

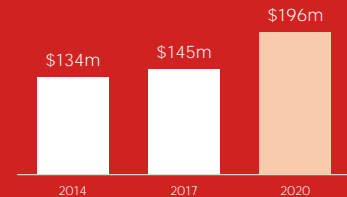
# MURRAY RIVER, LAKES & COORONG

## Regional Profile



### OVERVIEW

- Currently the Murray River, Lakes and Coorong contributes \$145 million to the December 2017 South Australian expenditure of \$6.6 billion.
- The Murray River, Lakes and Coorong has achieved 74 per cent of their \$196 million 2020 target.



### Annual Visitor Summary December 2015 - December 2017

#### ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
<b>Overnight Visits</b>	226,000	69,000	<b>294,000</b>	10,000	<b>304,000</b>
<b>%</b>	<b>77%</b>	<b>23%</b>	<b>97%</b>	<b>3%</b>	<b>100%</b>
<b>Nights</b>	545,000	211,000	<b>756,000</b>	121,000	<b>877,000</b>
<b>%</b>	<b>72%</b>	<b>28%</b>	<b>86%</b>	<b>14%</b>	<b>100%</b>
<b>Average Length of Stay</b>	2	3	3	12	3
<b>Domestic Day Trips</b>					820,000
Average Annual Day Trips to the Murray River, Lakes and Coorong					

#### PURPOSE

	Holiday	VFR	Business	Other	Total
<b>Overnight Visits</b>	170,000	84,000	36,000	14,000	<b>304,000</b>
<b>%</b>	<b>56%</b>	<b>28%</b>	<b>12%</b>	<b>5%</b>	<b>100%</b>
<b>Nights</b>	491,000	238,000	103,000	46,000	<b>877,000</b>
<b>%</b>	<b>56%</b>	<b>27%</b>	<b>12%</b>	<b>5%</b>	<b>100%</b>
<b>Average Length of Stay</b>	3	3	3	3	3
<b>Expenditure</b>					145,000,000
Average Annual Expenditure					

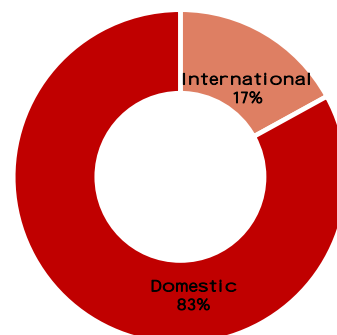
- 97 per cent of visitors are Domestic visitors and 3 per cent International visitors.
- Domestically 77 per cent of visitors are from within the state compared to 23 per cent from Interstate.
- 84 per cent of visitors to the Murray River, Lakes and Coorong are Leisure visitors (Holiday + VFR).

#### MURRAY RIVER LAKES AND COORONG TOURISM LISTINGS

Category	Murray River Lakes and Coorong
Accommodation	73
Attraction	27
Destination Information	2
Event	50
Food and Drink	11
General Services	1
Hire	15
Journey	1
Tour	4
<b>Grand Total</b>	<b>184</b>

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

#### MURRAY RIVER LAKES AND COORONG MEDIA COVERAGE



Source: Item Count - SATC Internal - 2017

# MURRAY RIVER, LAKES & COORONG

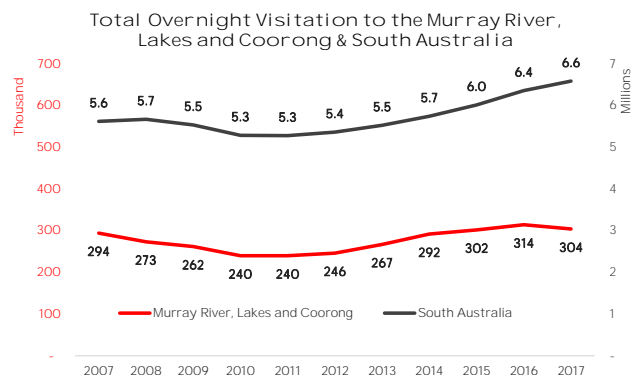
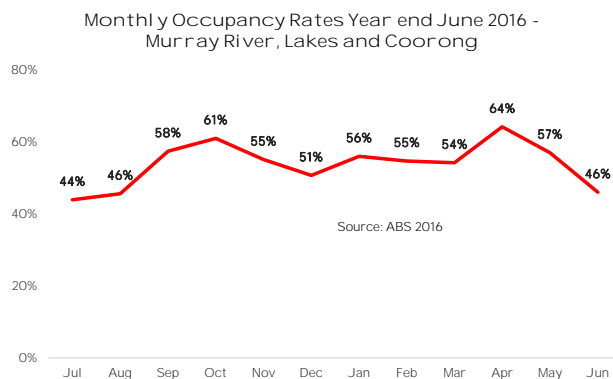
## Regional Profile



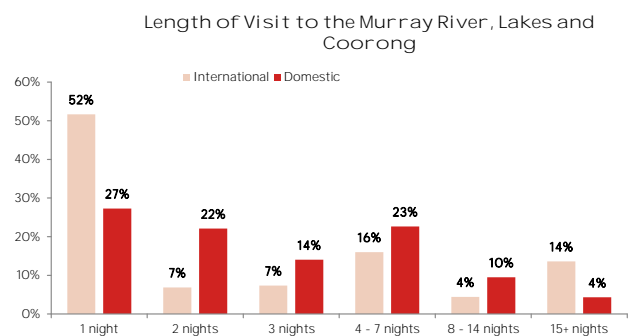
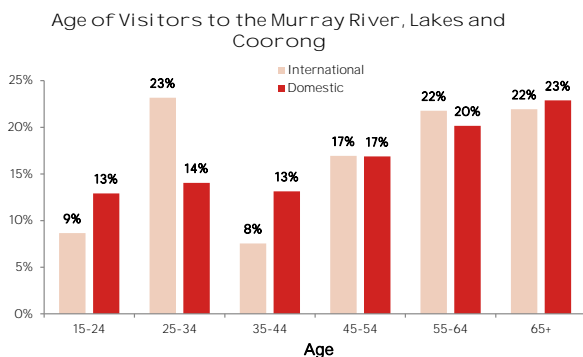
### ACCOMMODATION SUPPLY

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.



### VISITOR PROFILE



- International visitors peak in the 25-34 age group at 23 per cent.
- For Domestic visitors there is a peak in the 65+ age group at 23 per cent.

- 52 per cent of International visitors prefer to stay 1 night in the Murray River, Lakes and Coorong.
- 49 per cent of Domestic visitors stay 1-2 nights.

# MURRAY RIVER, LAKES & COORONG

## Regional Profile



### DOMESTIC VISITOR PROFILE

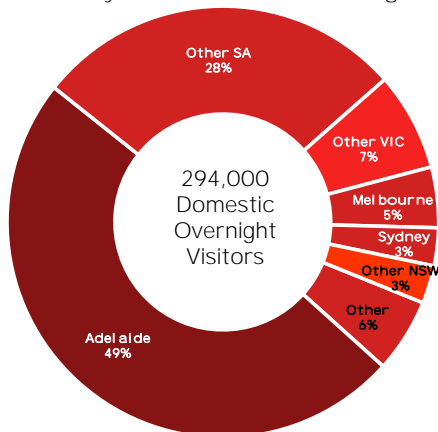
Purpose	Holiday	VFR	Other	Total
Visits	162,000	83,000	49,000	294,000
<b>%</b>	<b>55%</b>	<b>28%</b>	<b>17%</b>	<b>100%</b>
Nights	426,000	211,000	120,000	756,000
<b>%</b>	<b>56%</b>	<b>28%</b>	<b>16%</b>	<b>100%</b>
ALOS	3	3	2	3

### INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	8,000	1,000	1,000	10,000
<b>%</b>	<b>80%</b>	<b>10%</b>	<b>10%</b>	<b>100%</b>
Nights	65,000	27,000	30,000	121,000
<b>%</b>	<b>54%</b>	<b>22%</b>	<b>25%</b>	<b>100%</b>
ALOS	8	27	30	12

### VISITOR ORIGIN

Origin of Domestic Overnight Visitors to the Murray River, Lakes and Coorong



Origin of International Visitors to the Murray River, Lakes and Coorong



- Regional South Australia contributes 28 per cent of visitors to the Murray River, Lakes and Coorong.
- Adelaide visitors contribute 49 per cent of the visitors to the Murray River, Lakes and Coorong.
- 12 per cent of visitor come from Victoria with its close proximity to the Murray River, Lakes and Coorong.
- Internationally Europeans contribute 50 per cent of the visits to the Murray River, Lakes and Coorong, with Asia at 17 per cent.
- New Zealanders provide 22 per cent of all International visitors.

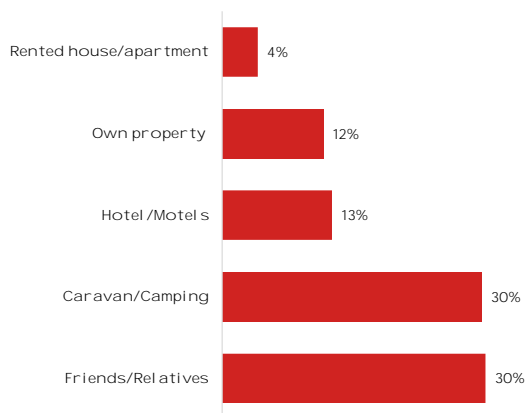
# MURRAY RIVER, LAKES & COORONG

## Regional Profile

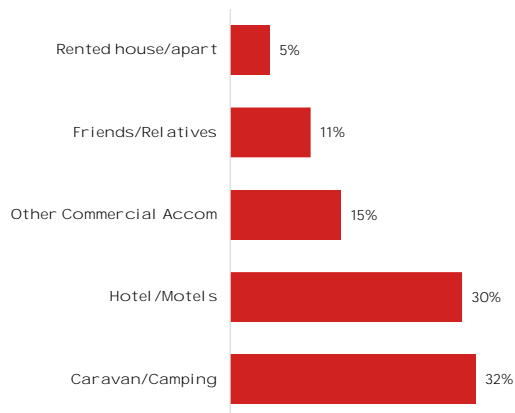


### VISITOR USE OF ACCOMMODATION

Accommodation used in the Murray River, Lakes and Coorong for Domestic Visitors



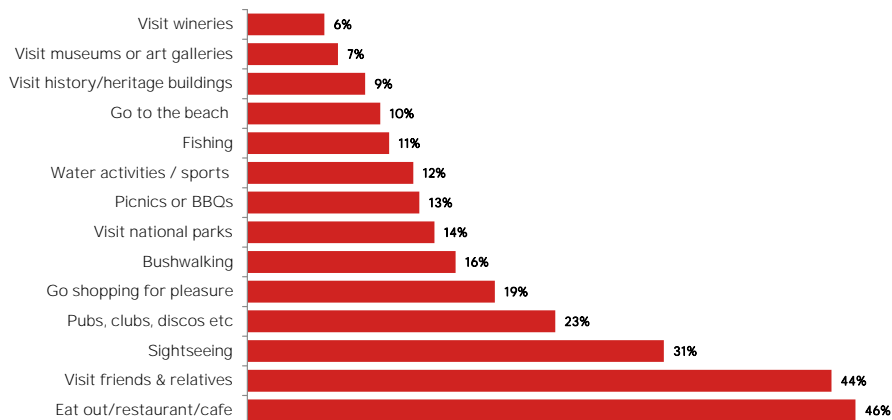
Accommodation used in the Murray River, Lakes and Coorong for International Visitors



- 43 per cent of Domestic visitor nights to the Murray River, Lakes and Coorong are spent either in a Friends or Relatives property or a Hotel or Motel.
- 30 per cent of Domestic visitors and 32 per cent of International visitors prefer to stay in Caravan and Camping accommodation.
- 41 per cent of International visitor nights to the Murray River, Lakes and Coorong are spent either in a Friends or Relatives property or a Hotel or Motel.

### VISITOR ACTIVITIES

Domestic Visitor Activities in the Murray River, Lakes and Coorong



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

# MURRAY RIVER, LAKES & COORONG

## Regional Profile



### REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2016-17, the tourism industry contributed an estimated \$120 million to the Murray River, Lakes and Coorong regional economy and directly employed approximately 1,000.

#### Employment

- 1,000 jobs for people employed directly by the tourism industry, 400 indirect jobs and a total employment impact of 1,400 people.

#### Tourism output

- \$110 million and \$122 million in direct and indirect tourism output, and \$232 million in total tourism output.

#### Gross Value Added (GVA)

- \$58 million and \$52 million in direct and indirect tourism GVA, and \$110 million in total tourism GVA.

#### Gross Regional Product (GRP)

- \$62 million and \$58 million in direct and indirect tourism GRP and \$120 million in total tourism GRP.

### REGIONAL INSIGHTS

- Range of activities provides solid appeal.

#### Interstate & Intrastate

- Responses largely positive though intensity of appeal.
- 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 South Australian 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.

#### Regional Visitor Strategy Priorities

- The region's priorities are to grow visitor spend from intrastate day trips as well as increase overnight visits from interstate, intrastate and a small international base.
- As the region is a predominantly self-drive visitor market, leveraging existing touring routes and promoting and developing events and hero tourism experiences that reflect the region's uniqueness will be key.

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 11 priority markets, with a sample of 1,600 per market.

Prepared by the South Australian Tourism Commission, December 2017

**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 2015 to December 2017.  
Consumer Demand Product Testing Phase 1 - 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  
Consumer Demand Product Testing Phase 1 - BDA Marketing