

MURRAY RIVER, LAKES & COORONG

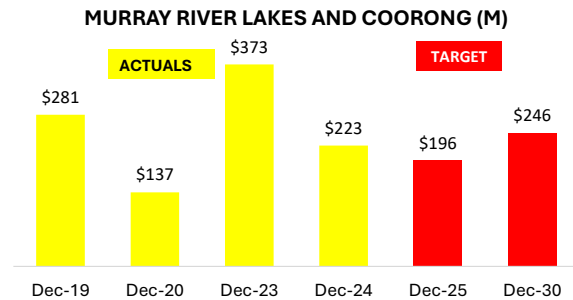
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2024

- Currently, the Murray River Lakes and Coorong contributes \$223 million to the year end December 2024 South Australian expenditure of \$9.8 billion.
- The Murray River Lakes and Coorong has achieved 100 per cent of their 2025 target of \$196 million and 91 per cent of their 2030 target of \$246 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2024

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	282,000	100,000	382,000	15,000	396,000
% of visits	71%	25%	96%	4%	100%
Share of Regional SA	8%	9%	9%	11%	9%
% Across Regional SA	73%	24%	97%	3%	100%
% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international					
Nights	568,000	202,000	770,000	358,000	1,128,000
% of nights	50%	18%	68%	32%	100%
Share of Regional SA	6%	4%	5%	14%	7%
% Across Regional SA	57%	28%	85%	15%	100%
% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international					
Average Length of Stay	2.0	2.0	2.0	24	2.8
ALOS Regional SA	2.9	4.2	3.2	20	3.7
Total Expenditure					\$223,000,000
Overnight Expenditure	\$64,000,000	\$45,000,000	\$109,000,000	\$18,000,000	\$127,000,000
Day Trip Expenditure					\$96,000,000
Domestic Day Trips					677,000

- The Murray River Lakes and Coorong saw 396,000 overnight visitors for the year end December 2024.
- 71 per cent of overnight visitors were from intrastate, 25 per cent from interstate and 4 per cent from overseas.
- The 282,000 intrastate overnight visitors stayed 568,000 nights with an average length of stay of 2.0 nights.
- There were 100,000 interstate overnight visitors who stayed 202,000 nights with an average length of stay of 2.0 nights.
- The region saw 15,000 international visitors with an average length of stay of 24 nights and spend of \$16 million.
- 677,000 day trips were taken to and within the Murray River Lakes and Coorong for the year with spend of \$96 million.

ALOS = Average Length of Stay

MURRAY RIVER, LAKES & COORONG

REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	216,000	78,000	75,000	39,000	396,000
% of visits	55%	20%	19%	10%	100%
Share of Regional SA	9%	7%	8%	13%	9%
% Across all regions	53%	24%	19%	7%	100%

Nights	484,000	306,000	142,000	196,000	1,128,000
% of nights	43%	27%	13%	17%	100%
Share of Regional SA	6%	7%	5%	13%	7%
% Across all regions	49%	25%	17%	9%	100%

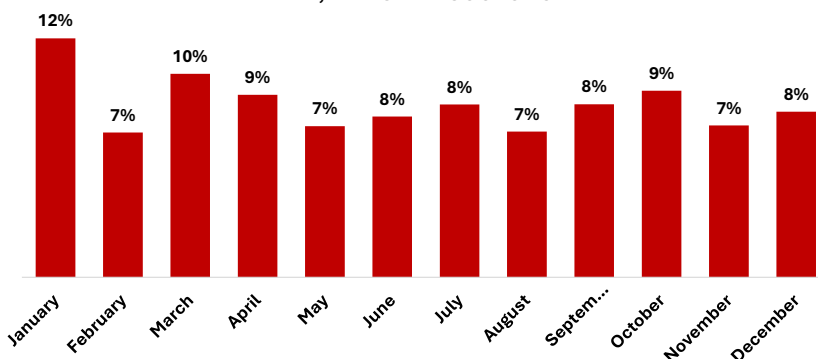
Average Length of Stay	2.2	3.9	1.9	5.0	2.8
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Expenditure					
Annual Overnight Exp	\$64,000,000	\$23,000,000	\$16,000,000	\$23,000,000	\$127,000,000
Expenditure 2019	\$117,000,000	\$12,000,000	\$21,000,000	\$13,000,000	\$163,000,000
Av spend per night	\$132	\$75	\$113	\$117	\$113
Av spend per night Reg SA	\$190	\$103	\$176	\$218	\$169
Share of Regional SA	3%	5%	1.3%	2%	3%

- 74per cent of overnight visitors to the Murray River Lakes and Coorong are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$132 per night compared to VFR visitors who spend \$75 per night.
- Leisure overnight visitors spent \$87 million for the year, making up 69 per cent of all overnight expenditure.
- There are 75,000 business visitors who stay 142,000 nights with spend of \$16 million.

SEASONALITY

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



- National Visitor Survey data shows us that in 2024 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.
- March, April, July and October also strong with school holidays, Easter and the March and October long weekends.

Source: NVS year end December 2024

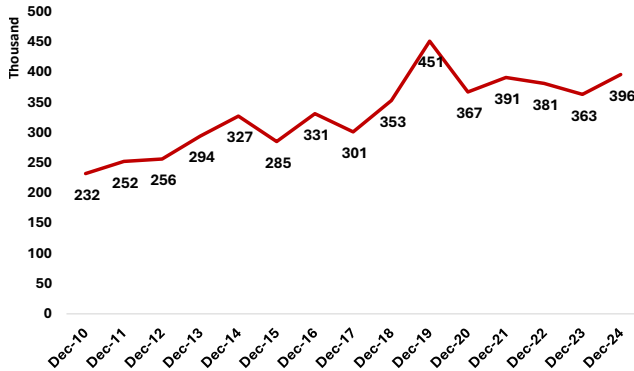
MURRAY RIVER, LAKES & COORONG

REGIONAL PROFILE

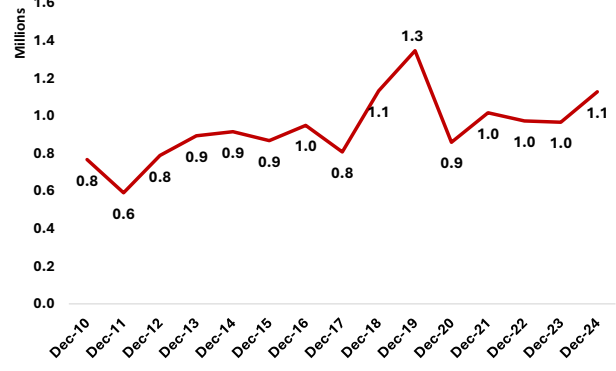


TOTAL OVERNIGHT VISITATION 2010 - 2024

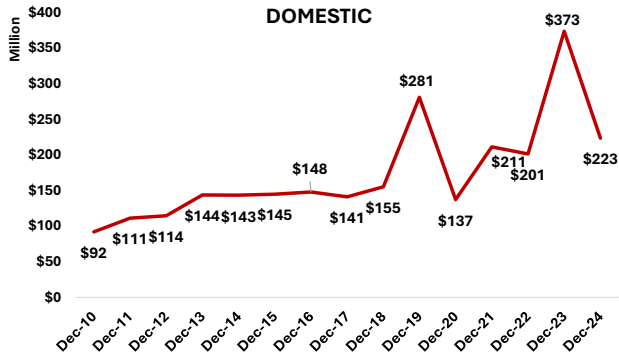
**VISITORS MURRAY RIVER, LAKES AND COORONG
2010 - 2024 - INTERNATIONAL AND DOMESTIC**



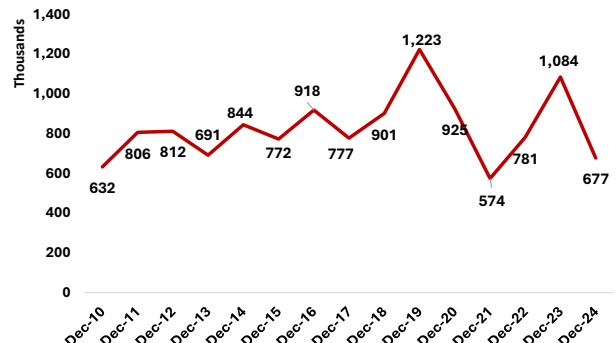
**NIGHTS MURRAY RIVER, LAKES AND COORONG
2010 - 2024 - INTERNATIONAL AND DOMESTIC**



**TOTAL EXPENDITURE MURRAY RIVER, LAKES AND
COORONG 2010 - 2024 - INTERNATIONAL AND
DOMESTIC**



**DAY TRIPS MURRAY RIVER, LAKES AND COORONG
2010 - 2024 - 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-24	Change on Dec-19	Dec-24	Change on Dec-19
Adelaide	3,933,000	0%	\$5,800,000,000	29%
Adelaide Hills	200,000	-12%	\$192,000,000	-7%
Barossa	244,000	-23%	\$287,000,000	27%
Clare Valley	222,000	9%	\$162,000,000	38%
Eyre Peninsula	455,000	-22%	\$455,000,000	-17%
Fleurieu Peninsula	727,000	-19%	\$519,000,000	-7%
Flinders Ranges and Outback	699,000	-25%	\$603,000,000	17%
Kangaroo Island	182,000	-12%	\$197,000,000	4%
Limestone Coast	807,000	4%	\$662,000,000	57%
Murray River, Lakes and Coorong	396,000	-12%	\$223,000,000	-20%
Riverland	464,000	8%	\$236,000,000	21%
Yorke Peninsula	620,000	4%	\$358,000,000	49%
Regional SA	4,615,000	-11%	\$3,950,000,000	11%
South Australia	8,034,000	-6%	\$9,800,000,000	21%

MURRAY RIVER, LAKES & COORONG

REGIONAL PROFILE



MURRAY RIVER LAKES AND COORONG TOURISM LISTINGS

Category	# Listings
ACCOMM	123
ATTRACTION	71
EVENT	19
HIRE	17
TOUR	15
RESTAURANT	14
DESTINFO	3
INFO	2
TRANSPORT	1
GENSERVICE	1
Grand Total	266

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

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)

MURRAY RIVER LAKES AND COORONG AUSTRALIAN TOURISM DATA WAREHOUSE LEADS

117,000

YEAR END DECEMBER 2024

ACCOMMODATION LEADS

57,000
48%

FOOD & DRINK LEADS

1,400
1%

TOUR LEADS

28,000
24%

*OTHER LEADS

31,000
27%

TOP 5

- THE CUBE MURRAY RIVER
- BILLS BOATHOUSE
- BIG4 THE BEND HOLIDAY PARK
- THE FLOATHOUSE
- COORONG NATIONAL PARK CAMPGROUNDS

TOP 5

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

TOP 5

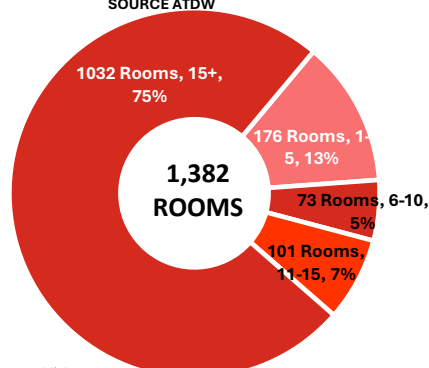
- MANNUM HOTEL
- LOT 23
- PRETORIA HOTEL
- TWIN BRIDGES DISTILLERY
- MANNUM COMMUNITY CLUB

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

ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS ON THE MURRAY RIVER LAKES AND COORONG

SOURCE ATDW



Rooms refers to rooms per establishment

- Currently there are 123 establishments in the Murray River Lakes and Coorong that accommodate guests.
- These 123 establishments account for 1,382 rooms across the region.
- 75 per cent of rooms fall into establishment with 15 or more rooms.
- 13 per cent of rooms fall into the 1-5 room establishments.

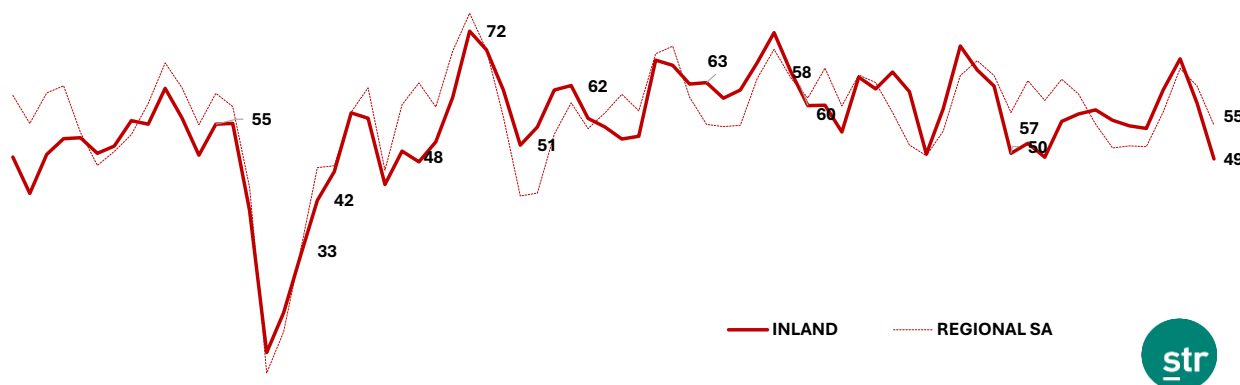
MURRAY RIVER, LAKES & COORONG

REGIONAL PROFILE



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY INLAND



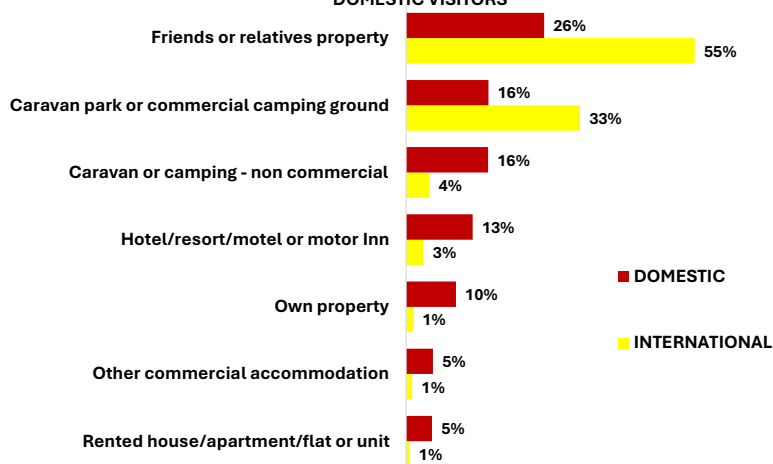
Jan-19 Feb-19 Mar-19 Apr-19 May-19 Jun-19 Jul-19 Aug-19 Sep-19 Oct-19 Nov-19 Dec-19 Jan-20 Feb-20 Mar-20 Apr-20 May-20 Jun-20 Jul-20 Aug-20 Sep-20 Oct-20 Nov-20 Dec-20 Jan-21 Feb-21 Mar-21 Apr-21 May-21 Jun-21 Jul-21 Aug-21 Sep-21 Oct-21 Nov-21 Dec-21 Jan-22 Feb-22 Mar-22 Apr-22 May-22 Jun-22 Jul-22 Aug-22 Sep-22 Oct-22 Nov-22 Dec-22 Jan-23 Feb-23 Mar-23 Apr-23 May-23 Jun-23 Jul-23 Aug-23 Sep-23 Oct-23 Nov-23 Dec-23 Jan-24 Feb-24 Mar-24 Apr-24 May-24 Jun-24 Jul-24 Aug-24 Sep-24 Oct-24 Nov-24 Dec-24

- The Inland regions include accommodation data for the Riverland, Murray River Lakes and Coorong 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 58% in 2021 and grew again in 2022 to 62%, fell to 60% in 2023 and 56% in 2024.

VISITOR USE OF ACCOMMODATION

- 26 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 55 per cent.
- 13 per cent of domestic and 3 per cent of international visitors stayed in a Hotel/resort/motel or motor inn.
- 32 per cent of domestic visitors and 37 per cent of international visitors to the Murray River Lakes and Coorong stay in a caravan park.

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



TRANSPORT - DOMESTIC OVERNIGHT



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

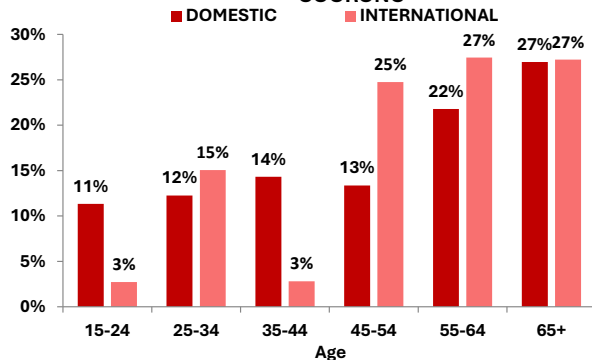
MURRAY RIVER, LAKES & COORONG

REGIONAL PROFILE



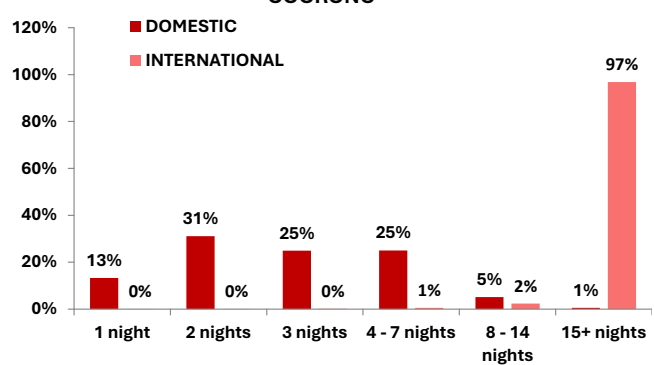
VISITOR PROFILE

AGE OF VISITORS TO MURRAY RIVER, LAKES AND COORONG



- In the domestic market the 65+ is the strongest age group with 27 per cent of visitors.
- The International market is also strongest for the 55+ age group with 54 per cent of all visits.

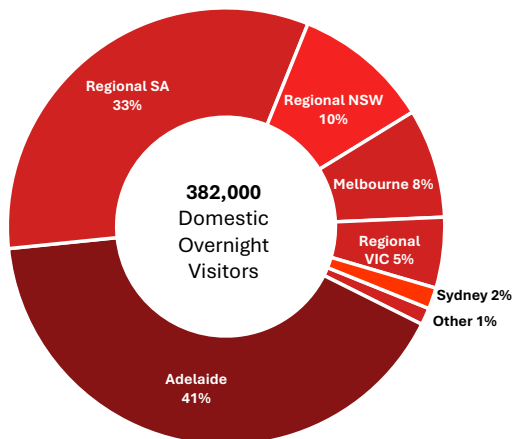
LENGTH OF VISIT TO MURRAY RIVER, LAKES AND COORONG



- 44 per cent of domestic overnight visitors like to stay 1 to 2 nights.
- 97 per cent of international visitors stay greater than 15+ nights.

VISITOR ORIGIN

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

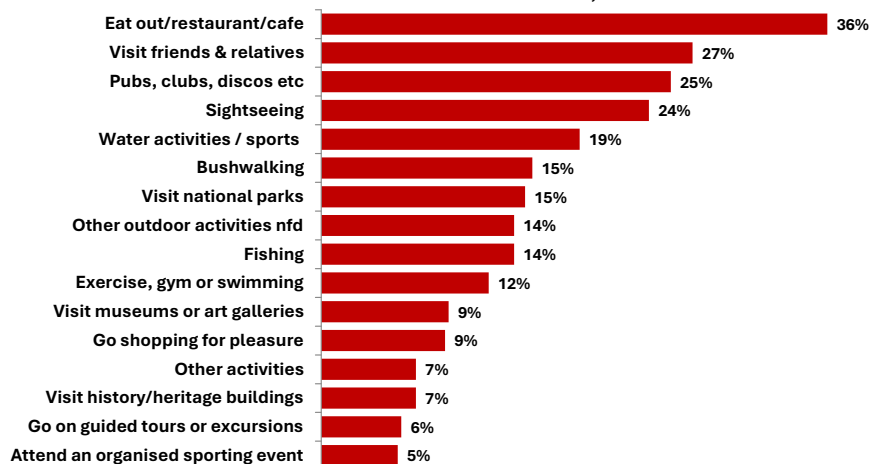


- Victoria at 13 per cent is the Murray River Lakes and Coorong biggest interstate overnight domestic markets.
- Regional South Australia contributes 33 per cent of visitors to the Murray River Lakes and Coorong.
- 41 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

- The most popular activity when coming to 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 2023-24, the tourism industry contributed an estimated \$336 million to the Murray River Lakes and Coorong regional economy and directly employed 1,400 people.

Employment

- 1,400 jobs for people employed directly by the tourism industry, 700 indirect jobs and a total employment impact of 2,100 people.

Gross Value Added (GVA)

- \$83 million and \$89 million in direct and indirect tourism GVA, and \$172 million in total tourism GVA.

Gross Regional Product (GRP)

- \$98 million and \$109 million in direct and indirect tourism GRP and \$207 million in total tourism GRP.

Tourism Consumption

2023-24

Tourism products - directly consumed

- Takeaway and restaurant meals 19%
- Fuel (petrol, diesel) 17%
- Shopping (including gifts and souvenirs) 15%
- Long distance passenger transportation 14%
- Accommodation services 7%
- Alcoholic beverages and other beverages 6%
- Food products 6%
- Travel agency and tour operator services 4%

Tourism Employment

2023-24

Tourism Industries - 1,400 directly employed

- Cafes, restaurants and takeaway food services 38%
- Retail trade 20%
- Accommodation 14%
- Air, water and other transport 8%
- Clubs, pubs, taverns and bars 7%
- All other industries 3%
- Other sports and recreation services 3%
- Road transport and transport equipment rental 3%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2024

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:

Appeal to the thrill seekers who want to escape the daily grind and get the adrenaline pumping

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.

Promote the amazing natural assets of the region and the best ways to experience these

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.

Make sure people know what there is to do along the way

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.

Region appeals to...

- Relaxation seekers
- Adventurers
- Caravanners and campers
- Nature lovers
- Travelling with children

Prepared by the South Australian Tourism Commission, December 2024

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 2024.

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