

MURRAY RIVER, LAKES & COORONG

REGIONAL PROFILE

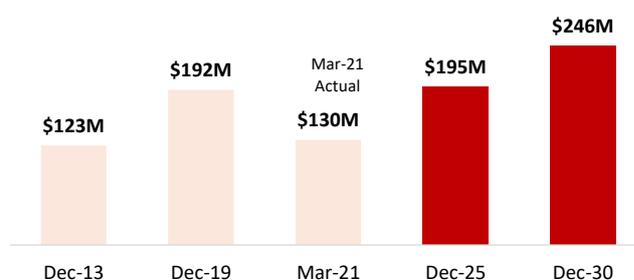


OVERVIEW

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

MURRAY RIVER, LAKES AND COORONG

- Currently Murray River, Lakes and Coorong contributes \$130 million to the year end March 2021 South Australian expenditure of \$4.4 billion.
- The Murray River, Lakes and Coorong has achieved 67 per cent of their 2025 target of \$195 million and 53 per cent of their 2030 target of \$246 million.



ANNUAL VISITOR SUMMARY YEAR END MARCH 2021

ORIGIN						
	Intrastate	Interstate	Total Domestic	International	Total	
Overnight Visits	312,000	23,000	335,000	-	335,000	
%	93%	7%	100%	0%	100%	
% Across all regions	90%	10%	100%	0%	100%	
Share of Regional SA	8%	5%	8%	0%	8%	
Nights	837,000	44,000	881,000	0%	881,000	
%	95%	5%	100%	0%	100%	
% Across all regions	82%	18%	100%	0%	100%	
Share of Regional SA	7%	2%	6%	0%	6%	
ALOS	2.7	1.9	2.6	-	2.6	
ALOS Regional SA	3.2	6.0	3.5	-	3.5	
Total Expenditure					\$130,000,000	
Overnight Expenditure	\$67,000,000	\$9,000,000	\$76,000,000	\$0	\$76,000,000	
Day Trip Expenditure					\$54,000,000	
Domestic Day Trips					779,000	

- Murray River Lakes and Coorong saw 335,000 domestic overnight visitors for the year end March 2021.
- 93 per cent of overnight visitors were from intrastate and 7 per cent from interstate.
- The 312,000 intrastate overnight visitors stayed 837,000 nights with an average length of stay of 2.7 nights.
- There were 23,000 interstate overnight visitors who stayed 44,000 nights with an average length of stay of 1.9 nights
- There have been no international arrivals with the borders closed.
- 779,000 day trips were taken to Murray River Lakes and Coorong for the year with spend of \$54 million.

ALOS = Average Length of Stay

MURRAY RIVER, LAKES & COORONG

REGIONAL PROFILE

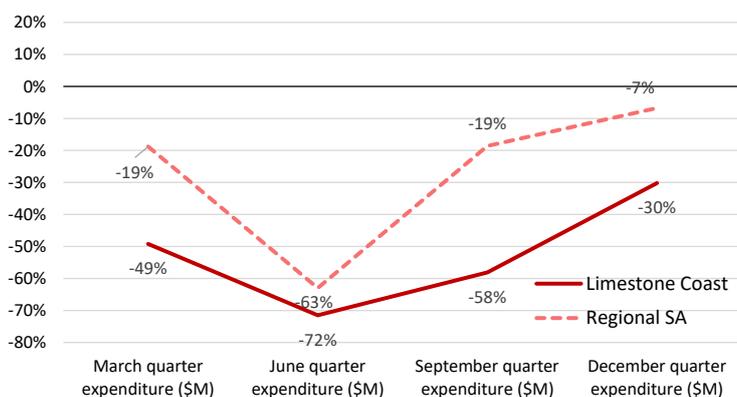


PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	170,000	80,000	66,000	19,000	335,000
%	51%	24%	20%	6%	100%
% Across all regions	56%	22%	18%	5%	100%
<i>Share of Regional SA</i>	8%	5%	8%	0%	8%
Nights	497,000	159,000	171,000	54,000	881,000
%	56%	18%	19%	6%	100%
% Across all regions	58%	18%	20%	3%	100%
<i>Share of Regional SA</i>	6%	6%	6%	11%	6%
Average Length of Stay	2.9	2.0	2.6	2.8	2.6
Expenditure					
Annual Expenditure	\$49,000,000	\$11,000,000	\$11,000,000	\$4,000,000	\$76,000,000
Av spend per night	\$99	\$69	\$64	\$74	\$86
Av spend per night Regional SA	\$213	\$126	\$132	\$511	\$191
<i>Share of Regional SA</i>	4%	5%	8%	3%	5%

- 75 per cent of overnight visitors to the Murray River, Lakes and Coorong are leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$99 per night compared to VFR visitors who spend \$69 per night.
- Holiday visitors spent \$49 million for the year and Leisure Visitors \$11 million, making up 79 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 49 per cent on the March quarter in 2019.
- The Murray River, Lakes and Coorong saw expenditure fall 72 per cent for the June quarter in 2020 compared to June quarter in 2019.
- The September quarter saw a recovery from June, however still down 58 per cent on 2019.
- The December 2020 quarter was down 30 per cent compared to the December quarter in 2019.

MURRAY RIVER, LAKES & COORONG

REGIONAL PROFILE



MURRAY RIVER, LAKES AND COORONG TOURISM LISTINGS

Category	# Listings
ACCOMMODATION	117
ATTRACTION	58
TOUR	15
RESTAURANT	14
HIRE	10
EVENT	8
DESTINATION INFORMATION	3
TRANSPORT	2
INFORMATION	2
JOURNEY	1
Grand Total	230

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>

**MURRAY RIVER, LAKES AND COORONG
AUSTRALIAN TOURISM DATA WAREHOUSE
LEADS
68,000
YEAR END MARCH 2021**

**ACCOMMODATION
LEADS
34,000
50%**

**FOOD & DRINK
LEADS
900
1%**

**TOUR
LEADS
13,000
19%**

***OTHER
LEADS
20,000
30%**

TOP 5

- THE CUBE MURRAY RIVER
- MANNUM RIVERSIDE CARAVAN PARK
- BIG4 THE BEND HOLIDAY PARK
- COORONG CABINS
- LAKE ALBERT CARAVAN PARK MENINGIE SA

TOP 5

- MANNUM COMMUNITY CLUB
- MANNUM HOTEL
- VORSTYS FISH AND CHIPS
- PRETORIA HOTEL
- CAFE MANNUM - MANNUM MOTEL COMPLEX

TOP 5

- MONARTO SAFARI PARK
- CAPTAIN COOK CRUISES PS MURRAY PRINCESS
- CAPTAIN PROUD PADDLEBOAT CRUISES
- BIG BEND BY NIGHT
- JUGGLE HOUSE EXPERIENCES

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

MURRAY RIVER, LAKES & COORONG

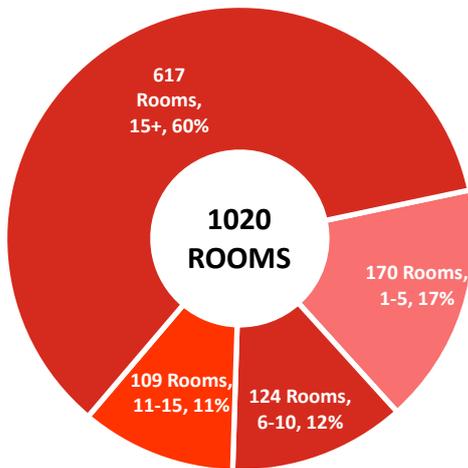
REGIONAL PROFILE



ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS IN THE MURRAY RIVER, LAKES AND COORONG

SOURCE ATDW



- Currently there are 117 establishments in Murray River Lakes and Coorong that accommodate guests.
- These 117 establishments account for 1020 rooms ranging from 1 room to over 50 rooms.
- 60 per cent of rooms fall into establishment with 15 or more rooms.
- 17 per cent of rooms fall into the 1-5 room establishments.

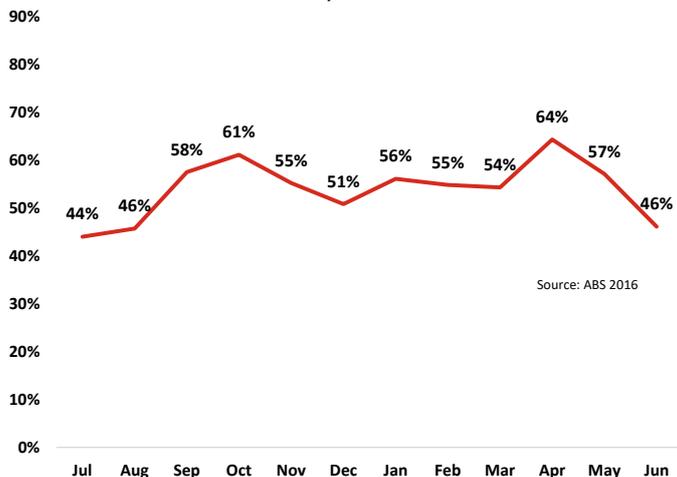
ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms

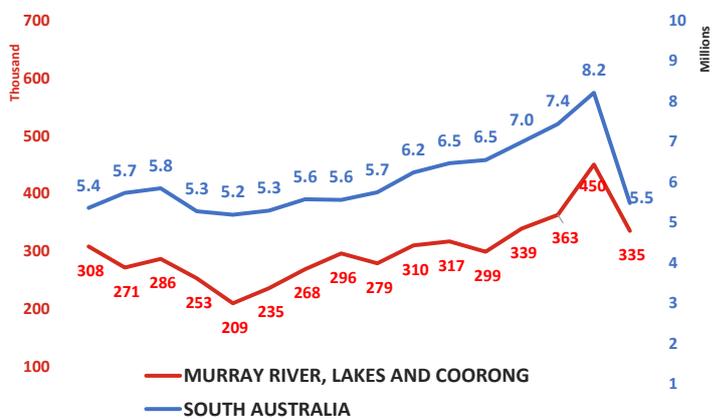
Establishments	7
Rooms	164
Occupancy	54%
Takings	\$3,500,000

- 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 come in Winter where occupancy drops to 45 per cent on average.

MONTHLY OCCUPANCY RATES YEAR END JUNE 2016 - MURRAY RIVER, LAKES AND COORONG



TOTAL OVERNIGHT VISITATION TO MURRAY RIVER, LAKES AND COORONG & 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.

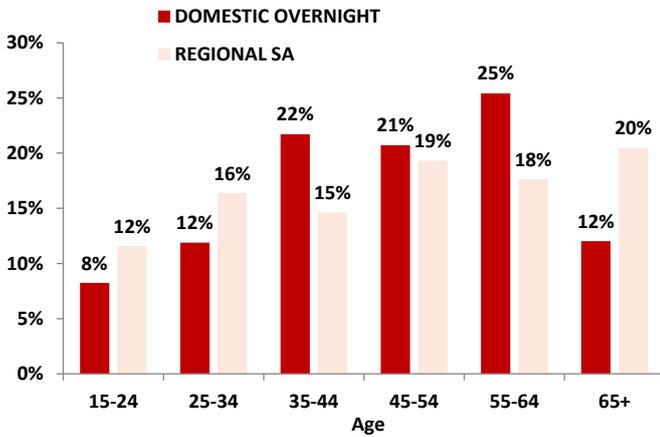
MURRAY RIVER, LAKES & COORONG

REGIONAL PROFILE



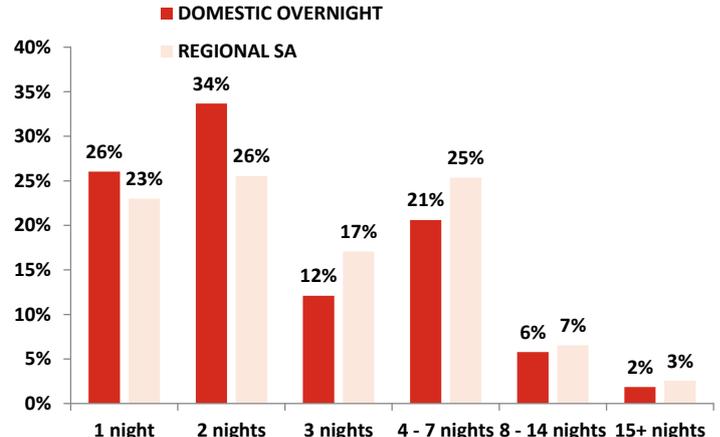
VISITOR PROFILE

AGE OF VISITORS TO MURRAY RIVER, LAKES AND COORONG



- Domestically there is a peak in 55-64 age group at 25 per cent above the regional average of 18 per cent.
- The 65+ age group at 12 per cent is well below the regional average of 20 per cent.

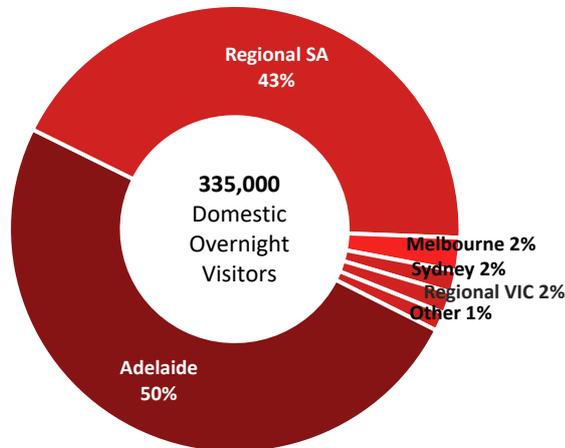
LENGTH OF VISIT TO MURRAY RIVER, LAKES AND COORONG



- 60 per cent of domestic visitors like to stay 1-2 nights, above the regional SA average of 49 per cent.
- 21 per cent of visitors like to stay 4-7 nights.
- Prior to the pandemic 15+ nights was very high for the international market with working holiday makers fruit picking.

VISITOR ORIGIN

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



- Melbourne and Regional Victoria together accounted for 4 per cent of visitors to the Murray River, Lakes and Coorong . Pre COVID Melbourne and Regional Victoria accounted for 11 per cent of visitors to the Murray River, Lakes and Coorong , their biggest interstate markets.
- Regional South Australia contributes 43 per cent of visitors to the Murray River, Lakes and Coorong.
- 50 per cent of visitors come from Adelaide, however prior to COVID this was 46 per cent.

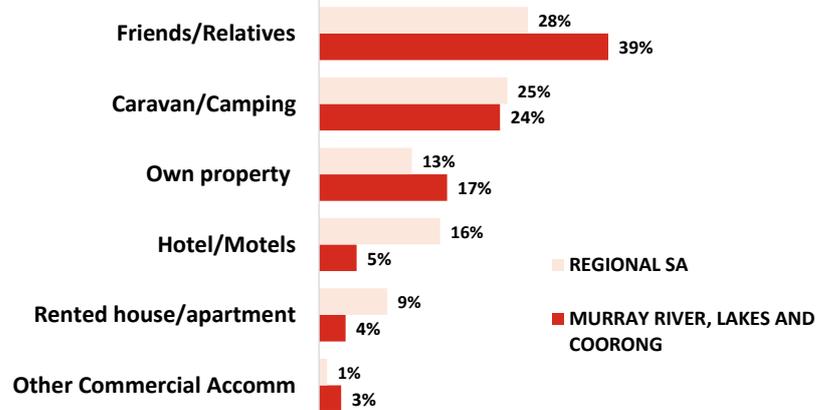
MURRAY RIVER, LAKES & COORONG

REGIONAL PROFILE



VISITOR USE OF ACCOMMODATION

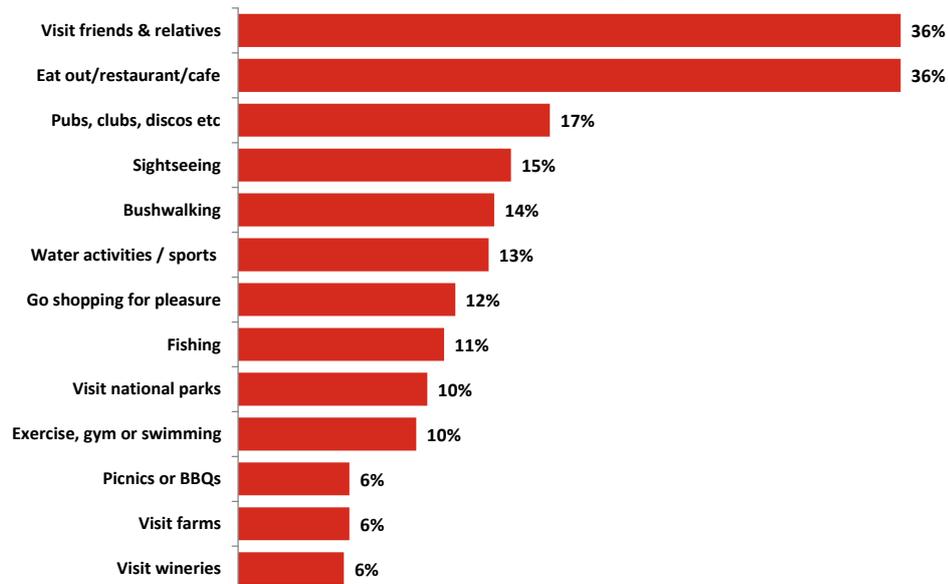
ACCOMMODATION USED IN MURRAY RIVER, LAKES AND COORONG FOR DOMESTIC VISITORS



- 39 per cent of domestic visitor nights are spent in a friends or relatives property.
- 25 per cent of people prefer to caravan and camp, above the regional average of 24 per cent. Prior to COVID-19 37 per cent of visitor nights were spent caravan and camping.

VISITOR ACTIVITIES

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN MURRAY RIVER, LAKES AND COORONG



- The most popular activities when coming to Murray River, Lakes and Coorong is visiting friends and relatives or eating out.
- Other popular activities include sightseeing, bush walking, water sports, fishing, visiting national parks, visiting wineries and farms.

MURRAY RIVER, LAKES & COORONG

REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2019-20, the tourism industry contributed an estimated \$251 million to the Murray River, Lakes and Coorong regional economy and directly employed approximately 1,500 people.

Employment

- 1,500 jobs for people employed directly by the tourism industry, 500 indirect jobs and a total employment impact of 2,000 people.

Gross Value Added (GVA)

- \$73 million and \$65 million in direct and indirect tourism GVA, and \$138 million in total tourism GVA.

Gross Regional Product (GRP)

- \$78 million and \$83 million in direct and indirect tourism GRP and \$161 million in total tourism GRP.

Tourism Consumption

2019–20

Tourism products - directly consumed

- 17% Takeaway and restaurant meals
- 17% Shopping (including gifts and souvenirs)
- 14% Long distance passenger transportation
- 13% Fuel (petrol, diesel)
- 9% Travel agency and tour operator services
- 6% Alcoholic beverages and other beverages
- 6% Food products

Tourism Employment

2019–20

Tourism Industries - 1,500 directly employed

- 33% - 479 - Cafes, restaurants and takeaway food services
- 19% - 282 - Retail trade
- 10% - 142 - Air, water and other transport
- 10% - 142 - Accommodation
- 8% - 110 - Travel agency and tour operator services
- 6% - 91 - 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 & 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 Murray River, Lakes and Coorong.
- New Zealand with strong awareness of the Murray River, Lakes and Coorong.
- 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.

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. 86B455001
Consumer Demand Product Testing Phase 1 - BDA Marketing