

MURRAY RIVER, LAKES & COORONG

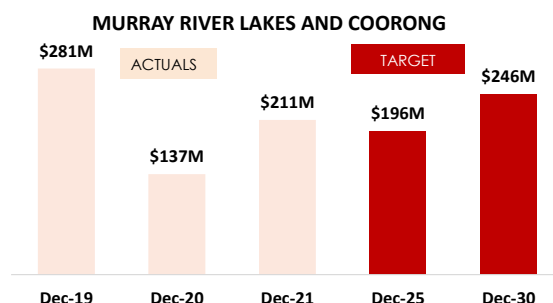
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2021

- Currently Murray River, Lakes and Coorong contributes \$211 million to the year end December 2021 South Australian expenditure of \$6.2 billion.
- The Murray River, Lakes and Coorong has achieved their 2025 target of \$195 million and 86 per cent of their 2030 target of \$246 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2021

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	329,000	62,000	391,000	-	391,000
%	84%	16%	100%	0%	100%
<i>Share of Regional SA</i>	7%	4%	6%	0%	6%
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<i>% Across Regional SA</i>	76%	23%	100%	0%	100%
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Nights	793,000	201,000	994,000	23,000	1,017,000
%	80%	20%	98%	2%	100%
<i>Share of Regional SA</i>	6%	2%	4%	5%	4%
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<i>% Across Regional SA</i>	60%	38%	98%	2%	100%
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Average Length of Stay	2.4	3.2	2.5	-	2.6
ALOS Regional SA	3.0	6.2	3.7	-	3.8
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Total Expenditure					\$211,000,000
Overnight Expenditure	\$118,000,000	\$24,000,000	\$143,000,000	\$0	\$143,000,000
Day Trip Expenditure					\$68,000,000
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Domestic Day Trips					574,000

- The Murray River, Lakes and Coorong saw 391,000 domestic overnight visitors for the year end December 2021.
- 84 per cent of overnight visitors were from intrastate and 16 per cent from interstate.
- The 329,000 intrastate overnight visitors stayed 793,000 nights with an average length of stay of 2.4 nights.
- There were 62,000 interstate overnight visitors who stayed 201,000 nights with an average length of stay of 3.2 nights
- There have been no international arrivals with the borders closed.
- 574,000 day trips were taken to the Murray River, Lakes and Coorong for the year with spend of \$68 million.

MURRAY RIVER, LAKES & COORONG

REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	208,000	68,000	87,000	28,000	391,000
%	53%	17%	22%	7%	100%
<i>Share of Regional SA</i>	7%	4%	8%	6%	6%
<i>% Across all regions</i>	49%	28%	18%	8%	100%

Nights	604,000	136,000	186,000	91,000	1,017,000
%	59%	13%	18%	9%	100%
<i>Share of Regional SA</i>	5%	2%	5%	5%	4%
<i>% Across all regions</i>	50%	26%	17%	8%	100%

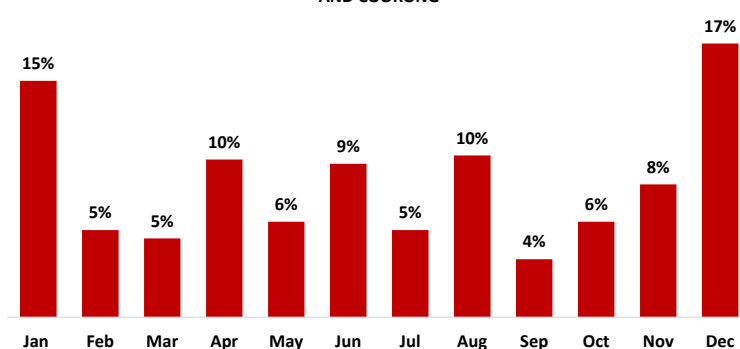
Average Length of Stay	2.9	2.0	2.1	3.3	2.6
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Expenditure					
Annual Expenditure	\$80,000,000	\$23,000,000	\$33,000,000	\$7,000,000	\$143,000,000
Expenditure 2019	\$117,000,000	\$12,000,000	\$21,000,000	\$13,000,000	\$163,000,000
Av spend per night	\$132	\$169	\$177	\$77	\$141
Av spend per night Reg SA	\$154	\$58	\$84	\$80	\$112
Share of Regional SA	4%	3%	6%	1%	3%

- 71 per cent of overnight visitors to the Murray River, Lakes and Coorong are leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$132 per night compared to VFR visitors who spend \$169 per night.
- Holiday visitors spent \$80 million for the year and VFR visitors \$23 million, making up 72 per cent of total expenditure.

SEASONALITY

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



- NVS data shows us that January, April and December are the strongest months for visitation to the Murray River, Lakes and Coorong.
- January and December were busy with Summer/School holidays. December was also when the interstate borders reopened.
- April is busy with Easter and School holidays.

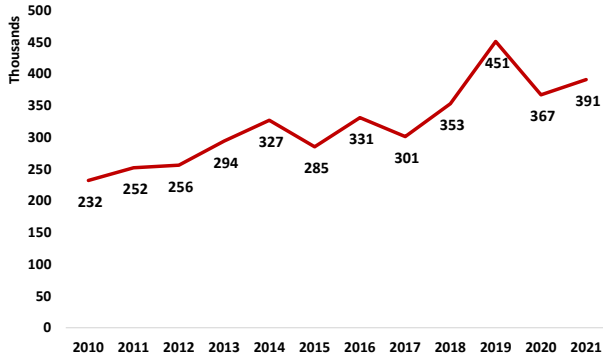
MURRAY RIVER, LAKES & COORONG

REGIONAL PROFILE

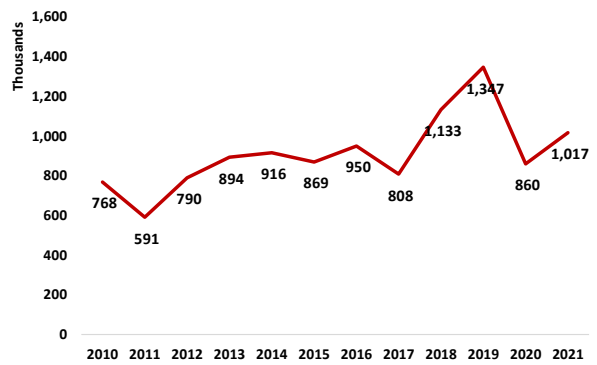


TOTAL OVERNIGHT VISITATION 2010 - 2021

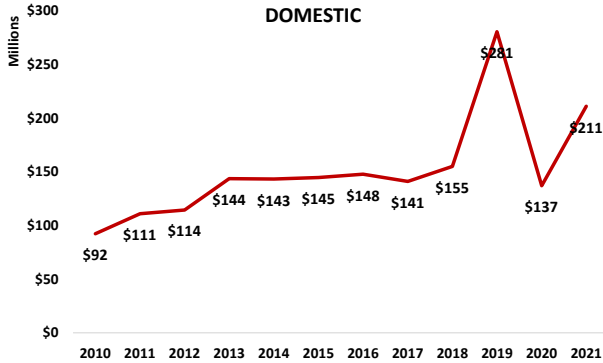
VISITORS MURRAY RIVER, LAKES AND COORONG 2010 - 2021 - INTERNATIONAL AND DOMESTIC



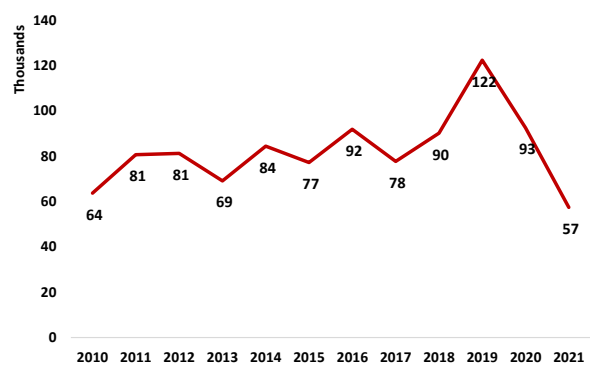
NIGHTS MURRAY RIVER, LAKES AND COORONG 2010 - 2021 - INTERNATIONAL AND DOMESTIC



TOTAL EXPENDITURE MURRAY RIVER, LAKES AND COORONG 2010 - 2021 - INTERNATIONAL AND DOMESTIC



DAY TRIPS MURRAY RIVER, LAKES AND COORONG 2010 - 2021 - 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-21	Change on Dec-19	Dec-21	Change on Dec-19
Adelaide	1,982,000	-49%	2,549,700,000	-44%
Adelaide Hills	184,000	-18%	204,500,000	-1%
Barossa	230,000	-28%	291,600,000	29%
Clare Valley	282,000	38%	171,700,000	46%
Eyre Peninsula	482,000	-17%	488,400,000	-11%
Fleurieu Peninsula	894,000	-1%	662,900,000	19%
Flinders Ranges and Outback	638,000	-31%	359,700,000	-30%
Kangaroo Island	189,000	-9%	238,500,000	25%
Limestone Coast	610,000	-21%	438,600,000	4%
Murray River, Lakes and Coorong	391,000	-13%	211,200,000	-25%
Riverland	345,000	-20%	231,600,000	19%
Yorke Peninsula	620,000	4%	279,500,000	16%
Regional SA	4,424,000	-14%	3,601,600,000	1%
South Australia	6,077,000	-29%	6,151,275,792	-24%

MURRAY RIVER, LAKES & COORONG

REGIONAL PROFILE



MURRAY RIVER, LAKES AND COORONG TOURISM LISTINGS

Category	# Listings
Accommodation	119
Attraction	64
Food and Drink	15
Tour	15
Event	13
Hire	8
Destination Information	3
Information Services	2
Transport	1
Journey	1
Grand Total	241

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

86,000

YEAR END DECEMBER 2021

ACCOMMODATION
LEADS
36,000
42%

TOP 5

- THE CUBE MURRAY RIVER
- BILLS BOATHOUSE
- MANNUM RIVERSIDE CARAVAN PARK
- BIG4 THE BEND HOLIDAY PARK
- BRIDGEPORT HOTEL

FOOD & DRINK
LEADS
1,000
1%

TOP 5

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

TOUR
LEADS
22,000
26%

TOP 5

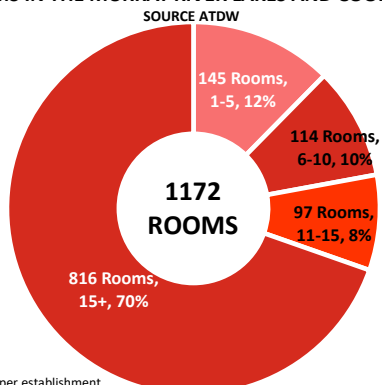
- MONARTO SAFARI PARK
- CAPTAIN PROUD PADDLEBOAT CRUISES
- CAPTAIN COOK CRUISES PS MURRAY PRINCESS
- JUGGLE HOUSE EXPERIENCES
- BIG BEND BY NIGHT

*OTHER
LEADS
27,000
30%

* 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



Rooms refer to rooms per establishment

- Currently there are 120 establishments in the Murray River, Lakes and Coorong that accommodate guests.
- These 120 establishments account for 1,172 rooms across the region.
- 70 per cent of rooms fall into establishment with 15 or more rooms.
- 12 per cent of rooms fall into the 1-5 room establishments.

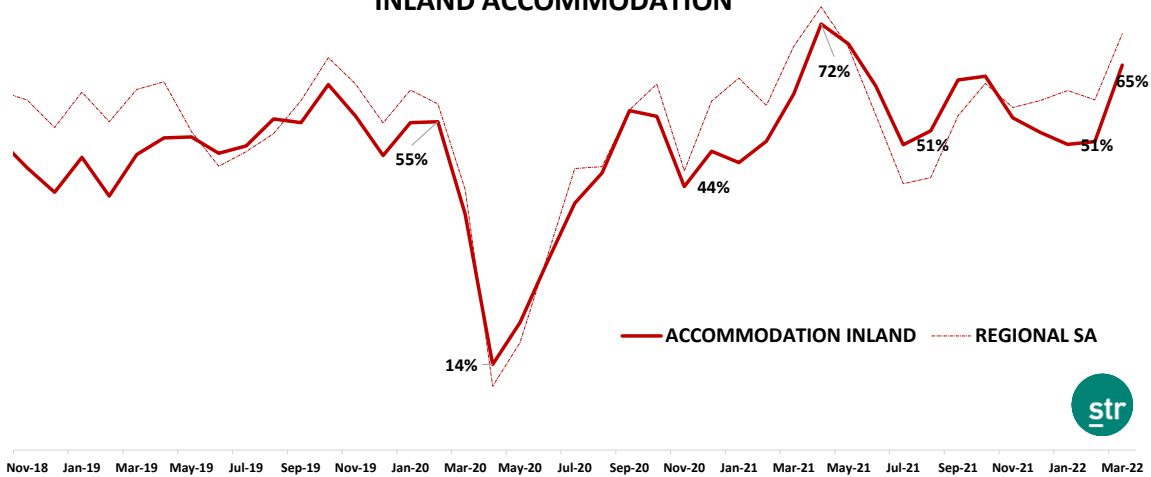
MURRAY RIVER, LAKES & COORONG

REGIONAL PROFILE



ACCOMMODATION STR

INLAND ACCOMMODATION

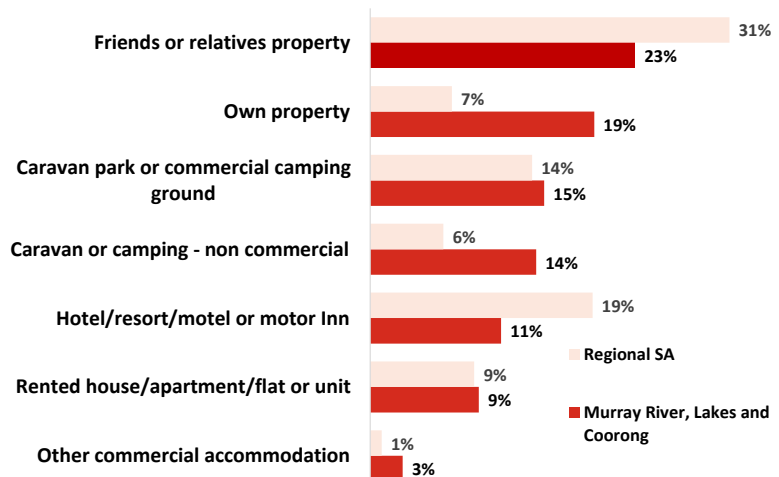


- The Murray River, Lakes and Coorong has been combined with the Riverland and the Flinders Ranges and Outback to provide occupancy rates from 2018 to 2022.
- In 2019 prior to COVID average occupancy for these combined regions was 52 per cent, this fell to 43 per cent in 2020, rose to 58 per cent in 2021 and for the first 3 month of 2022 the average is 56 per cent.

VISITOR USE OF ACCOMMODATION

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

- 19 per cent of domestic visitor nights are spent in their own property.
- 29 per cent of people prefer to caravan and camp, above the regional average of 20 per cent. Prior to COVID-19 37 per cent of visitor nights were spent caravan and camping.
- Pre COVID-19 - 24 per cent of visitor nights were spent in a friend or relatives property compared to 23% above.



TRANSPORT

TRANSPORT MURRAY RIVER, LAKES AND COORONG DECEMBER 2021



- The main method of transport used for the Murray River, Lakes and Coorong was a self drive vehicle.
- 92 per cent of visitors used this type of transport.
- The road trip market service this market well.

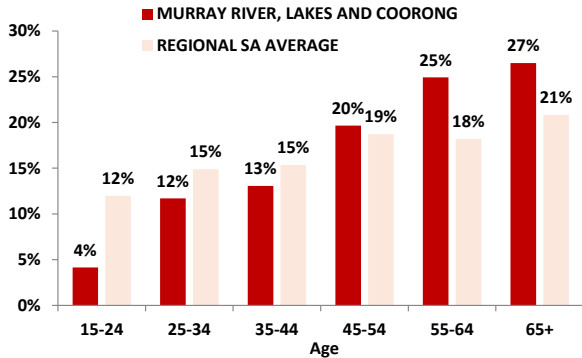
MURRAY RIVER, LAKES & COORONG

REGIONAL PROFILE



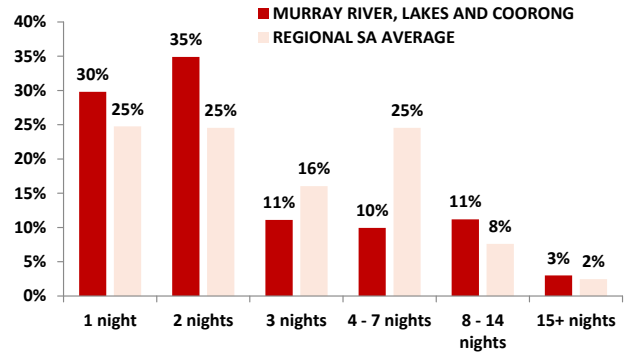
VISITOR PROFILE

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 27 per cent is well above the regional average of 21 per cent.

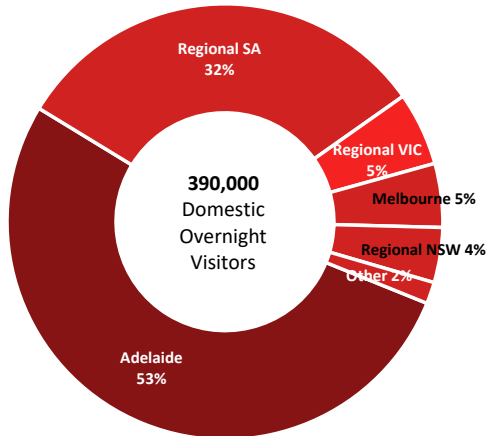
LENGTH OF VISIT TO MURRAY RIVER, LAKES AND COORONG



- 65 per cent of domestic visitors like to stay 1-2 nights, above the regional SA average of 50 per cent.
- 4-7 night stays are well below the regional average.
- 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 10 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.

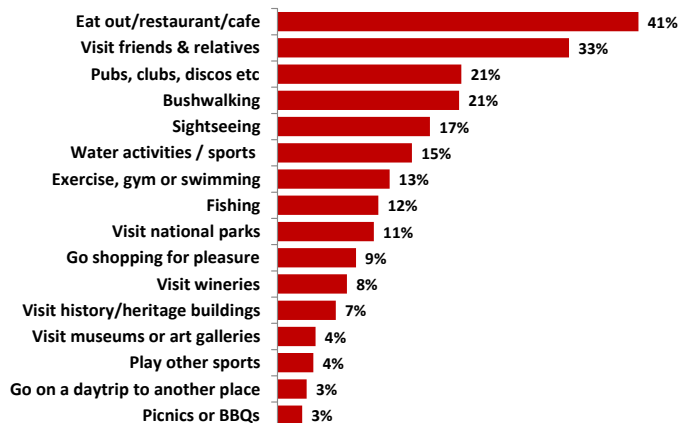
- Regional South Australia contributes 32 per cent of visitors to the Murray River, Lakes and Coorong.

- 53 per cent of visitors come from Adelaide, however prior to COVID this was 46 per cent.

VISITOR ACTIVITIES

- 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 going to

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN MURRAY RIVER, LAKES AND COORONG



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
- 6% Accommodation services

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, December 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 December 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. 8635455001
Consumer Demand Product Testing Phase 1 - BDA Marketing