

FLINDERS RANGES & OUTBACK

REGIONAL PROFILE

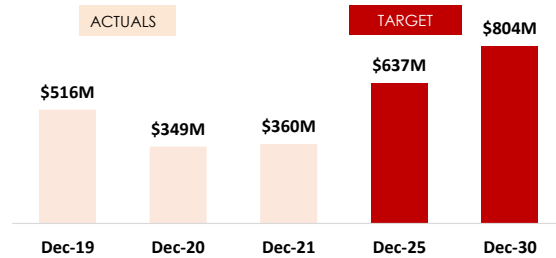


OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2021

FLINDERS RANGES AND OUTBACK

- Currently the Flinders Ranges and Outback contributes \$360 million to the year end December 2021 South Australian expenditure of \$6.2 billion.
- The Flinders Ranges and Outback has achieved 57 per cent their 2025 target of \$637 million and 45 per cent of their 2030 target of \$804 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2021

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	508,000	130,000	638,000	-	638,000
%	80%	20%	100%	0%	100%
<i>Share of Regional SA</i>	11%	9%	11%	0%	10%
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<i>% Across Regional SA</i>	76%	23%	100%	0%	100%
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Nights	2,075,000	671,000	2,746,000	2,000	2,747,000
%	76%	24%	100%	0%	100%
<i>Share of Regional SA</i>	15%	8%	12%	0%	12%
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<i>% Across Regional SA</i>	60%	38%	98%	2%	100%
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Average Length of Stay	4.1	5.2	4.3	-	4.3
ALOS Regional SA	3.0	6.2	3.7	-	3.8
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Total Expenditure					\$359,000,000
Overnight Expenditure	\$218,000,000	\$81,000,000	\$299,000,000	\$0	\$299,000,000
Day Trip Expenditure					\$60,000,000
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Domestic Day Trips					420,000

- The Flinders Ranges and Outback saw 638,000 domestic overnight visitors for the year end December 2021.
- 80 per cent of overnight visitors were from intrastate and 20 per cent from interstate.
- The 508,000 intrastate overnight visitors stayed 2.1 million nights with an average length of stay of 4.1 nights.
- There were 130,000 interstate overnight visitors who stayed 671,000 nights with an average length of stay of 5.2 nights
- There have been limited international arrivals with borders closed.
- 420,000 day trips were taken to the Flinders Ranges and Outback for the year with spend of \$60 million.

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PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	262,000	100,000	218,000	63,000	638,000
%	41%	16%	34%	10%	100%
<i>Share of Regional SA</i>	9%	6%	20%	13%	10%
<i>% Across all regions</i>	49%	28%	18%	8%	100%

Nights	1,030,000	200,000	1,294,000	223,000	2,747,000
%	37%	7%	47%	8%	100%
<i>Share of Regional SA</i>	9%	3%	34%	12%	12%
<i>% Across all regions</i>	50%	26%	17%	8%	100%

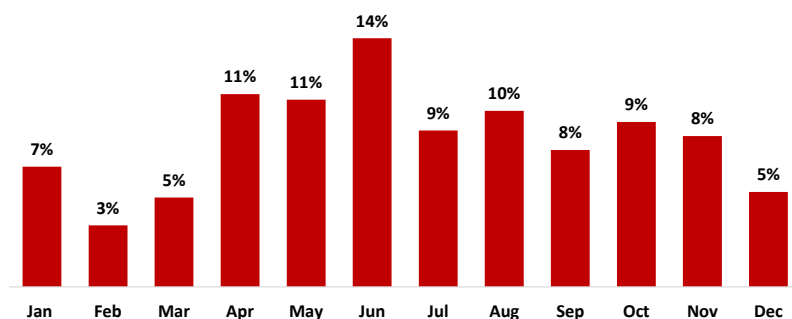
Average Length of Stay	3.9	2.0	5.9	3.5	4.3
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Expenditure					
Annual Expenditure	\$143,000,000	\$22,000,000	\$88,000,000	\$47,000,000	\$300,000,000
Expenditure 2019	\$256,000,000	\$37,000,000	\$110,000,000	\$37,000,000	\$440,000,000
Av spend per night	\$139	\$110	\$68	\$211	\$109
Av spend per night Reg SA	\$154	\$58	\$84	\$80	\$112
Share of Regional SA	5%	4%	11%	6%	6%

- 57 per cent of overnight visitors to the Flinders Ranges and Outback are either on holiday or visiting friends and relatives.
- Overnight holiday visitors on average spend \$139 per night compared to VFR visitors who spend \$110 per night.
- Leisure overnight visitors spent \$165 million for the year, making up 55 per cent of all overnight expenditure.
- 29 per cent of expenditure comes from the business visitor mainly revolving around the mining industry.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO FLINDERS RANGES AND OUTBACK



Source: NVS year end December 2021

- National Visitor Survey data shows us that April through to June are the strongest months for visitation in the Flinders Ranges and Outback.
- This is the time of the year when the temperature is not to the same level as it is in December and January.

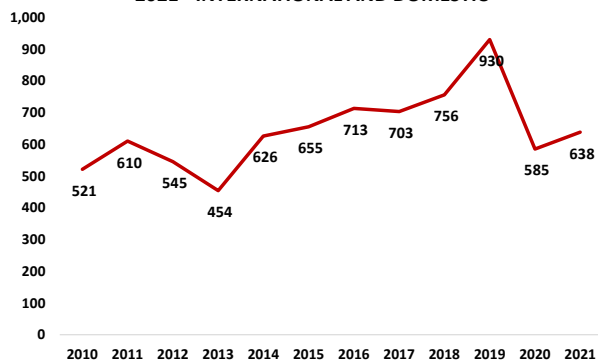
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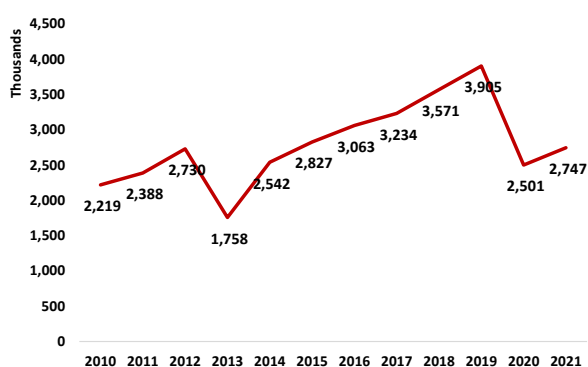


TOTAL OVERNIGHT VISITATION 2010 - 2021

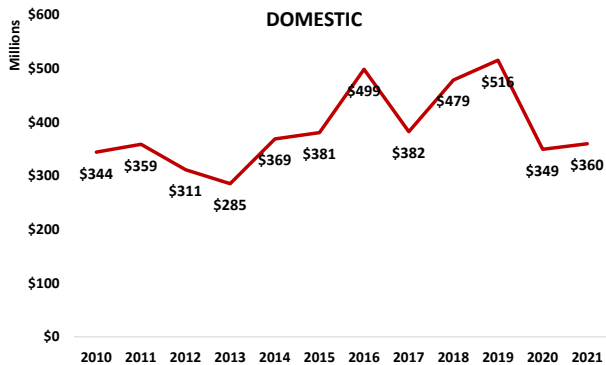
VISITORS FLINDERS RANGES AND OUTBACK 2010 - 2021 - INTERNATIONAL AND DOMESTIC



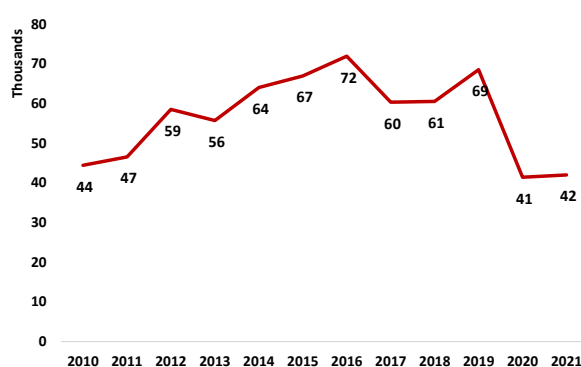
NIGHTS FLINDERS RANGES AND OUTBACK 2010 - 2021 - INTERNATIONAL AND DOMESTIC



TOTAL EXPENDITURE FLINDERS RANGES AND OUTBACK 2010 - 2021 - INTERNATIONAL AND DOMESTIC



DAY TRIPS FLINDERS RANGES AND OUTBACK 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%
South Australia	6,077,000	-29%	6,151,300,000	-24%

FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



FLINDER RANGES AND OUTBACK TOURISM LISTINGS

Category	# Listings
Accommodation	125
Attraction	100
Tour	39
Event	26
Food and Drink	22
Information Services	10
Hire	4
General Services	3
Destination Information	3
Journey	1
Transport	1
Grand Total	334

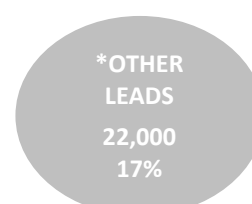
Note: some listings have multiple categories of accommodation
 Source: Australian Tourism Data Warehouse
 Categories above defined at - <https://tourism.sa.gov.au/support/atdw>

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)

**FLINDERS RANGES AND OUTBACK
 AUSTRALIAN TOURISM DATA WAREHOUSE
 LEADS
 130,000
 YEAR END DECEMBER 2021**



TOP 5

- WILPENA POUND RESORT
- FLINDERS BUSH RETREATS
- RAWNSLEY PARK STATION
- ARKARoola WILDERNESS SANCTUARY
- ARKABA

TOP 5

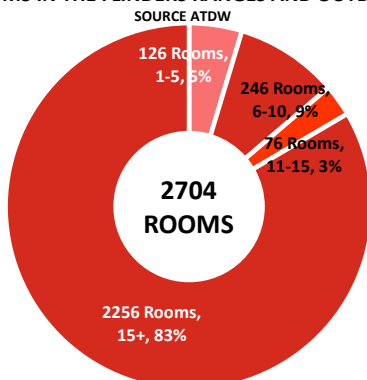
- THE WOOLSHED RESTAURANT AT RAWNSLEY PARK
- TRANSCONTINENTAL HOTEL
- BIG WINCH 360 CAFE BAR
- PRAIRIE HOTEL
- TICKLE BELLY HILL

TOP 5

- HELI CAMPING
- THE ARKABA WALK
- ARKARoola WILDERNESS SANCTUARY EXPERIENCES
- HOLOWILIENA STATION
- CAMEL TREKS AUSTRALIA PTY LTD

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

ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE ROOMS IN THE FLINDERS RANGES AND OUTBACK



- Currently there are 125 establishments in the Flinders Ranges and Outback that accommodate guests.
- These 125 establishments account for 2,704 rooms across the region.
- 83 per cent of rooms fall into establishment with 15 or more rooms.
- 5 per cent of rooms fall into the 1-5 room establishments.

Rooms refer to rooms per establishment

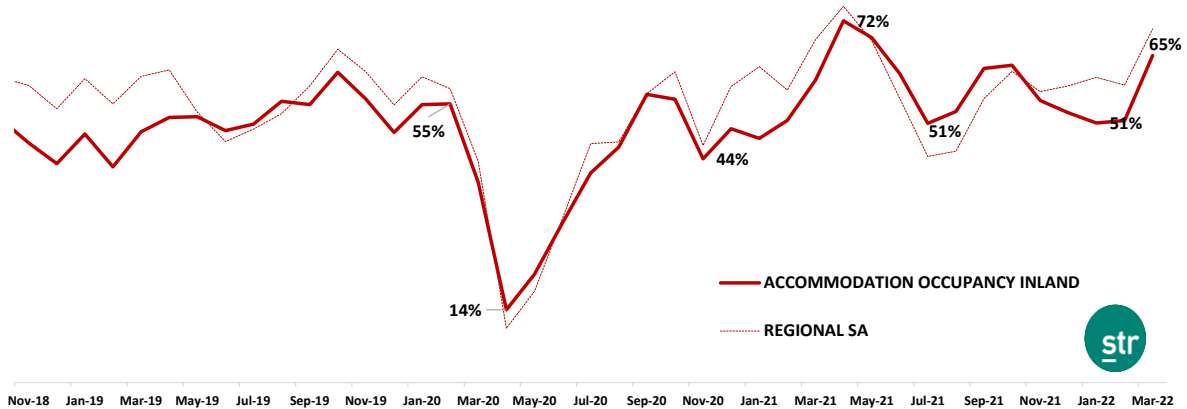
FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY INLAND

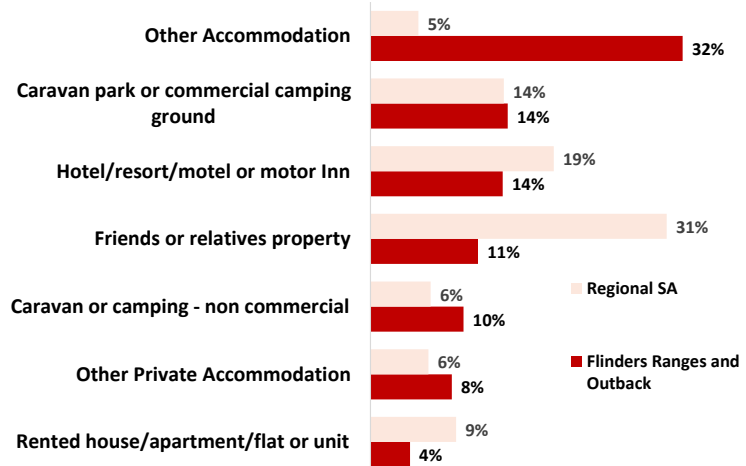


- Inland is defined as the Murray River Lakes and Coorong, the Riverland and the Flinders Ranges and Outback. Occupancy data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for these combined regions was 52%, this fell to 43% in 2020, rose to 58% in 2021 and for the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

VISITOR USE OF ACCOMMODATION

ACCOMMODATION USED IN FLINDERS RANGES AND OUTBACK FOR DOMESTIC VISITORS

- 25 per cent of domestic visitor nights in the Flinders Ranges and Outback are spent either in Friends or Relatives property or in in hotel/motel accommodation. This is above the regional average of 50 per cent.
- 32 per cent of nights are spent in other accommodation, the majority of this was FIFO accommodation.



TRANSPORT

TRANSPORT FLINDERS RANGES AND OUTBACK DECEMBER 2021



- The main method of transport used for Flinders Ranges and Outback was a self drive vehicle.
- 82 per cent of visitors used this type of transport.
- 12 per cent of people used air transport.

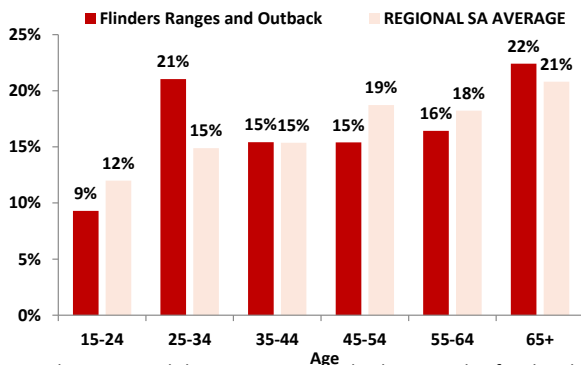
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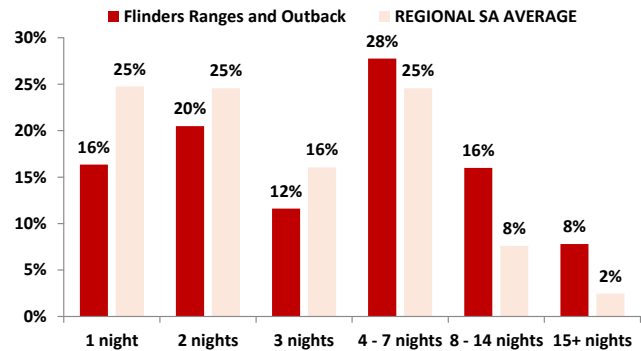
VISITOR PROFILE

AGE OF VISITORS TO FLINDERS RANGES AND OUTBACK



- The 25-34 and the 65+ age groups both over index for the Flinders Ranges and Outback when compared to the average across all regions.
- 15 per cent of visitors are in the 45-54 age group, below the regional average of 19 per cent.

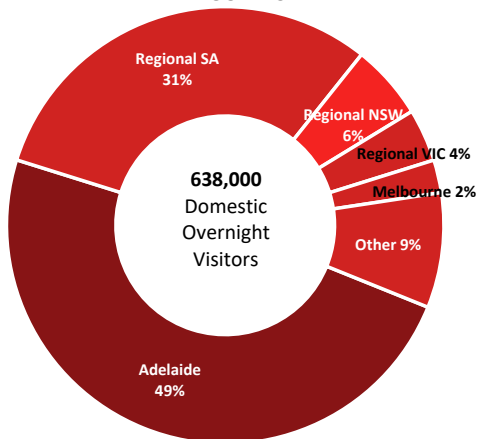
LENGTH OF VISIT TO FLINDERS RANGES AND OUTBACK



- 28 per cent of domestic visitors like to stay 4 to 7 nights.
- 24 per cent of visitors stayed 8+ nights, this was due to the mining industry shifts.

VISITOR ORIGIN

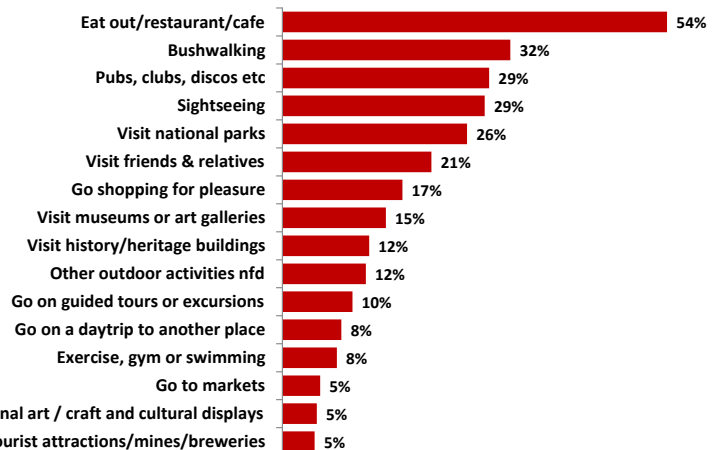
ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO FLINDERS RANGES AND OUTBACK



- Victoria at 7 per cent and New South Wales at 6 per cent are the Flinders Ranges and Outback's biggest interstate overnight domestic markets.
- Regional South Australia contributes 31 per cent of visitors to the Flinders Ranges and Outback's.
- 49 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN FLINDERS RANGES AND OUTBACK



- The most popular activities when coming to the Flinders Ranges and Outback are eating out.
- Other popular activities include bush walking, visiting national parks, sightseeing, visiting friends and relatives and visiting history and heritage buildings.

FLINDERS RANGES & OUTBACK

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REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2019-20, the tourism industry contributed an estimated \$542 million to the Flinders Ranges and Outback a regional economy and directly employed approximately 2,400 people.

Employment

- 2,400 jobs for people employed directly by the tourism industry, 800 indirect jobs and a total employment impact of 3,200 people.

Gross Value Added (GVA)

- \$145 million and \$110 million in direct and indirect tourism GVA, and \$255 million in total tourism GVA.

Gross Regional Product (GRP)

- \$155 million and \$140 million in direct and indirect tourism GRP and \$295 million in total tourism GRP.

Tourism Consumption

2019–20

Tourism products - directly consumed

- 18% Long distance passenger transportation
- 15% Takeaway and restaurant meals
- 12% Shopping (including gifts and souvenirs)
- 11% Travel agency and tour operator services
- 11% Fuel (petrol, diesel)
- 8% Accommodation services
- 6% Food products
- 6% Alcoholic beverages and other beverages

Tourism Employment

2019–20

Tourism Industries - 2,400 directly employed

- 34% - 808 - Cafes, restaurants and takeaway food services
- 16% - 388 - Accommodation
- 13% - 312 - Retail trade
- 10% - 242 - Travel agency and tour operator services
- 7% - 158 - Clubs, pubs, taverns and bars
- 6% - 152 - Air, water and other transport

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 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.

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 15 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. 8635455001
Consumer Demand Product Testing Phase 1 - BDA Marketing