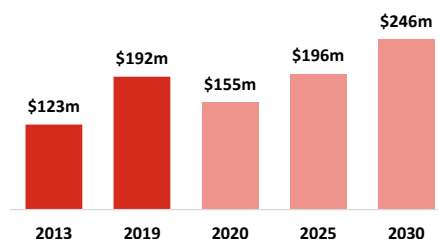


OVERVIEW

ALL DATA BASED ON THE ANNUAL AVERAGE FOR THE 3 YEARS TO THE YEAR END DECEMBER 2019 AND RELATES TO DATA PRIOR TO COVID-19 RESTRICTIONS

- Currently the Murray River, Lakes and Coorong contributes \$192 million to the December 2019 South Australian expenditure of \$8.1 billion.
- The Murray River, Lakes and Coorong has achieved their \$196 million 2020 target and 78 per cent of the 2030 target of \$246 million.



Annual Visitor Summary December 2017 - December 2019

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	280,000	78,000	358,000	10,000	368,000
%	78%	22%	97%	3%	100%
Nights	685,000	238,000	923,000	173,000	1,096,000
%	74%	26%	84%	16%	100%
Average Length of Stay	2	3	3	17	3
Domestic Day Trips					
Average Annual Day Trips to the Murray River, Lakes and Coorong					967,000

PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	199,000	98,000	55,000	18,000	368,000
%	54%	27%	15%	5%	100%
Nights	598,000	234,000	162,000	102,000	1,096,000
%	55%	21%	15%	9%	100%
Average Length of Stay	3	2	3	6	3
Expenditure					
Average Annual Expenditure	\$ 119,000,000	\$ 33,000,000	\$ 23,000,000	\$ 17,000,000	\$ 192,000,000

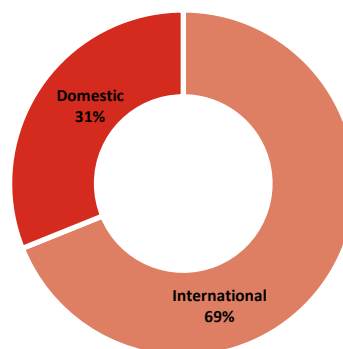
- 97 per cent of visitors are **Domestic** visitors and 3 per cent **International** visitors.
- Domestically** 78 per cent of visitors are from within the state compared to 22 per cent from Interstate.
- 81 per cent of visitors to the Murray River, Lakes and Coorong are Leisure visitors (Holiday + VFR).

MRLC TOURISM LISTINGS

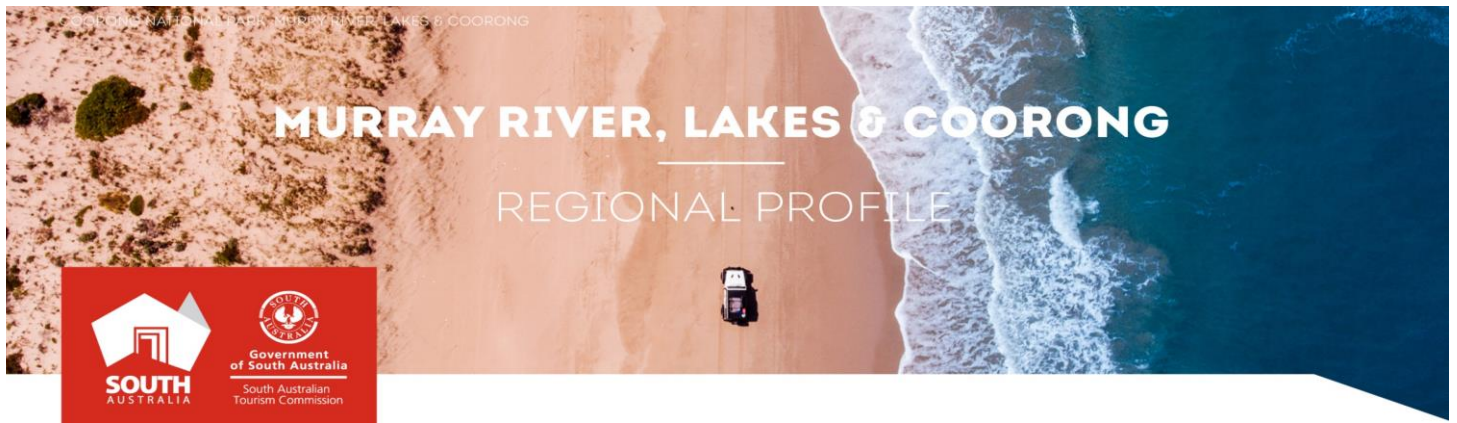
Category	MRLC
Accommodation	101
Attraction	39
Event	26
Tour	14
Food and Drink	14
Hire	9
Destination Information	3
Transport	2
Information Services	2
Journey	2
Grand Total	212

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

MRLC MEDIA COVERAGE



Source: Advertising Space Rate - 2018



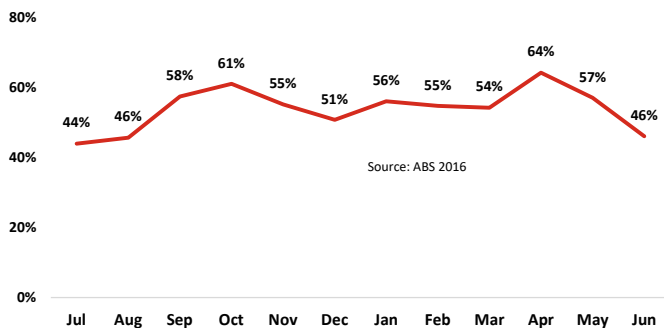
ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms

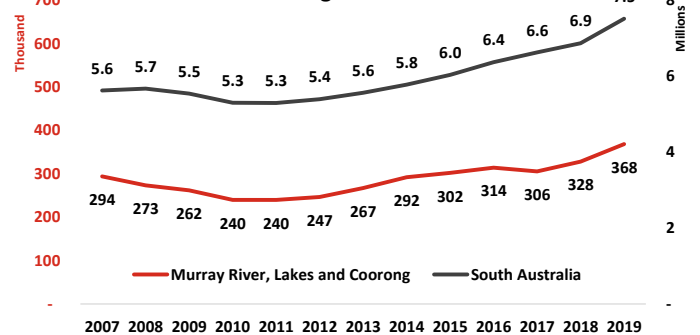
Establishments	7
Rooms	164
Occupancy	54%
Takings	\$3,500,000

- 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.

Monthly Occupancy Rates Year end June 2016 - Murray River, Lakes and Coorong

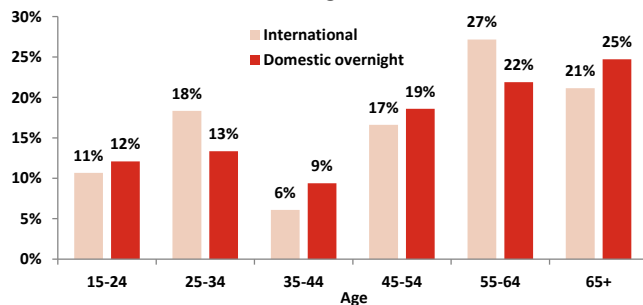


Total Overnight Visitation to the Murray River, Lakes and Coorong & South Australia



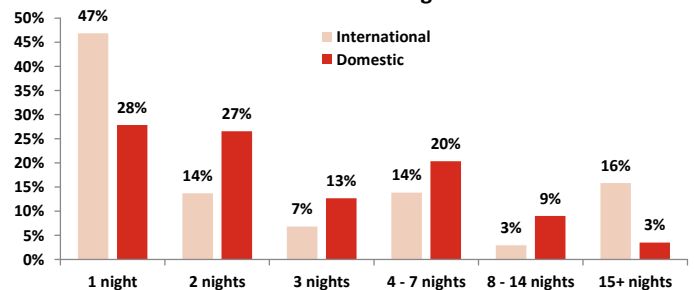
VISITOR PROFILE

Age of Visitors to the Murray River, Lakes and Coorong

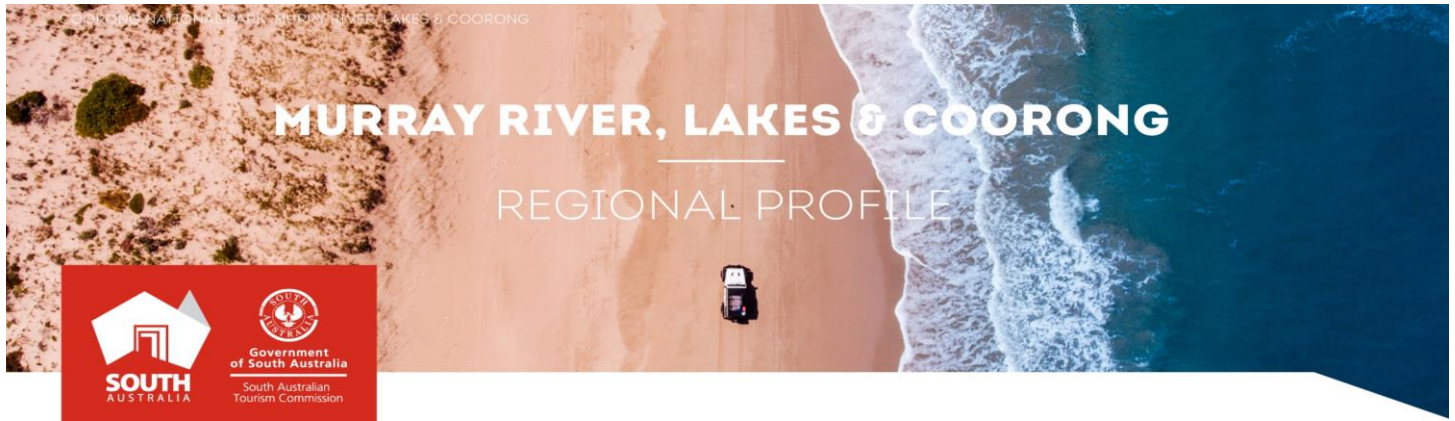


- **International** visitors peak in the 55-64 age group at 27 per cent.
- For **Domestic** visitors there is a peak in the 65+ age group at 25 per cent.

Length of Visit to the Murray River, Lakes and Coorong



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

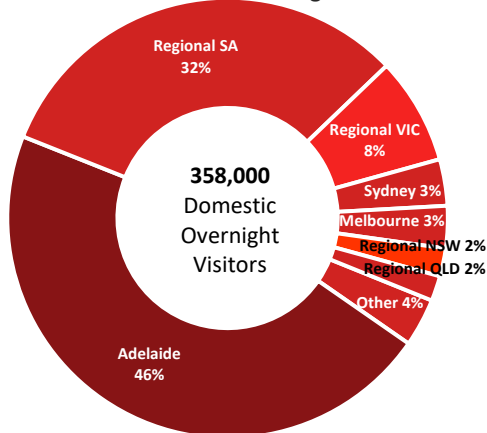


DOMESTIC VISITOR PROFILE					
Purpose	Holiday	VFR	Other	Total	
Visits	190,000	97,000	72,000	358,000	
%	53%	27%	20%	100%	
Nights	532,000	204,000	189,000	923,000	
%	58%	22%	20%	100%	
ALOS	3	2	3	3	

INTERNATIONAL VISITOR PROFILE					
Purpose	Holiday	VFR	Other	Total	
Visits	8,000	1,000	1,000	10,000	
%	80%	10%	10%	100%	
Nights	66,000	31,000	76,000	173,000	
%	38%	18%	44%	100%	
ALOS	8	31	76	17	

VISITOR ORIGIN

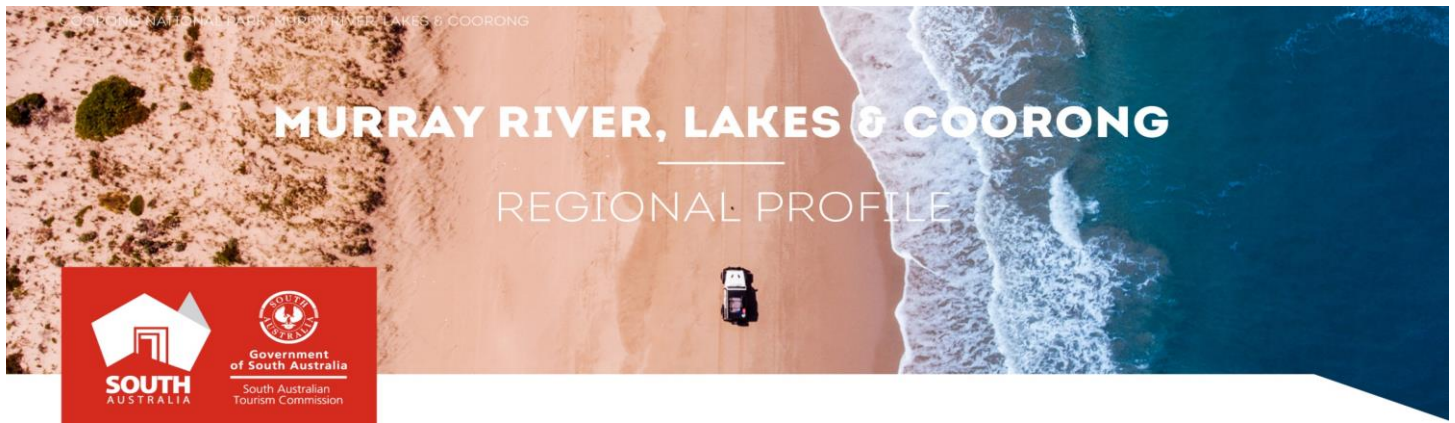
Origin of Domestic Overnight Visitors to the Murray River, Lakes and Coorong



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

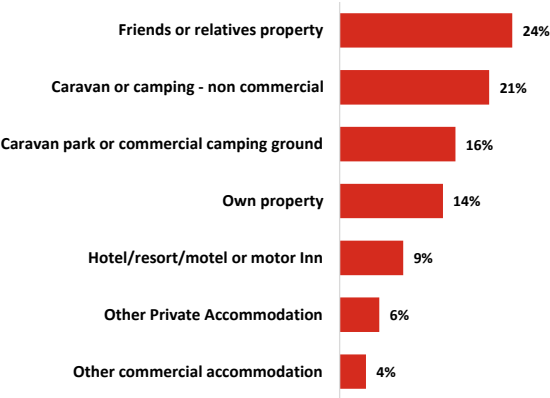


- Regional South Australia contributes 32 per cent of visitors to the Murray River, Lakes and Coorong.
- Adelaide visitors contribute 46 per cent of the visitors to the Murray River, Lakes and Coorong.
- 11 per cent of visitor come from Victoria with its close proximity to the Murray River, Lakes and Coorong.
- **Internationally** Europeans contribute 59 per cent of the visits to the Murray River, Lakes and Coorong, with Asia at 14 per cent.
- New Zealanders provide 17 per cent of all International visitors.

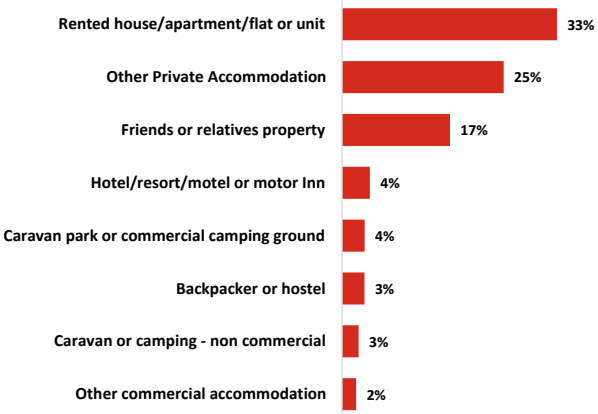


VISITOR USE OF ACCOMMODATION

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



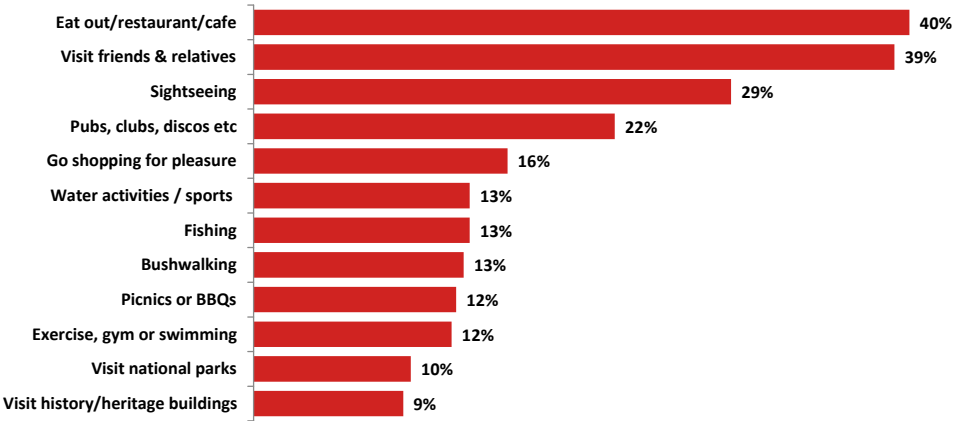
Accommodation used in the Murray River, Lakes and Coorong for International Visitors



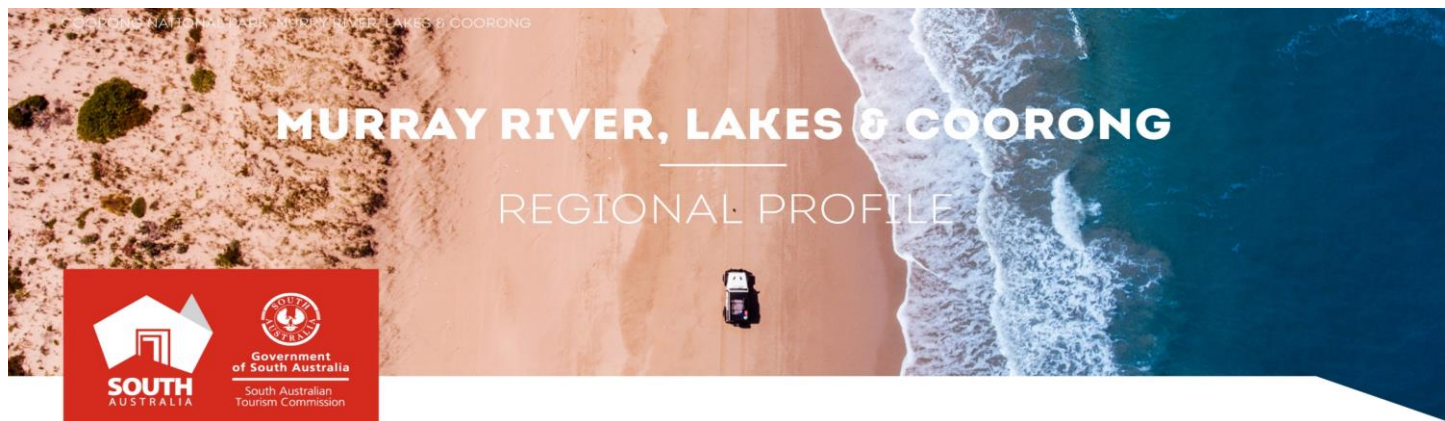
- 33 per cent of **Domestic** visitor nights to the Murray River, Lakes and Coorong are spent either in a Friends or Relatives property or a Hotel or Motel.
- 37 per cent of **Domestic** visitors prefer to stay in Caravan and Camping accommodation.
- 21 per cent of **International** visitor nights to the Murray River, Lakes and Coorong are spent either in a Friends or Relatives property or a Hotel or Motel.
- 58 per cent of **International** visitors prefer to stay in a rented house or private accommodation.

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 eat out or visit friends and relatives.
- Other popular activities include Water activities /Sports, Bushwalking and Sightseeing.



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2017-18, the tourism industry contributed an estimated \$248 million to the Murray River, Lakes and Coorong regional economy and directly employed approximately 1,100.

Employment

- 1,100 jobs for people employed directly by the tourism industry, 400 indirect jobs and a total employment impact of 1,500 people.

Tourism output

- \$115 million and \$133 million in direct and indirect tourism output, and \$248 million in total tourism output.

Gross Value Added (GVA)

- \$60 million and \$56 million in direct and indirect tourism GVA, and \$116 million in total tourism GVA.

Gross Regional Product (GRP)

- \$64 million and \$64 million in direct and indirect tourism GRP and \$129 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 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.

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 2019

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 2017 to December 2019.

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

Tourism Champions Case Study

BIG BEND BY NIGHT, SWAN REACH, MURRAY RIVER

ABOUT BIG BEND BY NIGHT

Established by David LeBrun and his daughter, Mardi in 1999, Big Bend By Night is a nature based tourism business run on the family farm in Swan Reach.

The business offers a range of experiences from nocturnal wildlife tours to outback pub tours and shearing shed shows.

Big Bend By Night have helped to grow tourism in their region by consistently bringing people into the area.

BUSINESS GROWTH

Originally started offering nocturnal wildlife tours to Unforgettable Houseboats' customers and averaged 2-3 bookings per month of around 12 people each.

Developed a partnership with Captain Cook Cruises (now Sealink) in 2000 which has seen some of their tours and attractions added to the Murray Princess's itinerary.

Visitor numbers have increased by approx. 20 per cent each year. The business now welcomes approximately 10,000 people per year on their tours.

In addition to providing full-time employment for Mardi and her parents (David and Janet), the business employs one part-time tour guide in Mannum and casual staff.

The business has four chauffeured vehicles to take guests on different tours and also offers meal options such as a bush tucker breakfast and sunset dinner tour.

CHALLENGES

During times of flood the river can pose challenges to picking guests up from the main river to take them to their farming property. Big Bend By Night have contingencies in place and hire boats from other operators to ferry their guests over the flooded wetlands.

THE FUTURE

Continue to grow the business by marketing the Shearing Shed Show to bus groups and the self-drive market.

Double guest numbers to 20,000 per year by 2022.

COMMUNITY IMPACT

Big Bend By Night offers casual employment to local shearers for the weekly shearing show and local drivers to take customers on tours. They currently have four casual drivers on the books and also offer educational shearing shows to school groups twice a week through Murray River Educational Nature Tours.

Buys from local suppliers including Male's Meats, Tabe's Auto Centre, IGA and Foodland at Mannum and Swan Reach Tyres and Mechanical and have tours that specifically target taking people to Sedan, Sutherlands and Mt Mary Hotels.

Offers work experience to local high school students and also offers tours to volunteer and disadvantaged groups, such as Canteen, for reduced rates.

"When we first started our business we went to a lot of workshops organised by the South Australian Tourism Commission which were fantastic. They put us on the right track, gave us all the templates we needed and really got us to where we are now."

"People love Big Bend By Night and we love sharing the native wildlife experience with our guests – so a day of work doesn't feel like work, which I think that is the best job you can have."

*Mardi LeBrun, Co-Owner,
Big Bend By Night*

SOUTH AUSTRALIAN TOURISM COMMISSION COLLABORATION

Big Bend By Night have attended a number of SATC run workshops and training sessions with both David and Mardi having served on the regional committee.

Also work closely with the SATC's Destination Development team to promote the region and their offering.



Government
of South Australia

South Australian
Tourism Commission