

RIVERLAND

REGIONAL PROFILE

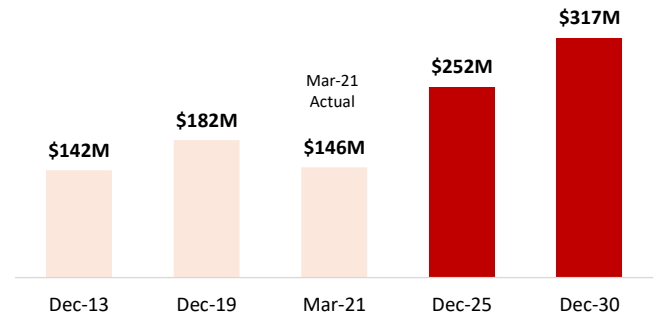


OVERVIEW

ALL DATA BASED ON THE YEAR END MARCH 2021 - FULL YEARS WORTH OF COVID AFFECTED DATA

RIVERLAND

- Currently Riverland contributes \$146 million to the year end March 2021 South Australian expenditure of \$4.4 billion.
- The Riverland has achieved 58 per cent of their 2025 target of \$252 million and 46 per cent of their 2030 target of \$317 million.



ANNUAL VISITOR SUMMARY YEAR END MARCH 2021

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	283,000	29,000	312,000	-	312,000
%	91%	9%	100%	0.0%	100%
% Across all regions	90%	10%	100%	0.0%	100%
Share of Regional SA	8%	7%	7%	0%	7%
Nights	787,000	99,000	886,000	-	886,000
%	89%	11%	100%	0.0%	100%
% Across all regions	82%	18%	100%	0.0%	100%
Share of Regional SA	6%	4%	6%	0%	6%
ALOS	2.8	3.4	2.8	-	2.8
ALOS Regional SA	3.2	6.0	3.5	-	3.5
Total Expenditure					\$146,000,000
Overnight Expenditure	\$106,000,000	\$16,000,000	\$122,000,000	\$0.0	\$122,000,000
Day Trip Expenditure					\$24,000,000
Domestic Day Trips					411,000

- Riverland saw 312,000 domestic overnight visitors for the year end March 2021.
- 91 per cent of overnight visitors were from intrastate and 9 per cent from interstate.
- The 283,000 intrastate overnight visitors stayed 787,000 nights with an average length of stay of 2.8 nights.
- There were 29,000 interstate overnight visitors who stayed 99,000 nights with an average length of stay of 3.4 nights
- There have been no international arrivals with the borders closed.
- 411,000 day trips were taken to Riverland for the year with spend of \$24 million.

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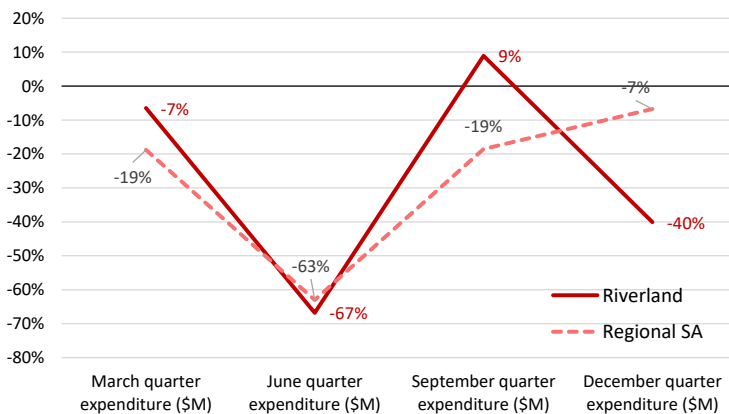
PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	176,000	80,000	41,000	15,000	312,000
%	56%	26%	13%	5%	100%
% Across all regions	56%	22%	18%	5%	100%
Share of Regional SA	8%	7%	7%	0%	7%
Nights	552,000	195,000	97,000	41,000	886,000
%	62%	22%	11%	5%	100%
% Across all regions	58%	18%	20%	3%	100%
Share of Regional SA	6%	7%	3%	8%	6%
Average Length of Stay	3.1	2.4	2.4	2.7	2.8
Expenditure					
Annual Expenditure	\$87,000,000	\$13,000,000	\$14,000,000	\$9,000,000	\$122,000,000
Av spend per night	\$158	\$67	\$144	\$220	\$138
Av spend per night Regional SA	\$213	\$126	\$132	\$511	\$191
Share of Regional SA	5%	5%	4%	6%	5%

- 82 per cent of overnight visitors to the Riverland are leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$158 per night compared to VFR visitors who spend \$67 per night.
- Holiday visitors spent \$87 million for the year and Leisure Visitors \$13 million, making up 82 per cent of total expenditure.

SPEND 2020 VERSUS 2019

CHANGE IN SPEND - 2020 COMPARED TO 2019



- March quarter 2020 prior to COVID-19 was down 7 per cent on the March quarter in 2019.
- The Riverland saw expenditure fall 67 per cent for the June quarter in 2020 compared to June quarter in 2019.
- The September quarter saw a recovery from June, up 9 per cent on 2019.
- The December 2020 quarter was down 40 per cent compared to the December quarter in 2019.

RIVERLAND

REGIONAL PROFILE



RIVERLAND TOURISM LISTINGS

Category	# Listings
ATTRACTION	112
ACCOMMODATION	73
HIRE	30
RESTAURANT	17
TOUR	13
EVENT	11
GENERAL SERVICE	8
INFORMATION	6
DESTINATION INFORMATION	4
JOURNEY	1
Grand Total	275

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

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>

RIVERLAND AUSTRALIAN TOURISM DATA WAREHOUSE LEADS

101,000
YEAR END MARCH 2021

ACCOMMODATION LEADS

75,000
75%

FOOD & DRINK LEADS

5000
5%

TOUR LEADS

2,000
2%

*OTHER LEADS

19,000
19%

TOP 5

- BIG4 RENMARK RIVERFRONT HOLIDAY PARK
- DISCOVERY PARKS LAKE BONNEY
- PIKE RIVER LUXURY VILLAS
- WAIKERIE HOLIDAY PARK
- KINGSTON ON MURRAY CARAVAN PARK

TOP 5

- WILKADENE WOOLSHED BREWERY
- CAUDO VINEYARD CELLAR DOOR
- OVERLAND CORNER HOTEL
- SALENA ESTATE WINES CUCINA 837 AT SALENA
- TWENTY THIRD STREET DISTILLERY

TOP 5

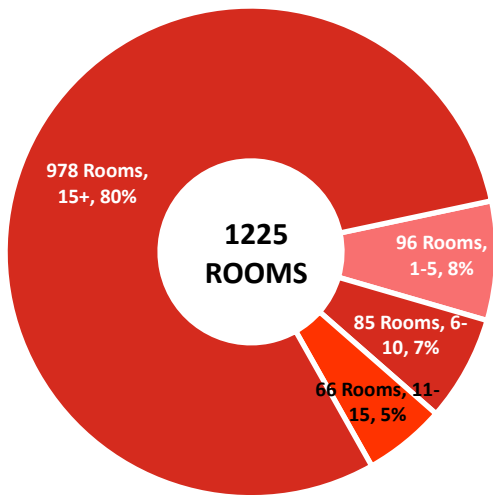
- RIVERGUM CRUISES
- RIVERLAND JET SKI
- MURRAY RIVER WALK
- CANOE ADVENTURES KAYAK TOURS RIVERLAND
- CANOE THE RIVERLAND KAYAK TOURS

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



ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS IN THE RIVERLAND
SOURCE ATDW



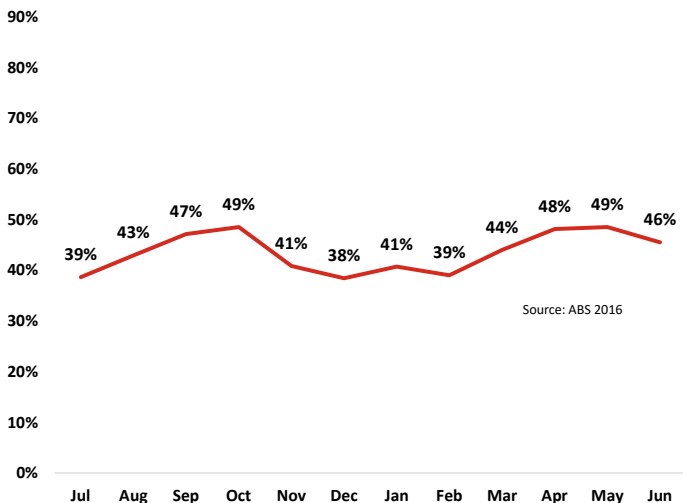
- Currently there are 73 establishments in Riverland that accommodate guests.
- These 73 establishments account for 1225 rooms ranging from 1 room to over 50.
- 80 per cent of rooms fall into establishment with 15 or more rooms.
- 8 per cent of rooms fall into the 1-5 room establishments.

ACCOMMODATION SUPPLY

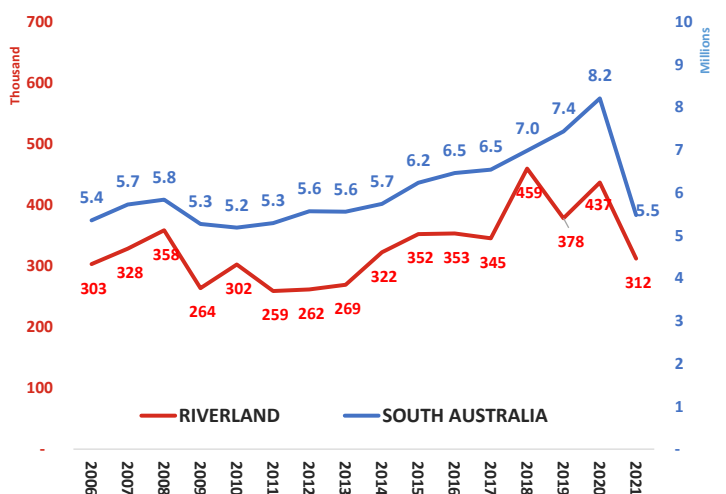
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	14
Rooms	502
Occupancy	44%
Takings	\$8,900,000

- Average occupancy for the year is 44 per cent over 14 establishments and 502 rooms.
- The peak months are May and October each with occupancy of 49 per cent.
- Low points of the year comes in December where occupancy drops to 38 per cent.
- Occupancy through the winter months averages 43 per cent.

MONTHLY OCCUPANCY RATES YEAR END JUNE 2016 - RIVERLAND



TOTAL OVERNIGHT VISITATION TO RIVERLAND & SOUTH AUSTRALIA

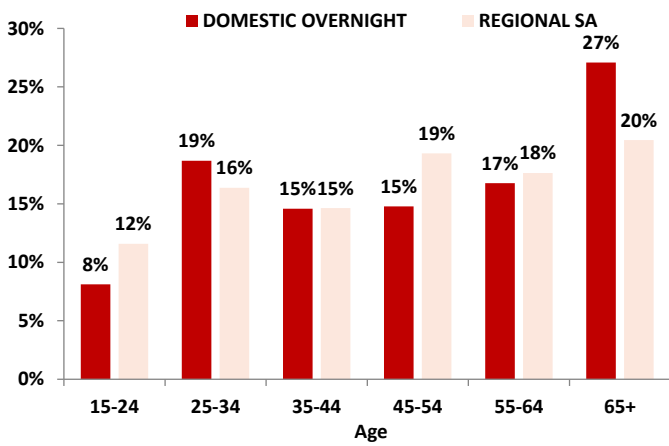


Note: Fluctuations can occur in visitation data due to small sample sizes. Prior regional profiles used data averaged over three years to smooth these fluctuations.



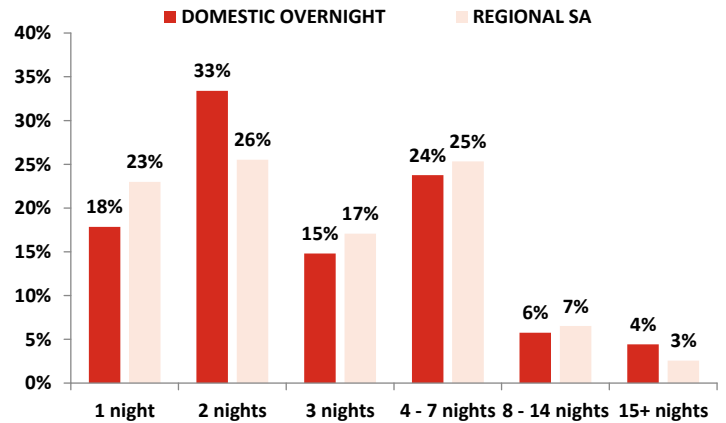
VISITOR PROFILE

AGE OF VISITORS TO RIVERLAND



- Domestically there is a peak in 65+ age group at 27 per cent above the regional average of 20 per cent.
- The 45-54 age group at 15 per cent is well below the regional average of 19 per cent.

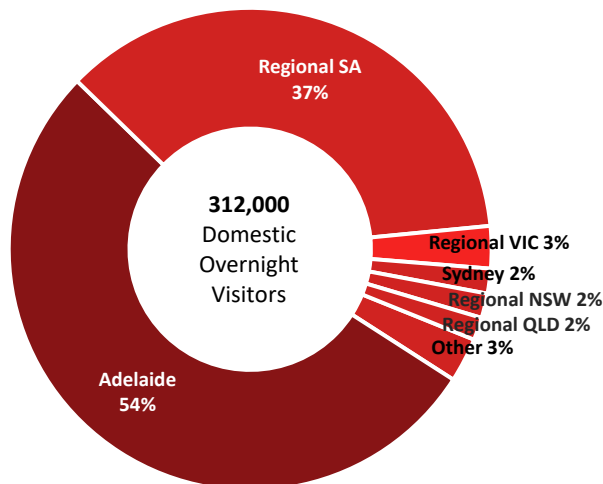
LENGTH OF VISIT TO RIVERLAND



- 51 per cent of Domestic visitors like to stay 1-2 nights, above the regional SA average of 49 per cent.
- 24 per cent of visitors like to stay 4-7 nights.
- prior to COVID-19 the Riverland made up 30 per cent of nights due to backpackers working in the region picking fruit.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO RIVERLAND

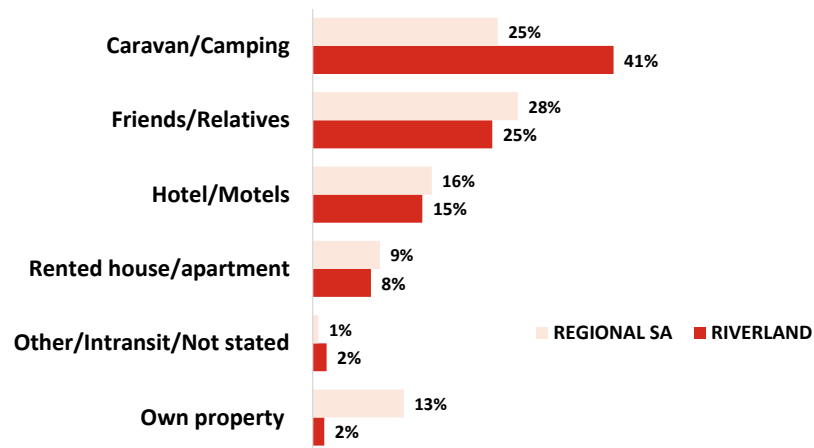


- New South Wales accounted for 4 per cent of visitors to the Riverland. Pre COVID Melbourne and Regional Victoria accounted for 13 per cent of visitors to the Riverland, their biggest interstate markets.
- Regional South Australia contributes 37 per cent of visitors to the Riverland, however prior to COVID this was 27 per cent.
- 54 per cent of visitors come from Adelaide.



VISITOR USE OF ACCOMMODATION

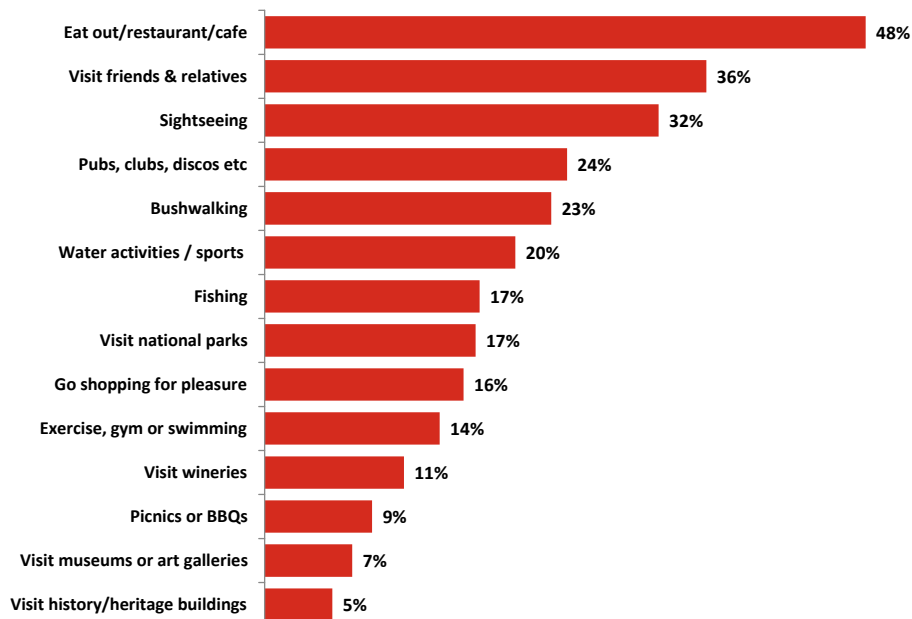
ACCOMMODATION USED IN RIVERLAND FOR DOMESTIC VISITORS



- 40 per cent of Domestic visitor nights are spent in Hotels/Motels or with friends or relatives.
- 41 per cent of people prefer to Caravan and Camp, above the regional average of 25 per cent. Prior to COVID-19 40 per cent of visitor nights were spent caravan and camping.
- Pre COVID-19 - 27 per cent of visitor nights were spent in a friend or relatives property.

VISITOR ACTIVITIES

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN RIVERLAND



- The most popular activities when coming to Riverland is eating out.
- Other popular activities include visiting friends and relatives, sightseeing, bush walking, water sports, fishing, visiting national parks, visiting wineries and visiting history and heritage buildings.



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2019-20, the tourism industry contributed an estimated \$211 million to the Riverland regional economy and directly employed approximately 1,100 people.

Employment

- 1,100 jobs for people employed directly by the tourism industry, 400 indirect jobs and a total employment impact of 1,400 people.

Gross Value Added (GVA)

- \$58 million and \$50 million in direct and indirect tourism GVA, and \$108 million in total tourism GVA.

Gross Regional Product (GRP)

- \$62 million and \$64 million in direct and indirect tourism GRP and \$126 million in total tourism GRP.

Tourism Consumption

2019–20

Tourism products - directly consumed

- 17% Long distance passenger transportation
- 15% Takeaway and restaurant meals
- 12% Shopping (including gifts and souvenirs)
- 10% Fuel (petrol, diesel)
- 10% Travel agency and tour operator services
- 8% Accommodation services
- 6% Food products
- 6% Alcoholic beverages and other beverages

Tourism Employment

2019–20

Tourism Industries - 1,400 directly employed

- 28% - 297 - Cafes, restaurants and takeaway food services
- 20% - 210 - Accommodation
- 18% - 196 - Retail trade
- 8% - 87 - Travel agency and tour operator services
- 6% - 59 - Air, water and other transport
- 5% - 58 - Clubs, pubs, taverns and bars

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2020

REGIONAL INSIGHTS

Interstate

- The river is a huge drawcard, offering a unique and diverse outdoor experience.
- Family activities offer an appealing holiday prospect.

Intrastate

- House boating and activities available are the main appeal factors.
- Time and distance a problem also for some Adelaide residents.

International

- Staying on a houseboat appeals to most.
- Most appealing activities:
 - Exploring historic riverside townships;
 - Fine dining on a river cruise;
 - Having a picnic on the riverbank.

Regional Visitor Strategy Priority

- The priority for the Riverland is to increase visitation and length of stay from Adelaide as well as key interstate and inter national markets.
- A focus on all parts of the visitor mix are required: growing events, creating new visitor experiences, driving increased col laboration and supporting operators.

Prepared by the South Australian Tourism Commission, March 2021

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 March 2021.

Consumer Demand Product Testing Phase 1 - BDA Marketing - 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.

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. 86 35455001
 Consumer Demand Product Testing Phase 1 - BDA Marketing