

# MURRAY RIVER, LAKES & COORONG

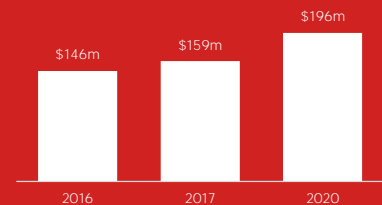
Regional Profile December 2014-2016



Government of South Australia  
South Australian Tourism Commission

## OVERVIEW

- Currently the Murray River, Lakes & Coorong contributes \$146 million to the December 2016 South Australian expenditure of \$5.8 billion.
- The Murray River, Lakes & Coorong has achieved 75 per cent of their \$196 million 2020 target.



## Annual Visitor Summary December 2014 - December 2016

### ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Visits	234,000	71,000	305,000	9,000	314,000
%	77%	23%	97%	3%	100%
Nights	554,000	235,000	790,000	127,000	917,000
%	70%	30%	86%	14%	100%
Average Length of Stay	2.4	3.3	2.6	14.1	2.9

### Day Trips

Average Annual Day Trips to Murraylands **845,000**

### PURPOSE

	Holiday	VFR	Business	Other	Total
Visits	183,000	79,000	37,000	16,000	314,000
%	58%	25%	12%	5%	100%
Nights	538,000	209,000	87,000	84,000	917,000
%	59%	23%	9%	9%	100%
Average Length of Stay	2.9	2.6	2.4	5.3	2.9

### Expenditure

Average Annual Expenditure **\$ 146,000,000**

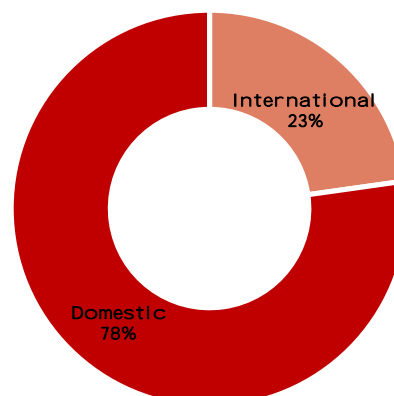
- 97 per cent of visitors are Domestic Visitors and 3 per cent International Visitors.
- Domestically 77 per cent are from within the state compared to 23 per cent from Interstate.
- 84 per cent of visitors to the Murraylands are Leisure visitors (Holiday + VFR).

## MURRAYLANDS TOURISM LISTINGS

Category	Murraylands
Event	116
Accommodation	78
Attraction	39
Hire	8
Tour	7
Food and Drink	7
Information Services	3
Destination Information	2
General Services	1
Grand Total	261

Note: some listings have multiple categories of accommodation  
Source: Australian Tourism Data Warehouse

## MURRAYLANDS MEDIA COVERAGE



Source: Item Count - SATC Internal - 2016

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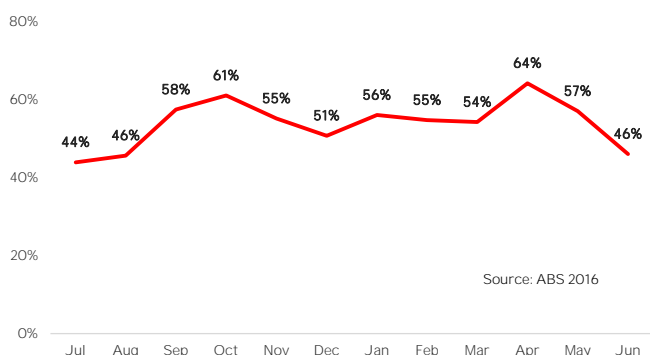


## ACCOMMODATION SUPPLY

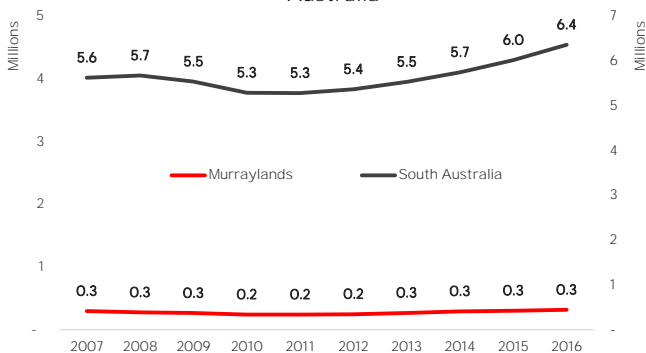
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	7
Rooms	164
Occupancy	54%
Takings	\$ 3,500,000

- Average occupancy for the year is 54 per cent over 7 establishments and 164 rooms.
- The peak months are October and April with occupancy at 61 per cent and 64 per cent respectively.
- Low points of the year comes in Winter where occupancy drops to 45 per cent on average.

Monthly Occupancy Rates Year end June 2016 - Murraylands

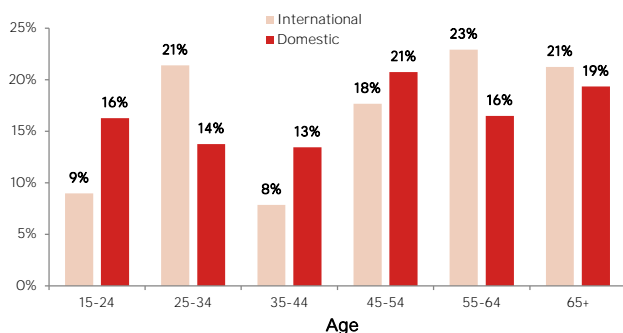


Total Overnight Visitation to Murraylands & South Australia



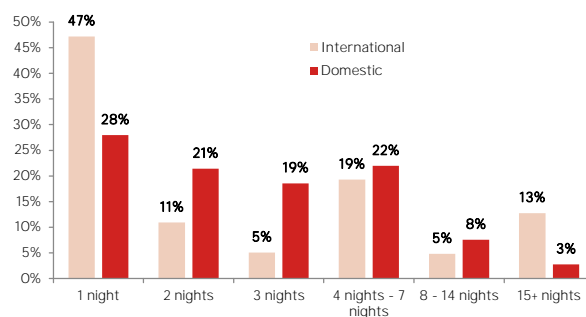
## VISITOR PROFILE

Age of Visitors to Murraylands



- International Visitors peak in the 55-64 age group at 23 per cent. They also feature in the 25-34 age group at 21 per cent.
- For Domestic Visitors there is a peak in the 45-54 age group at 21 per cent.

Length of Visit to Murraylands



- 58 per cent of International Visitors prefer to stay 1-2 nights in the Murraylands.
- 49 per cent of Domestic Visitors stay 1-2 nights.

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## DOMESTIC VISITOR PROFILE

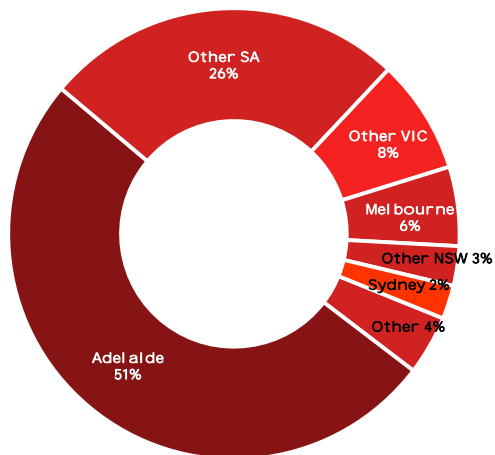
Purpose	Holiday	VFR	Other	Total
Visits	175,000	77,000	52,000	305,000
%	57%	25%	17%	100%
Nights	477,000	196,000	116,000	789,000
%	60%	25%	15%	100%
ALOS	2.7	2.5	2.2	2.6

## INTERNATIONAL VISITOR PROFILE

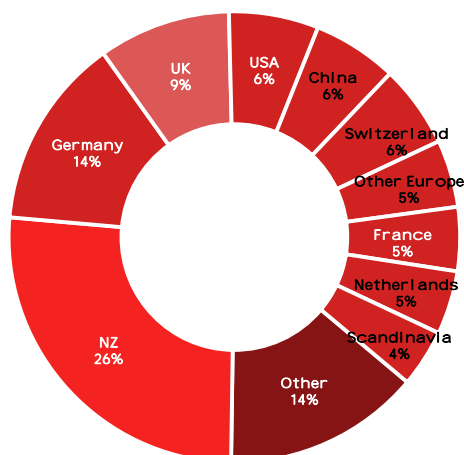
Purpose	Holiday	VFR	Other	Total
Visits	7,000	1,000	1,000	9,000
%	78%	11%	11%	100%
Nights	60,000	13,000	54,000	127,000
%	47%	10%	43%	100%
ALOS	8.6	13.0	54.0	14.1

## VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Murraylands



Origin of International Visitors to Murraylands



- Regional South Australia contributes 26 per cent of visitors to the Murraylands.
- Adelaide visitors contribute 51 per cent of the visitors to the Murraylands.
- 14 per cent of visitor come from Victoria with its close proximity to the Murraylands.
- Internationally Europeans contribute 48 per cent of the visits to the Murraylands, with Asia at 14 per cent.
- New Zealanders provide 26 per cent of all International visitors.

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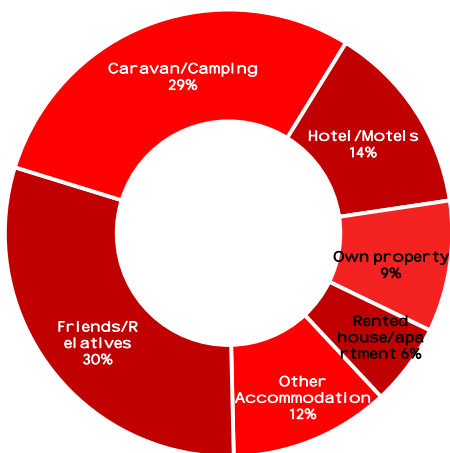
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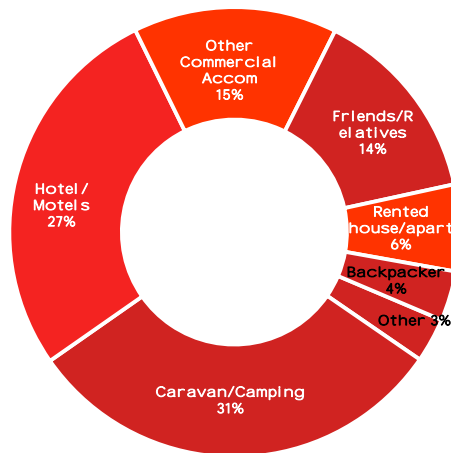
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## VISITOR USE OF ACCOMMODATION

Accommodation used in Murraylands for Domestic Visitors



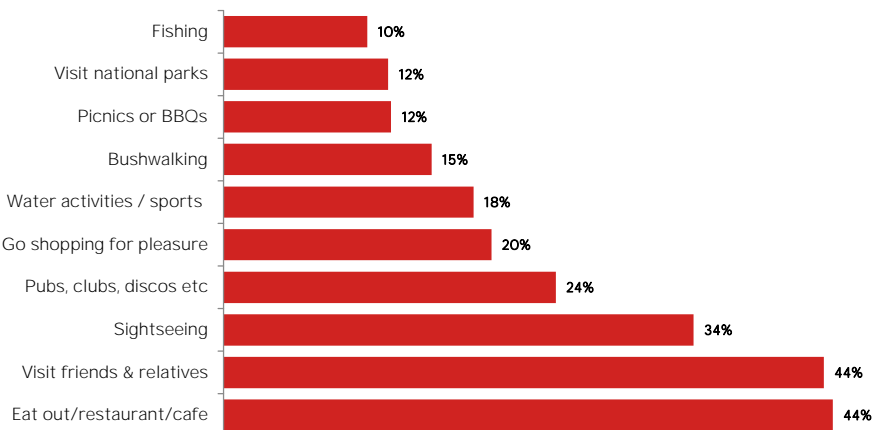
Accommodation used in Murraylands for International Visitors



- 44 per cent of Domestic Visitor nights to the Murraylands are spent either in a Friends or Relatives property or a Hotel or Motel.
- 29 per cent of Domestic visitors and 31 per cent of international visitors prefer to stay in Caravan and Camping accommodation.
- 41 per cent of International Visitor nights to the Murraylands are spent either in a Friends or Relatives property or a Hotel or Motel.

## VISITOR ACTIVITIES

Domestic Visitor Activities in Murraylands



- The most popular activity when coming to the Murraylands is to Visit friends & relatives.
- Other popular activities include Water activities /Sports, Bushwalking and Sightseeing.

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## REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

- In 2013-14, the tourism industry contributed an estimated \$167 million to the Murraylands regional economy (12.8 per cent of gross regional product) and directly employed approximately 700 people (6.4 per cent of regional employment).

In 2013-14, the tourism activity in Adelaide generated:

- \$100 million and \$230 million in direct and indirect tourism output, and \$330 million in total tourism output;
- \$51 million and \$96 million in direct and indirect tourism GVA, and \$148 million in total tourism GVA;
- \$54 million and \$112 million in direct and indirect tourism GRP and \$167 million in total tourism GRP;
- and
- 700 jobs for people employed directly by the tourism industry, 900 indirect jobs and a total employment impact of 1,700 people.

## REGIONAL INSIGHTS

- Range of activities provides solid appeal.

### Interstate & Intrastate

- Responses largely positive though intensity of appeal not as high as some other regions.
- Range of activities attractive to many from African safari, to cruises on the river, to historical sites.
- Relative proximity to Adelaide also a plus for SA residents.

### International

- New Zealand appeal high for the Murraylands.
- New Zealand with strong awareness of the Murraylands.
- Staying on a houseboat appeals the most.
- Monarto Zoo also tested well.
- Aboriginal activities have high appeal.

Appeal data is from the consumer surveying conducted for the SATC by BDA Marketing Planning. Sample of 800 interstate travellers and 400 interstate travellers, followed by eight focus groups in Adelaide, Sydney and Melbourne. Comments relating to international appeal are sourced from the Consumer Demand Project run by Tourism Australia in 9 priority markets, with a sample of 500 per market.

Prepared by the South Australian Tourism Commission, December 2016

**Sources** Unless otherwise stated, all data in this report is from the International Visitor and National Visitor Surveys (IVS and NVS) Conducted by Tourism Research Australia. These Sources are based on sample surveys and as with all sample surveys, are subject to sampling errors. Caution is required in interpreting some estimates, in particular, regional estimates can be affected by small sample sizes and can be subject to a high level of sampling error. Regional data should accordingly be used with a high level of caution and treated as being for indicative purposes only. Data refers to visitors 15 years and over. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from December 2014 to December 2016  
Consumer Demand Product Testing - BDA Marketing

**Notes and Abbreviations** Totals may not add to 100% due to rounding. VFR: Visiting Friends and Relatives. np: Not Published due to small sample size. ALOS: Average Length of Stay  
ABS: Survey of Tourism Accommodation. Hotels, Motels, Guest houses and Serviced Apartments with 15 or more rooms. Cat. No. 8635455001