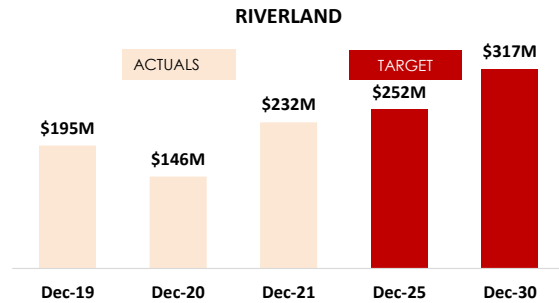




## OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2021

- Currently Riverland contributes \$232 million to the year end December 2021 South Australian expenditure of \$6.2 billion.
- The Riverland has achieved 92 per cent of their 2025 target of \$252 million and 73 per cent of their 2030 target of \$317 million.



## ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2021

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
<b>Overnight Visits</b>	283,000	62,000	<b>345,000</b>	-	<b>345,000</b>
%	82%	18%	<b>100%</b>	0%	<b>100%</b>
<i>Share of Regional SA</i>	6%	4%	<b>6%</b>	0%	<b>6%</b>
<hr/>					
<i>% Across Regional SA</i>	76%	23%	<b>100%</b>	0%	<b>100%</b>
<hr/>					
<b>Nights</b>	705,000	255,000	<b>960,000</b>	-	<b>960,000</b>
%	73%	27%	<b>100%</b>	0%	<b>100%</b>
<i>Share of Regional SA</i>	5%	3%	<b>4%</b>	0%	<b>4%</b>
<hr/>					
<i>% Across Regional SA</i>	60%	38%	<b>98%</b>	2%	<b>100%</b>
<hr/>					
<b>Average Length of Stay</b>	2.5	4.1	<b>2.8</b>	-	<b>2.8</b>
<b>ALOS Regional SA</b>	3.0	6.2	<b>3.7</b>	-	<b>3.8</b>
<hr/>					
<b>Total Expenditure</b>					<b>\$231,000,000</b>
<b>Overnight Expenditure</b>	\$104,000,000	\$54,000,000	<b>\$157,000,000</b>	\$0	<b>\$157,000,000</b>
<b>Day Trip Expenditure</b>					<b>\$74,000,000</b>
<hr/>					
<b>Domestic Day Trips</b>					<b>431,000</b>

- The Riverland saw 345,000 domestic overnight visitors for the year end December 2021.
- 82 per cent of overnight visitors were from intrastate and 18 per cent from interstate.
- The 283,000 intrastate overnight visitors stayed 705,000 nights with an average length of stay of 2.5 nights.
- There were 62,000 interstate overnight visitors who stayed 255,000 nights with an average length of stay of 4.1 nights
- There have been no international arrivals with the borders closed.
- 431,000 day trips were taken to Riverland for the year with spend of \$74 million.

# RIVERLAND

## REGIONAL PROFILE



### PURPOSE

	Holiday	VFR	Business	Other	Total
<b>Overnight Visits</b>	204,000	90,000	35,000	17,000	<b>345,000</b>
%	59%	26%	10%	5%	<b>100%</b>
<i>Share of Regional SA</i>	7%	5%	3%	4%	<b>6%</b>
<i>% Across all regions</i>	49%	28%	18%	8%	<b>100%</b>

<b>Nights</b>	593,000	231,000	114,000	22,000	<b>960,000</b>
%	62%	24%	12%	2%	<b>100%</b>
<i>Share of Regional SA</i>	5%	4%	3%	1%	<b>4%</b>
<i>% Across all regions</i>	50%	26%	17%	8%	<b>100%</b>

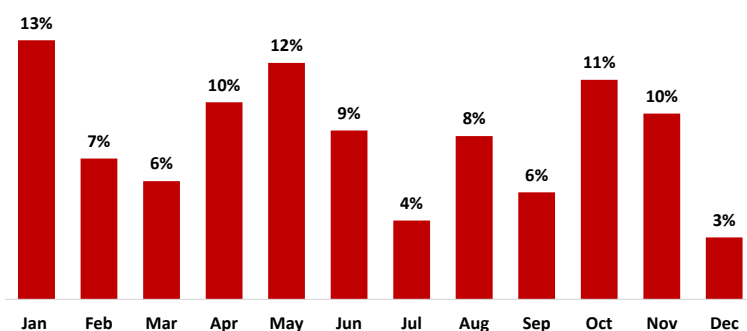
<b>Average Length of Stay</b>	2.9	2.6	3.3	1.3	<b>2.8</b>
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Expenditure					
<b>Annual Expenditure</b>	\$110,000,000	\$31,000,000	\$13,000,000	\$4,000,000	<b>\$158,000,000</b>
<b>Expenditure 2019</b>	\$114,000,000	\$18,000,000	\$20,000,000	\$9,000,000	<b>\$161,000,000</b>
<b>Av spend per night</b>	\$185	\$134	\$114	\$182	<b>\$165</b>
<b>Av spend per night Reg SA</b>	\$154	\$58	\$84	\$80	<b>\$112</b>
<b>Share of Regional SA</b>	4%	4%	6%	1%	<b>4%</b>

- 85 per cent of overnight visitors to the Riverland are leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$185 per night compared to VFR visitors who spend \$134 per night.
- Holiday visitors spent \$110 million for the year and VFR \$31 million, making up 89 per cent of total expenditure.

### SEASONALITY

#### SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO RIVERLAND



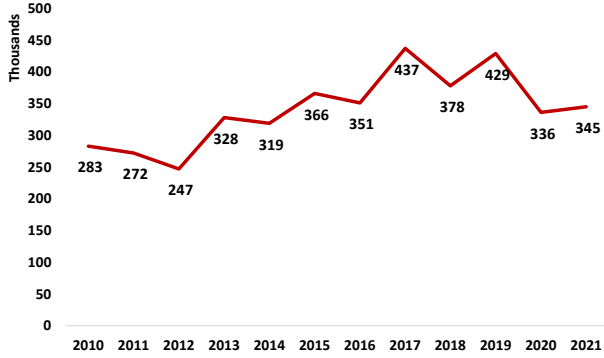
- National Visitor Survey data shows us that January, May and October are the busiest months in the Riverland.
- January has strong visitation with the summer/school holidays.
- Visitation increases with the October school holidays.
- May in 2021 was also very strong with all the interstate borders open and restrictions reduced.

Source: NVS year end December 2021

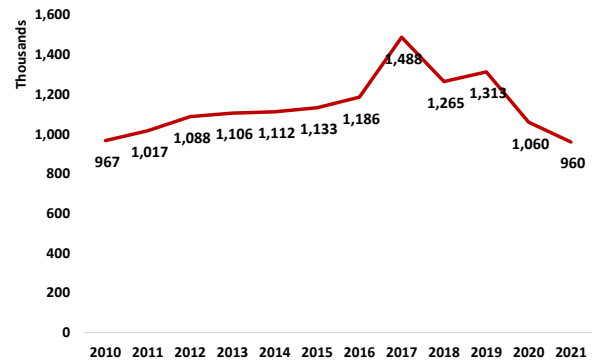


**TOTAL OVERNIGHT VISITATION 2010 - 2021**

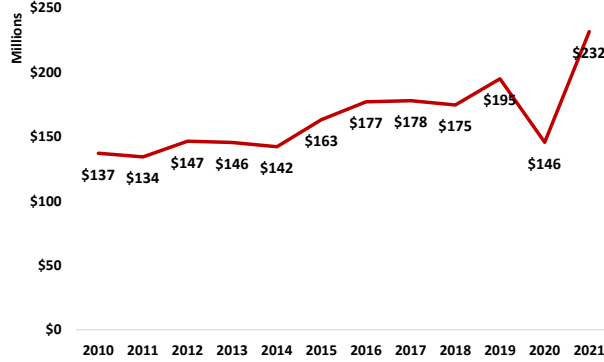
**VISITORS RIVERLAND 2010 - 2021 - INTERNATIONAL AND DOMESTIC**



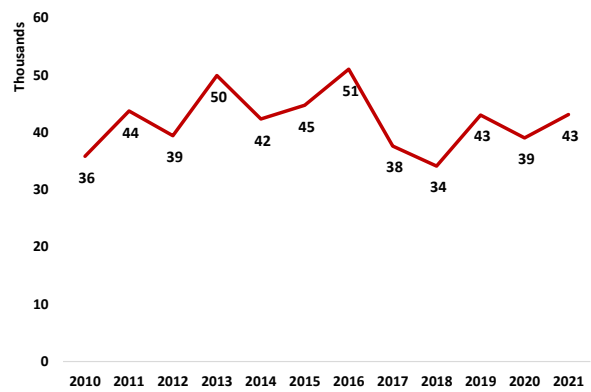
**NIGHTS RIVERLAND 2010 - 2021 - INTERNATIONAL AND DOMESTIC**



**TOTAL EXPENDITURE RIVERLAND 2010 - 2021 - INTERNATIONAL AND DOMESTIC**



**DAY TRIPS RIVERLAND 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%
<b>South Australia</b>	<b>6,077,000</b>	<b>-29%</b>	<b>6,151,300,000</b>	<b>-24%</b>



**RIVERLAND TOURISM LISTINGS**

Category	# Listings
Attraction	117
Accommodation	78
Hire	23
Event	20
Food and Drink	18
Tour	15
General Services	7
Information Services	6
Destination Information	3
<b>Grand Total</b>	<b>287</b>

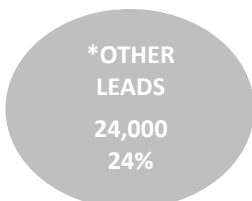
*Note: some listings have multiple categories of accommodation  
 Source: Australian Tourism Data Warehouse  
 Categories above defined at - <https://tourism.sa.gov.au/support/atdw>*

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](http://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)

**RIVERLAND  
 AUSTRALIAN TOURISM DATA WAREHOUSE  
 LEADS  
 99,000  
 YEAR END DECEMBER 2021**



**TOP 5**

- BIG4 RENMARK RIVERFRONT
- HOLIDAY PARK DISCOVERY PARKS LAKE BONNEY
- PIKE RIVER LUXURY VILLAS
- THE FRAMES LUXURY RIVERLAND ACCOMMODATION
- BERRI RIVERSIDE HOLIDAY PARK

**TOP 5**

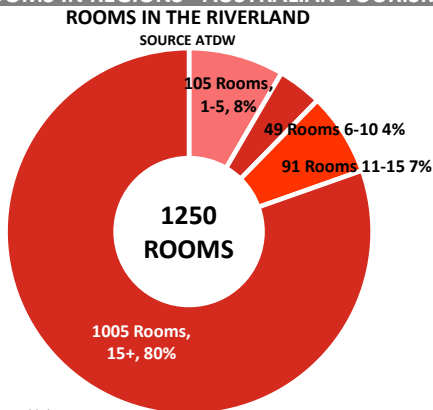
- TWENTY THIRD STREET DISTILLERY
- WILKADENE WOOLSHED BREWERY
- SALENA ESTATE WINES CUCINA 837 AT SALENA
- CAUDO VINEYARD CELLAR DOOR
- OVERLAND CORNER HOTEL

**TOP 5**

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

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

**ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE**



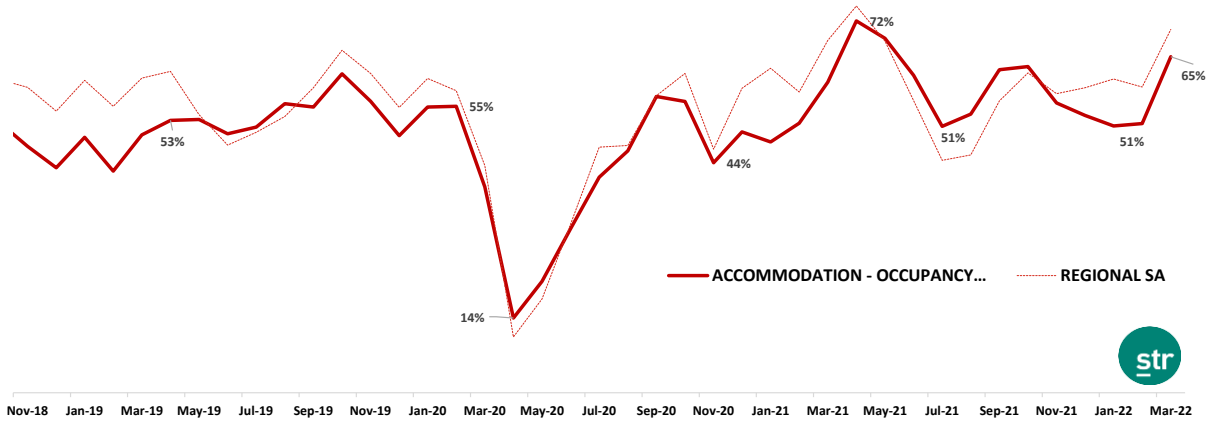
- Currently there are 78 establishments in the Riverland that accommodate guests.
- These 78 establishments account for 1,250 rooms across the region.
- 80 per cent of rooms fall into establishment with 15 or more rooms.
- 8 per cent of rooms fall into the 1-5 room establishments.

Rooms refer to rooms per establishment



**ACCOMMODATION STR**

**ACCOMMODATION - OCCUPANCY INLAND**

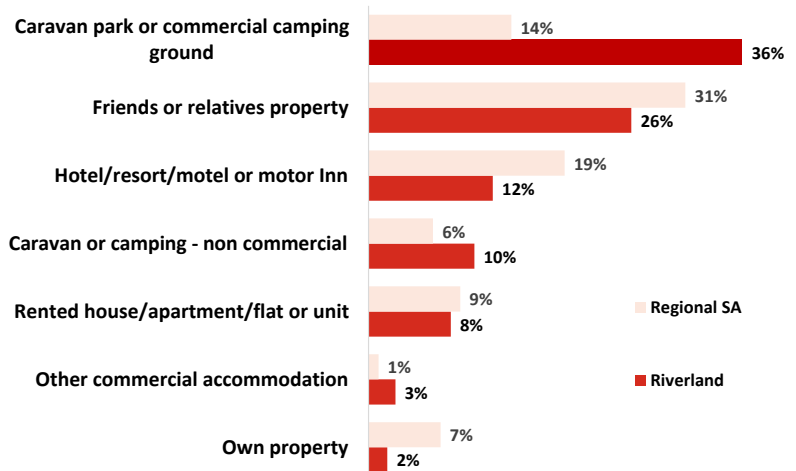


- Inland is defined as the Murray River Lakes and Coorong, the Riverland and the Flinders Ranges and Outback. Occupancy data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for these combined regions was 52 per cent, this fell to 43 per cent in 2020, rose to 58 per cent in 2021 and for the first 3 months of 2022 the average is 56 per cent.

**VISITOR USE OF ACCOMMODATION**

- 38 per cent of Domestic visitor nights are spent in Hotels/Motels or with friends or relatives.
- 46 per cent of people prefer to Caravan and Camp, above the regional average of 20 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

**ACCOMMODATION USED IN RIVERLAND FOR DOMESTIC VISITORS**



**TRANSPORT**

**TRANSPORT RIVERLAND DECEMBER 2021**

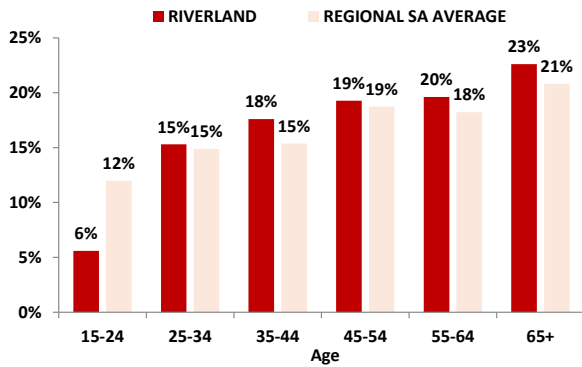


- The main method of transport used for the Riverland was a self drive vehicle.
- 95 per cent of visitors used this type of transport.
- 5 per cent of people used other land or water transport.



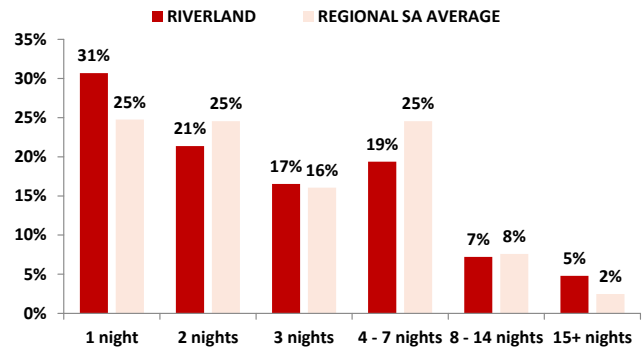
**VISITOR PROFILE**

**AGE OF VISITORS TO RIVERLAND**



- Domestically there is a peak in 65+ age group at 23 per cent above the regional average of 21 per cent.
- The 35-44 age group at 18 per cent was above the regional average of 15 per cent.

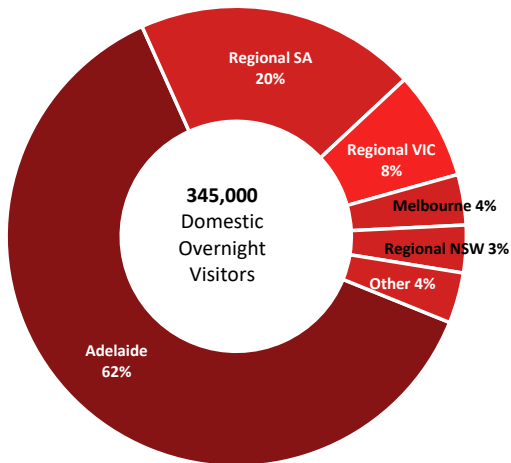
**LENGTH OF VISIT TO RIVERLAND**



- 52 per cent of Domestic visitors like to stay 1-2 nights, above the regional SA average of 50 per cent.
- 19 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**

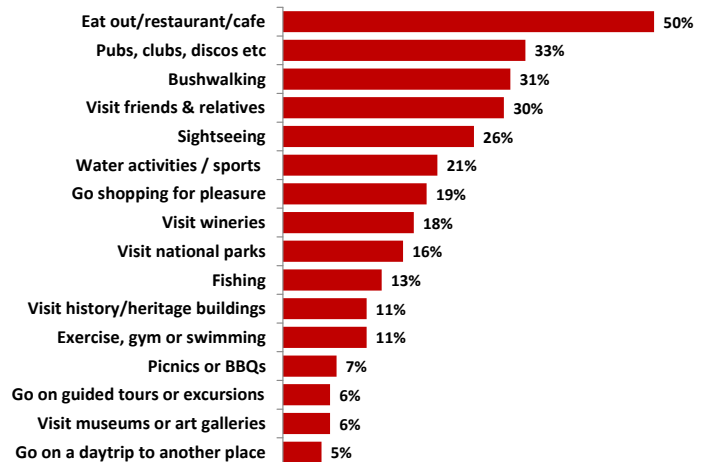


- Victoria accounted for 12 per cent of visitors to the Riverland. Pre COVID Melbourne and Regional Victoria accounted for 13 per cent of visitors to the Riverland, their biggest interstate markets.
- Regional South Australia contributes 20 per cent of visitors to the Riverland, however prior to COVID this was 27 per cent.
- 62 per cent of visitors come from Adelaide.

**VISITOR ACTIVITIES**

- 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.

**DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN RIVERLAND**





## 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 international markets.
- A focus on all parts of the visitor mix are required: growing events, creating new visitor experiences, driving increased collaboration and supporting operators.

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 1.5 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. 86 35455001  
Consumer Demand Product Testing Phase 1 - BDA Marketing