)

Average Future Occupancy for the Christmas and New Years period 2023 was 82.3%, a decrease of 1.1% when compared to 2022

Daily Future Occupancy - Region Comparison

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



Accommodation Data

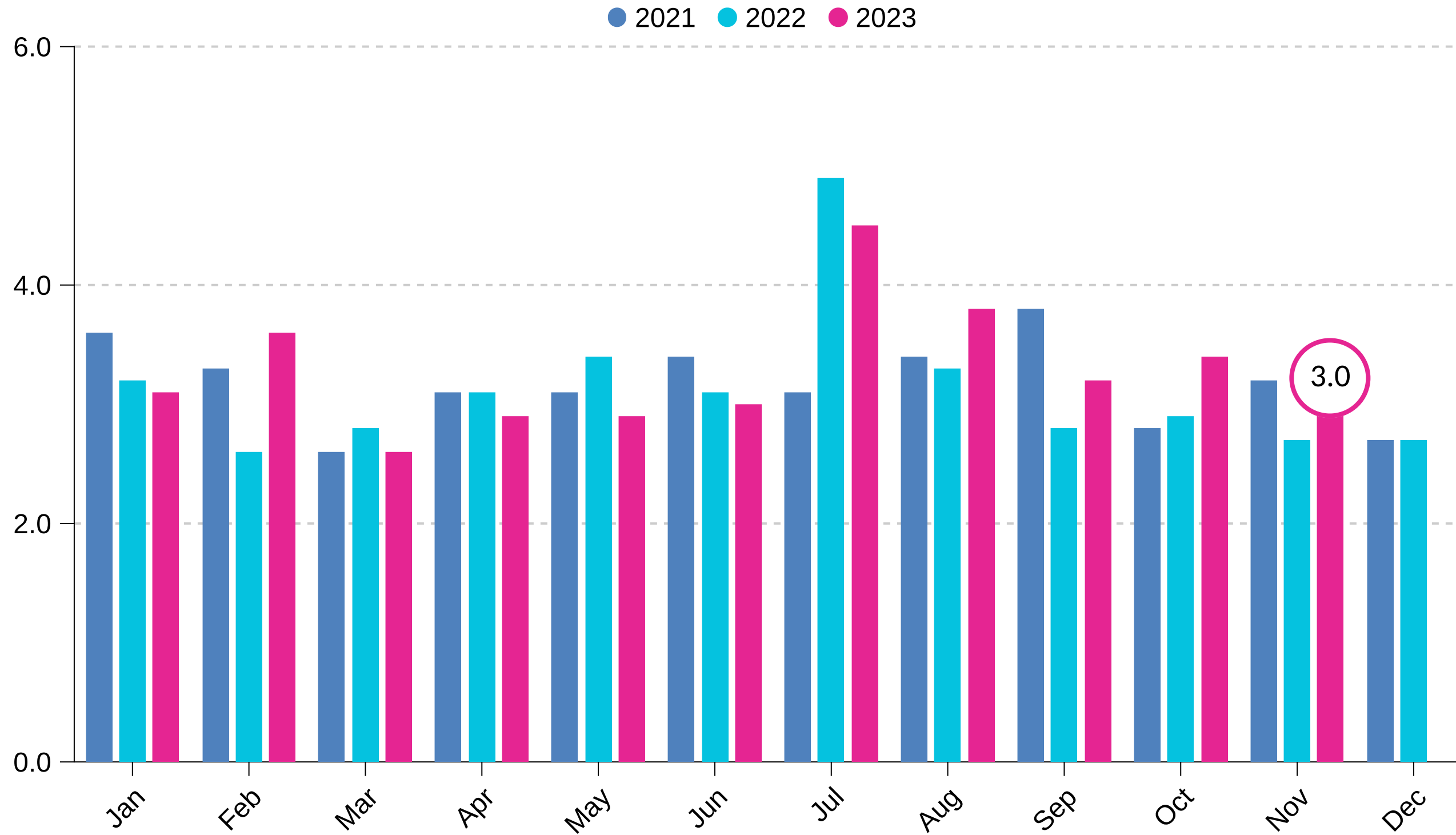
INSIGHT

Limestone Coast has the highest projected occupancy for the Christmas and New Years period.

Western Grampians has a spike overtaking Great Ocean Road for Christmas, while Great Ocean Road moves ahead of Western Grampians for the New Years period.

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.



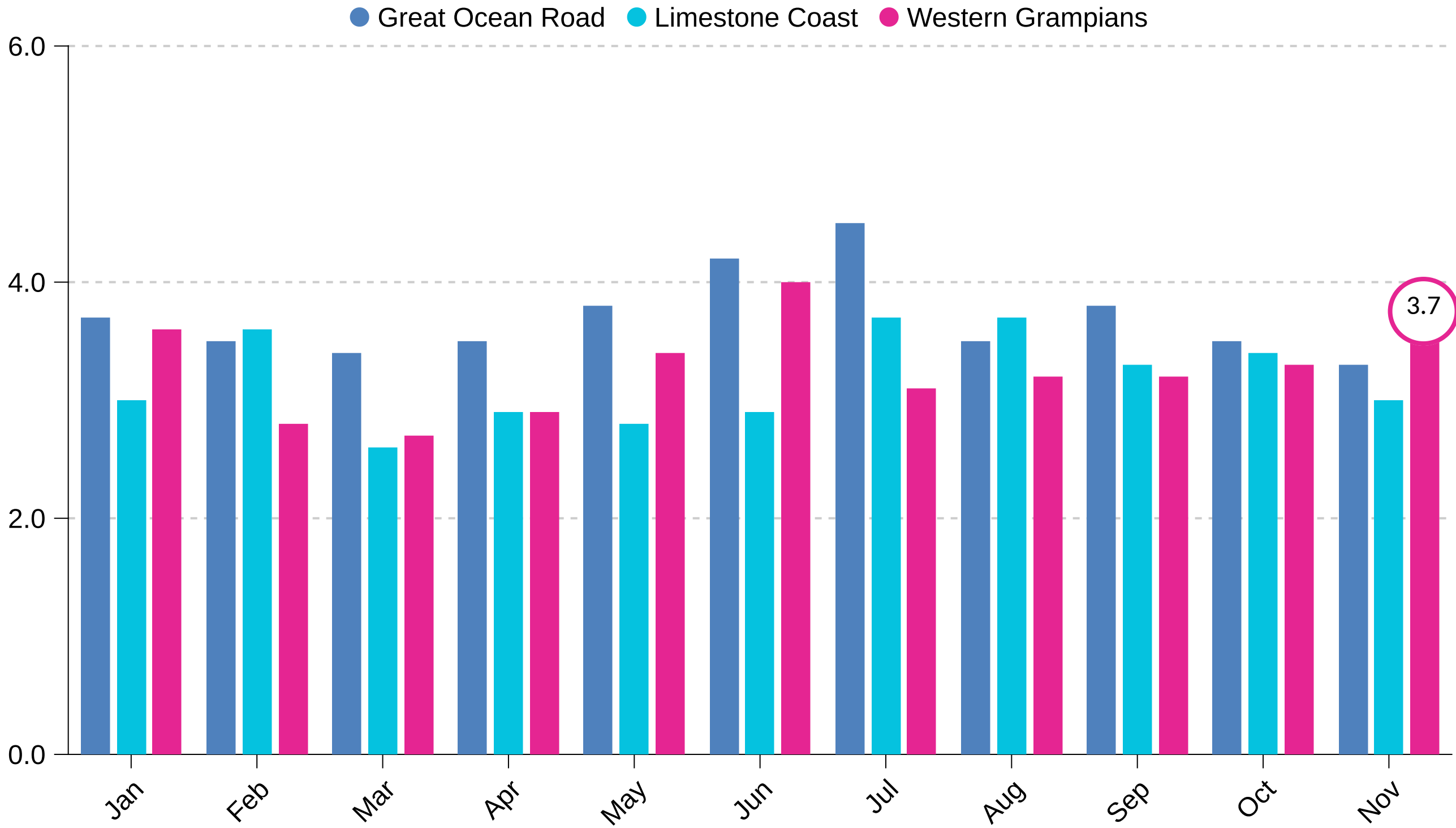
Accommodation Data

INSIGHT

Length of stay in November 2023 was 3.0 days which is a 11% increase compared to November 2022.

Length of Stay - Region Comparison

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



Accommodation Data

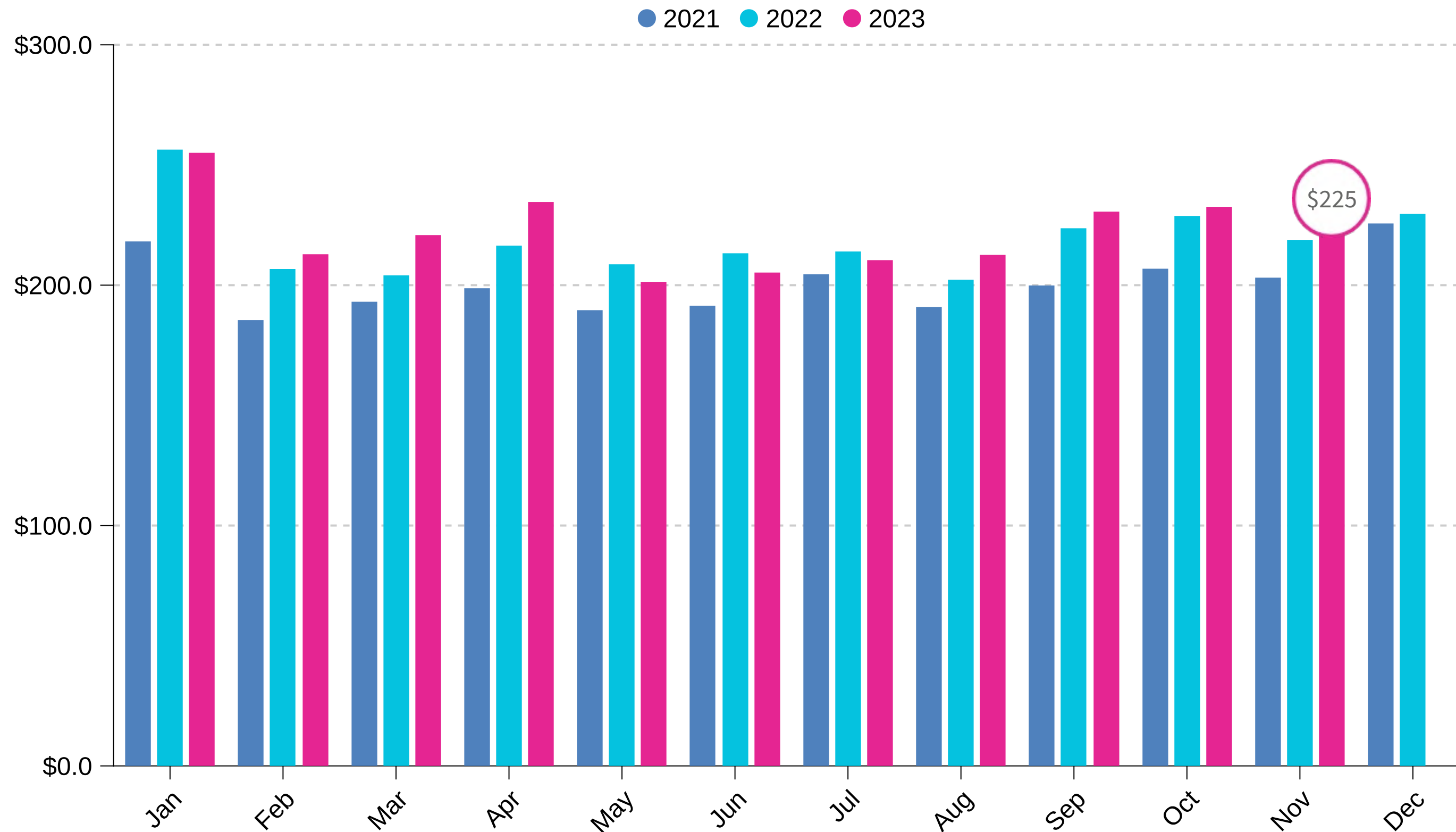
INSIGHT

Western Grampians had the highest length of stay in November.

Limestone Coast trailed with 3.0 days, a difference of 19% to Western Grampians

Average Daily Rate

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



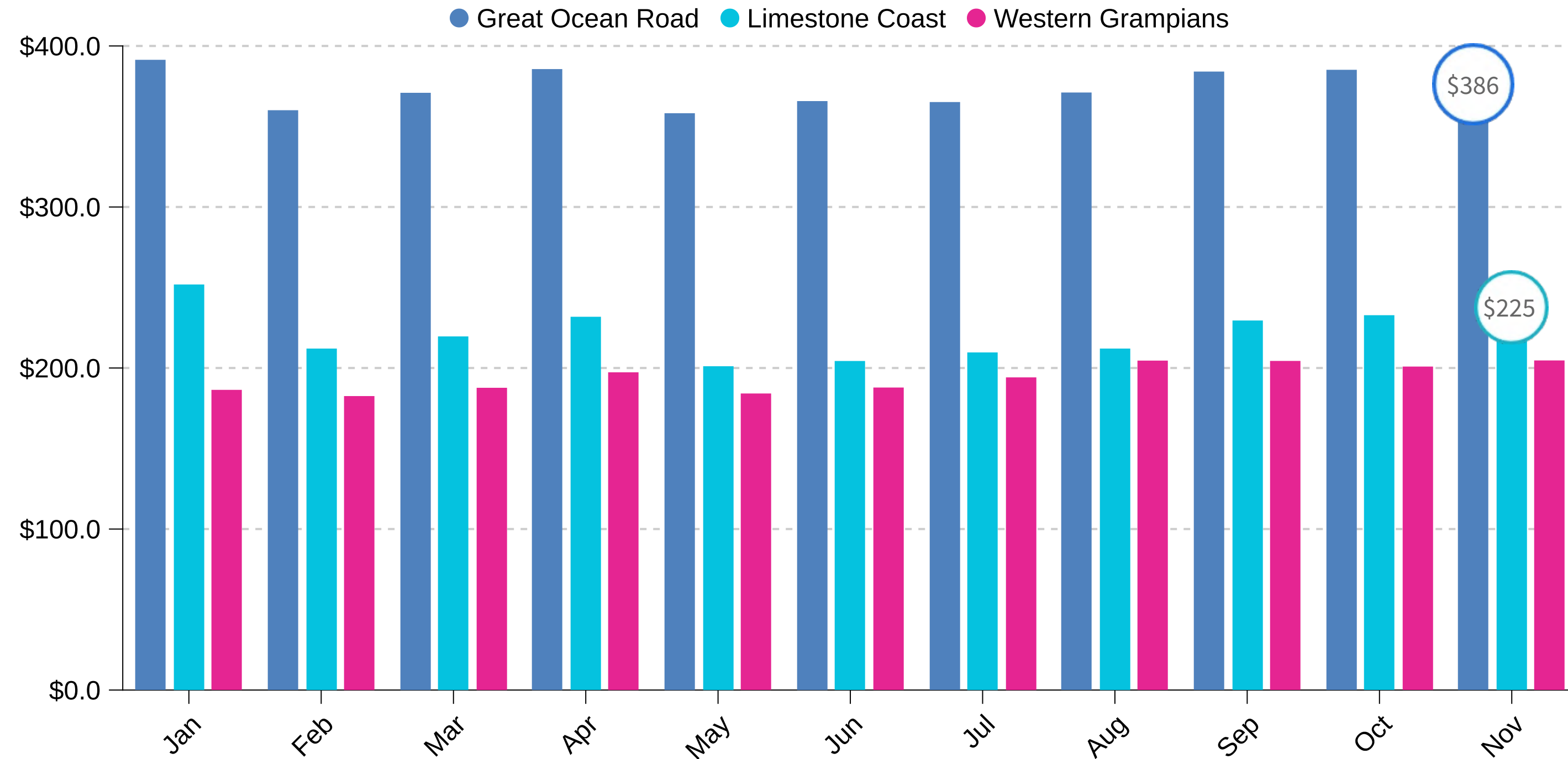
Accommodation Data

INSIGHT

Average daily rate for November 2023 was \$225, which is a 3.2% increase when compared to November 2022.

Average Daily Rate - Region Comparison

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



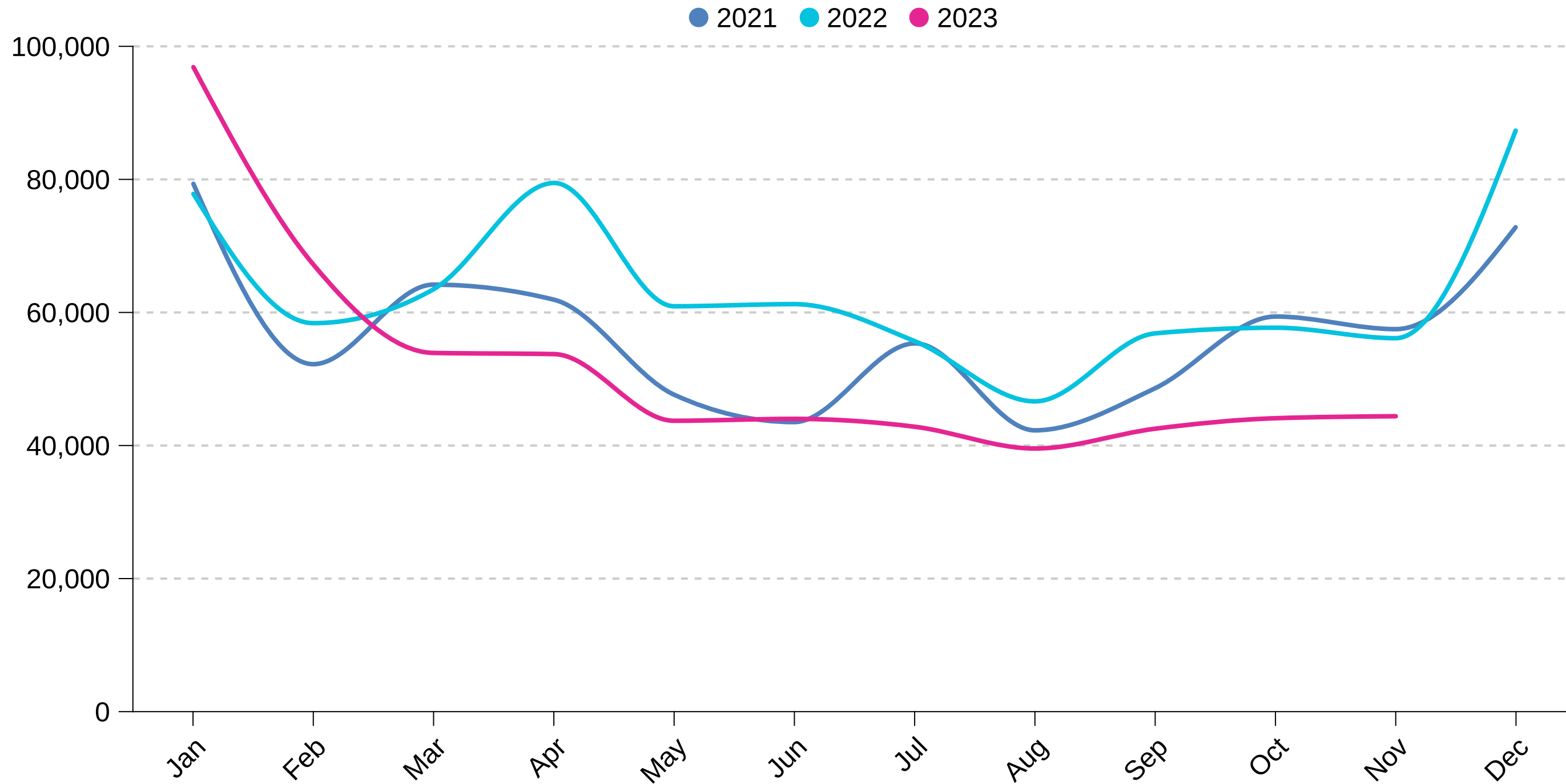
Accommodation Data

INSIGHT

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



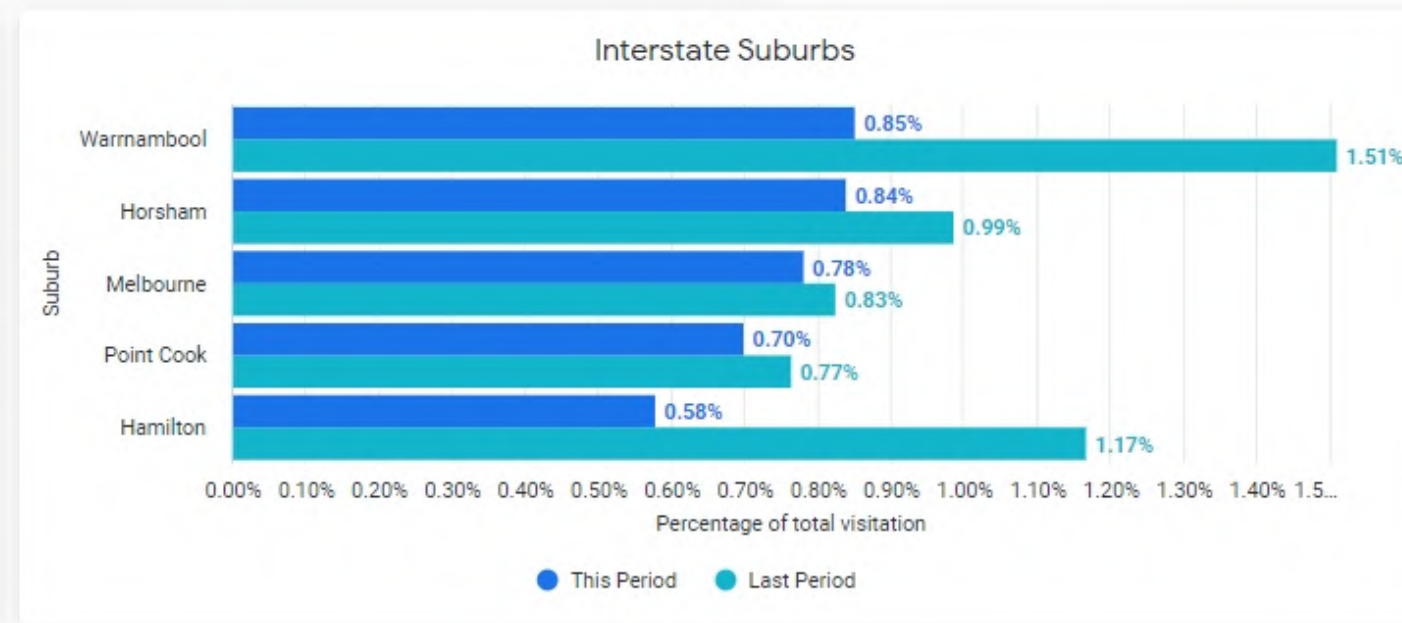
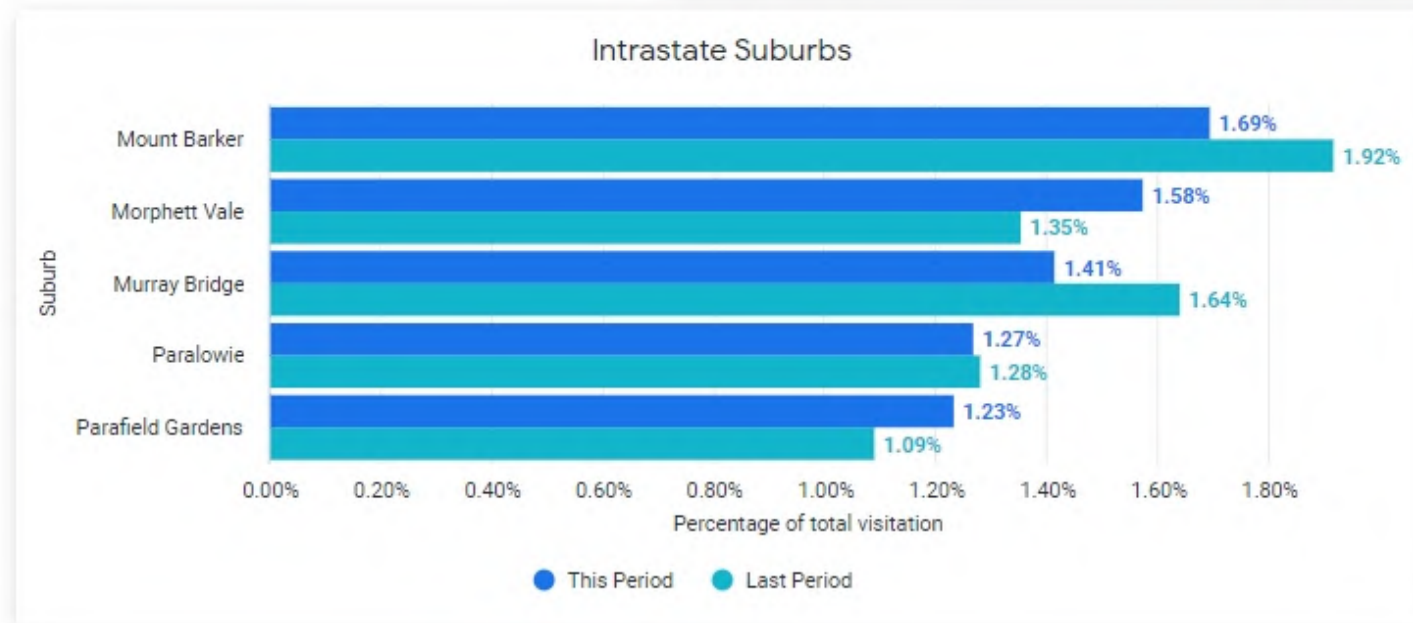
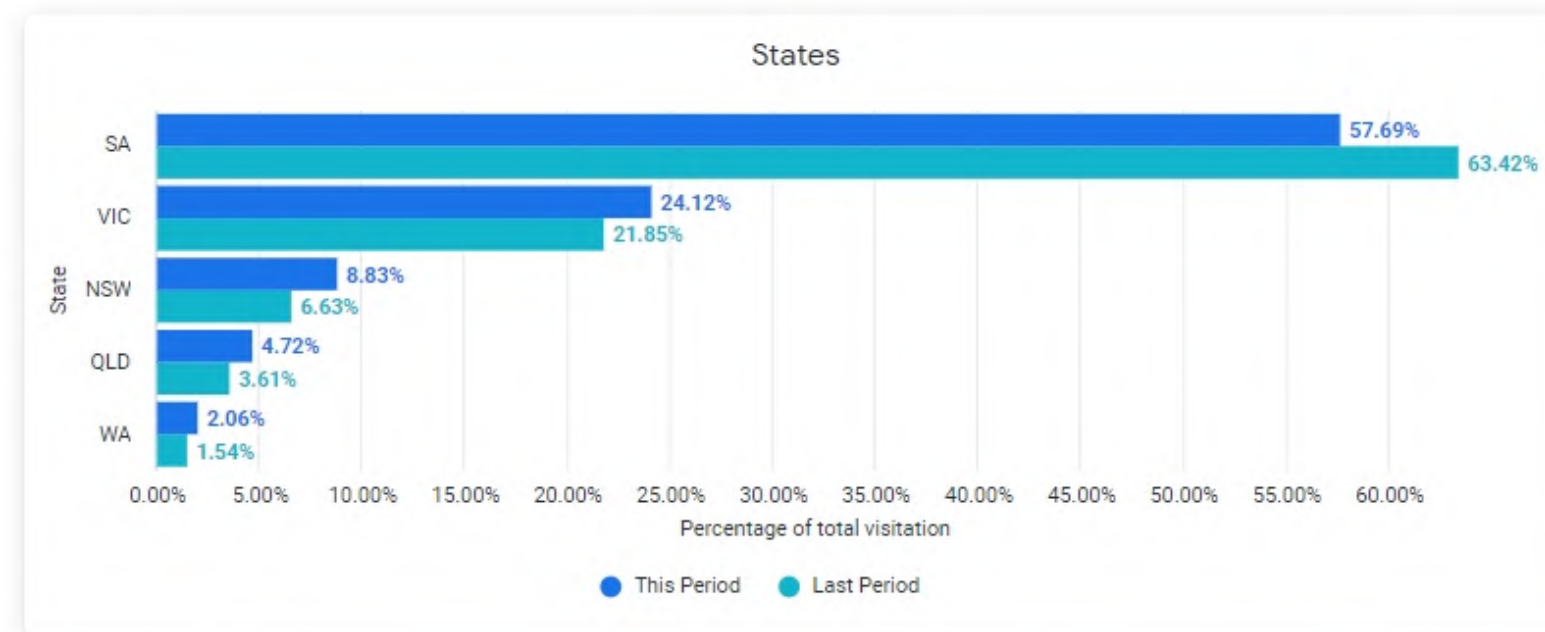
Accommodation Data, TRA and Mobility Data

INSIGHT

November 2023 had approximately 44,402 overnight visitors which is a decrease of 20.8% compared to November 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

November 2022 vs November 2023

Interstate visitation for the month of November 2023 was 42.31% which is a 15.6% increase when compared to November 2022.

Mount Barker had the highest intrastate visitation at 1.69%, a 12% decrease compared to November 2022.

Warrnambool was the biggest interstate suburb source market at 0.85%, which was a 47% decrease year on year.