



Limestone Coast Tourism - Monthly Report

January 2024

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 738 unique listings , providing an estimated capacity of 4,353 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:

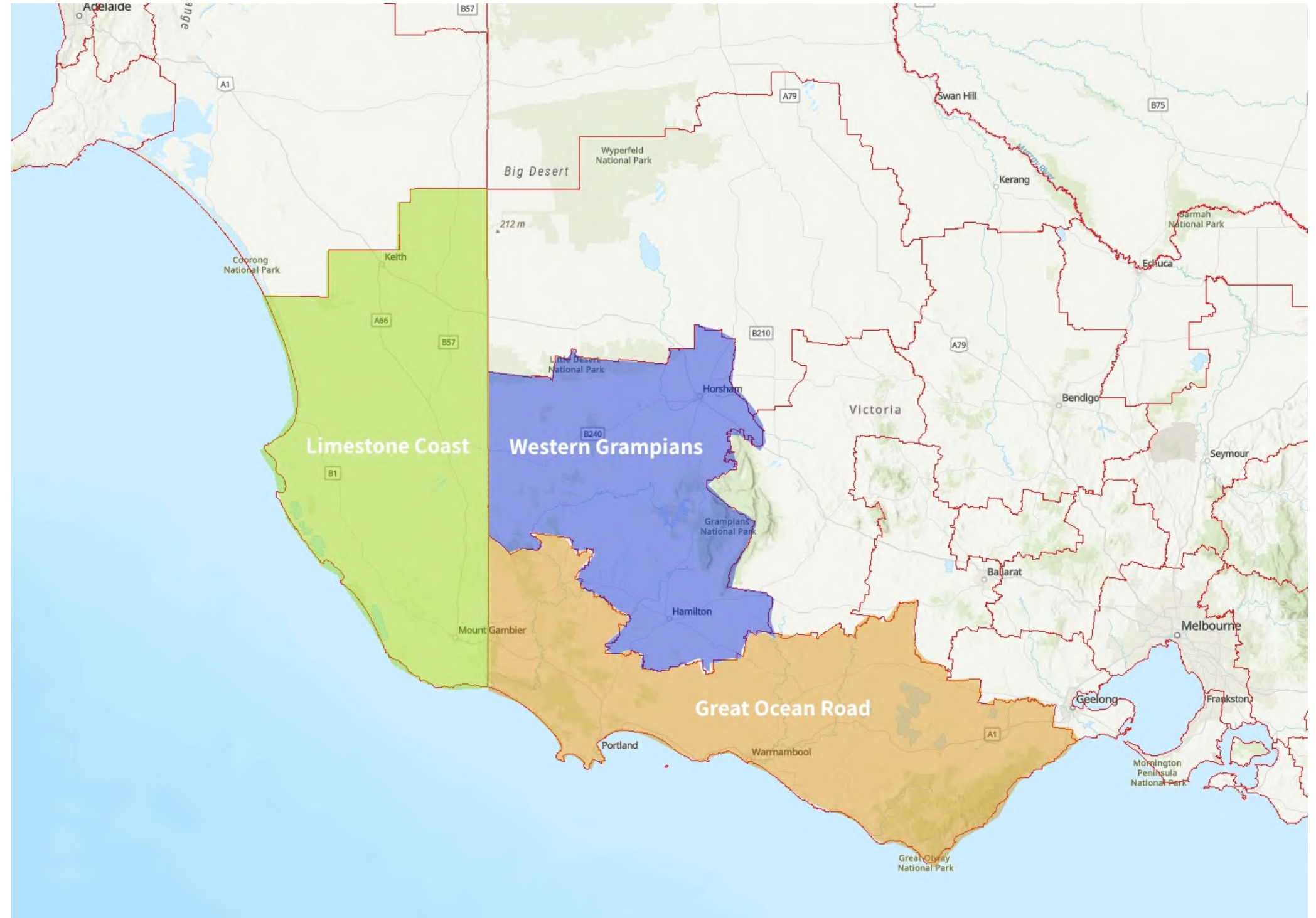
West Wimmera Shire,
Southern Grampians Shire,
Horsham Rural City

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



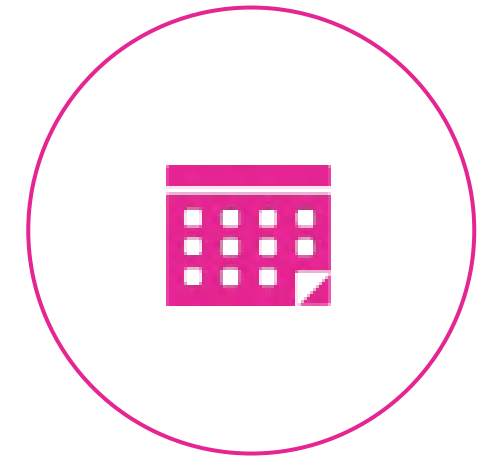
Key Points from January 2024



Limestone Coast's monthly average occupancy rate for January 2024 was 66%, which is a 9.6% decrease compared to December 2023.



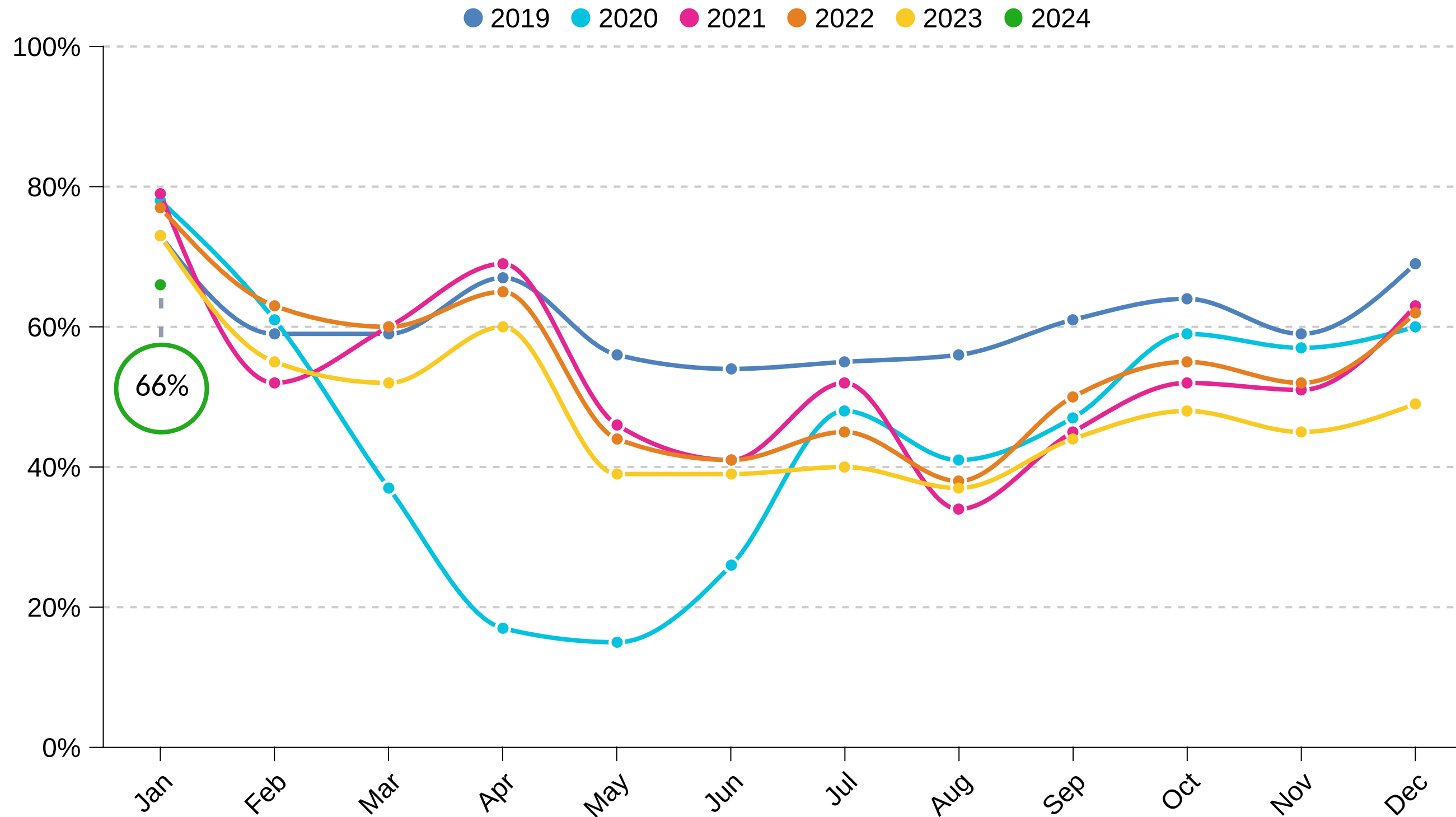
Length of stay in January 2023 was 3.3 days which is a 6.4% increase compared to January 2023.



February 2024 future occupancy is projected to be 42% which is a decrease of 14% when compared to February 2023.

Average Occupancy Rate

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



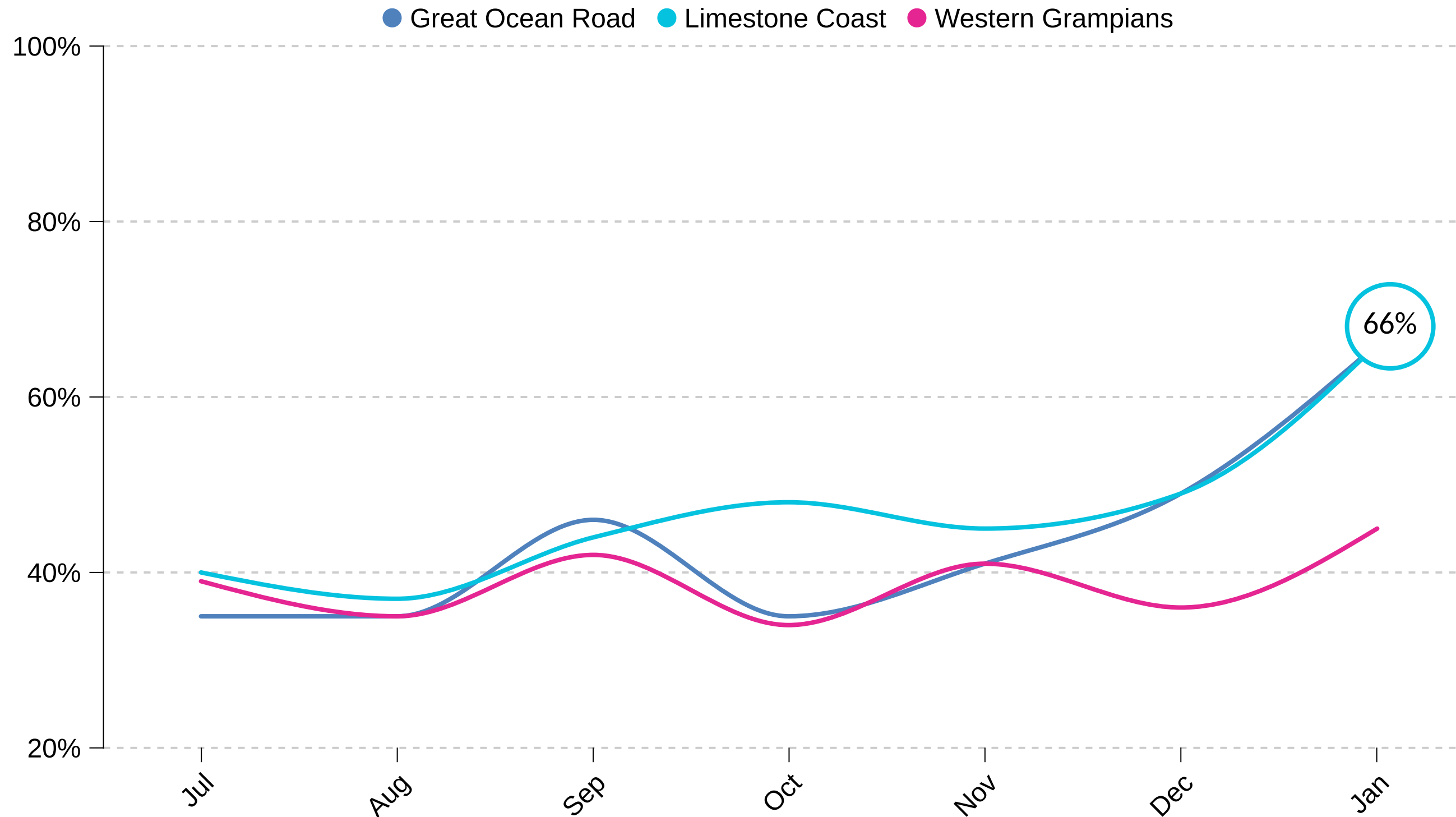
Accommodation Data

INSIGHT

Limestone Coast's monthly average occupancy rate for January 2024 was 66%, which is a 9.6% decrease compared to January 2023.

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.



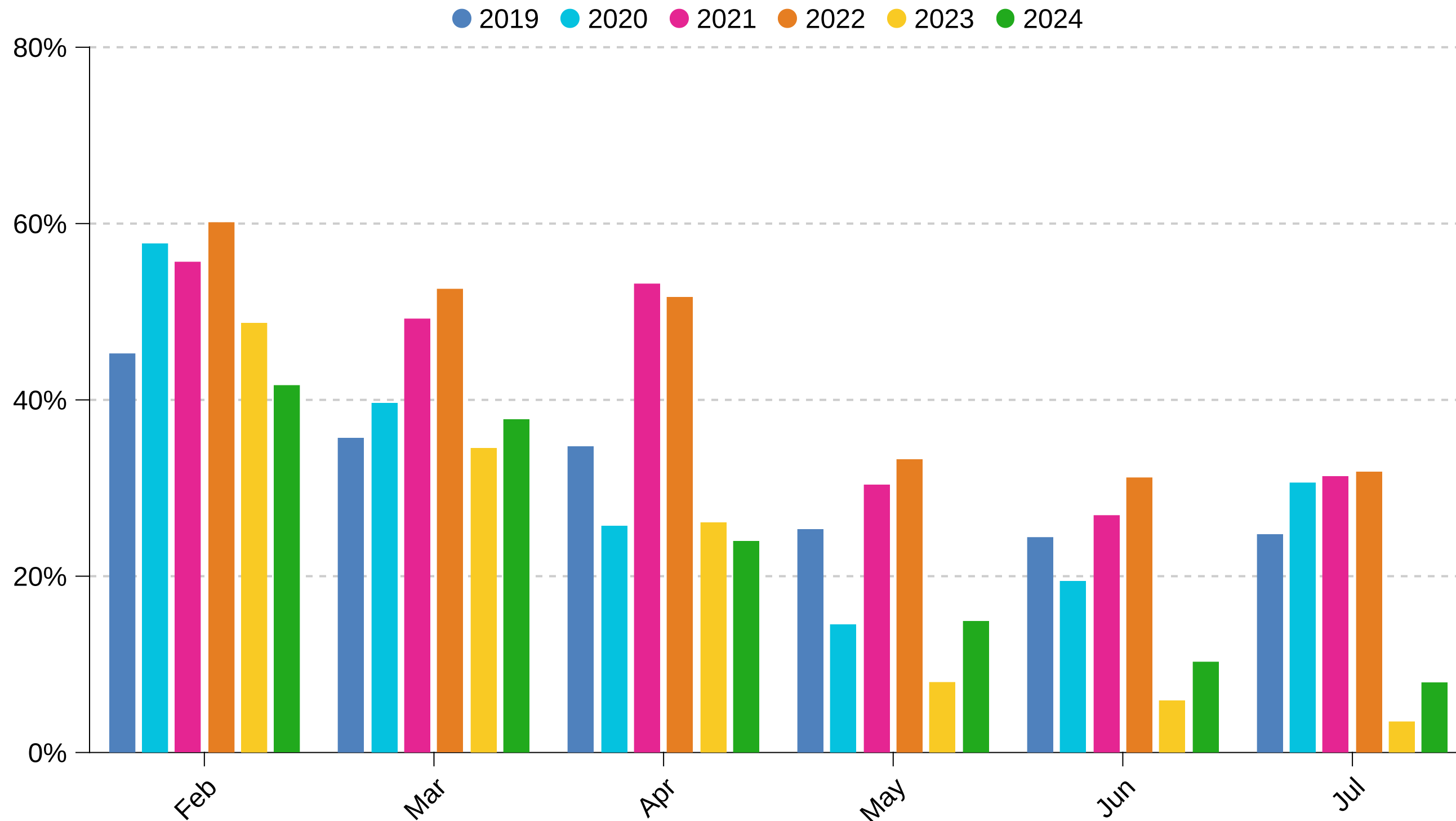
Accommodation Data

INSIGHT

Limestone Coast and Great Ocean Road had a higher occupancy level for the month of January when compared to the Western Grampians region.

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.



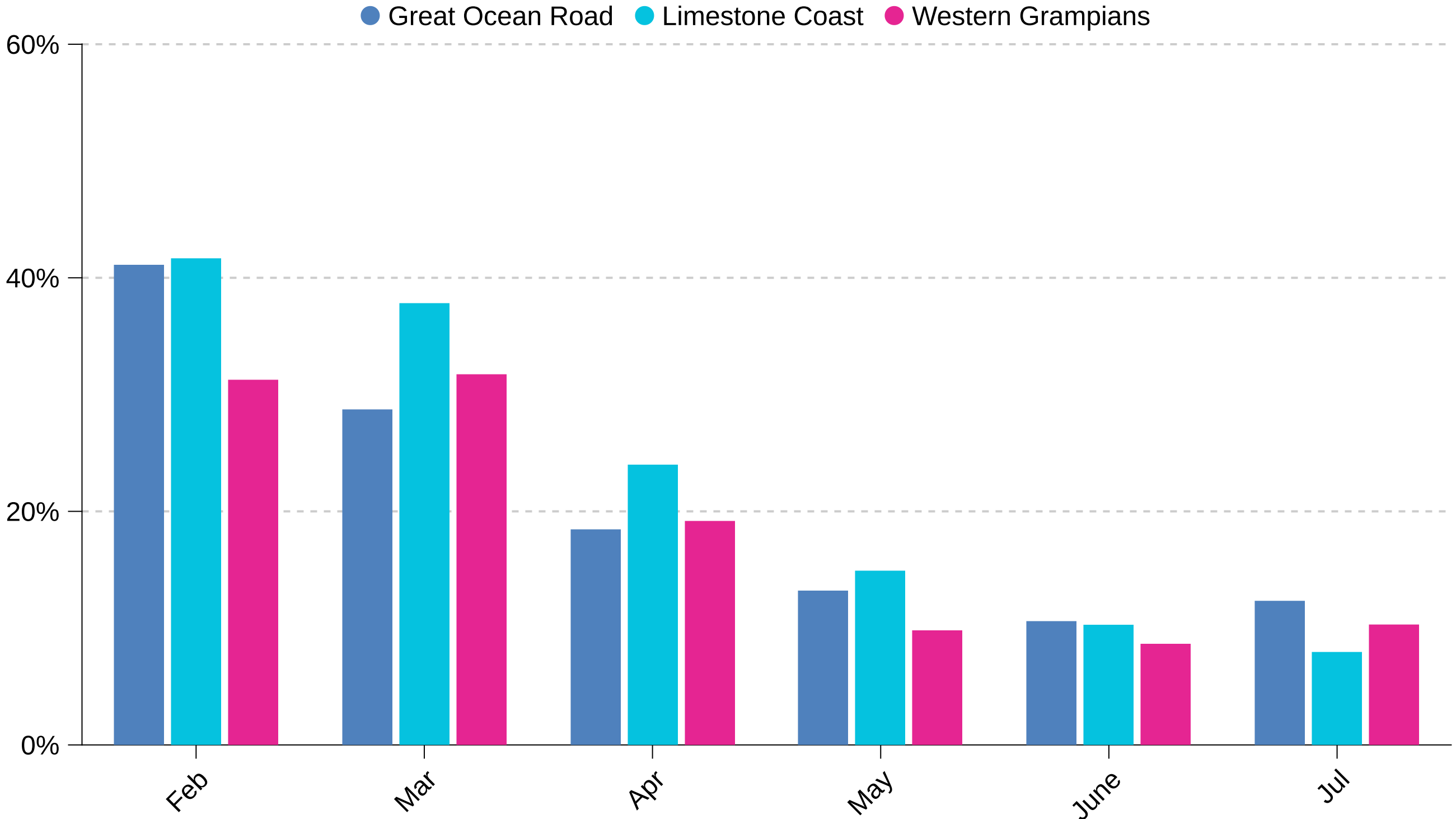
Accommodation Data

INSIGHT

February 2024 future occupancy is projected to be 42% which is a decrease of 14% when compared to February 2023.

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.



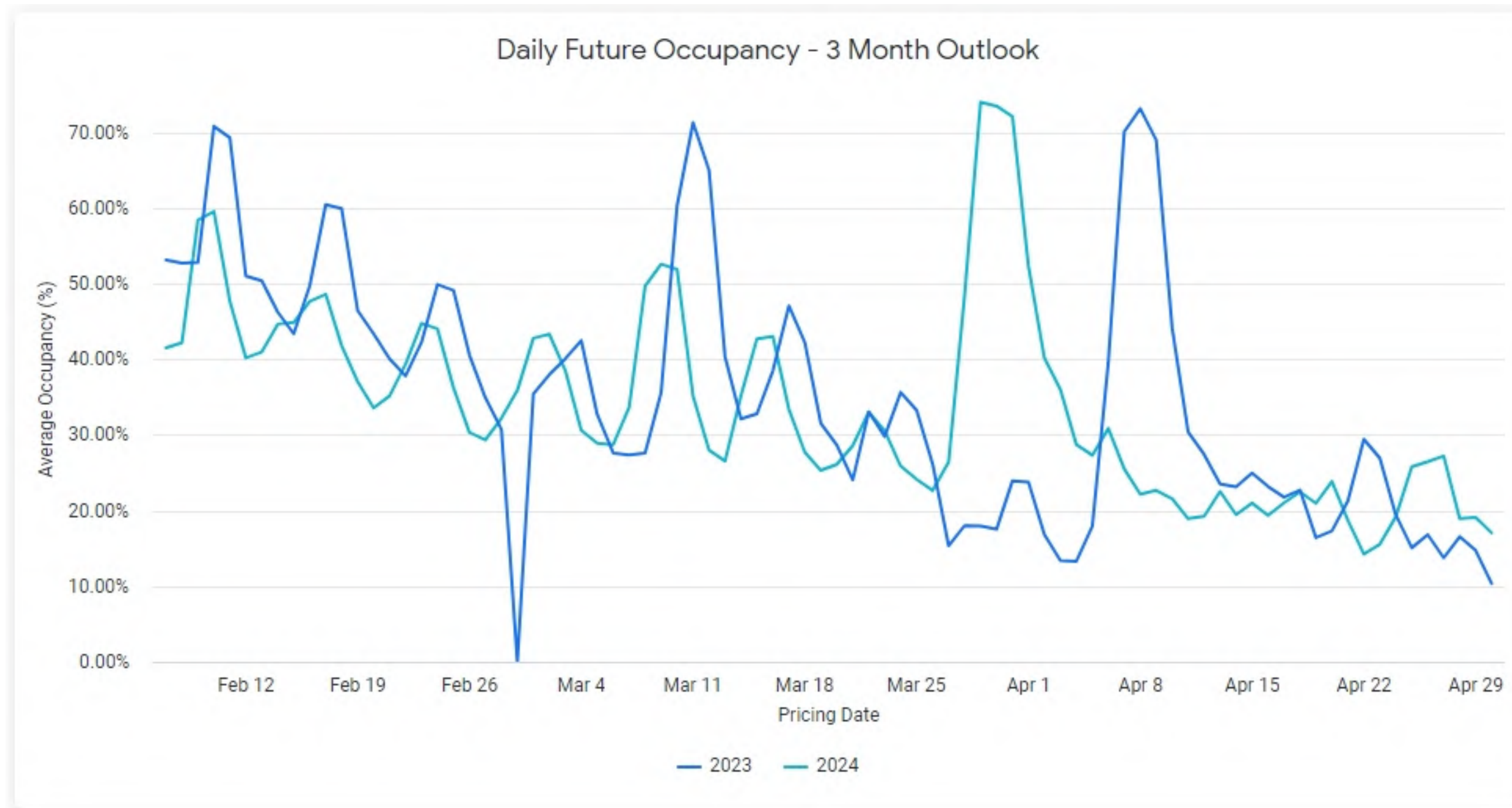
Accommodation Data

INSIGHT

According to projections, the Limestone coast is expected to have the highest occupancy rate amongst its neighbouring regions for February to May.

Daily Future Occupancy - 3 Month Outlook

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



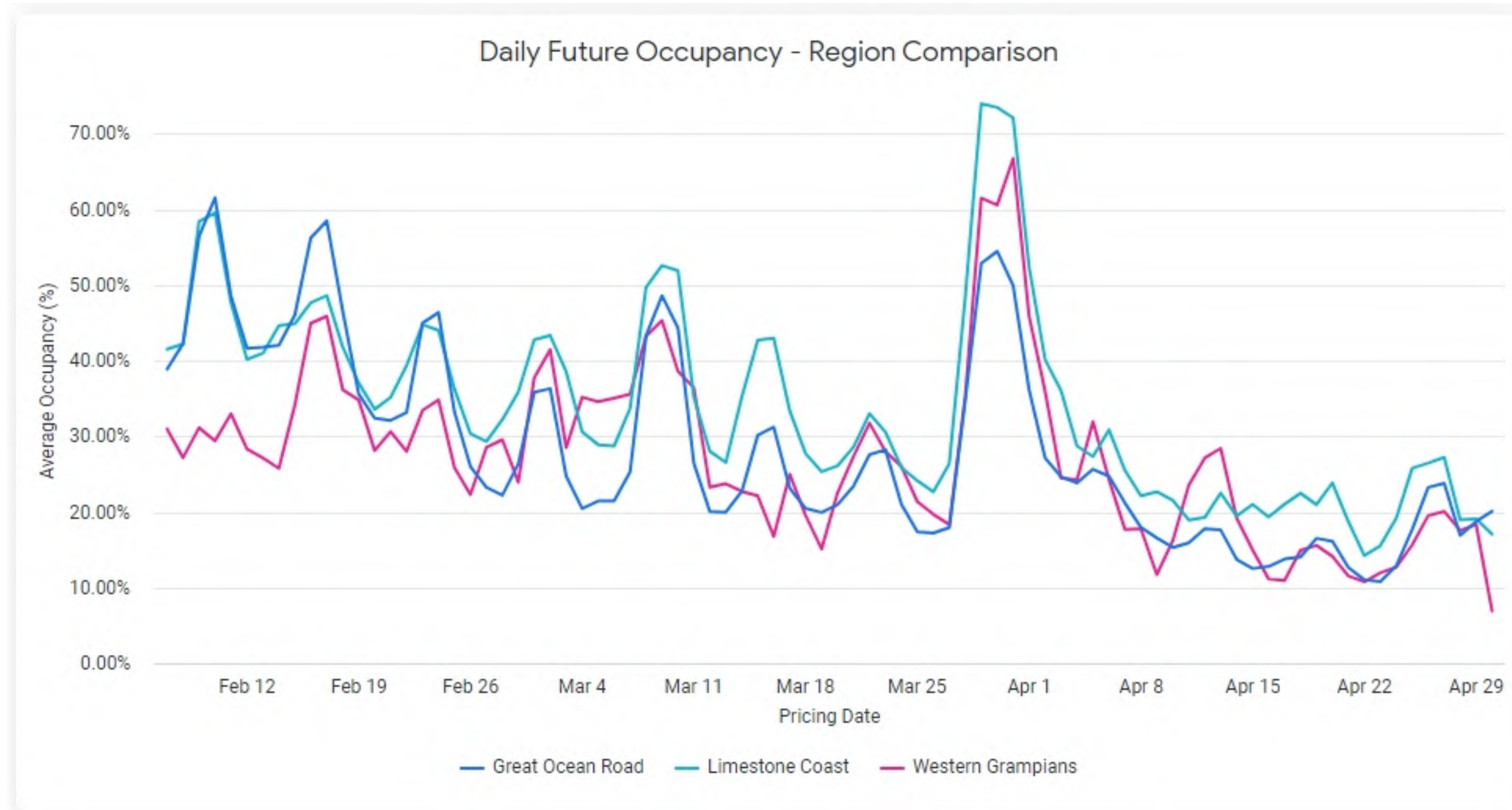
Accommodation Data

INSIGHT

Limestone Coast's Future Occupancy is showing a slightly lower start to February, and a spike around Easter Weekend.

Daily Future Occupancy - Region Comparison

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



Accommodation Data

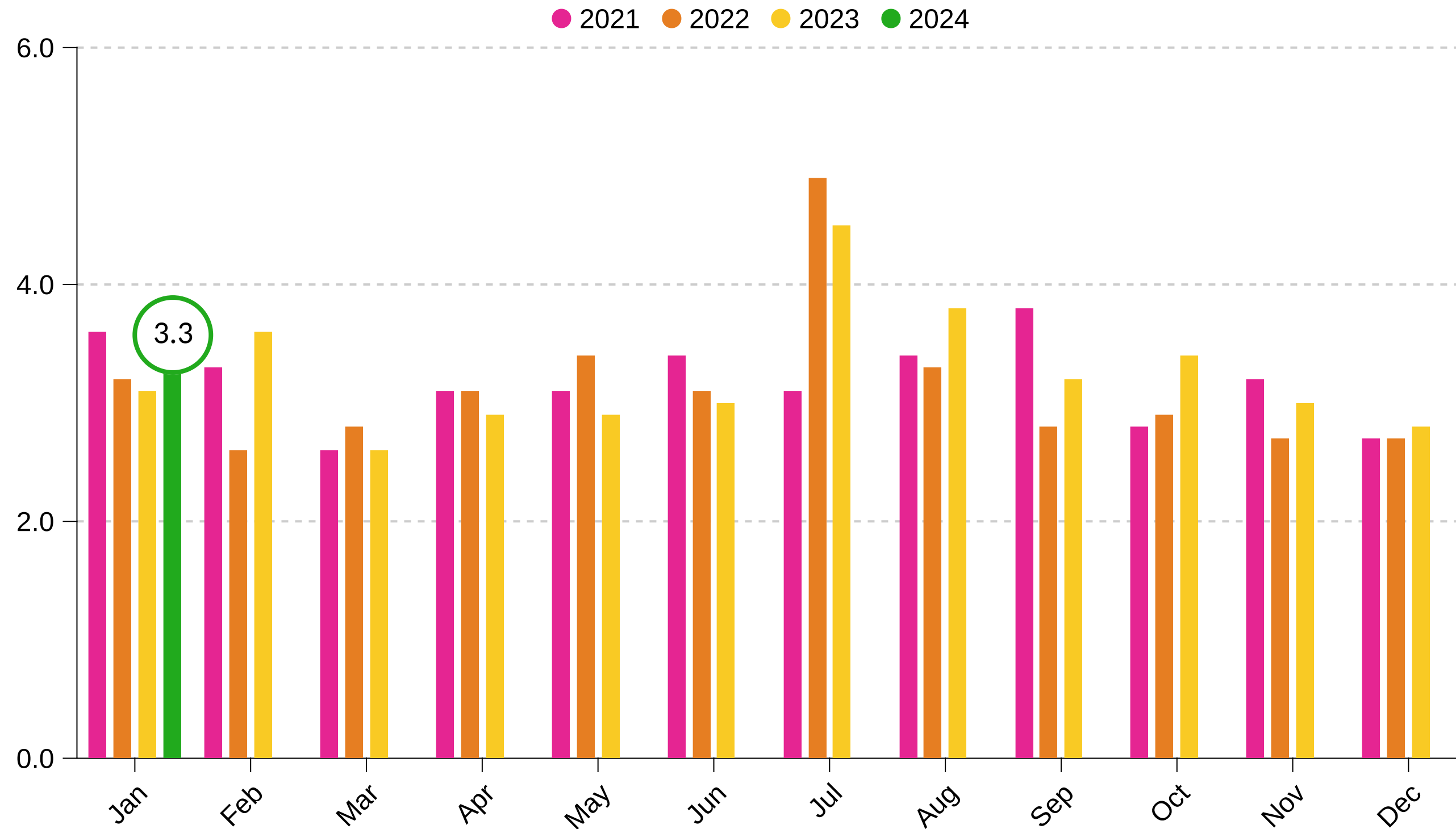
INSIGHT

Limestone Coast is slightly ahead Great Ocean Road in projected occupancy for February 2024.

Limestone Coast is expected to take significant lead over Great Ocean Road in March.

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.



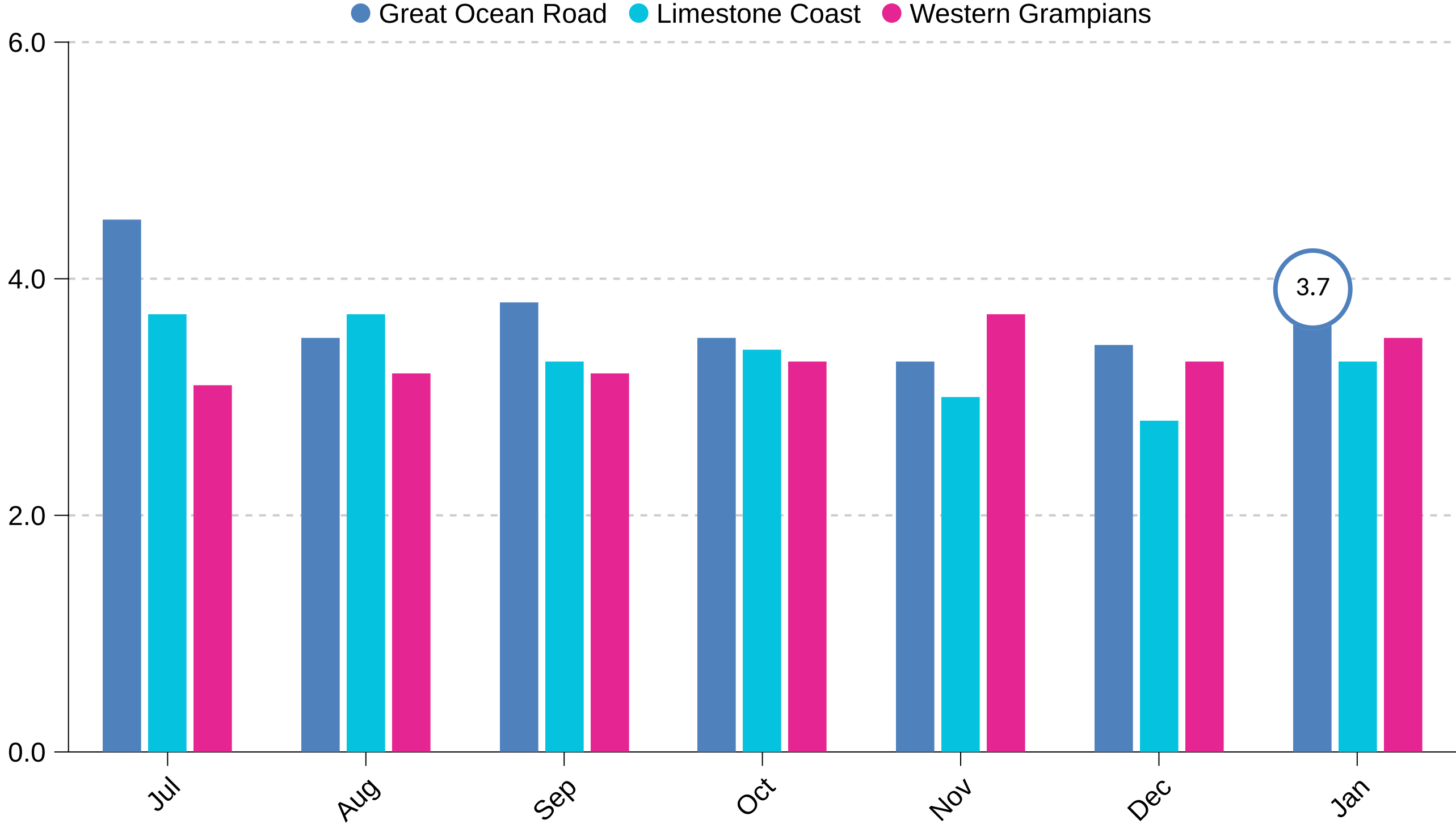
Accommodation Data

INSIGHT

Length of stay in January 2023 was 3.3 days which is a 6.4% increase compared to January 2022.

Length of Stay - Region Comparison

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



Accommodation Data

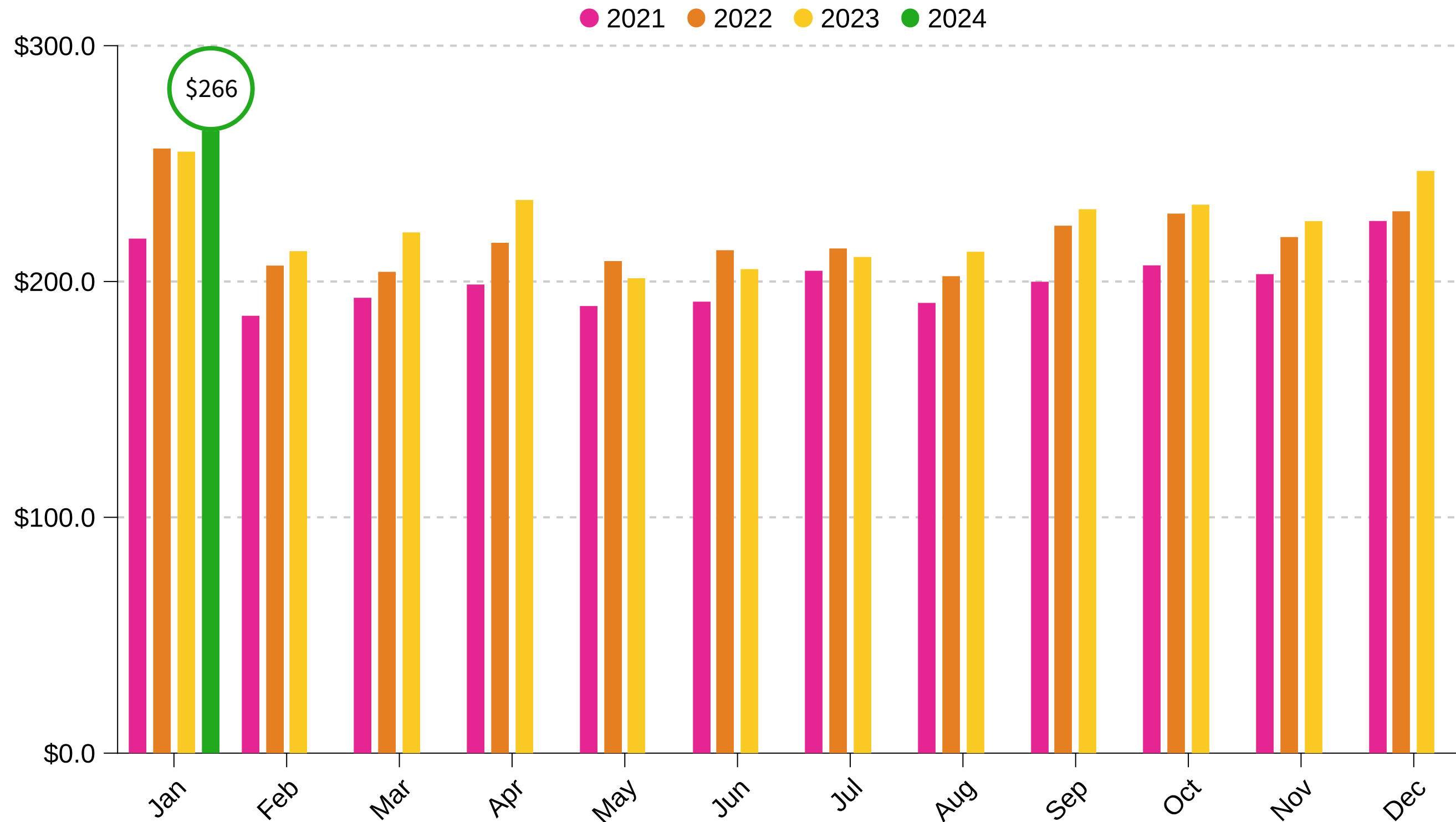
INSIGHT

Great Ocean Road had the highest length of stay in January.

Limestone Coast trailed with 3.3 days, a difference of 11% to Great Ocean Road.

Average Daily Rate

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



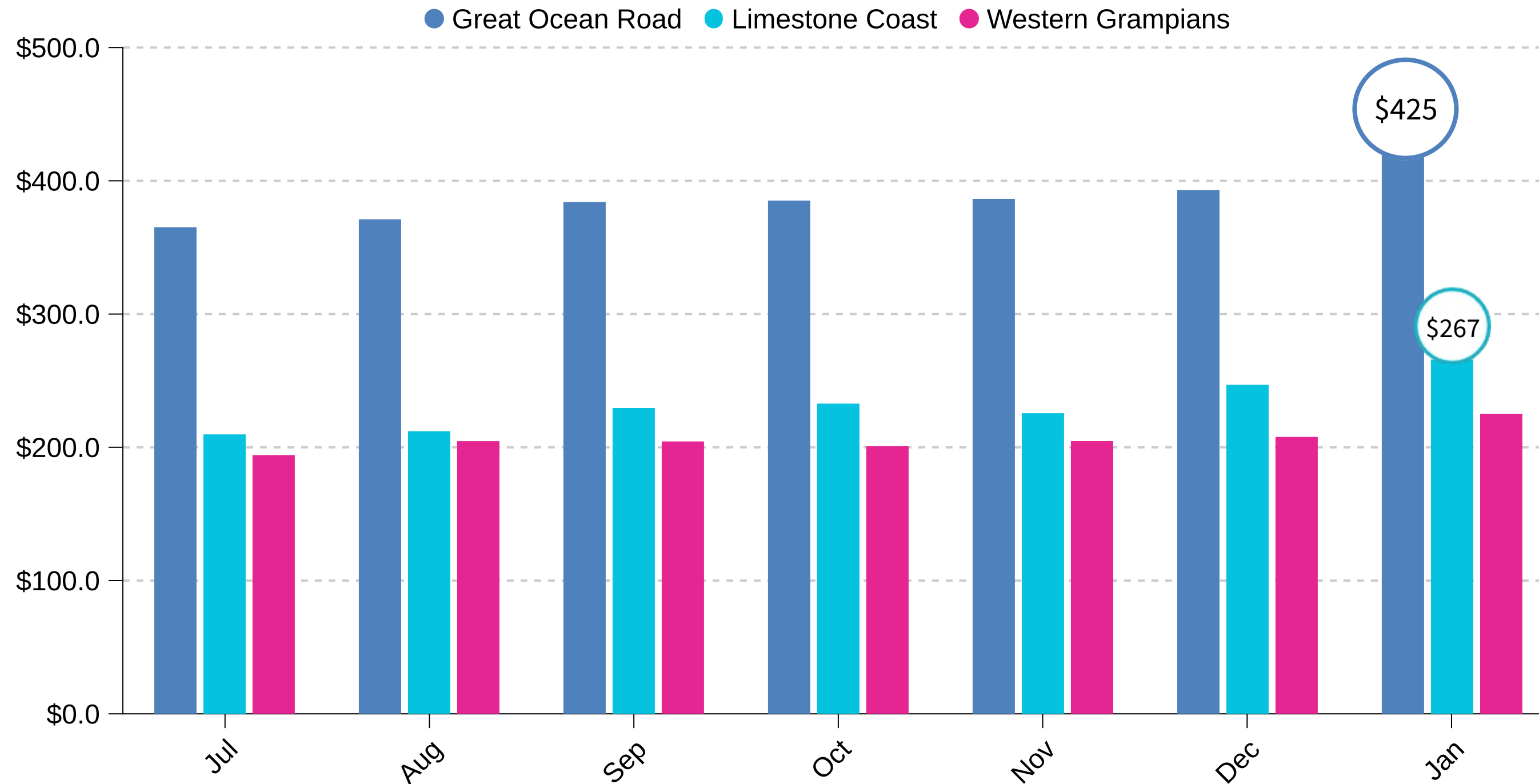
Accommodation Data

INSIGHT

Average daily rate for January 2024 was \$266, which is a 4.2% increase when compared to January 2023.

Average Daily Rate - Region Comparison

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



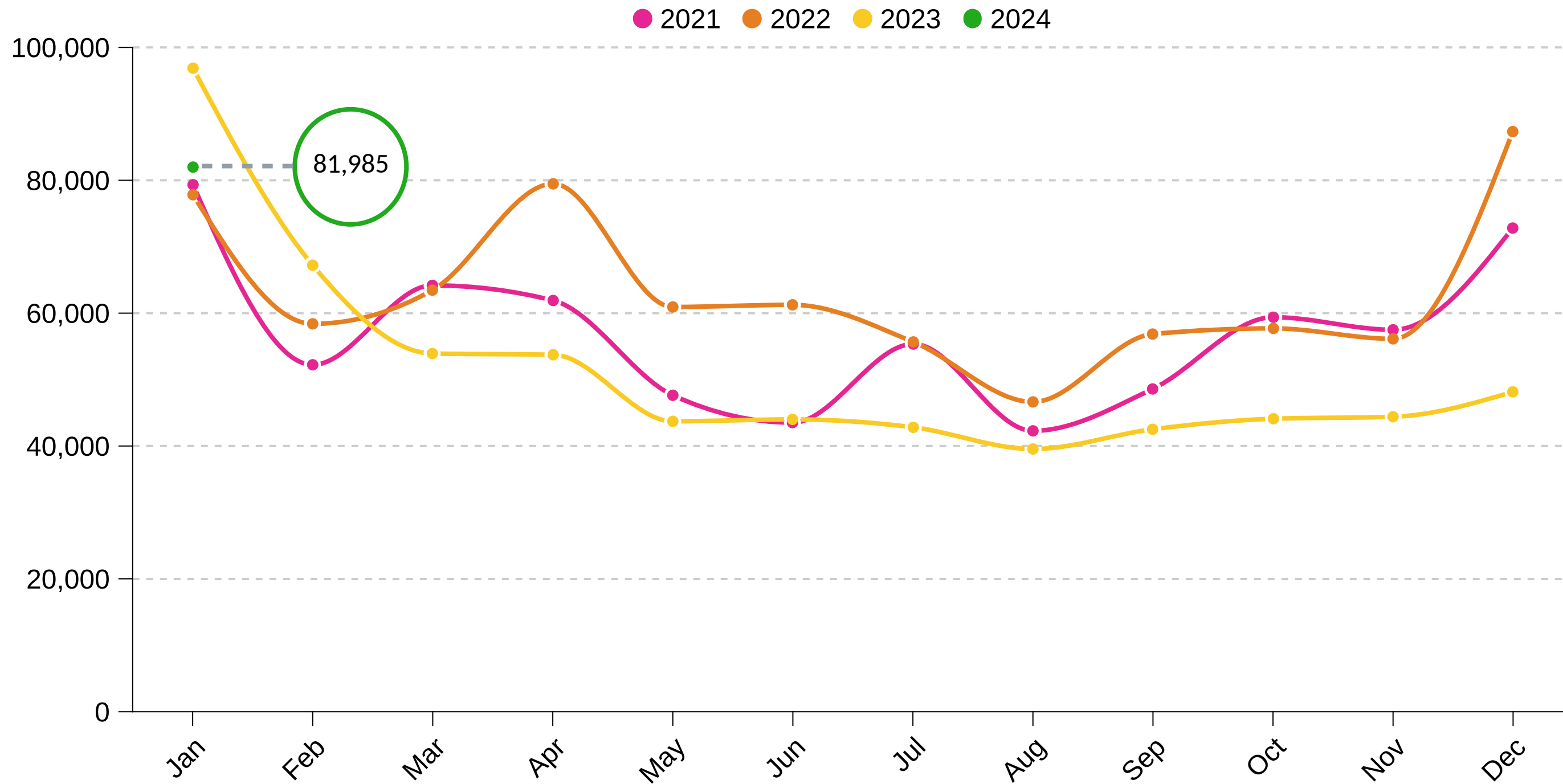
Accommodation Data

INSIGHT

Great Ocean Road had the highest ADR in the month of January 2024 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

January 2024 had approximately 81,985 overnight visitors which is a decrease of -15% compared to January 2023.

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

January 2024 vs January 2023

Interstate visitation for the month of January 2023 was 42.09% which is a 9.7% increase when compared to January 2023.

Mount Barker had the highest intrastate visitation at 2.07%, a 28% increase compared to January 2023.

Horsham was the biggest interstate suburb source market at 1.15%, which was a 3.6% increase year on year.

