Limestone Coast Tourism - Monthly Report

December 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 866 unique listings , providing an estimated capacity of 5,081 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.

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,
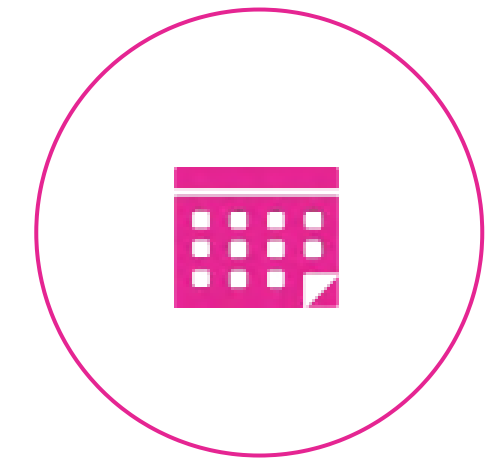
Wattle Range Council

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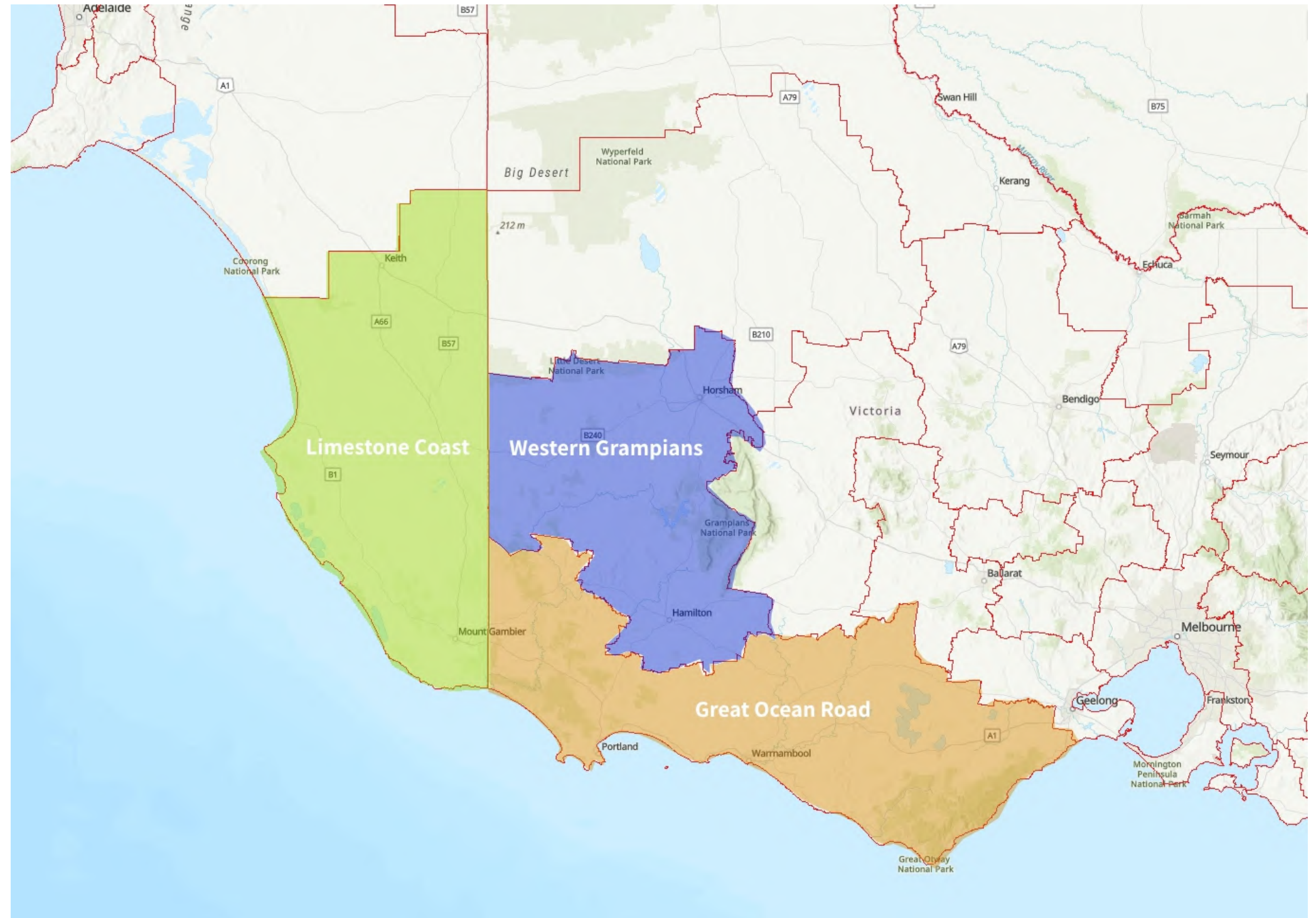
Key Points from December 2023

Limestone Coast's monthly average occupancy rate for December 2023 was 49%, which is a 21% decrease compared to December 2022.

Length of stay in December 2023 was 2.8 days which is a 3.7% increase compared to December 2022.

January 2024 future occupancy is projected to be 45% which is a decrease of 23% when compared to January 2023.

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Average Occupancy Rate

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

Legend: ● 2019 ● 2020 ● 2021 ● 2022 ● 2023

49%

Accommodation Data

INSIGHT

Limestone Coast's monthly average occupancy rate for December 2023 was 49%, which is a 21% decrease compared to December 2022.

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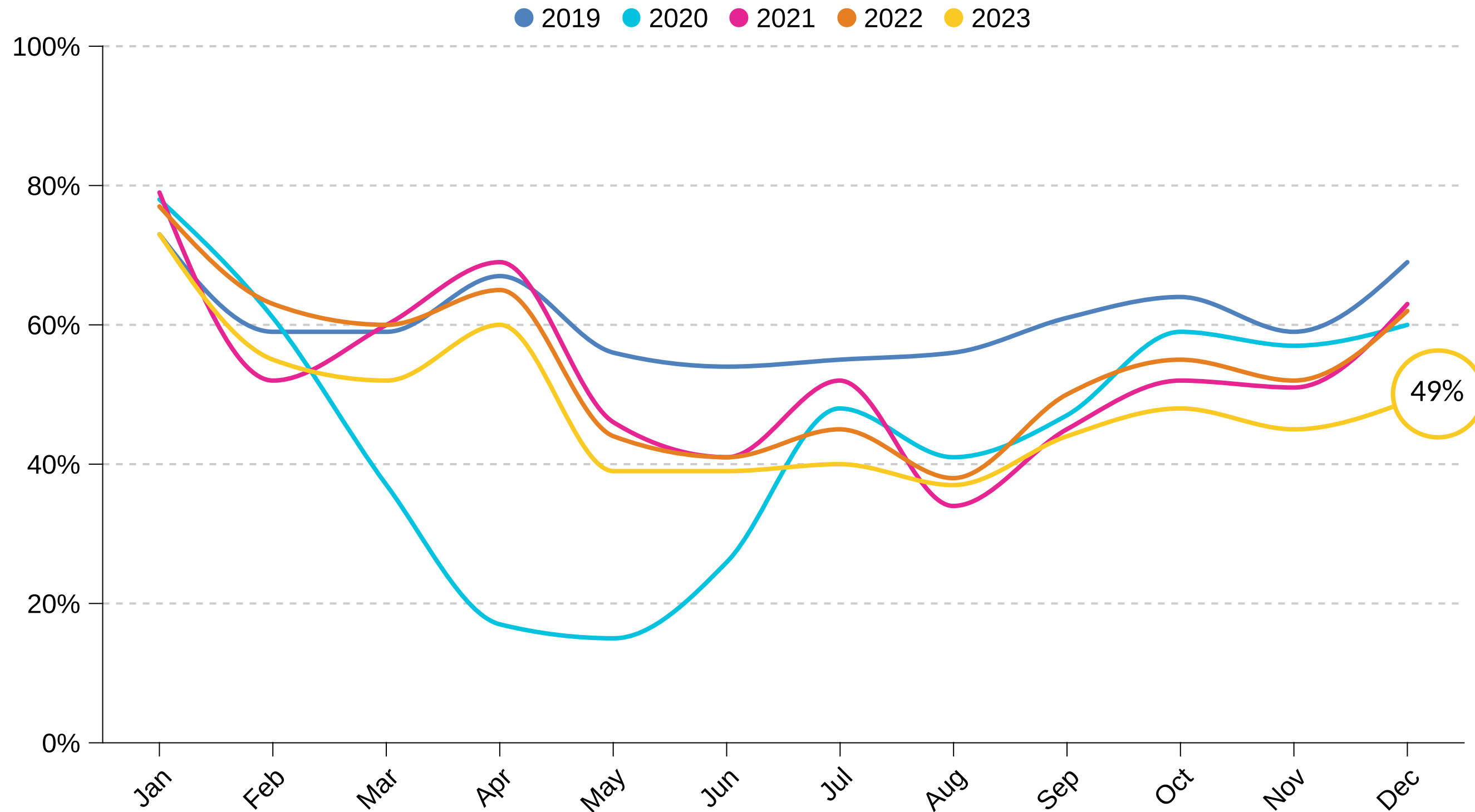
Average Occupancy Rate - Region Comparison

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

● Great Ocean Road ● Limestone Coast ● Western Grampians
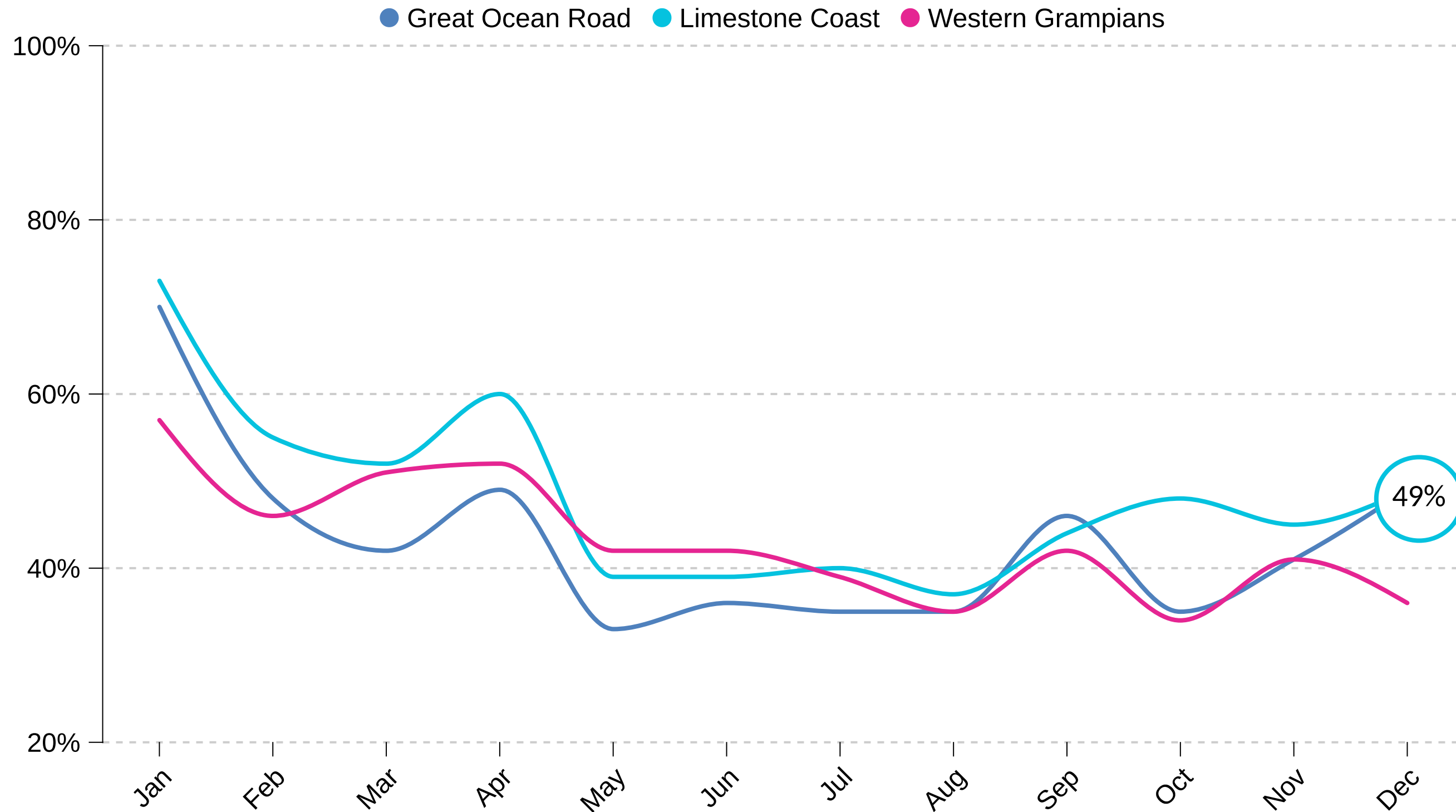
Accommodation Data

INSIGHT

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

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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.

Legend: ● 2019 ● 2020 ● 2021 ● 2022 ● 2023 ● 2024
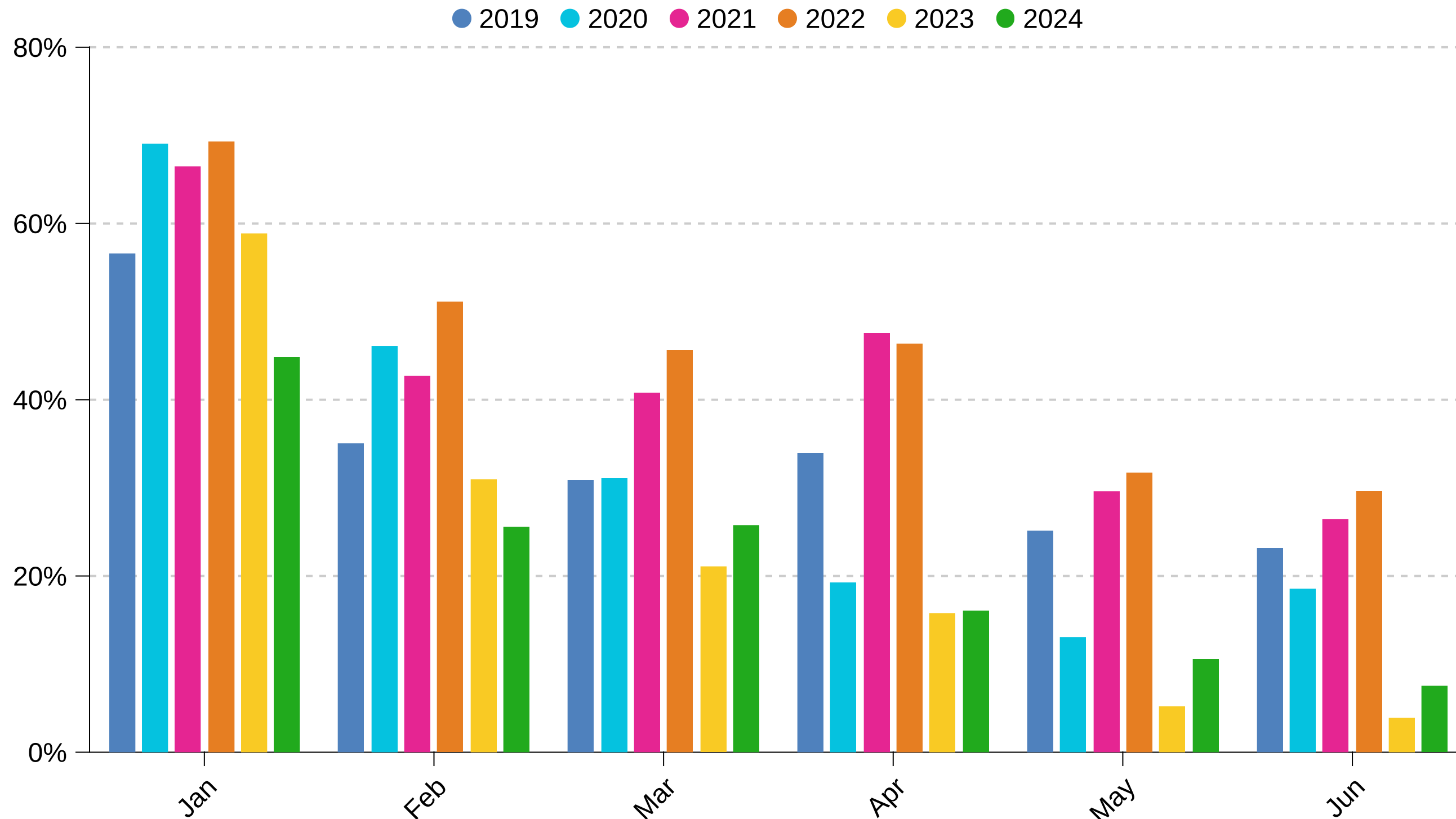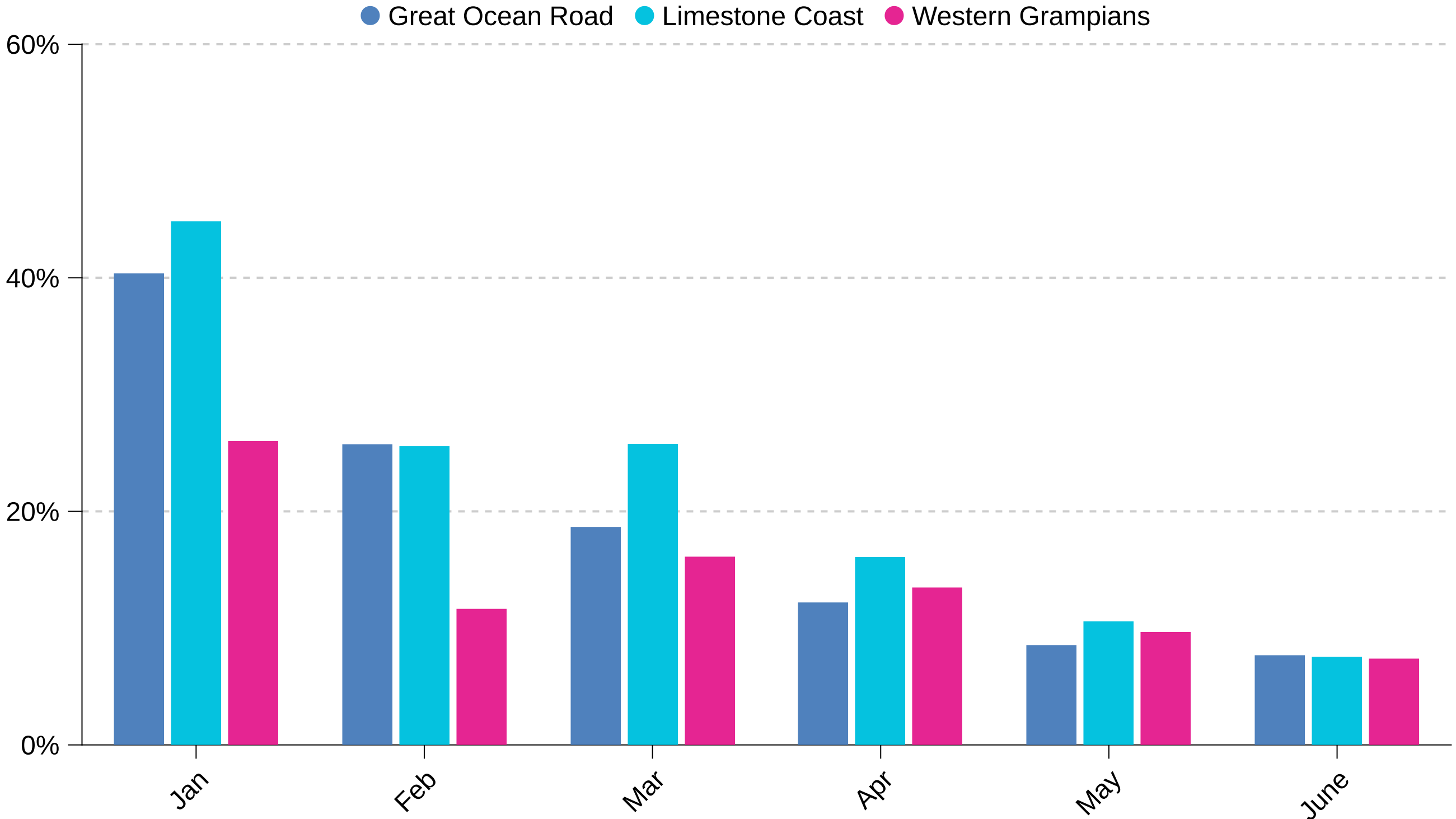

Accommodation Data

INSIGHT

January 2024 future occupancy is projected to be 45% which is a decrease of 23% when compared to January 2023.

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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.

Legend:
- Great Ocean Road
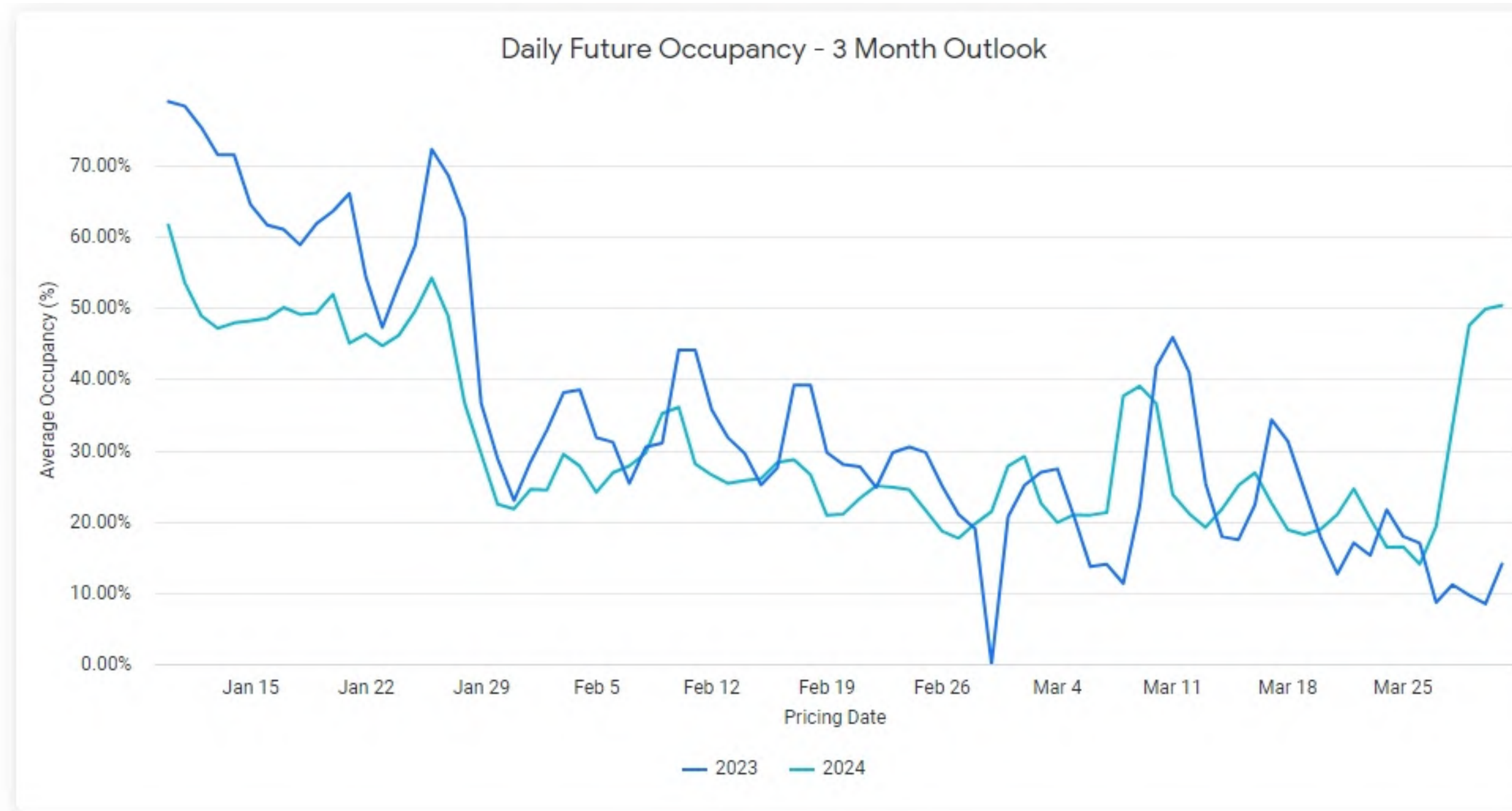- Limestone Coast
- Western Grampians

Accommodation Data

INSIGHT

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

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Daily Future Occupancy - 3 Month Outlook

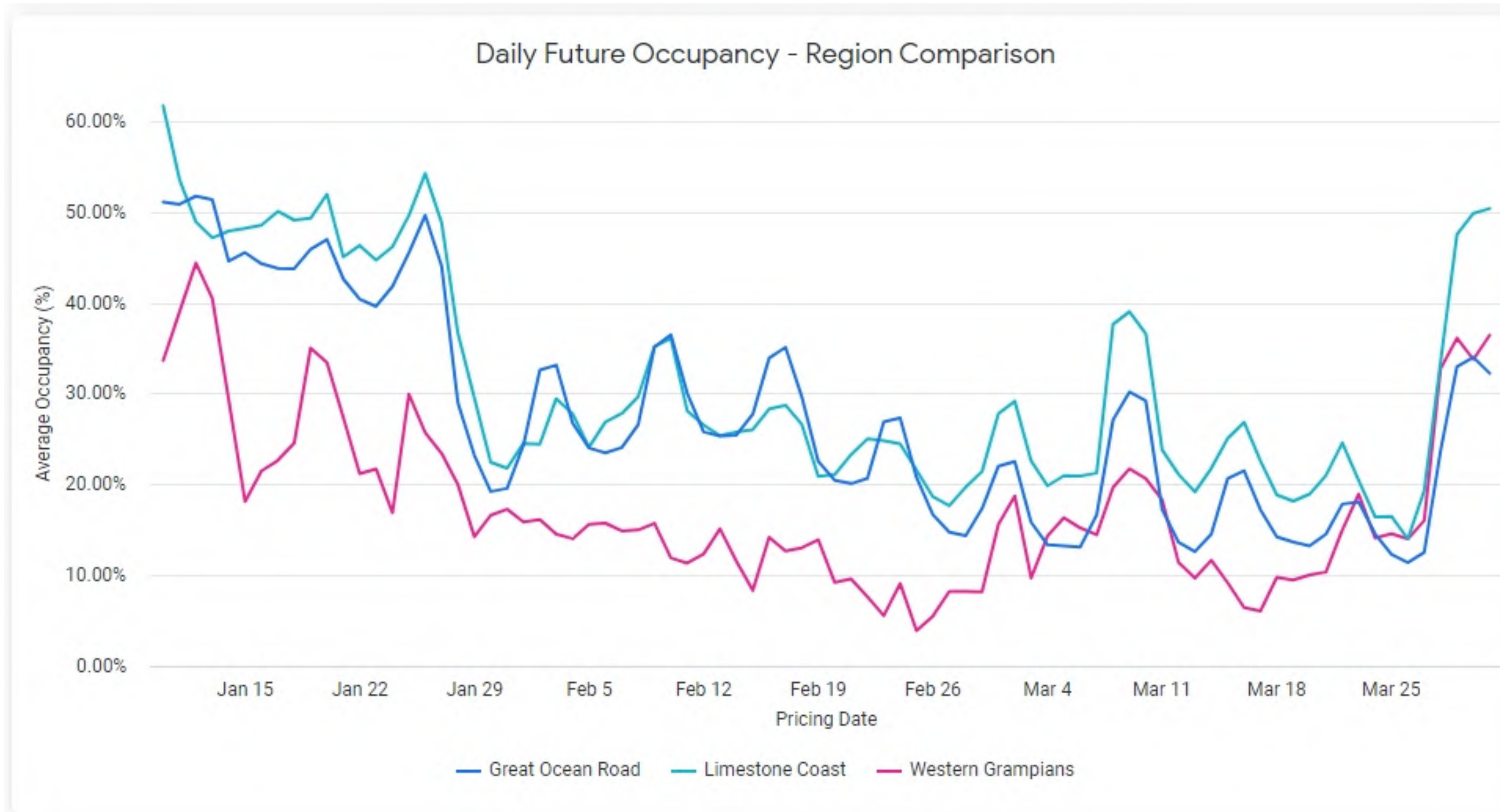The graph below shows daily future occupancy over the next 3 months.

Accommodation Data

INSIGHT

Limestone Coast's Future Occupancy is showing a lower start to January, and a spike towards Australia day.

Daily Future Occupancy - Region Comparison

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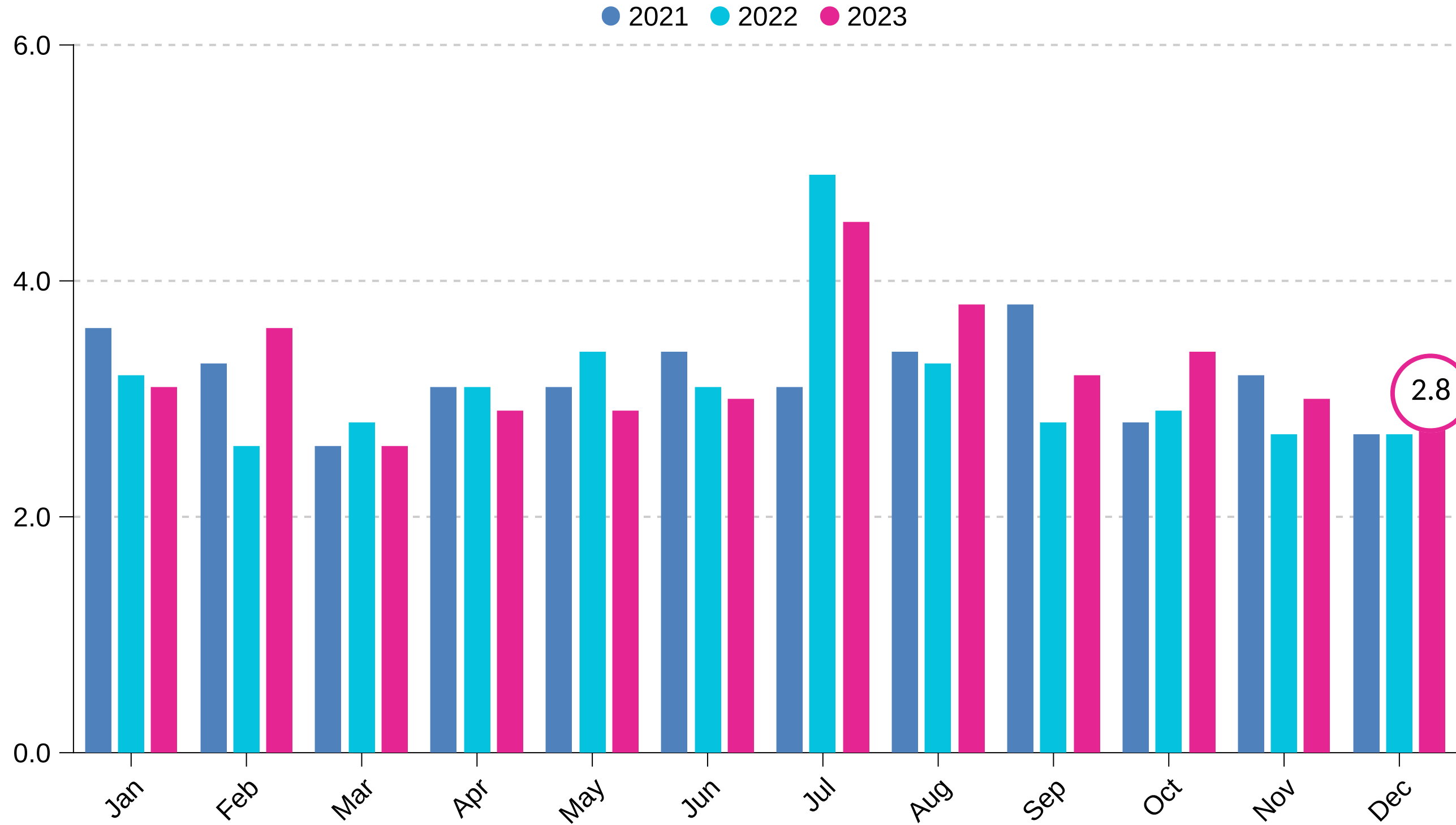

Accommodation Data

INSIGHT

Limestone Coast has the highest projected occupancy for January 2024.

Great Ocean Road is expected to takeover Limestone coast in February .

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.
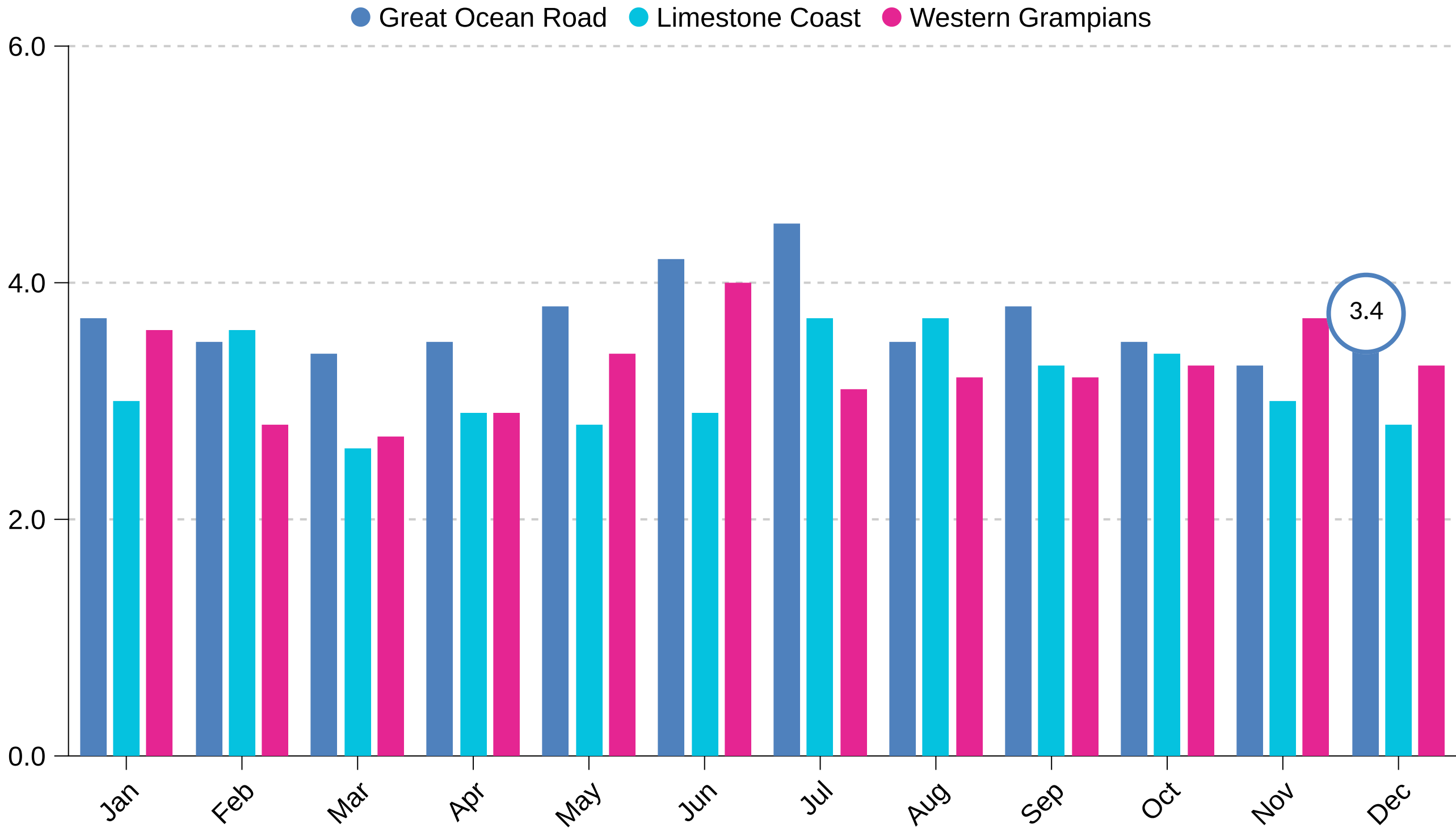

● 2021 ● 2022 ● 2023

Accommodation Data

INSIGHT

Length of stay in December 2023 was 2.8 days which is a 3.7% increase compared to December 2022.

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Length of Stay - Region Comparison

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

● Great Ocean Road ● Limestone Coast ● Western Grampians
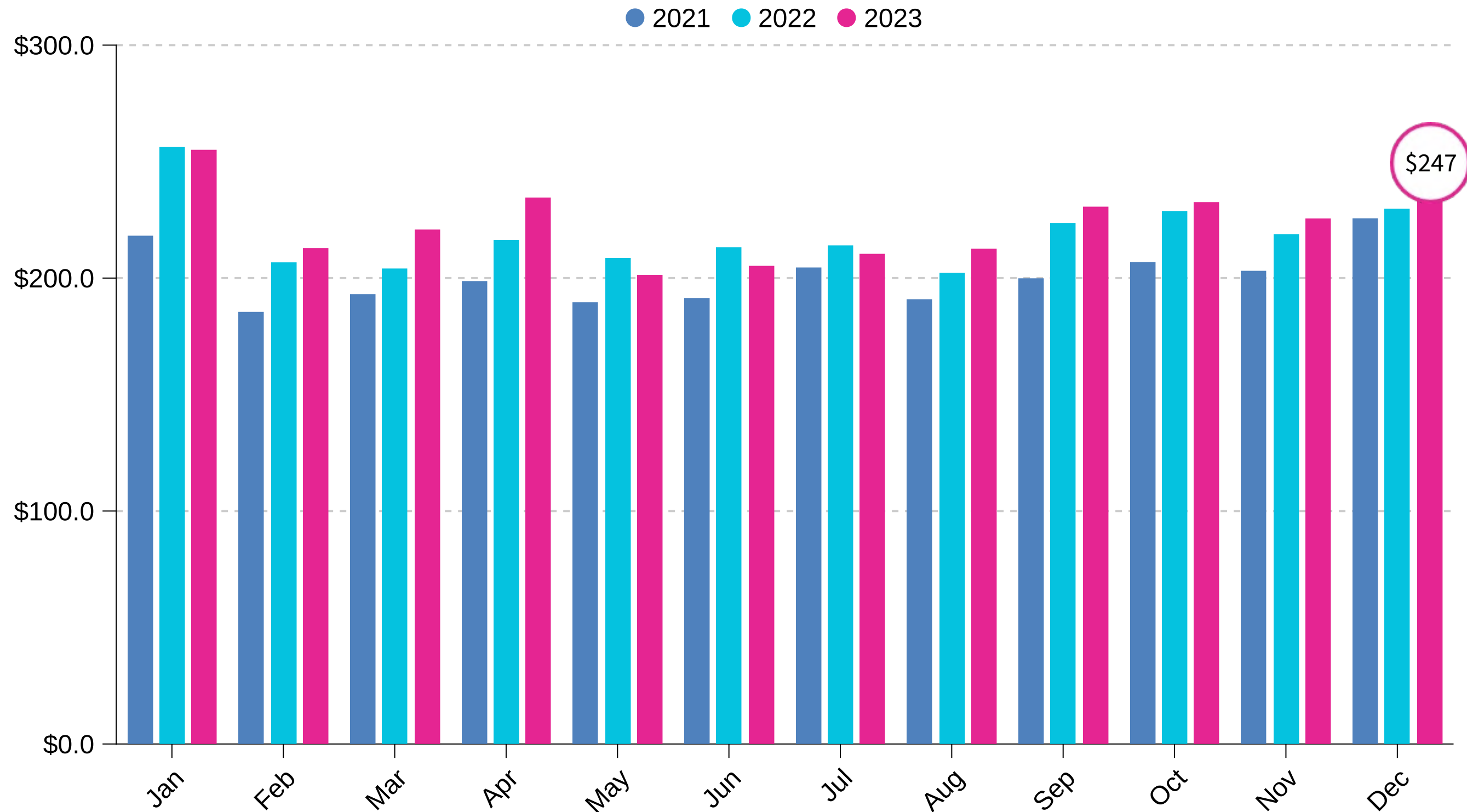
Accommodation Data

INSIGHT

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

Limestone Coast trailed with 2.8 days, a difference of 21% to Great Ocean Road.

Average Daily Rate

The average daily rate (ADR) measures the average rental revenue earned for an occupied room per day.
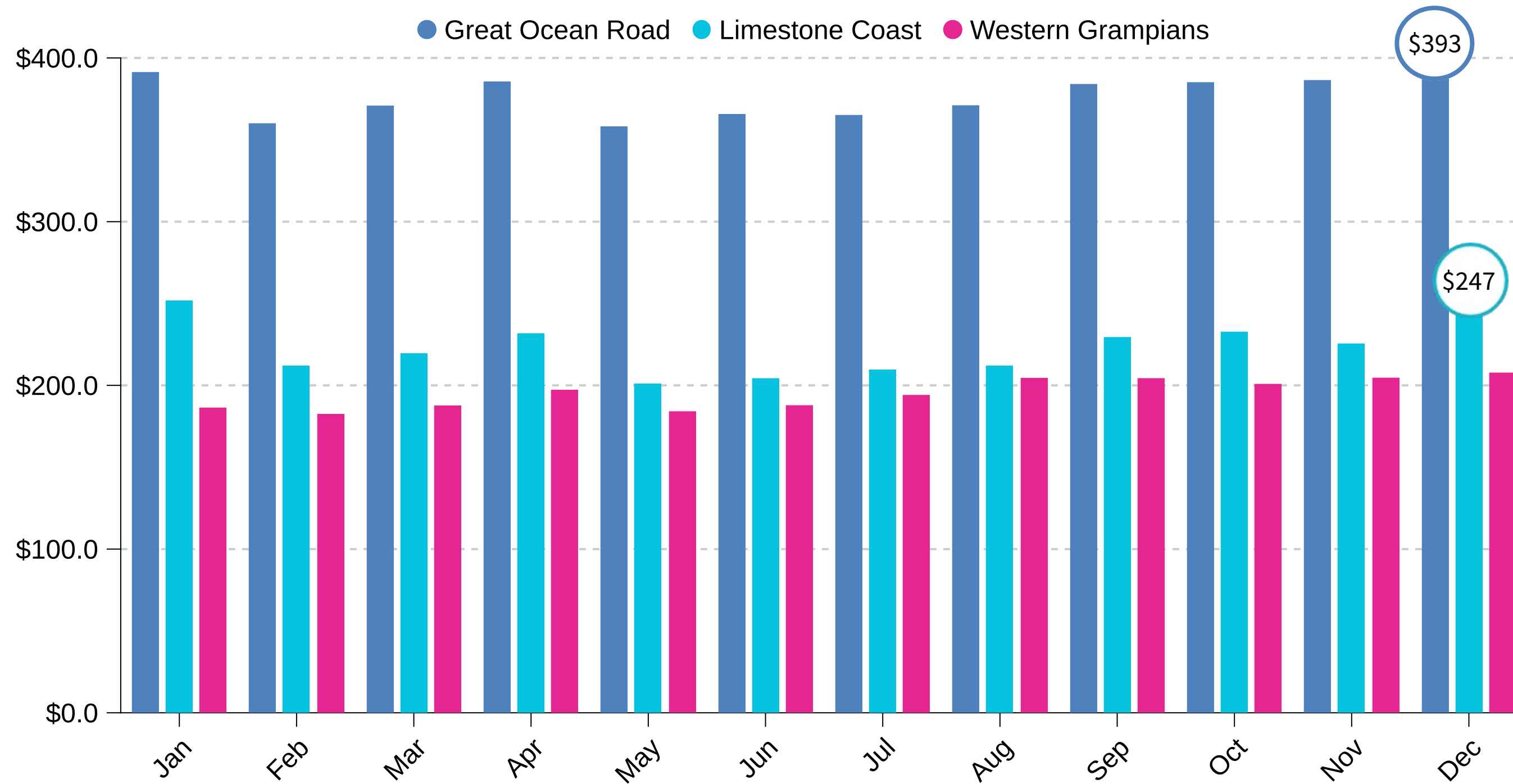
● 2021 ● 2022 ● 2023

$247

Accommodation Data

INSIGHT

Average daily rate for December 2023 was $247, which is a 7.4% increase when compared to December 2022.

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Average Daily Rate - Region Comparison

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

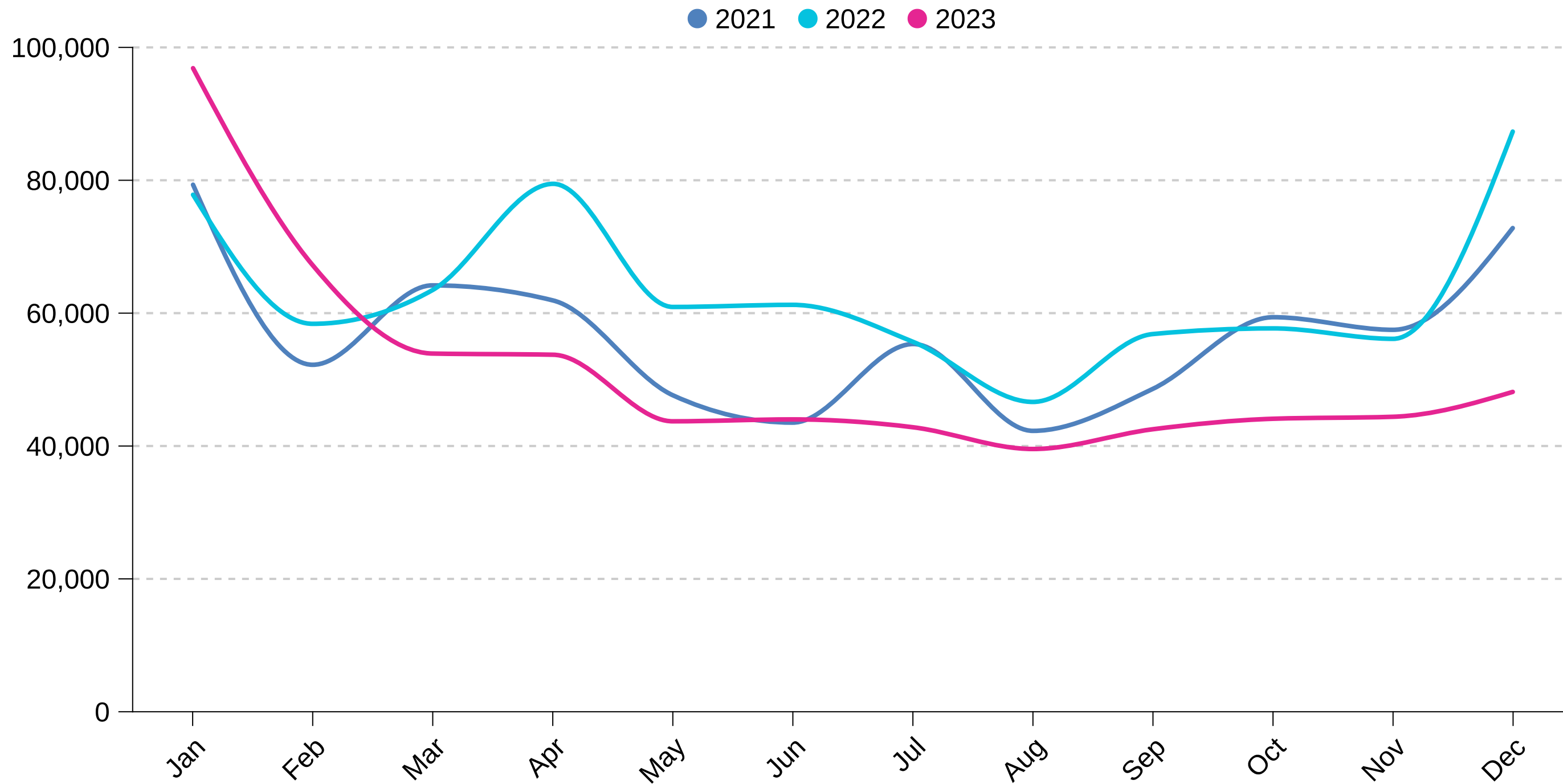**Accommodation Data**

INSIGHT

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

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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.
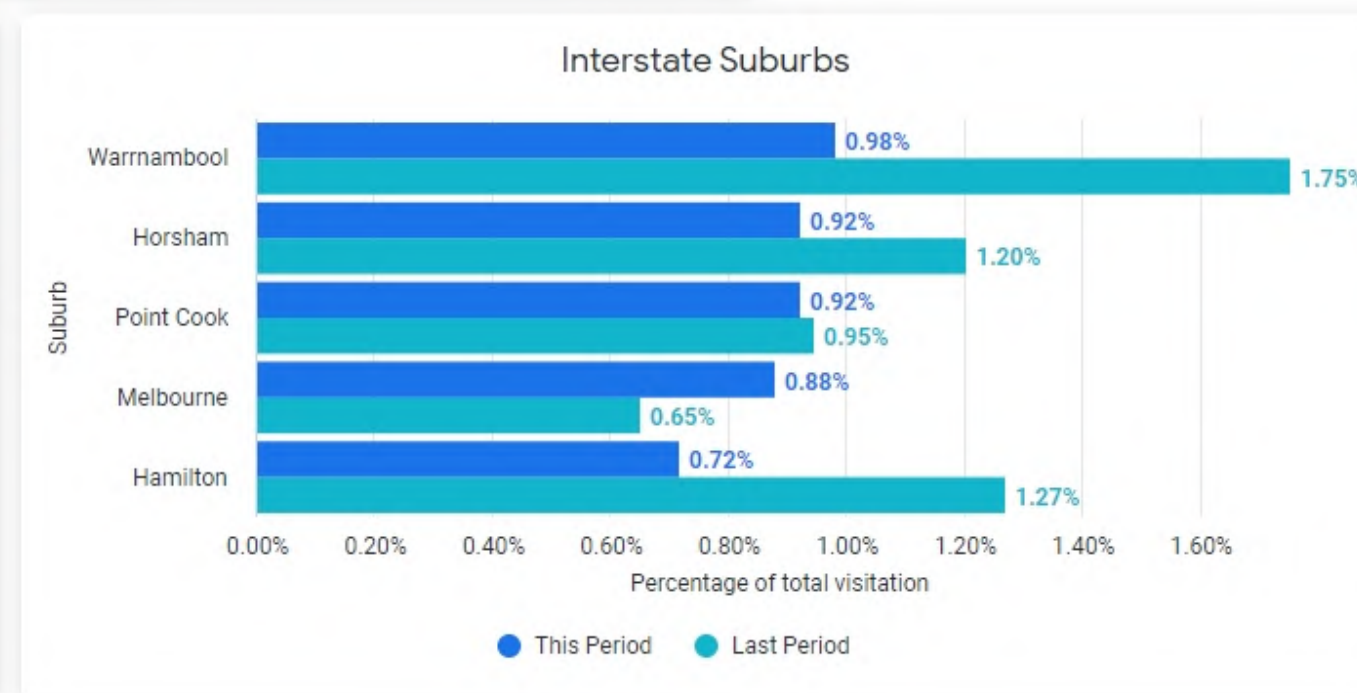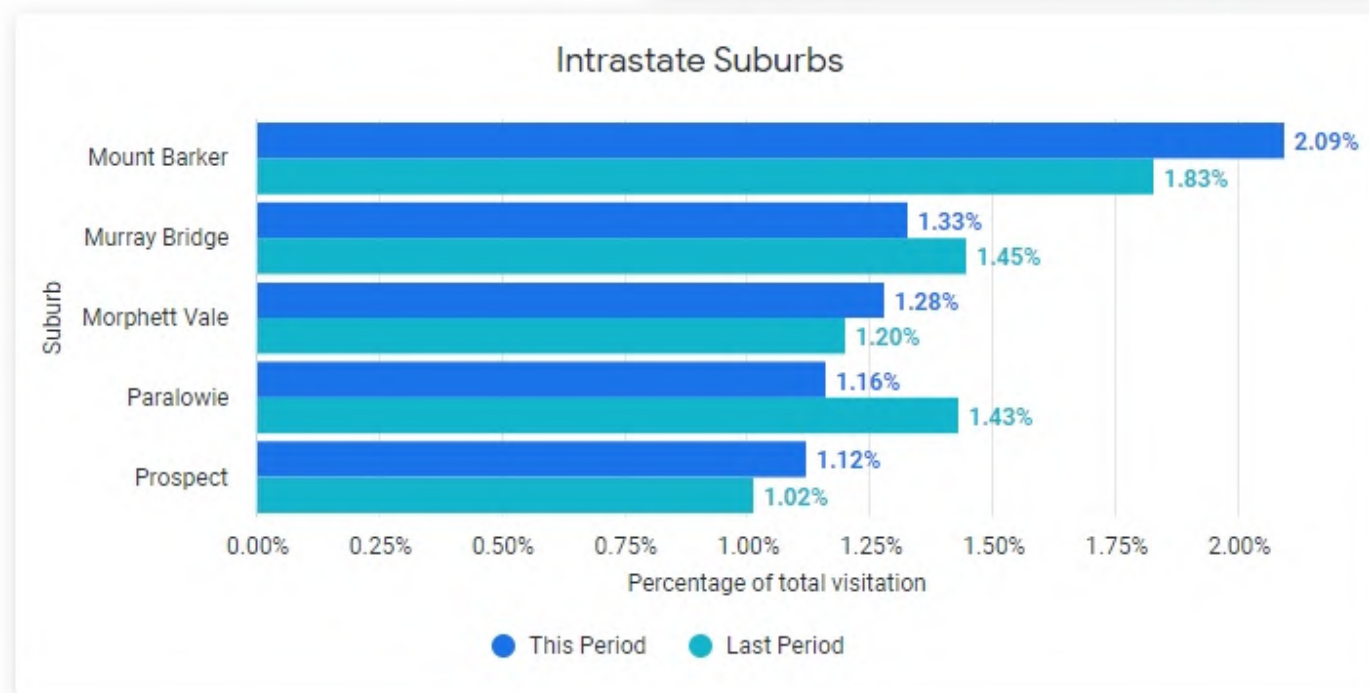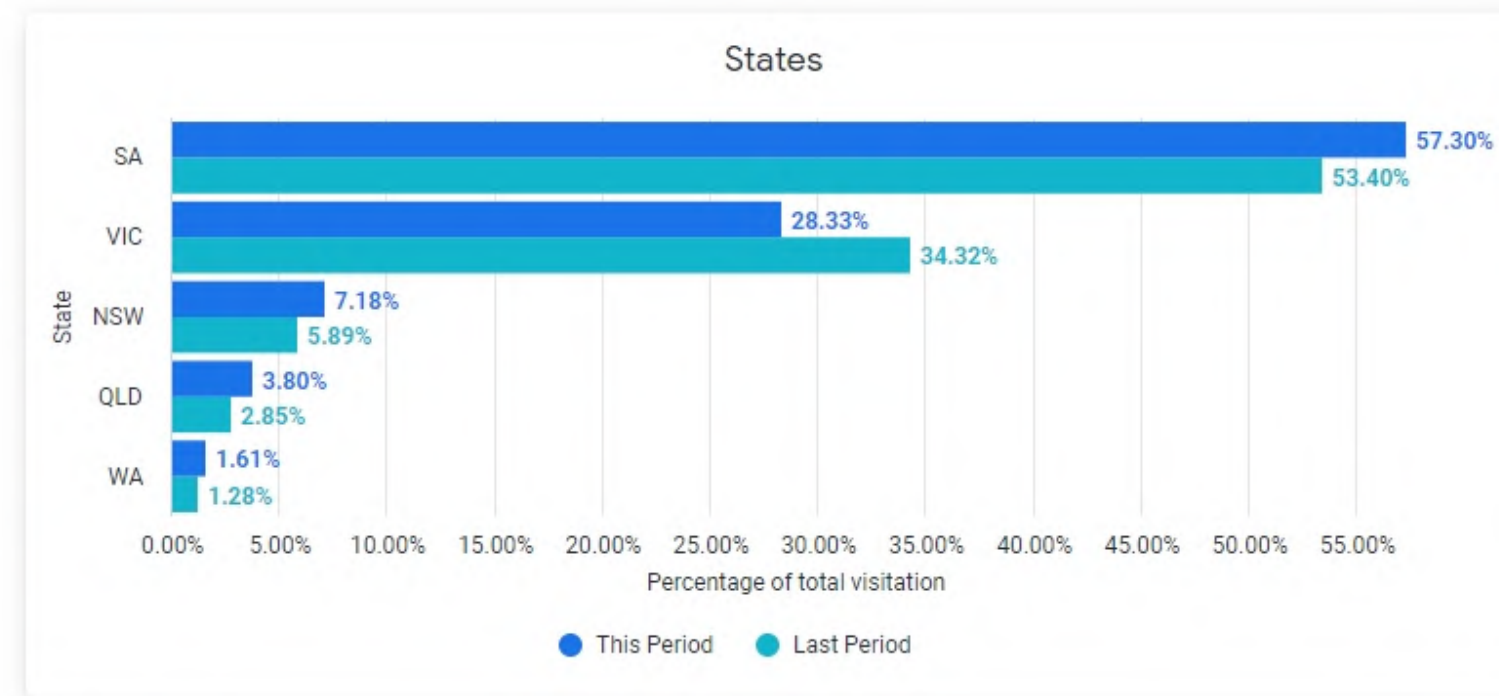
● 2021 ● 2022 ● 2023

Accommodation Data, TRA and Mobility Data

INSIGHT

December 2023 had approximately 48,147 overnight visitors which is a decrease of 45% compared to December 2022.

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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.

States

State	This Period	Last Period
SA	57.30%	53.40%
VIC	28.33%	34.32%
NSW	7.18%	5.89%
QLD	3.80%	2.85%
WA	1.61%	1.28%

Intrastate Suburbs

Suburb	This Period	Last Period
Mount Barker	2.09%	1.83%
Murray Bridge	1.33%	1.45%
Morphett Vale	1.28%	1.20%
Paralowie	1.16%	1.43%
Prospect	1.12%	1.02%

Interstate Suburbs

Suburb	This Period	Last Period
Warrnambool	0.98%	1.75%
Horsham	0.92%	1.20%
Point Cook	0.92%	0.95%
Melbourne	0.88%	0.65%
Hamilton	0.72%	1.27%

Mobility Data

INSIGHT

December 2022 vs December 2023

Interstate visitation for the month of December 2023 was 43.56% which is a 13.3% decrease when compared to December 2022.

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

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

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