

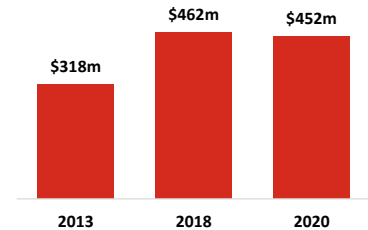
FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



OVERVIEW

- Currently the Flinders Ranges and Outback contributes \$462 million to the December 2018 South Australian expenditure of \$6.8 billion.
- The Flinders Ranges and Outback has achieved 102 per cent of their \$452 million 2020 target.



Annual Visitor Summary December 2016 - December 2018

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	473,000	218,000	690,000	43,000	733,000
%	69%	32%	94%	6%	100%
Nights	1,926,000	1,115,000	3,041,000	285,000	3,326,000
%	63%	37%	91%	9%	100%
Average Length of Stay	4	5	4	7	5
Domestic Day Trips					
Average Annual Day Trips to Flinders Ranges and Outback					653,000
PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	326,000	133,000	246,000	41,000	733,000
%	44%	18%	34%	6%	100%
Nights	1,321,000	386,000	1,446,000	174,000	3,326,000
%	40%	12%	43%	5%	100%
Average Length of Stay	4	3	6	4	5
Expenditure					
Average Annual Expenditure				\$	460,000,000

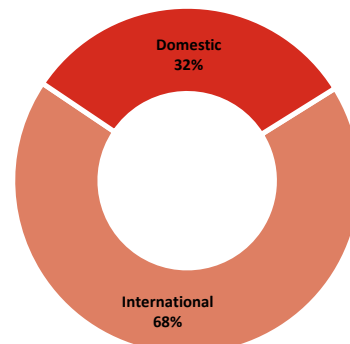
- 94 per cent of visitors are Domestic visitors and 6 per cent International visitors.
- Domestically 69 per cent of visitors are from within the state compared to 32 per cent from Interstate.
- 63 per cent of visitors to the Flinders Ranges and Outback are Leisure visitors (Holiday + VFR).

FLINDERS RANGES AND OUTBACK TOURISM LISTINGS

Category	Flinders Ranges and Outback
Accommodation	47
Event	39
Attraction	28
Tour	15
Food and Drink	8
Information Services	5
Hire	3
General Services	2
Transport	1
Destination Information	1
Grand Total	149

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

FLINDERS RANGES AND OUTBACK MEDIA COVERAGE



Source: Advertising Space Rate - 2018

FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



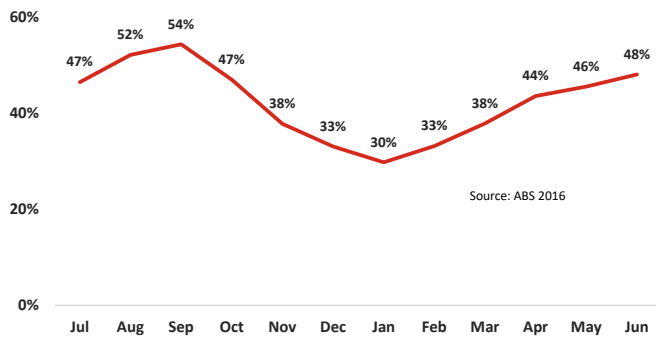
ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms

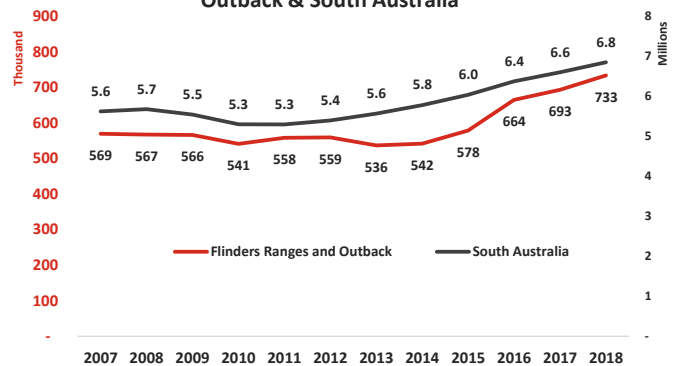
Establishments	33
Rooms	1,268
Occupancy	42%
Takings	\$24,000,000

- Average occupancy for the year is 42 per cent over 33 establishments 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

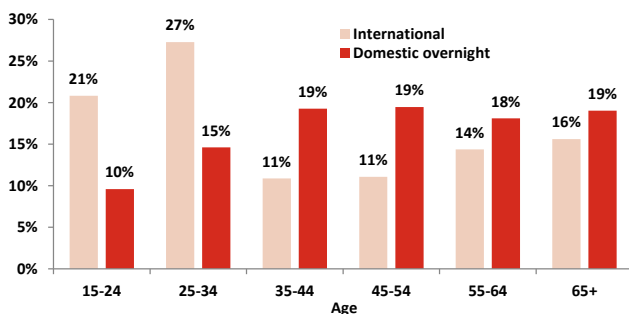


Total Overnight Visitation to Flinders Ranges and Outback & South Australia

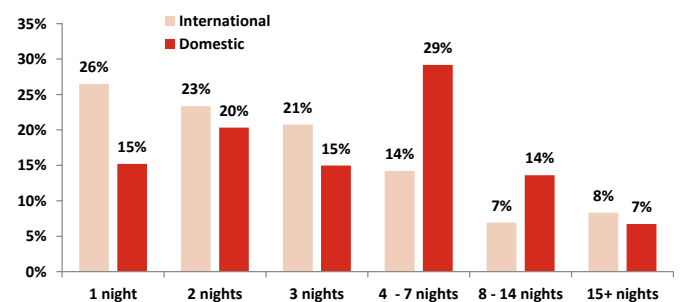


VISITOR PROFILE

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 27 per cent.
- The majority of international visitors are aged between 15 and 34.
- Domestically the Flinders Ranges and Outback is consistent across all the age groups over 35.

- 49 per cent of International visitors prefer to stay 1-2 nights in Adelaide.
- 29 per cent of Domestic visitors stay 4-7 nights in Adelaide.

FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



DOMESTIC VISITOR PROFILE

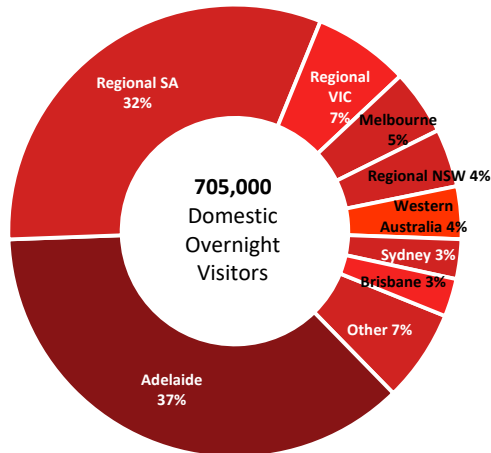
Purpose	Holiday	VFR	Other	Total
Visits	290,000	131,000	283,000	705,000
%	41%	19%	40%	100%
Nights	1,161,000	354,000	1,525,000	3,041,000
%	38%	12%	50%	100%
ALOS	4	3	5	4

INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	37,000	2,000	4,000	43,000
%	86%	5%	9%	100%
Nights	160,000	31,000	95,000	285,000
%	56%	11%	33%	100%
ALOS	4	16	24	7

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Flinders Ranges and Outback



Origin of International Visitors to Flinders Ranges and Outback



- Victoria, at 12 per cent and New South Wales at 7 per cent are the Flinders Ranges and Outback's biggest Interstate markets.
- Regional South Australia contributes 32 per cent of visitors to the Flinders Ranges and Outback and Adelaide visitors contribute 37 per cent.
- Internationally, Europeans contribute 63 per cent of the visits to the Flinders Ranges and Outback, with the United Kingdom 16 per cent and Germany contributing 14 per cent.
- The USA and New Zealand contribute 9 and 8 per cent respectively to the visitors to the Flinders Ranges and Outback.

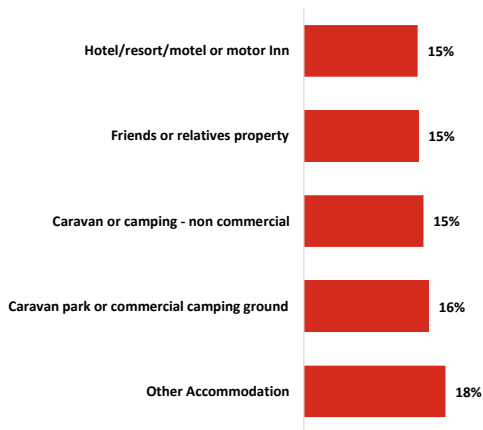
FLINDERS RANGES & OUTBACK

REGIONAL PROFILE

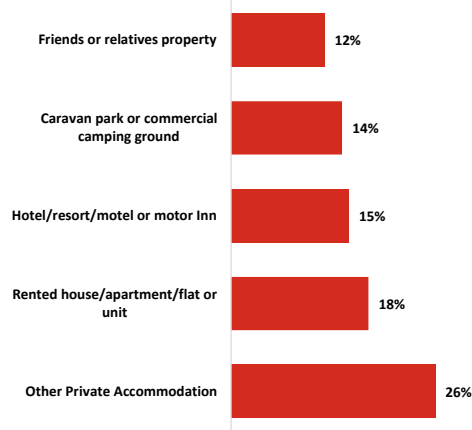


VISITOR USE OF ACCOMMODATION

Accommodation used in Flinders Ranges and Outback for Domestic Visitors



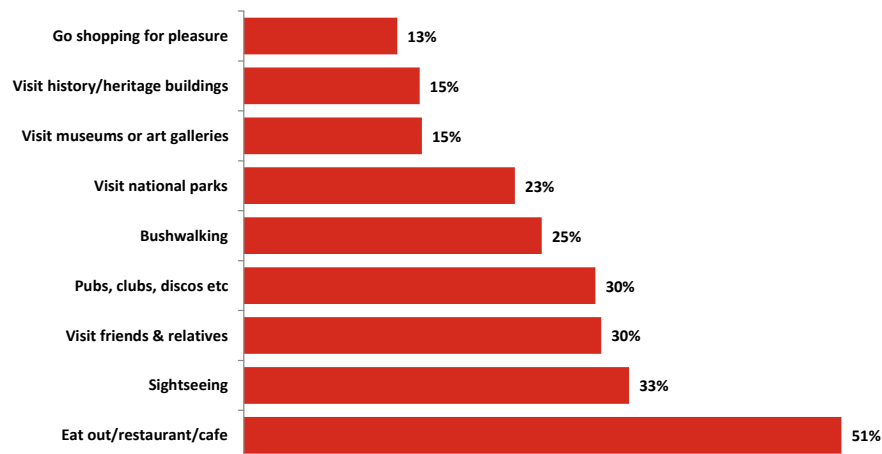
Accommodation used in Flinders Ranges and Outback for International Visitors



- 30 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 31 per cent of visitors preferring this accommodation.
- 14 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

FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2016-17, the tourism industry contributed an estimated \$283 million to the Flinders Ranges and Outback regional economy and directly employed approximately 2,100 people.

Employment

- 2,100 jobs for people employed directly by the tourism industry, 900 indirect jobs and a total employment impact of 3,000 people.

Tourism output

- \$268 million and \$284 million in direct and indirect tourism output, and \$552 million in total tourism output.

Gross Value Added (GVA)

- \$142 million and \$116 million in direct and indirect tourism GVA, and \$257 million in total tourism GVA.

Gross Regional Product (GRP)

- \$153 million and \$130 million in direct and indirect tourism GRP and \$283 million in total tourism GRP.

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 the 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.

Regional Visitor Strategy Priority Areas

- The focus for the Flinders Ranges and Outback is to increase overnight visitation via greater regional and cross regional collaboration around touring routes and events.
- New products, infrastructure and capability building will be critical for success.

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 2018

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 2016 to December 2018.

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

ARKABA WALK, FLINDERS RANGES & OUTBACK

TOURISM CHAMPIONS CASE STUDY



"We're experiencing a landscape in recovery and simply by having a Wild Bush Luxury experience at Arkaba guests are making a very visible contribution - this is one of the greatest and most rewarding things I have ever done."

The South Australian Tourism Commission has been very supportive from the initial concept to developing the product. We've received great exposure and the SATC has helped place our business on the world map."

Brendon Bevan, Conservation & General Manager, The Arkaba Walk

ABOUT THE ARKABA WALK

The Arkaba Walk is a multi-day luxury walking experience in the Ikara-Flinders Ranges offering some of Australia's most spectacular outback scenery.

Bought in 2009, the 60,000-acre private wildlife conservancy is managed by Brendon Bevan and is home to a diverse array of native flora and fauna.

Guests experience the sights and sounds of the outback accompanied by an expert guide, wine and dine under the stars for two nights and spend their final night in comfort of the heritage Arkaba Homestead.

BUSINESS GROWTH

The Arkaba Walk has grown considerably since the first walk took place in 2010. Initially the business offered 8 walks per season and now operates 55 walks each year with groups of up to 10 walkers. Over the past five years the business has built two walking camps and employment has grown from two guides to a team of nine, with six field guides, two chefs and housekeeping staff.

CHALLENGES

Operating in a remote location can be challenging from an access perspective.

By packaging The Arkaba Walk with private charter flights from Adelaide, guests now arrive in the Flinders Ranges in less than an hour, returning by scenic road transfer through the Clare Valley. This not only makes booking easy, it allows The Arkaba Walk to showcase another part of South Australia and support SA businesses on the way.

THE FUTURE

The guided experience is pivotal in leading The Arkaba Walk into the future. Field guides turn great experiences into immersive ones that are worth travelling across the country and the world for.

With the value of the field guide in mind, The Arkaba Walk has developed an in-house field guide training program to further develop exceptional field guides. The business will also continue to focus on revegetation and habitat recovery as well as other future expansion programs.

COMMUNITY IMPACT

The Arkaba Walk prides itself in its support of a range of local businesses including Chris's Mechanical for all vehicle maintenance, Teague's Motors for fuel and the Hawker General Store for food supplies. Arkaba encourages guests to make the most out of their time in the region by pointing people in the direction of many other local businesses such as the Prairie Hotel, Flinders Food Company, Jeff Morgan Gallery to name but a few.

They have adopted a 'buy local' principle and their head chef uses the very best of South Australia's produce to craft the food program. A purely South Australian wine cellar has been selected to showcase a cross-section of wine growing regions.

SOUTH AUSTRALIAN TOURISM COMMISSION COLLABORATION

The business has a strong partnership with the South Australian Tourism Commission and has hosted many media and trade familiarisation trips. The Arkaba Walk has also been featured in the SATC's global advertising campaign which is promoted to local, domestic and international audiences.

CONTACT US
TOURISM.SA.GOV.AU

