

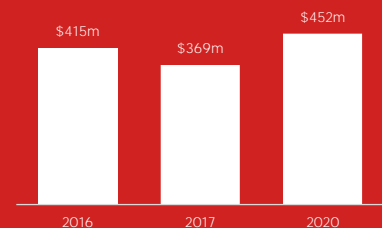
FLINDERS RANGES & OUTBACK

Regional Profile December 2014-2016



OVERVIEW

- Currently the Flinders Ranges and Outback contributes \$415 million to the December 2016 South Australian expenditure of \$5.8 billion.
- The Flinders Ranges and Outback has achieved 92 per cent of their \$452 million 2020 target.



Annual Visitor Summary December 2014 - December 2016

ORIGIN

| | Intrastate | Interstate | Total Domestic | International | Total visits |
|------------------------|------------|------------|----------------|---------------|--------------|
| Visits | 413,000 | 214,000 | 628,000 | 37,000 | 665,000 |
| % | 66% | 34% | 94% | 6% | 100% |
| Nights | 1,554,000 | 1,017,000 | 2,570,000 | 236,000 | 2,806,000 |
| % | 60% | 40% | 92% | 8% | 100% |
| Average Length of Stay | 3.8 | 4.8 | 4.1 | 6.4 | 4.2 |

Day Trips

Average Annual Day Trips to Flinders Ranges and Outback **676,000**

PURPOSE

| | Holiday | VFR | Business | Other | Total |
|------------------------|-----------|---------|----------|---------|-----------|
| Visits | 295,000 | 131,000 | 182,000 | 63,000 | 665,000 |
| % | 44% | 20% | 27% | 9% | 100% |
| Nights | 1,195,000 | 383,000 | 897,000 | 331,000 | 2,806,000 |
| % | 43% | 14% | 32% | 12% | 100% |
| Average Length of Stay | 4.1 | 2.9 | 4.9 | 5.3 | 4.2 |

Expenditure

Average Annual Expenditure **\$ 415,000,000**

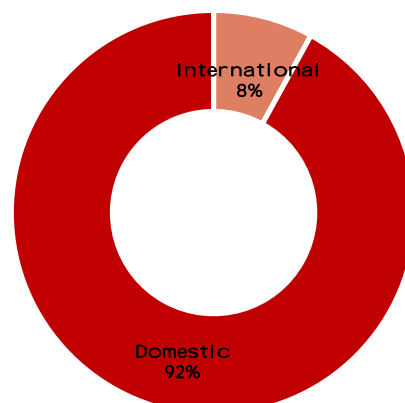
- 94 per cent of visitors are Domestic Visitors and 6 per cent International Visitors.
- Domestically 66 per cent are from within the state compared to 34 per cent from Interstate.
- 68 per cent of visitors to the Flinders Ranges and Outback are Leisure visitors (Holiday + VFR).

Flinders Ranges and Outback TOURISM LISTINGS

| Category | Flinders Ranges and Outback |
|-------------------------|-----------------------------|
| Accommodation | 129 |
| Attraction | 102 |
| Event | 53 |
| Tour | 31 |
| Food and Drink | 20 |
| Information Services | 14 |
| Destination Information | 4 |
| General Services | 3 |
| Hire | 2 |
| Transport | 1 |

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

Flinders Ranges and Outback MEDIA COVERAGE



Source: Item Count - SATC Internal - 2016

FLINDERS RANGES & OUTBACK

Regional Profile December 2014-2016



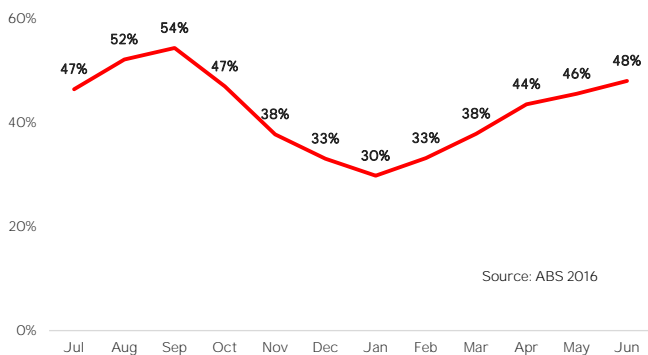
ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms

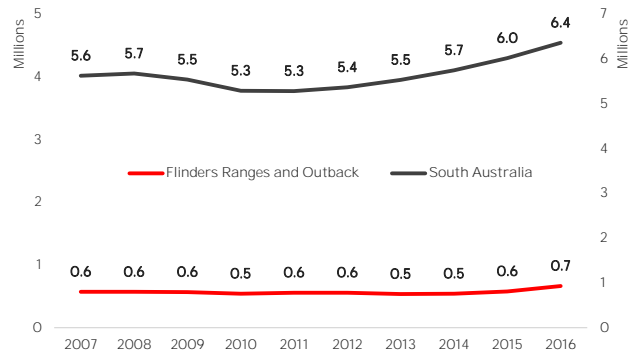
| | |
|----------------|---------------|
| Establishments | 33 |
| Rooms | 1,268 |
| Occupancy | 42% |
| Takings | \$ 24,000,000 |

- Average occupancy for the year is 42 per cent over 33 establishment and 1,268 rooms.
- The peak months are August and September with occupancy of 52 and 54 per cent respectively.
- Low point of the year comes in January with occupancy falling to 30 per cent.

Monthly Occupancy Rates Year end June 2016 - Flinders Ranges and Outback

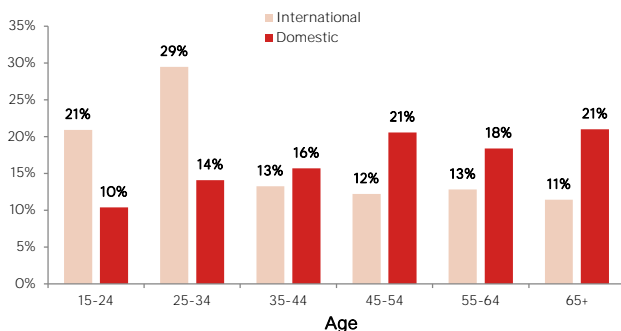


Total Overnight Visitation to Flinders Ranges and Outback & South Australia

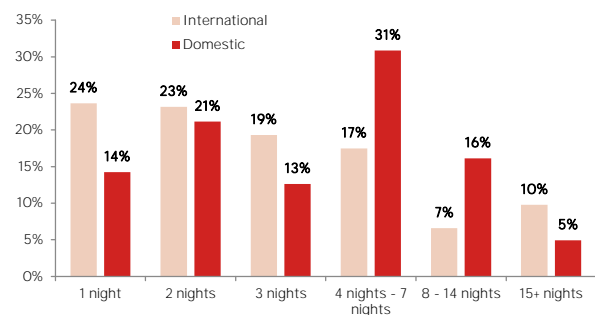


VISITOR PROFILE

Age of Visitors to Flinders Ranges and Outback



Length of Visit to Flinders Ranges and Outback



- International visitors peak in the 25-34 age group at 29 per cent,
- Domestically the Flinders Ranges and Outback peaks in the 45-54 and the 65+ age group at 21 per cent.

- 47 per cent of International Visitors prefer to stay 1 or 2 nights in the Flinders Ranges and Outback.
- 31 per cent of Domestic Visitors prefer to stay 4 - 7 nights.

FLINDERS RANGES & OUTBACK

Regional Profile December 2014-2016



DOMESTIC VISITOR PROFILE

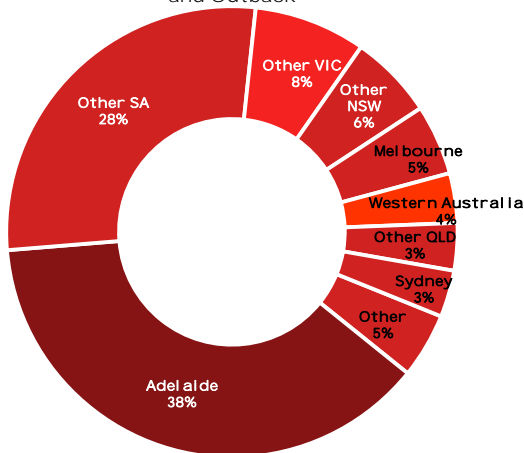
| Purpose | Holiday | VFR | Other | Total |
|---------|-----------|---------|-----------|-----------|
| Visits | 263,000 | 130,000 | 241,000 | 627,000 |
| % | 42% | 21% | 38% | 100% |
| Nights | 1,080,000 | 369,000 | 1,121,000 | 2,571,000 |
| % | 42% | 14% | 44% | 100% |
| ALOS | 4.1 | 2.8 | 4.7 | 4.1 |

INTERNATIONAL VISITOR PROFILE

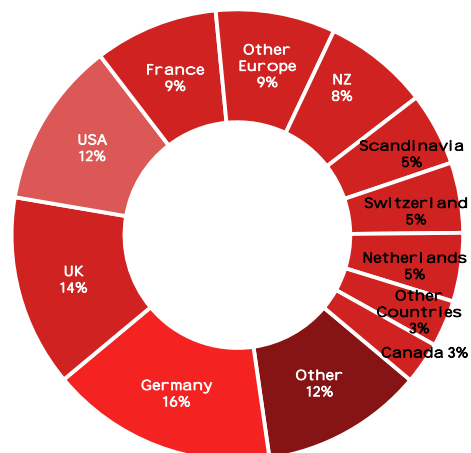
| Purpose | Holiday | VFR | Other | Total |
|---------|---------|--------|---------|---------|
| Visits | 31,000 | 1,000 | 5,000 | 37,000 |
| % | 84% | 3% | 14% | 100% |
| Nights | 115,000 | 14,000 | 108,000 | 236,000 |
| % | 49% | 6% | 46% | 100% |
| ALOS | 3.7 | 14.0 | 21.6 | 6.4 |

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Flinders Ranges and Outback



Origin of International Visitors to Flinders Ranges and Outback



- Victoria, at 13 per cent and New South Wales at 9 per cent are the Flinders Ranges and Outback's biggest Interstate markets.
- Regional South Australia contributes 28 per cent of visitors to the Flinders Ranges and Outback and Adelaide visitors contribute 38 per cent.
- Internationally, Europeans contribute 65 per cent of the visits to the Flinders Ranges and Outback, with Germany contributing 16 per cent and the United Kingdom 14 per cent.
- The USA and New Zealand contribute 12 and 8 per cent respectively to the visitors to the Flinders Ranges and Outback.

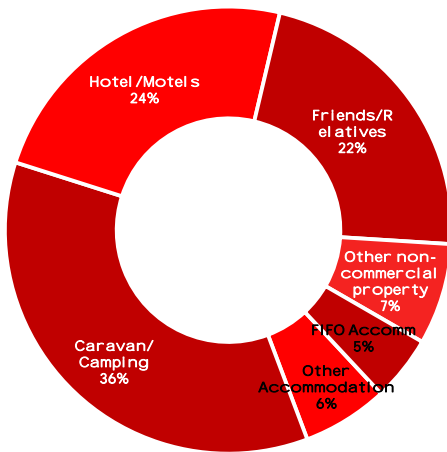
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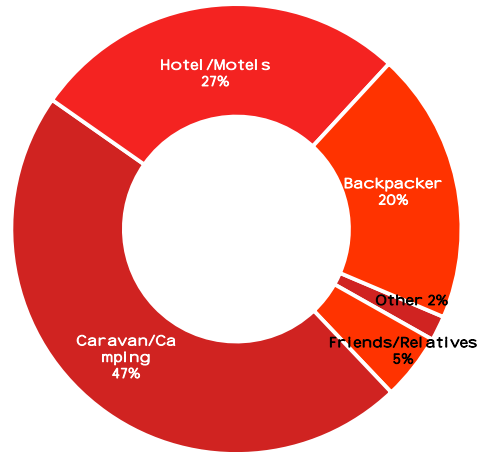


VISITOR USE OF ACCOMMODATION

Accommodation used in Flinders Ranges and Outback for Domestic Visitors



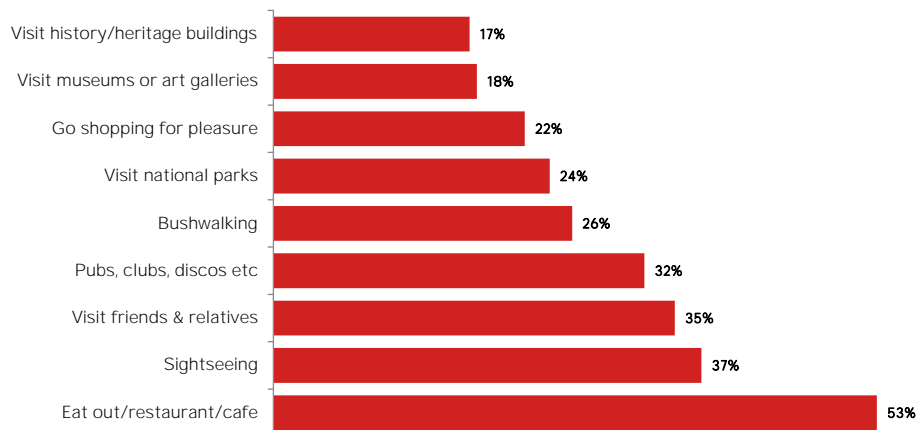
Accommodation used in Flinders Ranges and Outback for International Visitors



- 46 per cent of Domestic Visitor nights in the Flinders Ranges and Outback are spent either with Friends or Relatives or in Hotels and similar accommodation.
- Domestically Caravan and Camping is also popular with 36 per cent of visitors preferring this accommodation.
- 47 per cent of International Visitors to the Flinders Ranges and Outback prefer Caravan and Camping accommodation.
- 27 per cent of International Visitors stay in Hotels and similar accommodation.

VISITOR ACTIVITIES

Domestic Visitor Activities in Flinders Ranges and Outback



- The most popular activity when coming to the Flinders Ranges and Outback is to Eat out or Dine at a restaurant and or cafe.
- Other popular activities include Bushwalking, visiting the National Parks and Sightseeing.

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REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

- In 2013-14, the tourism industry contributed an estimated \$281 million to the Flinders Ranges and Outback regional economy (6.0% of gross regional product) and directly employed approximately 1,400 people (5.2% of regional employment).

In 2013-14, the tourism activity in Flinders Ranges and Outback generated:

- \$203 million and \$331 million in direct and indirect tourism output, and \$535 million in total tourism output;
- \$114 million and \$136 million in direct and indirect tourism GVA, and \$250 million in total tourism GVA;
- \$123 million and \$158 million in direct and indirect tourism GRP and \$281 million in total tourism GRP; and
- 1,400 jobs for people employed directly by the tourism industry, 1,300 indirect jobs and a total employment impact of 2,700 people.

REGIONAL INSIGHTS

- Attractive natural setting.

Interstate

- The natural landscape is the obvious draw card.
- Key appealing experiences include railways, scenic flights and 4WD tours.
- Opportunity to enhance the range of child friendly attractions.

Intrastate

- Rediscovering the Flinders through new activities of particular appeal to intrastate market.
- Essential to differentiate the experience from competitor products.

International

- Enjoying the spectacular scenery and sunset a strong driver of appeal.
- Strong visitation from western markets.
- Nature, wildlife and natural history also highly appealing.

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 9 priority markets, with a sample of 500 per market.

Prepared by the South Australian Tourism Commission, December 2016

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 2014 to December 2016
Consumer Demand Product Testing - 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