

# MURRAY RIVER, LAKES & COORONG

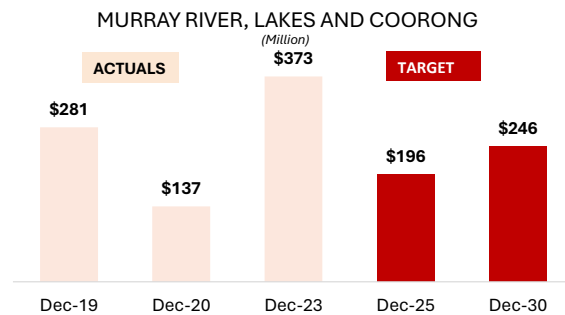
## REGIONAL PROFILE



### OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2023

- Currently, the Murray River Lakes and Coorong contributes \$373 million to the year end December 2023 South Australian expenditure of \$10.1 billion.
- The Murray River Lakes and Coorong has achieved 100 per cent of their 2025 target of \$196 million and their 2030 target of \$246 million.



### ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2023

ORIGIN						
	Intrastate	Interstate	Total Domestic	International	Total	
<b>Overnight Visits</b>	272,000	84,000	<b>356,000</b>	7,000	<b>363,000</b>	
% of visits	75%	23%	<b>98%</b>	2%	<b>100%</b>	
<b>Share of Regional SA</b>	6%	3%	<b>5%</b>	2%	<b>5%</b>	
<hr/>						
<b>% Across Regional SA</b>	60%	35%	<b>94%</b>	6%	<b>100%</b>	
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>						
<b>Nights</b>	511,000	332,000	<b>844,000</b>	125,000	<b>969,000</b>	
% of nights	53%	34%	<b>87%</b>	13%	<b>100%</b>	
<b>Share of Regional SA</b>	4%	3%	<b>3%</b>	1%	<b>2%</b>	
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<b>% Across Regional SA</b>	33%	31%	<b>65%</b>	35%	<b>100%</b>	
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>						
<b>Average Length of Stay</b>	1.9	4.0	<b>2.4</b>	17.9	<b>2.7</b>	
<b>ALOS Regional SA</b>	2.8	4.6	<b>3.5</b>	32.0	<b>5.1</b>	
<hr/>						
<b>Total Expenditure</b>						<b>\$374,000,000</b>
<b>Overnight Expenditure</b>	\$50,000,000	\$102,000,000	<b>\$152,000,000</b>	\$14,000,000	<b>\$166,000,000</b>	
<b>Day Trip Expenditure</b>						<b>\$208,000,000</b>
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<b>Domestic Day Trips</b>						<b>1,084,000</b>

- The Murray River Lakes and Coorong saw 363,000 overnight visitors for the year end December 2023.
- 75 per cent of overnight visitors were from intrastate, 23 per cent from interstate and 2 per cent from overseas.
- The 272,000 intrastate overnight visitors stayed 511,000 nights with an average length of stay of 1.9 nights.
- There were 84,000 interstate overnight visitors who stayed 332,000 nights with an average length of stay of 4.0 nights
- The region saw 7,000 international visitors with an average length of stay of 17.9 nights and spend of \$14 million.
- 1.1 million day trips were taken to and within the Murray River Lakes and Coorong for the year with spend of \$208 million.

ALOS = Average Length of Stay

# MURRAY RIVER, LAKES & COORONG

## REGIONAL PROFILE



### PURPOSE

	Holiday	VFR	Business	Other	Total
<b>Overnight Visits</b>	193,000	79,000	79,000	12,000	<b>363,000</b>
% of visits	53%	22%	22%	3%	<b>100%</b>
Share of Regional SA	6%	3%	5%	2%	<b>5%</b>
<b>% Across all regions</b>	<b>41%</b>	<b>33%</b>	<b>21%</b>	<b>6%</b>	<b>100%</b>

<b>Nights</b>	433,000	223,000	243,000	71,000	<b>969,000</b>
% of nights	45%	23%	25%	7%	<b>100%</b>
Share of Regional SA	3%	1%	4%	1%	<b>2%</b>
<b>% Across all regions</b>	<b>31%</b>	<b>39%</b>	<b>15%</b>	<b>14%</b>	<b>100%</b>

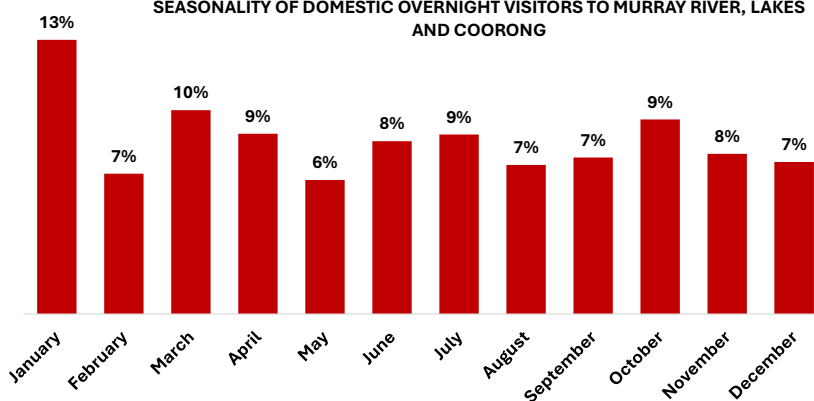
<b>Average Length of Stay</b>	2.2	2.8	3.1	5.9	<b>2.7</b>
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Expenditure					
<b>Annual Expenditure</b>	\$98,000,000	\$20,000,000	\$33,000,000	\$15,000,000	<b>\$165,000,000</b>
<b>Expenditure 2019</b>	\$117,000,000	\$12,000,000	\$21,000,000	\$13,000,000	<b>\$163,000,000</b>
<b>Av spend per night</b>	\$226	\$90	\$136	\$211	\$170
<b>Av spend per night Reg SA</b>	\$224	\$109	\$155	\$297	\$181
<b>Share of Regional SA</b>	3%	5%	1.3%	2%	<b>3%</b>

- 75 per cent of overnight visitors to the Murray River Lakes and Coorong are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$226 per night compared to VFR visitors who spend \$90 per night.
- Leisure overnight visitors spent \$118 million for the year, making up 72 per cent of all overnight expenditure.
- There are 79,000 business visitors who stay 243,000 nights with spend of \$33 million.

### SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO MURRAY RIVER, LAKES AND COORONG



- National Visitor Survey data shows us that in 2023 January, March, April, July and October are the strongest months for visitation on the Murray River Lakes and Coorong.
- January is the busiest month for the year with summer school holidays.
- April, July and October also strong with school holidays, Easter and the October long weekend.

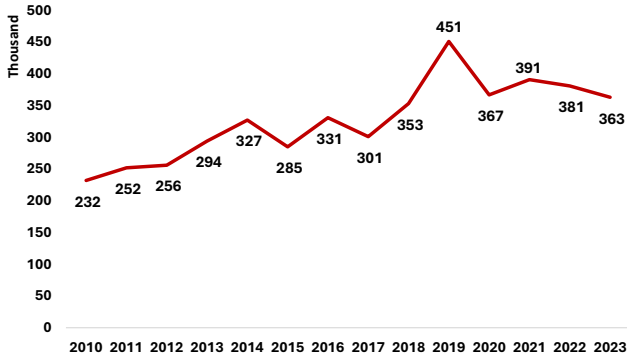
# MURRAY RIVER, LAKES & COORONG

## REGIONAL PROFILE

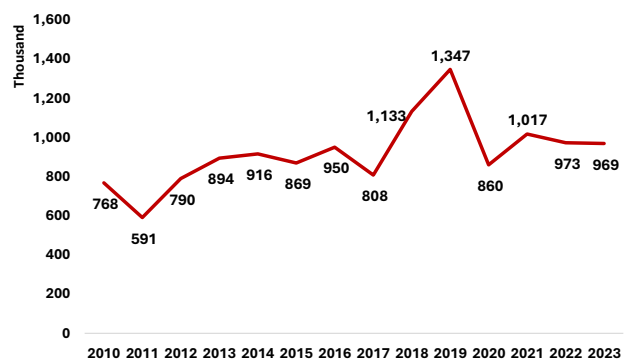


### TOTAL OVERNIGHT VISITATION 2010 - 2022

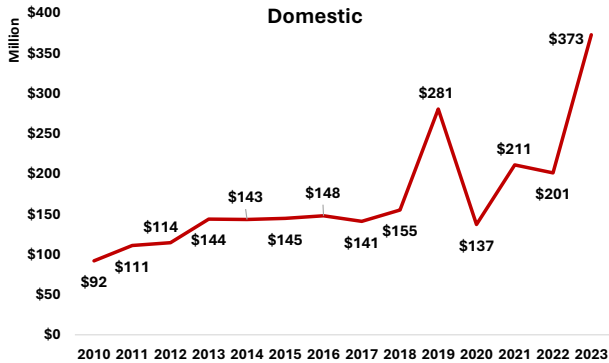
**VISITORS MURRAY RIVER LAKES AND COORONG 2010 - 2023 - International and Domestic**



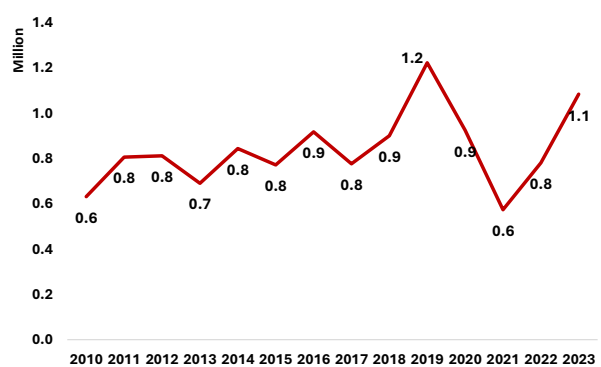
**NIGHTS MURRAY RIVER LAKES AND COORONG 2010 - 2023 - International and Domestic**



**TOTAL EXPENDITURE MURRAY RIVER LAKES AND COORONG 2010 - 2023 - International and Domestic**



**DAY TRIPS MURRAY RIVER LAKES AND COORONG 2010 - 2023 - Domestic**



Note: Fluctuations can occur in visitation data due to small sample sizes. Prior regional profiles used data averaged over three years to smooth these fluctuations.

Regions	Visits		Expenditure	
	Dec-23	Change on Dec-19	Dec-23	Change on Dec-19
Adelaide	3,422,000	-13%	\$5,500,000,000	22%
Adelaide Hills	233,000	3%	\$293,000,000	42%
Barossa	343,000	8%	\$261,000,000	16%
Clare Valley	226,000	11%	\$191,000,000	62%
Eyre Peninsula	537,000	-8%	\$591,000,000	7%
Fleurieu Peninsula	868,000	-4%	\$837,000,000	50%
Flinders Ranges and Outback	761,000	-18%	\$610,000,000	19%
Kangaroo Island	205,000	-1%	\$280,000,000	47%
Limestone Coast	763,000	-2%	\$520,000,000	24%
Murray River, Lakes and Coorong	363,000	-20%	\$373,000,000	33%
Riverland	322,000	-25%	\$239,000,000	22%
Yorke Peninsula	530,000	-11%	\$384,000,000	60%
Regional SA	4,830,000	-7%	\$4,630,000,000	30%
<b>South Australia</b>	<b>7,835,000</b>	<b>-9%</b>	<b>\$10,140,000,000</b>	<b>25%</b>

# MURRAY RIVER, LAKES & COORONG

## REGIONAL PROFILE



### MURRAY RIVER, LAKES AND COORONG TOURISM LISTINGS

Category	# Listings
Accommodation	129
Attraction	72
Food & Drink	18
Hire	17
Tour	14
Event	12
Destination Information	3
Information Services	2
Transport	1
General Services	1
<b>Grand Total</b>	<b>269</b>

The **Australian Tourism Data Warehouse (ATDW)** is Australia's national platform for digital tourism information. Eligible tourism businesses can create a listing for their accommodation, tour, food and drink establishment, event and more, free of charge. These listings appear on websites such as [southaustralia.com](https://southaustralia.com)

An **ATDW lead** is generated when a user performs one of the following actions when viewing an ATDW product page on southaustralia.com:

- Website click through (via visit website button or website URL)
- Book now button click
- Claim deal button click
- Clicking on contact email address to start writing email
- Clicking on a phone number to start a phone call (mobile only)

Note: some listings have multiple categories of accommodation  
Source: Australian Tourism Data Warehouse  
Categories above defined at - <https://tourism.sa.gov.au/support/atdw>

### MURRAY RIVER LAKES AND COORONG AUSTRALIAN TOURISM DATA WAREHOUSE LEADS

# 66,000

YEAR END DECEMBER 2023

#### ACCOMMODATION LEADS

44,000  
67%

#### FOOD & DRINK LEADS

1,000  
1%

#### TOUR LEADS

10,000  
14%

#### \*OTHER LEADS

11,000  
17%

#### TOP 5

- THE CUBE MURRAY RIVER
- COORONG LIFE
- BIG4 THE BEND HOLIDAY PARK
- BILL'S BOATHOUSE
- BIG4 BREEZE HOLIDAY PARKS MANNUM

#### TOP 5

- MANNUM HOTEL
- SWAN REACH HOTEL
- PRETORIA HOTEL
- TWIN BRIDGES DISTILLERY
- RUSTIC COUNTRY CAFE

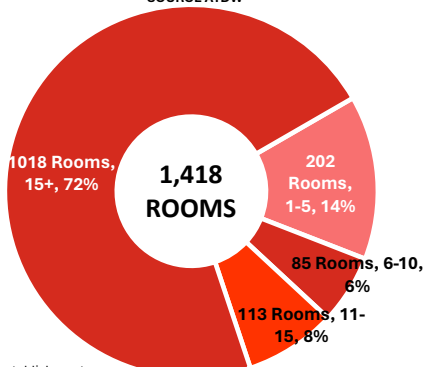
#### TOP 5

- JUGGLE HOUSE EXPERIENCES
- MONARTO SAFARI PARK EXPERIENCES
- MURRAY PRINCESS
- ADELAIDE HAUNTED HORIZONS GHOST TOURS
- BIG BEND BY NIGHT

\* Other refers to leads for events, destination information, attractions, general services, hire and transport

### ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

#### ROOMS IN THE MURRAY RIVER, LAKES AND COORONG SOURCE ATDW



Rooms refers to rooms per establishment

- Currently there are 133 establishments on the Murray River Lakes and Coorong that accommodate guests.
- These 133 establishments account for 1,418 rooms across the region.
- 72 per cent of rooms fall into establishment with 15 or more rooms.
- 14 per cent of rooms fall into the 1-5 room establishments.

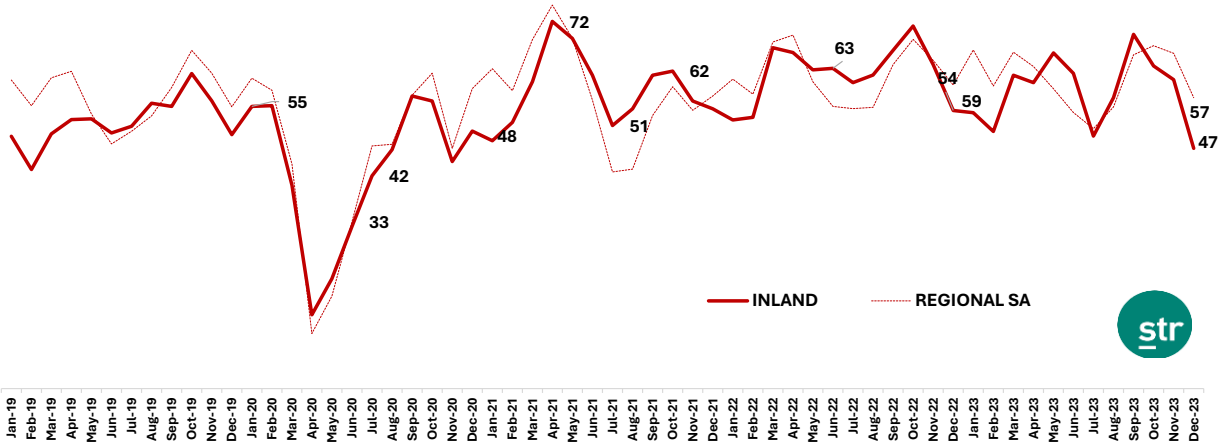
# MURRAY RIVER, LAKES & COORONG

## REGIONAL PROFILE



### ACCOMMODATION STR

#### ACCOMMODATION OCCUPANCY INLAND

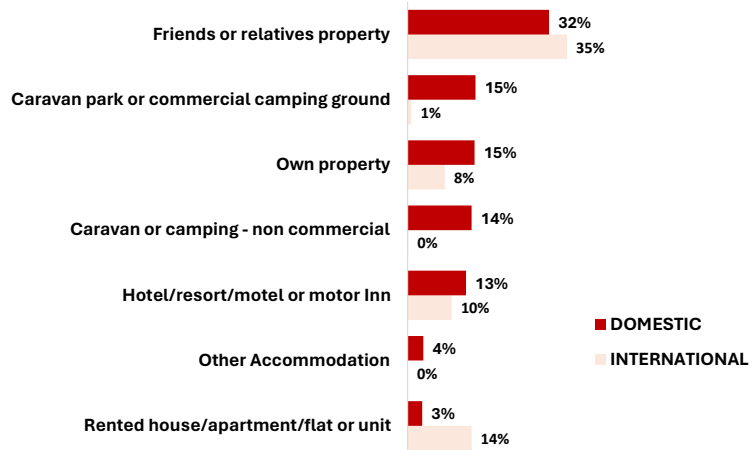


- The Inland regions include accommodation data for the Riverland, MRLC and the Flinders. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Inland regions was 52%, this fell to 43% in 2020, rose to 59% in 2021, 62% in 2022 and fell in 2023 to 58%.

#### VISITOR USE OF ACCOMMODATION

##### ACCOMMODATION USED IN MURRAY RIVER, LAKES AND COORONG FOR DOMESTIC AND INTERNATIONAL VISITORS

- 32 per cent of domestic overnight visitor nights in the Murray River Lakes and Coorong are spent with Friends or Relatives compared to the international average of 35 per cent.
- 13 per cent of domestic and 10 per cent of international visitors stayed in a Hotel/resort/motel or motor inn.
- 29 per cent of domestic visitors to the Murray River Lakes and Coorong stay in a caravan park.
- 14 per cent of international visitors stay in a rented house/apartment/flat or unit.



#### TRANSPORT



- The main method of transport used on trips to the Murray River Lakes and Coorong was self drive.
- 97 per cent travel to the region is through self drive.

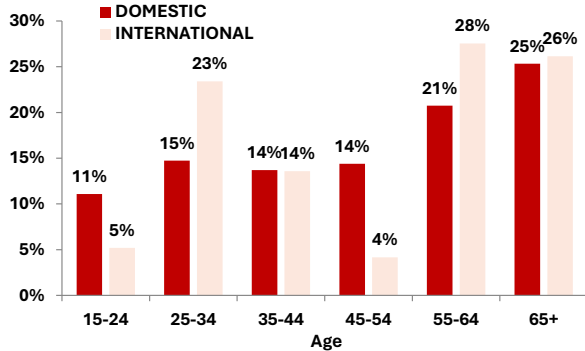
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## REGIONAL PROFILE



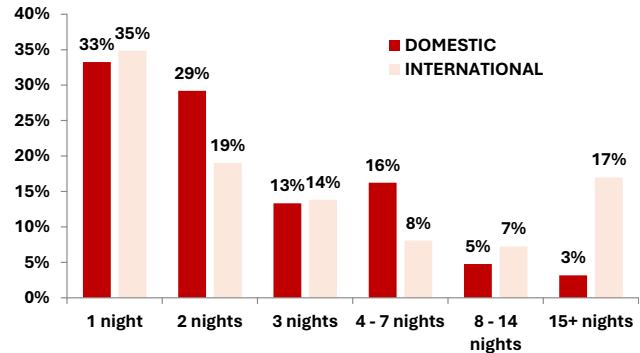
### VISITOR PROFILE

AGE OF VISITORS TO MURRAY RIVER, LAKES AND COORONG



- In the domestic market the 55+ is the strongest age group with 46 per cent of visitors.
- The International market is also strongest for the 55+ age group with 54 per cent of all visits.

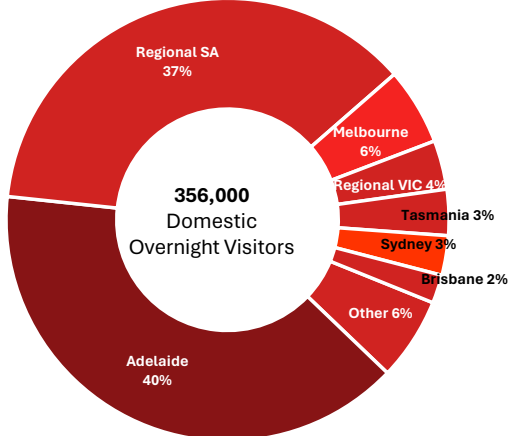
LENGTH OF VISIT TO MURRAY RIVER, LAKES AND COORONG



- 62 per cent of domestic overnight visitors like to stay 1 to 2 nights.
- 54 per cent of international visitors stay 1-2 nights.

### VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO MURRAY RIVER, LAKES AND COORONG

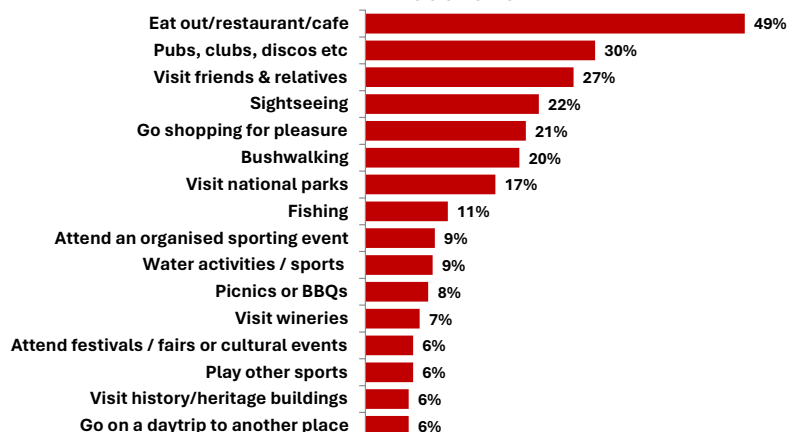


- Victoria at 10 per cent is the Murray River Lakes and Coorong biggest interstate overnight domestic markets.
- Regional South Australia contributes 37 per cent of visitors to the Murray River Lakes and Coorong.
- 40 per cent of visitors come from Adelaide.

### VISITOR ACTIVITIES

- The most popular activity when coming to the Murray River Lakes and Coorong is to eat out at a restaurant or cafe.
- Other popular activities include visiting a friend or relative, water activities/sports, visiting wineries, bushwalking, visiting national parks, fishing and seeing the sights.

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN MURRAY RIVER, LAKES AND COORONG



# MURRAY RIVER, LAKES & COORONG

## REGIONAL PROFILE



### REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2021-22, the tourism industry contributed an estimated \$237 million to the Murray River Lakes and Coorong regional economy and directly employed 1,300 people.

#### Employment

- 1,300 jobs for people employed directly by the tourism industry, 500 indirect jobs and a total employment impact of 1,700 people.

#### Gross Value Added (GVA)

- \$63 million and \$61 million in direct and indirect tourism GVA, and \$124 million in total tourism GVA.

#### Gross Regional Product (GRP)

- \$70 million and \$79 million in direct and indirect tourism GRP and \$148 million in total tourism GRP.

#### Tourism Consumption

2021-22 Tourism products - directly consumed	
• Takeaway and restaurant meals	18%
• Shopping (including gifts and souvenirs)	17%
• Fuel (petrol, diesel)	12%
• Long distance passenger transportation	9%
• Accommodation services	8%
• Actual and imputed rent on dwellings	8%
• Food products	6%
• Alcoholic beverages and other beverages	6%

#### Tourism Employment

2021-22 Tourism Industries - 1,300 directly employed	
• Cafes, restaurants and takeaway food services	38%
• Retail trade	18%
• Clubs, pubs, taverns and bars	8%
• Accommodation	15%
• Travel agency and tour operator services	4%
• All other industries	3%
• Other sports and recreation services	2%
• Air, water and other transport	10%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2022

### REGIONAL PERCEPTIONS REPORTING

- The Murray River, Lakes and Coorong is seen as great option for a laid back holiday with plenty to offer in the way of excitement
- This destination appeals to the adventurous thrill seekers and those who want to get back to nature, relax and unwind
- For some though, this region is somewhat of an unknown quantity beyond the obvious water related activities.
- This means it is also less appealing in the colder months.

To drive increased visitation and expenditure, we recommend the Murray River, Lakes and Coorong:

<b>Appeal to the thrill seekers who want to escape the daily grind and get the adrenaline pumping</b>	This region hosts plenty of high octane activities, some of which aren't widely known. A thrill seekers guide, including motorsports at The Bend, sky diving at Wellington and water skiing on the Murray is worth considering.
<b>Promote the amazing natural assets of the region and the best ways to experience these</b>	This region boasts beautiful landscapes and diverse wildlife. Highlight the opportunities to experience these first hand through camp grounds and walking trails, so people can immerse themselves in the great outdoors.
<b>Make sure people know what there is to do along the way</b>	Some see the region as being quite spread out, with the need to travel large distances between destinations. Show what's on offer along the way, so they know where to stop off and sample local produce and experience the best of the region.
<b>Region appeals to...</b>	<ul style="list-style-type: none"> <li>— Relaxation seekers</li> <li>— Adventurers</li> <li>— Caravanners and campers</li> <li>— Nature lovers</li> <li>— Travelling with children</li> </ul>

Prepared by the South Australian Tourism Commission, December 2023

**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 year end December 2023.

**Regional Perceptions Testing - June 2022** - 3-day, online bulletin board (OBB) Approx. 40 mins of content per person, per day.

Participants were recruited as follows: - 22 Intrastate participants (70% metro, 30% regional), - 20 Interstate participants (Melbourne, Regional VIC and Sydney)

A mix of age (18-44 and 45-69) and gender was achieved across participants. Participants were willing travellers, non-rejectors of travelling to/within SA, and did not live in the region they were recruited to explore (for intrastate).

**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