

FLINDERS RANGES & OUTBACK

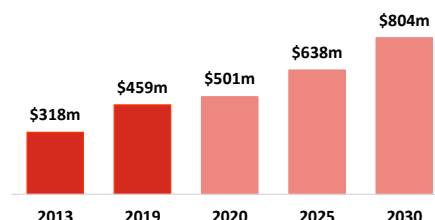
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE ANNUAL AVERAGE FOR THE 3 YEARS TO THE YEAR END DECEMBER 2019 AND RELATES TO DATA PRIOR TO COVID-19 RESTRICTIONS

- Currently the Flinders Ranges and Outback contributes \$459 million to the December 2019 South Australian expenditure of \$8.1 billion.
- The Flinders Ranges and Outback has achieved 92 per cent of their \$501 million 2020 target and 57 per cent of their 2030 target of \$804 million.



Annual Visitor Summary December 2017 - December 2019

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	517,000	234,000	751,000	45,000	796,000
%	69%	31%	94%	6%	100%
Nights	2,092,000	1,206,000	3,298,000	271,000	3,570,000
%	63%	37%	92%	8%	100%
Average Length of Stay	4	5	4	6	4
Domestic Day Trips					
Average Annual Day Trips to Flinders Ranges and Outback					631,000
PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	359,000	135,000	266,000	51,000	796,000
%	45%	17%	33%	6%	100%
Nights	1,340,000	388,000	1,667,000	174,000	3,570,000
%	38%	11%	47%	5%	100%
Average Length of Stay	4	3	6	3	4
Expenditure					
Average Annual Expenditure	\$ 218,000,000	\$ 46,000,000	\$ 149,000,000	\$ 47,000,000	\$ 459,000,000

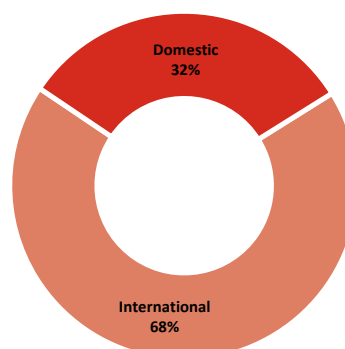
- 94 per cent of visitors are **Domestic** visitors and 6 per cent **International** visitors.
- Domestically** 69 per cent of visitors are from within the state compared to 31 per cent from Interstate.
- 62 per cent of visitors to the Flinders Ranges and Outback are Leisure visitors (Holiday + VFR).

FLINDERS RANGES AND OUTBACK TOURISM LISTINGS

FLINDERS RANGES AND OUTBACK MEDIA COVERAGE

Category	Flinders Ranges and Outback
Accommodation	104
Attraction	77
Tour	33
Event	29
Food and Drink	13
Information Services	9
Destination Information	8
General Services	2
Transport	1
Hire	1
Grand Total	277

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



Source: Advertising Space Rate - 2018

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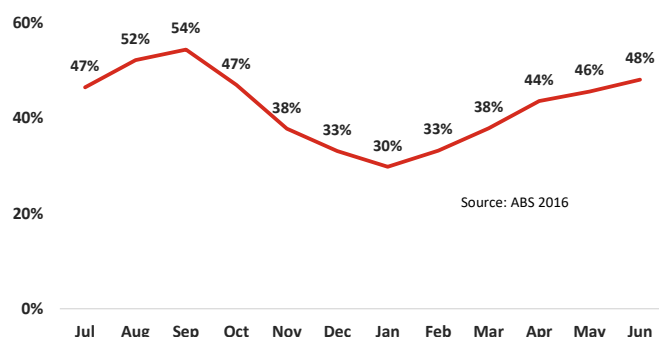
ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms

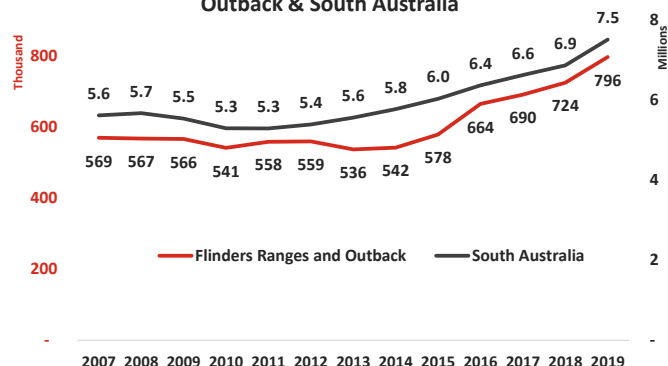
Establishments	33
Rooms	1,268
Occupancy	42%
Takings	\$24,000,000

- 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

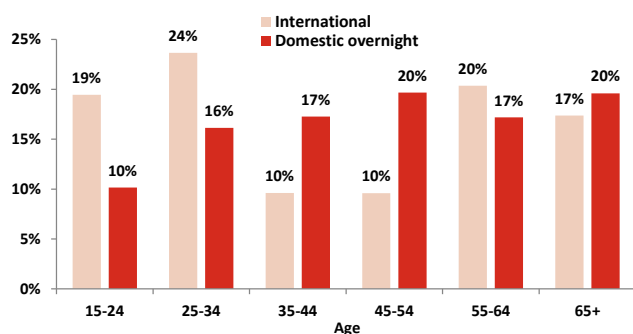


Total Overnight Visitation to Flinders Ranges and Outback & South Australia

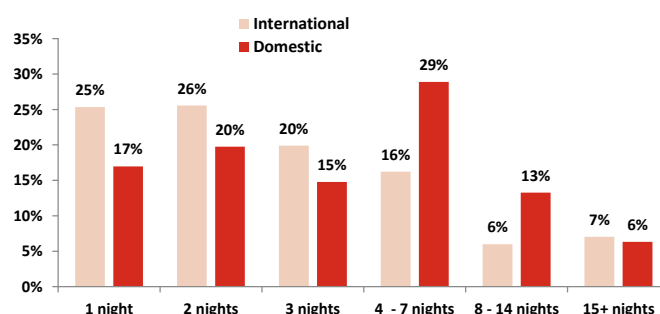


VISITOR PROFILE

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 24 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.

- 51 per cent of **International** visitors prefer to stay 1-2 nights in the Flinders Ranges and Outback.
- 29 per cent of **Domestic** visitors stay 4-7 nights in the Flinders Ranges and Outback.

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DOMESTIC VISITOR PROFILE

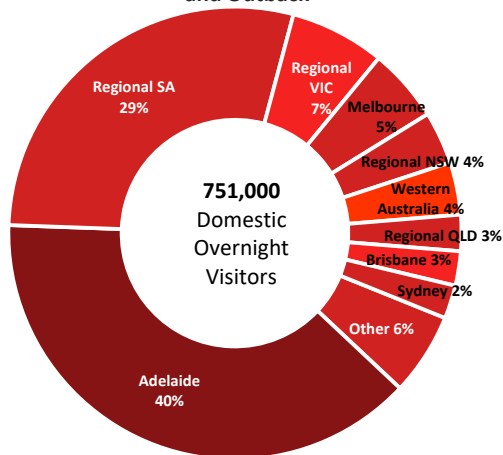
Purpose	Holiday	VFR	Other	Total
Visits	319,000	132,000	313,000	751,000
%	42%	18%	42%	100%
Nights	1,180,000	349,000	1,769,000	3,298,000
%	36%	11%	54%	100%
ALOS	4	3	6	4

INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	39,000	3,000	4,000	45,000
%	87%	7%	9%	100%
Nights	159,000	40,000	73,000	271,000
%	59%	15%	27%	100%
ALOS	4	13	18	6

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 6 per cent are the Flinders Ranges and Outback's biggest Interstate markets.
- Regional South Australia contributes 29 per cent of visitors to the Flinders Ranges and Outback and Adelaide visitors contribute 40 per cent.
- **Internationally**, Europeans contribute 63 per cent of the visits to the Flinders Ranges and Outback, with the United Kingdom 18 per cent and Germany contributing 13 per cent.
- The USA and New Zealand contribute 7 and 8 per cent respectively to the visitors to the Flinders Ranges and Outback.

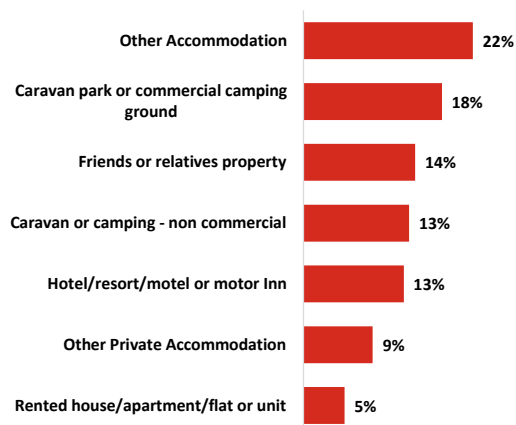
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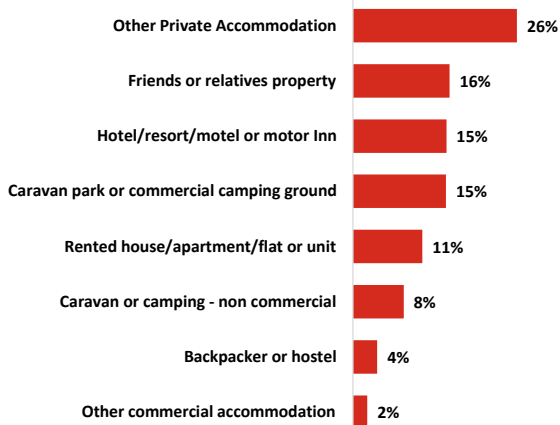


VISITOR USE OF ACCOMMODATION

Accommodation used in Flinders Ranges and Outback for Domestic Visitors



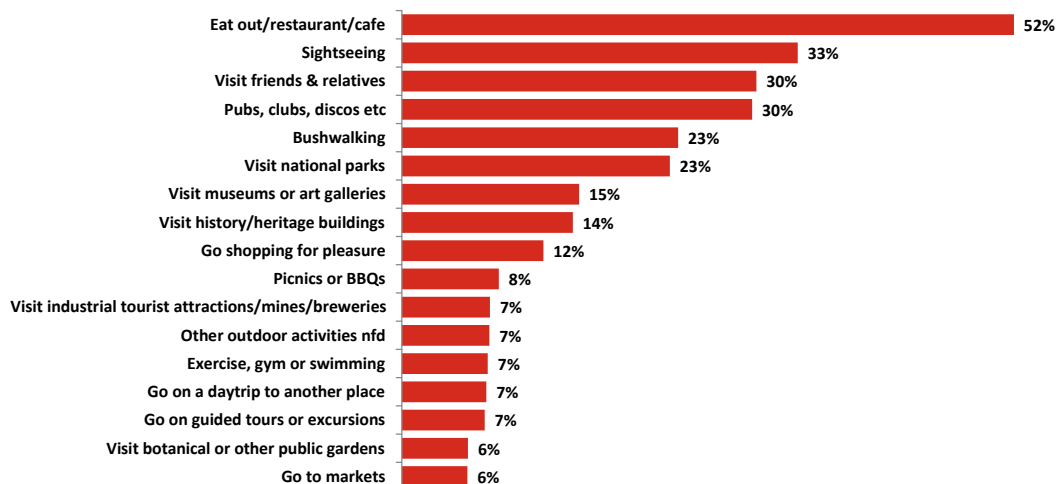
Accommodation used in Flinders Ranges and Outback for International Visitors



- 27 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.
- 15 per cent of **International** visitors to the Flinders Ranges and Outback prefer Caravan and Camping accommodation.
- 31 per cent of **International** visitors stay with Friends or Relatives or 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 2017-18, the tourism industry contributed an estimated \$584 million to the Flinders Ranges and Outback regional economy and directly employed approximately 2,200 people.

Employment

- 2,200 jobs for people employed directly by the tourism industry, 900 indirect jobs and a total employment impact of 3,100 people.

Tourism output

- \$278 million and \$306 million in direct and indirect tourism output, and \$584 million in total tourism output.

Gross Value Added (GVA)

- \$146 million and \$125 million in direct and indirect tourism GVA, and \$271 million in total tourism GVA.

Gross Regional Product (GRP)

- \$154 million and \$143 million in direct and indirect tourism GRP and \$297 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.

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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 2017 to December 2019.
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



RAWNSLEY PARK STATION

HAWKER, FLINDERS RANGES AND OUTBACK

ABOUT RAWNSLEY PARK

- Working sheep station that was turned into a tourism venture in 1968.
- 29,000 acre property that offers different accommodation options, a restaurant and a variety of tours.
- Tony and Julie took over the family business in 1985.

BUSINESS GROWTH

- The business started with 6 cabins and 2 shower blocks and now has 25 units, 8 villas, one homestead and a caravan park with 60 powered sites.
- Grown from one to 12 directly employed staff with a further 10 staff employed by the restaurant and caravan park. Two thirds of staff are full time.
- Property now has a turnover of \$3 million.
- 80% of guests are from Australia.
- The biggest international markets are UK and western Europe.
- Occupancy rates:
 - Peak season (April/May and September/October): 80-90%
 - Off season (summer months): 40-50% (driven by international visitors).

CHALLENGES

- Limited air access.
- Attracting skilled staff to a remote location.

THE FUTURE

- Medium term plans include the possibility of expanding the restaurant on the property as well as the accommodation offerings.
- Over the past five years the station has seen dramatic growth and is now in a stable consolidation phase.

COMMUNITY IMPACT

- Partnered with local tour company Wallaby Tracks Tours run by Paul Keen.
- Also partnered with Chinta Air to offer scenic flights to guests of Rawnsley Park Station. Chinta Air uses Rawnsley Park Station's airstrip and Rawnsley Park Station offers the pilot accommodation.
- Local builders and service providers such as landscapers, were used for the villa developments and are used for all refurbishment projects.
- Local produce is used, where available, for the restaurant.

SOUTH AUSTRALIAN TOURISM COMMISSION COLLABORATION

- Rawnsley Park Station was the recipient of two \$100,000 grants towards the build of Rawnsley Park Station's villas in 2006 and 2009.
- SATC consults and provides insights and advice to Rawnsley Park Station to increase bookings, particularly in the international market.

WWW.RAWNSLEYPARK.COM.AU

"Tourism has been good for Julie and I. It has provided a lot of opportunities and has been a good journey so far. We are very hopeful that one day our sons will continue our work at Rawnsley Park Station and take over from us," Tony.

"The SATC's help in the international marketing space has been critical to our success. It has helped us increase our summer trade by 40-50%, 10 years ago I thought that would have been impossible!" Tony.

