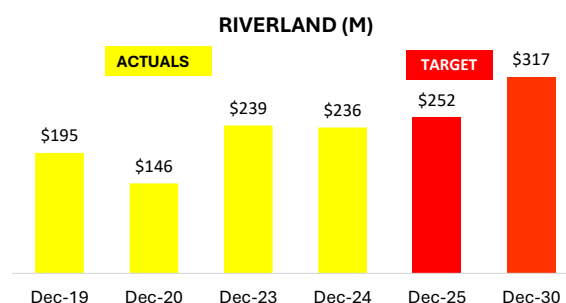




OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2024

- Currently, the Riverland contributes \$236 million to the year end December 2024 South Australian expenditure of \$9.8 billion.
- The Riverland has achieved 94 per cent of their 2025 target of \$252 million and 74 per cent of their 2030 target of \$317 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2024

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	308,000	148,000	456,000	7,000	464,000
% of visits	66%	32%	98%	2%	100%
Share of Regional SA	9%	13%	10%	5%	10%
% 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	718,000	451,000	1,169,000	212,000	1,381,000
% of nights	52%	33%	85%	15%	100%
Share of Regional SA	7%	10%	8%	8%	8%
% 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	2.3	3.0	2.6	30	3.0
ALOS Regional SA	2.9	4.2	3.2	20	3.7
Total Expenditure					\$236,000,000
Overnight Expenditure	\$116,000,000	\$70,000,000	\$186,000,000	\$15,000,000	\$201,000,000
Day Trip Expenditure					\$35,000,000
Domestic Day Trips					291,000

- The Riverland saw 464,000 overnight visitors for the year end December 2024.
- 66 per cent of overnight visitors were from intrastate, 32 per cent from interstate and 2 per cent from overseas.
- The 308,000 intrastate overnight visitors stayed 718,000 nights with an average length of stay of 2.3 nights.
- There were 148,000 interstate overnight visitors who stayed 451,000 nights with an average length of stay of 3.0 nights
- The region saw 7,000 international visitors with an average length of stay of 30 nights and spend of \$15 million.
- 291,000 day trips were taken to and within the Riverland for the year with spend of \$35 million.

ALOS = Average Length of Stay



PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	241,000	109,000	104,000	13,000	464,000
% of visits	52%	23%	22%	3%	100%
Share of Regional SA	10%	10%	12%	4%	10%
% Across all regions	53%	24%	19%	7%	100%

Nights	755,000	290,000	231,000	105,000	1,381,000
% of nights	55%	21%	17%	8%	100%
Share of Regional SA	9%	7%	8%	7%	8%
% Across all regions	49%	25%	17%	9%	100%

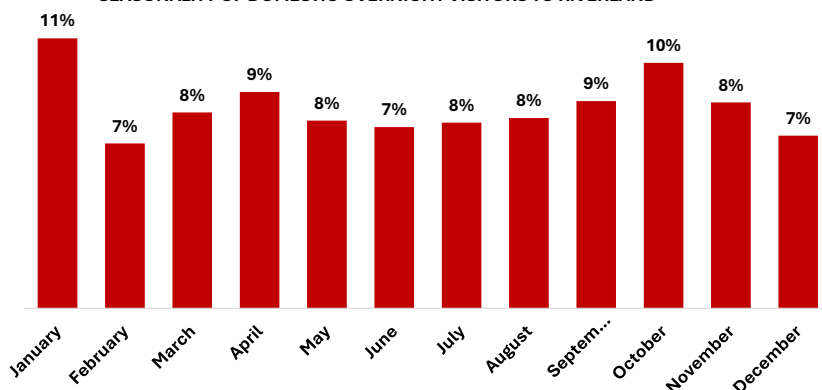
Average Length of Stay	3.1	2.7	2.2	8.1	3.0
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Expenditure					
Annual Overnight Exp	\$137,000,000	\$34,000,000	\$17,000,000	\$14,000,000	\$201,000,000
Expenditure 2019	\$114,000,000	\$18,000,000	\$20,000,000	\$9,000,000	\$162,000,000
Av spend per night	\$181	\$117	\$74	\$133	\$146
Av spend per night Reg SA	\$190	\$103	\$176	\$218	\$169
Share of Regional SA	3%	5%	1.3%	2%	3%

- 75 per cent of overnight visitors to the Riverland are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$181 per night compared to VFR visitors who spend \$117 per night.
- Leisure overnight visitors spent \$171 million for the year, making up 85 per cent of all overnight expenditure.
- There are 104,000 business visitors who stay 231,000 nights with spend of \$17 million .

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO RIVERLAND



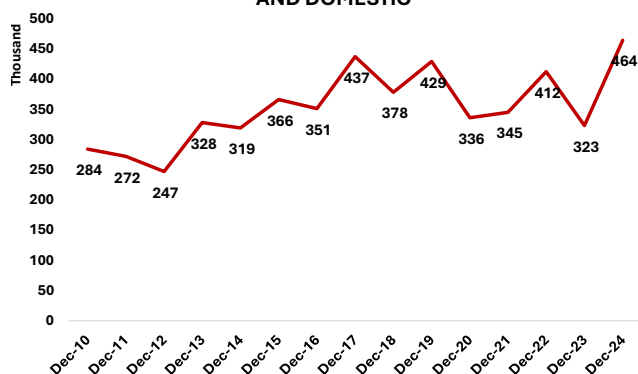
Source: NVS year end December 2024

- National Visitor Survey data shows us that in 2024 January, April and October are the strongest months for visitation on the Riverland.
- January is the busiest month for the year with summer school holidays.
- April and October also strong with school holidays, Easter and the October long weekend.

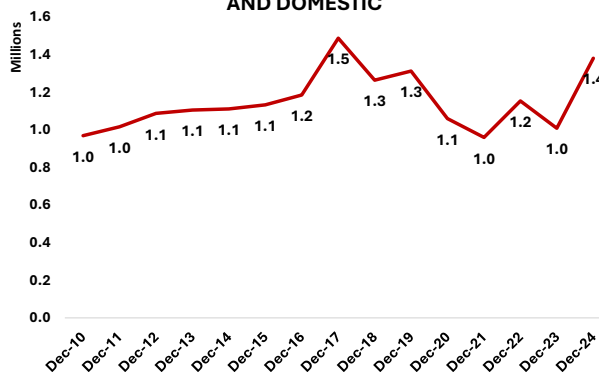


TOTAL OVERNIGHT VISITATION 2010 - 2024

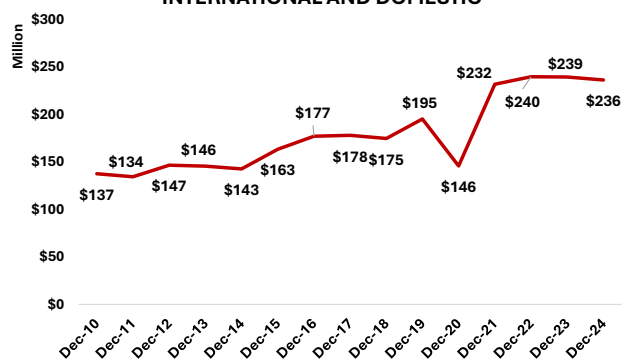
VISITORS RIVERLAND 2010 - 2024 - INTERNATIONAL AND DOMESTIC



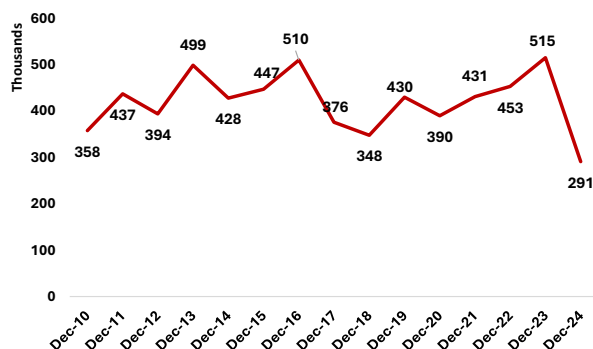
NIGHTS RIVERLAND 2010 - 2024 - INTERNATIONAL AND DOMESTIC



TOTAL EXPENDITURE RIVERLAND 2010 - 2024 - INTERNATIONAL AND DOMESTIC



DAY TRIPS RIVERLAND 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%



RIVERLAND TOURISM LISTINGS

Category	# Listings
ATTRACTION	127
ACCOMM	101
EVENT	87
RESTAURANT	30
HIRE	23
TOUR	14
GENSERVICE	10
INFO	6
DESTINFO	3
JOURNEY	1
Grand Total	402

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)

RIVERLAND AUSTRALIAN TOURISM DATA WAREHOUSE LEADS

122,000

YEAR END DECEMBER 2024

ACCOMMODATION LEADS

75,000
61%

FOOD & DRINK LEADS

6,000
5%

TOUR LEADS

6,000
5%

*OTHER LEADS

35,000
29%

TOP 5

- BIG4 RENMARK RIVERFRONT HOLIDAY PARK
- PIKE RIVER LUXURY VILLAS
- RIVERBEND CARAVAN PARK
- DISCOVERY PARKS LAKE BONNEY
- BIG4 LOXTON RIVERFRONT HOLIDAY PARK

TOP 5

- TWENTY THIRD STREET DISTILLERY
- WILKADENE WOOLSHED BREWERY
- RIVERLAND WINE CENTRE
- SALENA ESTATE WINES / CUCINA 837 AT SALENA
- OVERLAND CORNER HOTEL

TOP 5

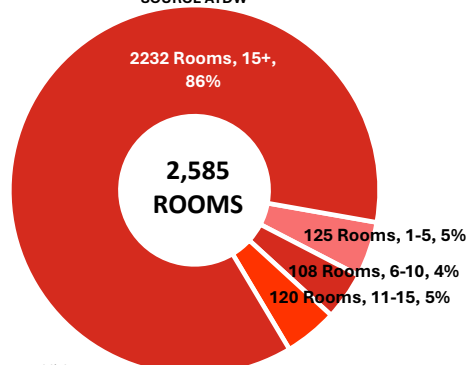
- RIVERGUM CRUISES RENMARK
- RIVER CRUISES
- LOVEDAY ADVENTURE PARK EXPERIENCES
- MURRAY RIVER TRAILS
- CANOE ADVENTURES KAYAK TOURS RIVERLAND

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

ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS ON THE RIVERLAND

SOURCE ATDW



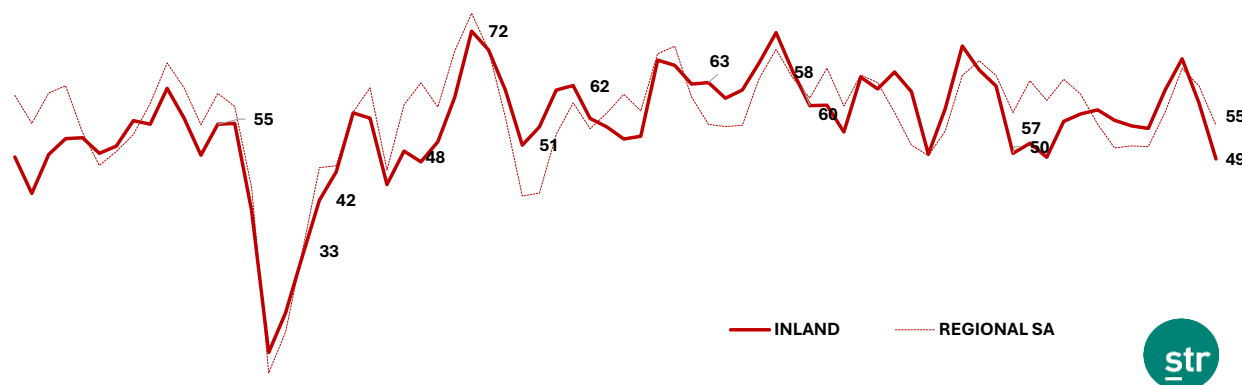
Rooms refers to rooms per establishment

- Currently there are 104 establishments in the Riverland that accommodate guests.
- These 104 establishments account for 2,585 rooms across the region.
- 86 per cent of rooms fall into establishment with 14 or more rooms.
- 5 per cent of rooms fall into the 1-5 room establishments.



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY INLAND



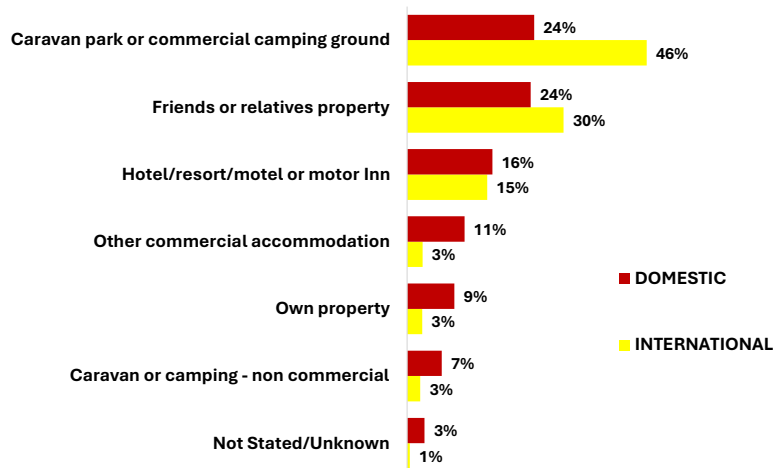
Jan-19 Feb-19 Mar-19 Apr-19 May-19 Jun-19 Jul-19 Aug-19 Sep-19 Oct-19 Nov-19 Dec-19 Jan-20 Feb-20 Mar-20 Apr-20 May-20 Jun-20 Jul-20 Aug-20 Sep-20 Oct-20 Nov-20 Dec-20 Jan-21 Feb-21 Mar-21 Apr-21 May-21 Jun-21 Jul-21 Aug-21 Sep-21 Oct-21 Nov-21 Dec-21 Jan-22 Feb-22 Mar-22 Apr-22 May-22 Jun-22 Jul-22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

ACCOMMODATION USED IN RIVERLAND FOR DOMESTIC VISITORS

- 24 per cent of domestic overnight visitor nights in the Riverland are spent with Friends or Relatives compared to the international average of 30 per cent.
- 16 per cent of domestic and 15 per cent of international visitors stayed in a Hotel/resort/motel or motor inn.
- 31 per cent of domestic visitors to the Riverland stay in a caravan park.
- 49 per cent of international visitors stay in a caravan park.



TRANSPORT - DOMESTIC OVERNIGHT

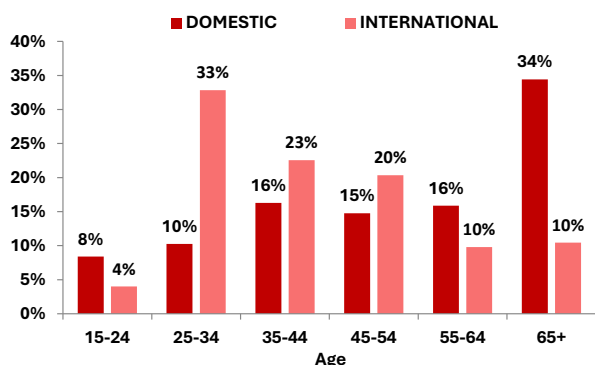


- The main method of transport used on trips to the Riverland was self drive.
- 89 per cent travel to the region is through self drive.



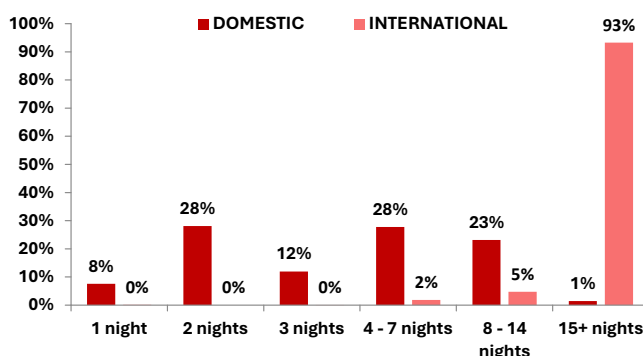
VISITOR PROFILE

AGE OF VISITORS TO RIVERLAND



- In the domestic market the 55+ is the strongest age group with 50 per cent of visitors.
- The International market is strong in the 25-34 age group 33 per cent of all visits.

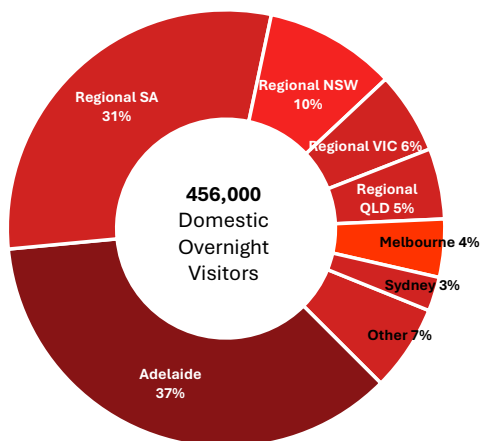
LENGTH OF VISIT TO RIVERLAND



- 36 per cent of domestic overnight visitors like to stay 1 to 2 nights. Domestic market also strong in the 4-7 nights with 28 per cent.
- 93 per cent of international visitors stay 15+ nights. This is on the back of employment.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO RIVERLAND

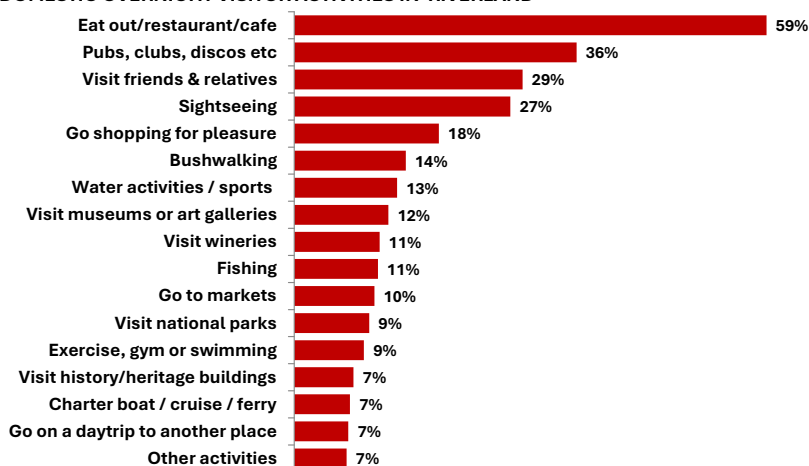


- NSW at 13 per cent is the Riverland biggest interstate overnight domestic markets.
- Regional South Australia contributes 31 per cent of visitors to the Riverland.
- 37 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN RIVERLAND

- The most popular activity when coming to the Riverland 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.





REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2023-24, the tourism industry contributed an estimated \$317 million to the Riverland regional economy and directly employed 1,200 people.

Employment

- 1,200 jobs for people employed directly by the tourism industry, 600 indirect jobs and a total employment impact of 1,700 people.

Gross Value Added (GVA)

- \$71 million and \$76 million in direct and indirect tourism GVA, and \$147 million in total tourism GVA.

Gross Regional Product (GRP)

- \$84 million and \$92 million in direct and indirect tourism GRP and \$177 million in total tourism GRP.

Tourism Consumption

2023-24

Tourism products - directly consumed

- Takeaway and restaurant meals 18%
- Long distance passenger transportation 17%
- Fuel (petrol, diesel) 14%
- Shopping (including gifts and souvenirs) 11%
- Accommodation services 10%
- Food products 6%
- Alcoholic beverages and other beverages 6%
- Travel agency and tour operator services 5%

Tourism Employment

2023-24

Tourism Industries - 1,200 directly employed

- Cafes, restaurants and takeaway food services 34%
- Accommodation 26%
- Retail trade 19%
- Clubs, pubs, taverns and bars 6%
- Air, water and other transport 4%
- Road transport and transport equipment rental 3%
- All other industries 2%
- Travel agency and tour operator services 2%

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 Riverland holds a special place in the minds of South Australian's who visited the region growing up.
- However, the region is largely unknown, beyond the association with the river, for interstaters and locals who haven't ventured into this part of SA before.
- The region's appeal rests in the ability to kick back and relax by the river, roam the region and sample local produce, or for the more adventurous at heart, get active on the water

To drive increased visitation and expenditure, we recommend the Riverland:

Increase the understanding of what the region has to offer

To attract those who have never been to this region before, more needs to be done to increase awareness of what's on offer beyond the river.

Promote the nature based activities available

The opportunity travel down the river on a house boat, sit by a camp fire after mooring, take in the native wildlife and explore the water via kayak are all strong drawcards – making sure this is top of mind is key.

Develop or promote a tasting trail for the region

Visitors love the idea of being able to sample local produce and visit the region's wineries, distilleries and breweries. Guiding them through the best stop-offs is a great way to hold their interest for longer and increase their footprint throughout the region.

Region appeals to...

- Relaxation seekers
- Nature lovers
- Families

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