

# MURRAY RIVER, LAKES & COORONG

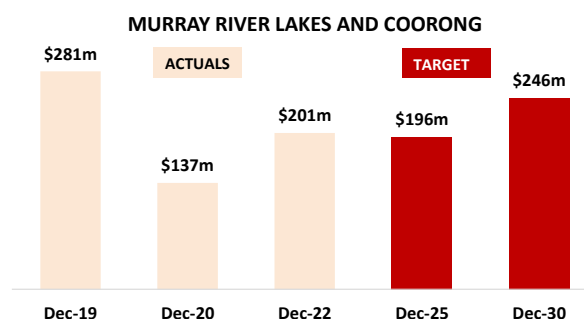
## REGIONAL PROFILE



### OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2022

- Currently the Murray River Lakes and Coorong contributes \$201 million to the year end December 2022 South Australian expenditure of \$8.3 billion.
- The Murray River Lakes and Coorong has achieved 100 per cent of their 2025 target of \$196 million and 82 per cent of their 2030 target of \$246 million.



### ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2022

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
<b>Overnight Visits</b>	310,000	69,000	<b>379,000</b>	2,000	<b>381,000</b>
%	82%	18%	<b>99%</b>	1%	<b>100%</b>
<i>Share of Regional SA</i>	9%	7%	<b>8%</b>	4%	<b>8%</b>
<hr/>					
<i>% Across Regional SA</i>	76%	22%	<b>99%</b>	1%	<b>100%</b>
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<b>Nights</b>	753,000	209,000	<b>962,000</b>	11,000	<b>973,000</b>
%	78%	22%	<b>99%</b>	1%	<b>100%</b>
<i>Share of Regional SA</i>	7%	4%	<b>6%</b>	1%	<b>6%</b>
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<i>% Across Regional SA</i>	63%	32%	<b>95%</b>	5%	<b>100%</b>
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<b>Average Length of Stay</b>	2.4	3.0	<b>2.5</b>	5.5	<b>2.6</b>
<b>ALOS Regional SA</b>	3.0	5.1	<b>3.5</b>	16.1	<b>3.7</b>
<hr/>					
<b>Total Expenditure</b>					<b>\$201,000,000</b>
<b>Overnight Expenditure</b>	\$92,000,000	\$32,000,000	<b>\$124,000,000</b>	\$155,000	<b>\$124,000,000</b>
<b>Day Trip Expenditure</b>					<b>\$77,000,000</b>
<hr/>					
<b>Domestic Day Trips</b>					<b>781,000</b>

- The Murray River Lakes and Coorong saw 379,000 domestic overnight visitors for the year end December 2022.
- 82 per cent of overnight visitors were from intrastate and 18 per cent from interstate.
- The 310,000 intrastate overnight visitors stayed 753,000 nights with an average length of stay of 2.4 nights.
- There were 69,000 interstate overnight visitors who stayed 209,000 nights with an average length of stay of 3.0 nights
- The region saw 2,000 international visitors with an average length of stay of 5.5 nights and spend of \$155,000.
- 781,000 day trips were taken to the Murray River Lakes and Coorong for the year with spend of \$77 million.

ALOS = Average Length of Stay

# MURRAY RIVER, LAKES & COORONG

## REGIONAL PROFILE



### PURPOSE

	Holiday	VFR	Business	Other	Total
<b>Overnight Visits</b>	197,000	67,000	96,000	20,000	<b>381,000</b>
%	52%	18%	25%	5%	<b>100%</b>
<i>Share of Regional SA</i>	8%	6%	11%	14%	<b>8%</b>
<i>% Across all regions</i>	53%	25%	19%	3%	<b>100%</b>

<b>Nights</b>	595,000	119,000	222,000	36,000	<b>973,000</b>
%	61%	12%	23%	4%	<b>100%</b>
<i>Share of Regional SA</i>	7%	3%	7%	5%	<b>6%</b>
<i>% Across all regions</i>	54%	21%	20%	4%	<b>100%</b>

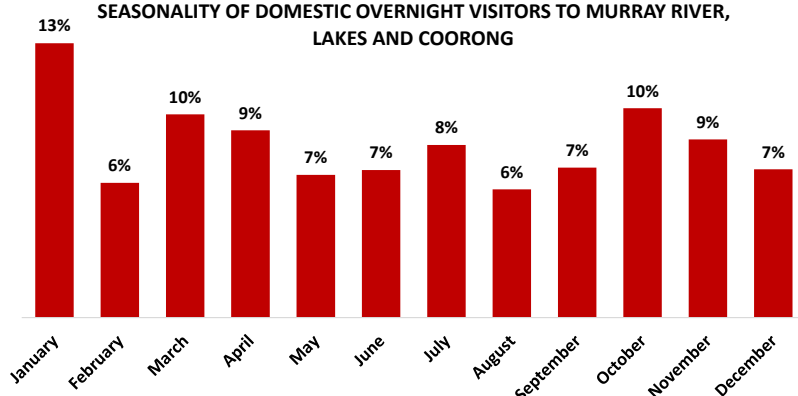
<b>Average Length of Stay</b>	3.0	1.8	2.3	1.8	<b>2.6</b>
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Expenditure					
<b>Annual Expenditure</b>	\$81,000,000	\$12,000,000	\$22,000,000	\$10,000,000	<b>\$124,000,000</b>
<b>Expenditure 2019</b>	\$117,000,000	\$12,000,000	\$21,000,000	\$13,000,000	<b>\$163,000,000</b>
<b>Av spend per night</b>	\$136	\$101	\$99	\$278	\$127
<b>Av spend per night Reg SA</b>	\$204	\$112	\$142	\$279	\$175
<b>Share of Regional SA</b>	3%	4%	0%	2%	<b>3%</b>

- 70 per cent of overnight visitors to the Murray River Lakes and Coorong are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$136 per night compared to VFR visitors who spend \$101 per night.
- Leisure overnight visitors spent \$93 million for the year, making up 75 per cent of all overnight expenditure.

### SEASONALITY

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



- National Visitor Survey data shows us that in 2022 January, March, April and October are the strongest months for visitation in the Murray River Lakes and Coorong.
- January and April are busy with the school holidays.
- October is strong with the long weekend and school holidays.

Source: NVS year end December 2022

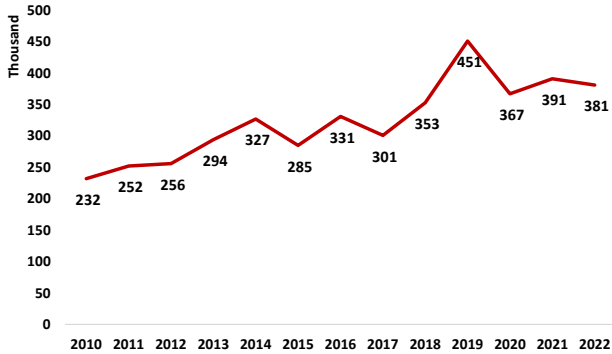
# MURRAY RIVER, LAKES & COORONG

## REGIONAL PROFILE

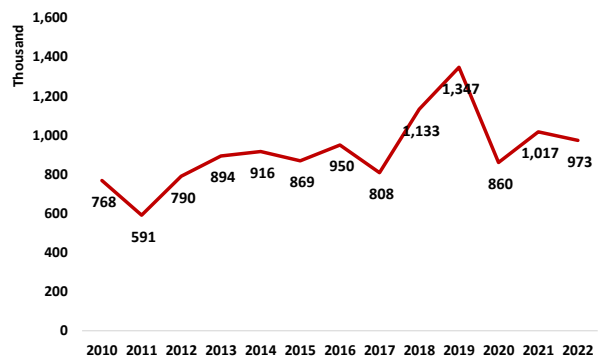


### TOTAL OVERNIGHT VISITATION 2010 - 2022

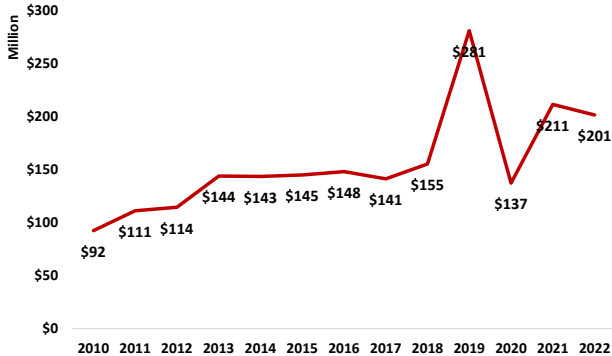
**VISITORS MURRAY RIVER LAKES AND COORONG 2010 - 2022 - International and Domestic**



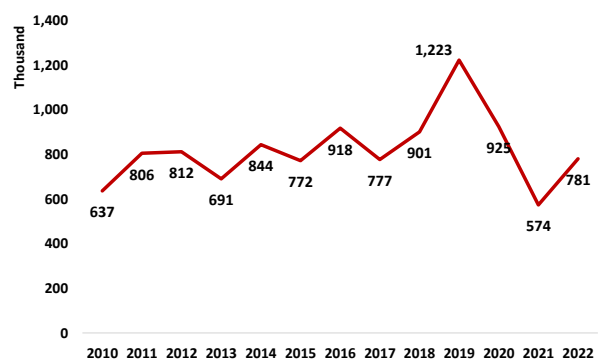
**NIGHTS MURRAY RIVER LAKES AND COORONG 2010 - 2022 - International and Domestic**



**TOTAL EXPENDITURE MURRAY RIVER LAKES AND COORONG 2010 - 2022 - International and Domestic**



**DAY TRIPS MURRAY RIVER LAKES AND COORONG 2010 - 2022 - 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-22	Change on Dec-19	Dec-22	Change on Dec-19
Adelaide	3,084,000	-21%	\$4,400,000,000	-3%
Adelaide Hills	155,000	-31%	\$225,000,000	9%
Barossa	319,000	1%	\$326,000,000	45%
Clare Valley	196,000	-4%	\$152,000,000	29%
Eyre Peninsula	500,000	-14%	\$503,000,000	-8%
Fleurieu Peninsula	783,000	-13%	\$665,000,000	19%
Flinders Ranges and Outback	835,000	-10%	\$576,000,000	12%
Kangaroo Island	171,000	-18%	\$187,000,000	-2%
Limestone Coast	622,000	-20%	\$441,000,000	5%
Murray River, Lakes and Coorong	381,000	-16%	\$201,000,000	-28%
Riverland	412,000	-4%	\$240,000,000	23%
Yorke Peninsula	602,000	1%	\$354,000,000	47%
Regional SA	4,568,000	-12%	\$3,980,000,000	12%
<b>South Australia</b>	<b>7,291,000</b>	<b>-15%</b>	<b>\$8,340,000,000</b>	<b>3%</b>

# MURRAY RIVER, LAKES & COORONG

## REGIONAL PROFILE



### MURRAY RIVER LAKES AND COORONG TOURISM LISTINGS

Category	# Listings
ACCOMM	122
ATTRACTION	69
RESTAURANT	19
EVENT	16
TOUR	13
HIRE	10
DESTINFO	3
INFO	2
TRANSPORT	2
GENSERVICE	1
Grand Total	257

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](https://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

# 63,000

YEAR END DECEMBER 2022

ACCOMMODATION  
LEADS  
31,000  
48%

FOOD & DRINK  
LEADS  
1,000  
1%

TOURS  
LEADS  
15,000  
24%

\*OTHER  
LEADS  
17,000  
27%

#### TOP 5

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

#### TOP 5

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

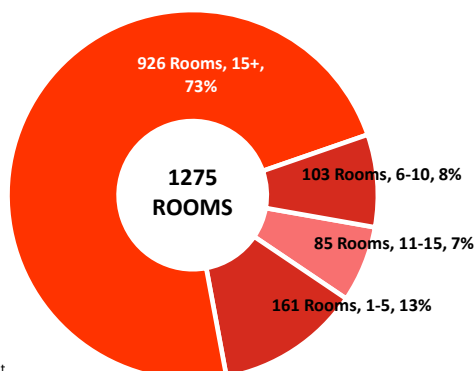
#### TOP 5

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

\* 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 - SOURCE ATDW



- Currently there are 122 establishments in the Murray River Lakes and Coorong that accommodate guests.
- These 122 establishments account for 1,275 rooms across the region.
- 73 per cent of rooms fall into establishment with 15 or more rooms.
- 13 per cent of rooms fall into the 1-5 room

Rooms refers to rooms per establishment

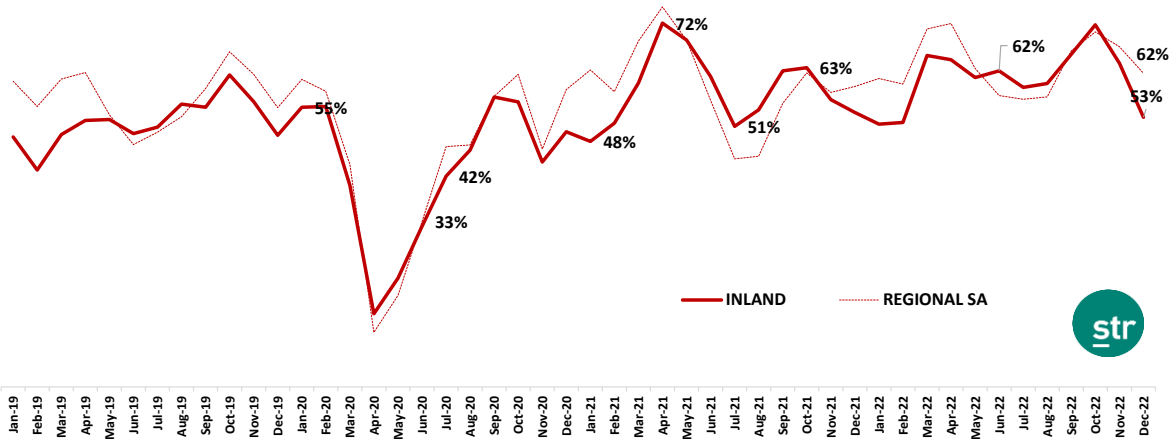
# MURRAY RIVER, LAKES & COORONG

## REGIONAL PROFILE



### ACCOMMODATION STR

#### ACCOMMODATION OCCUPANCY INLAND

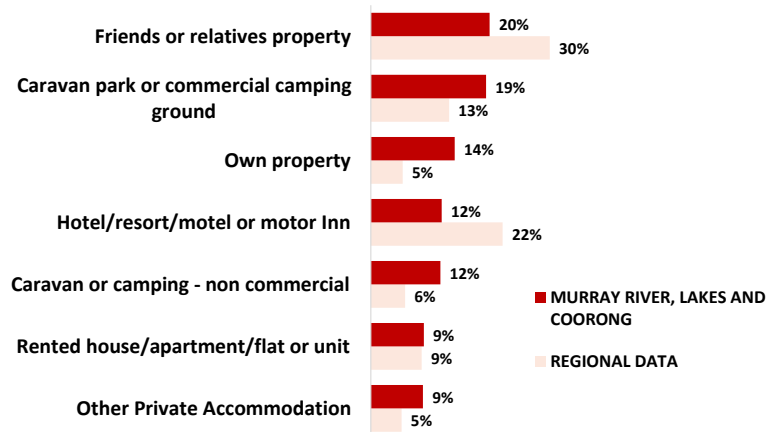


- The Inland regions include accommodation data for the Riverland, MRLC and the Flinders. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Inland regions was 52%, this fell to 43% in 2020, rose to 59% in 2021 and grew again in 2022 to 61%.

### VISITOR USE OF ACCOMMODATION

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

- 31 per cent stayed in a Caravan Park or Camping. This compares to the regional average of 19 per cent.
- 20 per cent of domestic overnight visitor nights in the Murray River Lakes and Coorong are spent with Friends or Relatives compared to the SA regional average of 30 per cent.



### TRANSPORT



- The main method of transport used on trips to the Murray River Lakes and Coorong was a self drive vehicle.
- 95% of visitors used this type of transport.
- 2% of people used another form of transport, this included helicopters, buses etc.

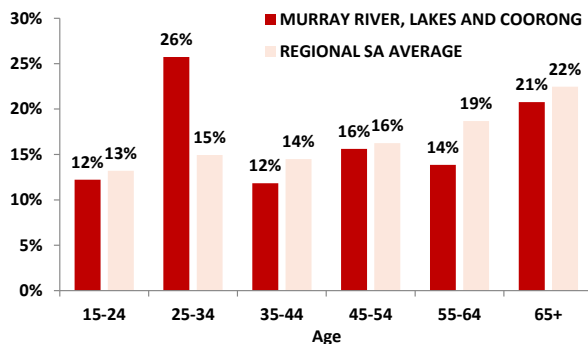
# MURRAY RIVER, LAKES & COORONG

## REGIONAL PROFILE



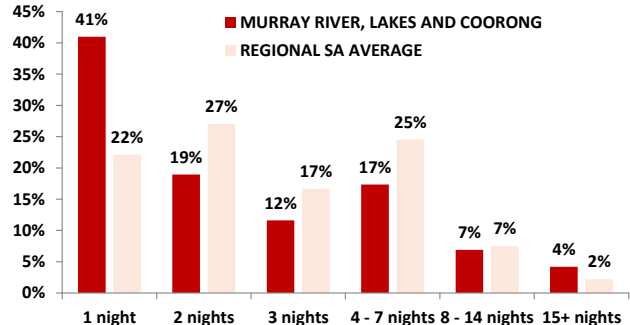
### VISITOR PROFILE

AGE OF VISITORS TO MURRAY RIVER, LAKES AND COORONG



- Overnight domestically there is a peak in the 25-34 age group of 26 per cent. This compares to the regional average of 15 per cent.
- All other ages groups are below the regional average.

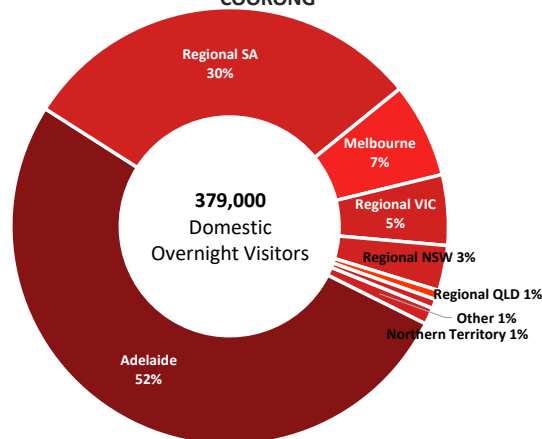
LENGTH OF VISIT TO MURRAY RIVER, LAKES AND COORONG



- 41 per cent of domestic overnight visitors like to stay 1 night.
- 17 per cent like to stay between 4 and 7 days, below the regional average of 25 per cent.

### VISITOR ORIGIN

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

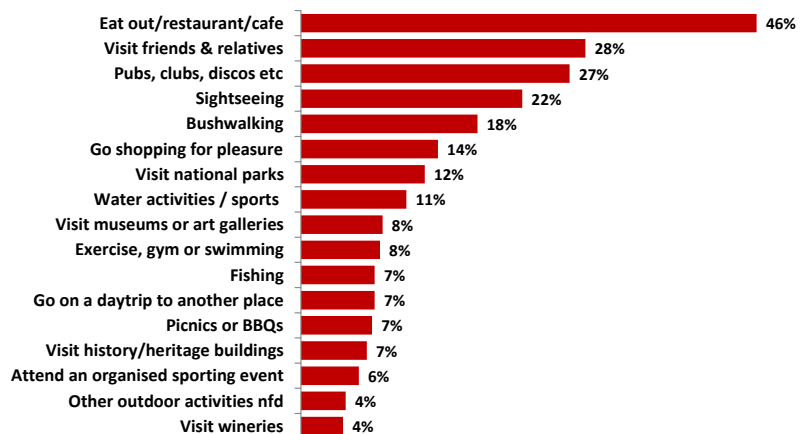


- Victoria at 12 per cent and New South Wales at 3 per cent are the Murray River Lakes and Coorong's biggest interstate overnight domestic markets.
- Regional South Australia contributes 30 per cent of visitors to the Murray River Lakes and Coorong.
- 52 per cent of visitors come from Adelaide.

### VISITOR ACTIVITIES

- The most popular activity when coming to the 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 2020-21, the tourism industry contributed an estimated \$206 million to the Murray River Lakes and Coorong regional economy and directly employed approximately 1,400 people.

#### Employment

- 1,400 jobs for people employed directly by the tourism industry, 500 indirect jobs and a total employment impact of 1,900 people.

#### Gross Value Added (GVA)

- \$59 million and \$52 million in direct and indirect tourism GVA, and \$112 million in total tourism GVA.

#### Gross Regional Product (GRP)

- \$66 million and \$65 million in direct and indirect tourism GRP and \$131 million in total tourism GRP.

#### Tourism Consumption

2020-21

**Tourism products** - directly consumed

- Takeaway and restaurant meals 20%
- Shopping (including gifts and souvenirs) 18%
- Fuel (petrol, diesel) 11%
- Travel agency and tour operator services 10%
- Accommodation services 8%
- Food products 7%
- Alcoholic beverages and other beverages 7%
- Long distance passenger transportation 6%

#### Tourism Employment

2020-21

**Tourism Industries** - 1,400 directly employed

- Cafes, restaurants and takeaway food services 28%
- Retail trade 22%
- Accommodation 12%
- Air, water and other transport 9%
- Travel agency and tour operator services 9%
- All other industries 6%
- Clubs, pubs, taverns and bars 6%
- 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 2022

### 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 2022

**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 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 2022.

**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 Intra-state 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