

# FLINDERS RANGES & OUTBACK

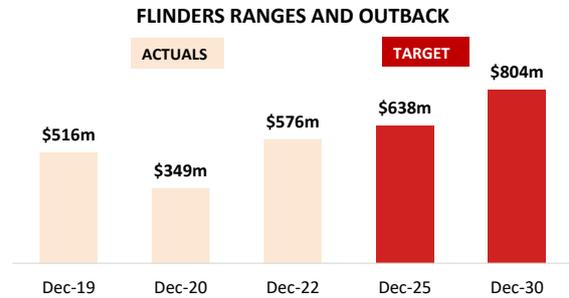
## REGIONAL PROFILE



### OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2022

- Currently the Flinders Ranges and Outback contributes \$576 million to the year end December 2022 South Australian expenditure of \$8.3 billion.
- The Flinders Ranges and Outback has achieved 90 per cent of their 2025 target of \$638 million and 72 per cent of their 2030 target of \$804 million.



### ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2022

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
<b>Overnight Visits</b>	566,000	261,000	<b>827,000</b>	9,000	<b>835,000</b>
%	68%	32%	<b>99%</b>	1%	<b>100%</b>
<b>Share of Regional SA</b>	16%	25%	<b>18%</b>	17%	<b>18%</b>
<hr/>					
<b>% Across Regional SA</b>	76%	22%	<b>99%</b>	1%	<b>100%</b>
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>					
<b>Nights</b>	2,261,000	1,250,000	<b>3,511,000</b>	65,000	<b>3,576,000</b>
%	64%	36%	<b>98%</b>	2%	<b>100%</b>
<b>Share of Regional SA</b>	21%	24%	<b>22%</b>	8%	<b>21%</b>
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>					
<hr/>					
<b>% Across Regional SA</b>	63%	32%	<b>95%</b>	5%	<b>100%</b>
<hr/>					
<b>Average Length of Stay</b>	4.0	4.8	<b>4.2</b>	7.2	<b>4.3</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>\$576,000,000</b>
<b>Overnight Expenditure</b>	\$222,000,000	\$284,000,000	<b>\$506,000,000</b>	\$3,000,000	<b>\$509,000,000</b>
<b>Day Trip Expenditure</b>					<b>\$67,000,000</b>
<hr/>					
<b>Domestic Day Trips</b>					<b>494,000</b>

- The Flinders Ranges and Outback saw 827,000 domestic overnight visitors for the year end December 2022.
- 68 per cent of overnight visitors were from intrastate and 32 per cent from interstate.
- The 566,000 intrastate overnight visitors stayed 2.3 million nights with an average length of stay of 4.0 nights.
- There were 261,000 interstate overnight visitors who stayed 1.3 million nights with an average length of stay of 4.8 nights
- The region saw 9,000 international visitors with an average length of stay of 7.2 nights and spend of \$3 million.
- 494,000 day trips were taken to the Flinders Ranges and Outback for the year with spend of \$67 million.

ALOS = Average Length of Stay

# FLINDERS RANGES & OUTBACK

## REGIONAL PROFILE



### PURPOSE

	Holiday	VFR	Business	Other	Total
<b>Overnight Visits</b>	326,000	120,000	356,000	34,000	<b>835,000</b>
%	39%	14%	43%	4%	<b>100%</b>
<i>Share of Regional SA</i>	13%	10%	40%	23%	<b>18%</b>
<i>% Across all regions</i>	53%	25%	19%	3%	<b>100%</b>

<b>Nights</b>	1,289,000	347,000	1,829,000	112,000	<b>3,576,000</b>
%	36%	10%	51%	3%	<b>100%</b>
<i>Share of Regional SA</i>	14%	10%	54%	17%	<b>21%</b>
<i>% Across all regions</i>	54%	21%	20%	4%	<b>100%</b>

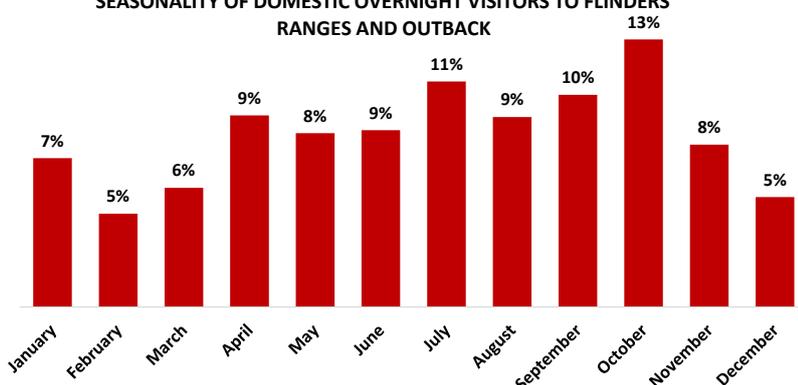
<b>Average Length of Stay</b>	4.0	2.9	5.1	3.3	<b>4.3</b>
-------------------------------	-----	-----	-----	-----	------------

Expenditure					
<b>Annual Expenditure</b>	\$246,000,000	\$44,000,000	\$193,000,000	\$27,000,000	<b>\$509,000,000</b>
<b>Expenditure 2019</b>	\$256,000,000	\$37,000,000	\$110,000,000	\$37,000,000	<b>\$441,000,000</b>
<b>Av spend per night</b>	\$191	\$127	\$106	\$241	\$142
<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>

- 53 per cent of overnight visitors to the Flinders Ranges and Outback are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$191 per night compared to VFR visitors who spend \$127 per night.
- Leisure overnight visitors spent \$290 million for the year, making up 57 per cent of all overnight expenditure.
- There are 356,000 business visitors who stay 1.8 million nights with spend \$193 million.

### SEASONALITY

#### SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO FLINDERS RANGES AND OUTBACK



- National Visitor Survey data shows us that in 2022 July, September and October are the strongest months for visitation in the Flinders Ranges and Outback.
- These three months align with the cooler months and school holidays.

Source: NVS year end December 2022

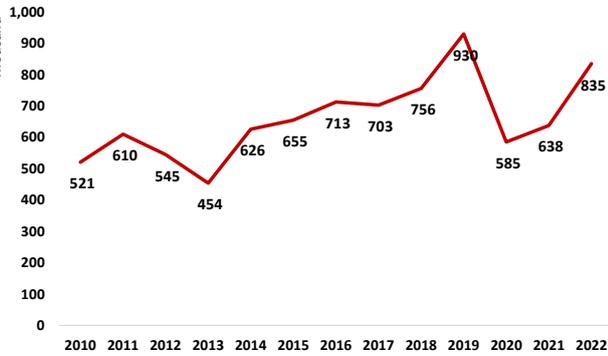
# FLINDERS RANGES & OUTBACK

## REGIONAL PROFILE

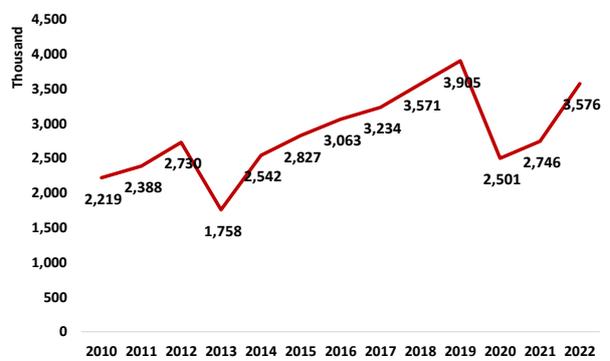


### TOTAL OVERNIGHT VISITATION 2010 - 2022

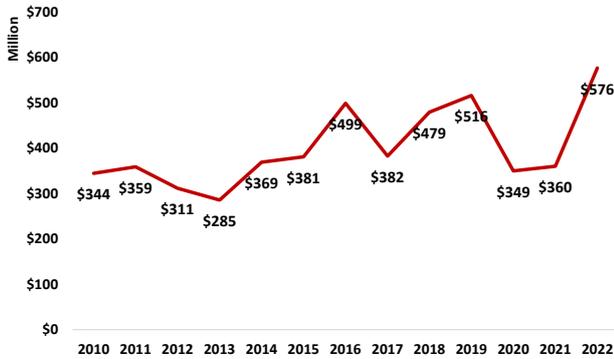
**VISITORS FLINDERS RANGES AND OUTBACK 2010 - 2022 - International and Domestic**



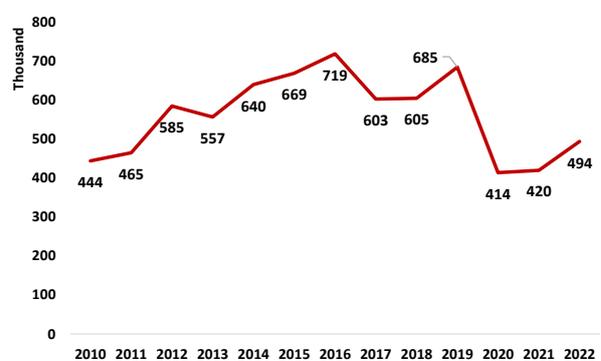
**NIGHTS FLINDERS RANGES AND OUTBACK 2010 - 2022 - International and Domestic**



**TOTAL EXPENDITURE FLINDERS RANGES AND OUTBACK 2010 - 2022 - International and Domestic**



**DAY TRIPS FLINDERS RANGES AND OUTBACK 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>

# FLINDERS RANGES & OUTBACK

## REGIONAL PROFILE



### FLINDERS RANGES AND OUTBACK TOURISM LISTINGS

Category	# Listings
ACCOMM	133
ATTRACTION	104
TOUR	36
EVENT	20
RESTAURANT	19
INFO	11
GENSERVICE	4
HIRE	4
DESTINFO	2
JOURNEY	1
TRANSPORT	1
Grand Total	335

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)

### FLINDERS RANGES AND OUTBACK AUSTRALIAN TOURISM DATA WAREHOUSE LEADS

# 95,000

YEAR END DECEMBER 2022



#### TOP 5

- WILPENA POUND RESORT
- RAWNSLEY PARK STATION
- FLINDERS BUSH RETREATS
- BIG4 STUART RANGE OUTBACK RESORT
- ARKAROOA WILDERNESS SANCTUARY ACCOMMODATION

#### TOP 4

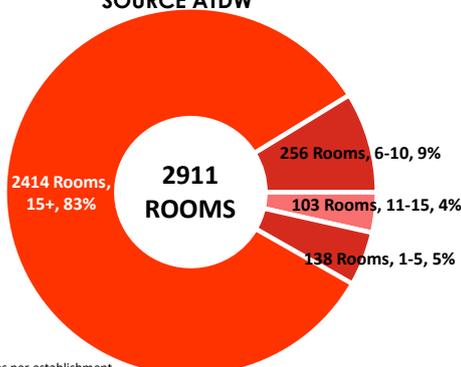
- TRANSCONTINENTAL HOTEL
- THE WOOLSHED RESTAURANT AT RAWNSLEY PARK
- FLINDERS GIN DISTILLERY
- PRAIRIE HOTEL
- BIG WINCH 360 CAFE BAR

#### TOP 5

- ARKAROOA WILDERNESS SANCTUARY EXPERIENCES
- ABORIGINAL CULTURAL TOURS WILPENA POUND RESORT
- 4WD AUSSIE OUTBACK ADVENTURES
- THE ARKABA WALK
- HELI CAMPING

\* 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 - SOURCE ATDW



Rooms refers to rooms per establishment

- Currently there are 133 establishments in the Flinders Ranges and Outback that accommodate guests.
- These 133 establishments account for 2,911 rooms across the region.
- 83 per cent of rooms fall into establishment with 15 or more rooms.
- 9 per cent of rooms fall into the 6-10 room establishments.

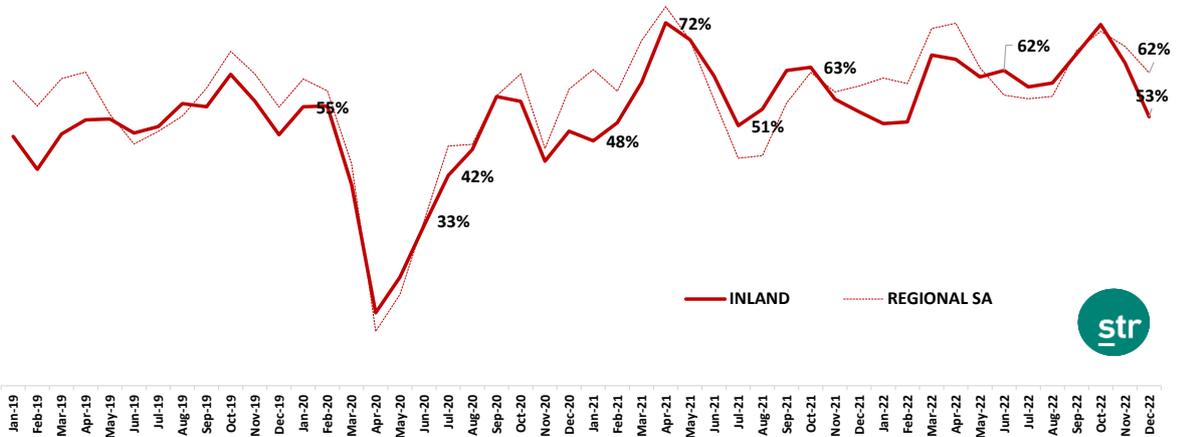
# FLINDERS RANGES & OUTBACK

## REGIONAL PROFILE



### ACCOMMODATION STR

#### ACCOMMODATION OCCUPANCY INLAND

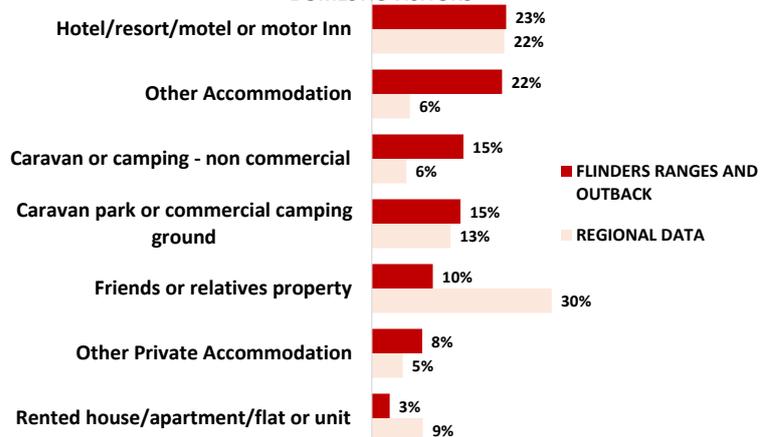


- The Inland regions include accommodation data for the Riverland, MRLC and the Flinders. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Inland regions was 52%, this fell to 43% in 2020, rose to 59% in 2021 and grew again in 2022 to 61%.

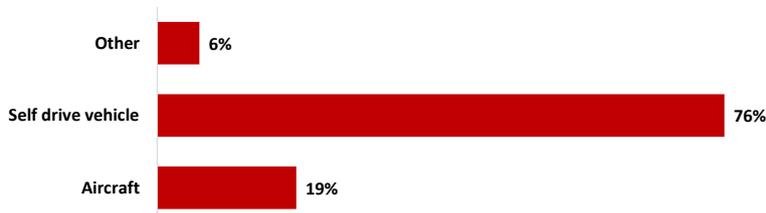
### VISITOR USE OF ACCOMMODATION

#### ACCOMMODATION USED IN FLINDERS RANGES AND OUTBACK FOR DOMESTIC VISITORS

- 30 per cent of domestic overnight visitor nights in the Flinders Ranges and Outback are spent in Caravan Parks or camping compared to the SA regional average of 19 per cent.
- 23 per cent stayed in a Hotel/resort/motel or motor inn. This compares to the regional average of 22 per cent.
- 10 per cent stay with friends or relatives compared to the regional average of 30 per cent.



### TRANSPORT



- The main method of transport used on trips to the Flinders Ranges and Outback was a self drive vehicle.
- 76% of visitors used this type of transport.
- 19% of people used an aircraft.

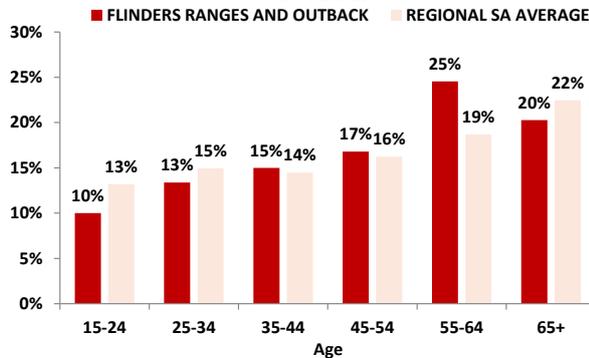
# FLINDERS RANGES & OUTBACK

## REGIONAL PROFILE



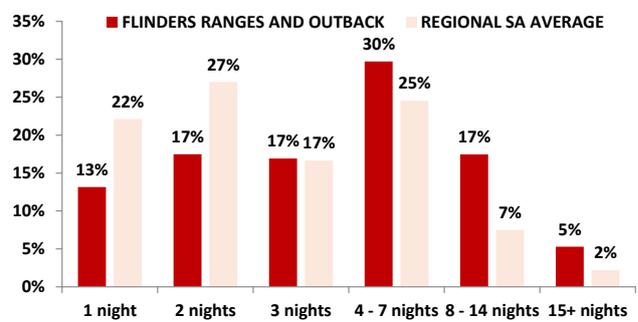
### VISITOR PROFILE

AGE OF VISITORS TO FLINDERS RANGES AND OUTBACK



- Overnight domestically there is a peak in the 55-64 age group of 25 per cent compared to the regional average of 19 per cent.
- The 15-24 age group at 10 per cent was below the regional average of 13 per cent.

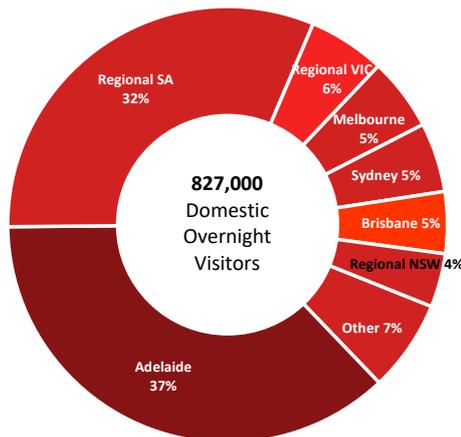
LENGTH OF VISIT TO FLINDERS RANGES AND OUTBACK



- 30 per cent of domestic overnight visitors like to stay 4-7 nights above the regional average of 25 per cent.
- 17 per cent like to stay between 8-14 nights, above the regional average of 7 per cent. Potentially due to the high number of FIFO workers for mining.

### VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO FLINDERS RANGES AND OUTBACK

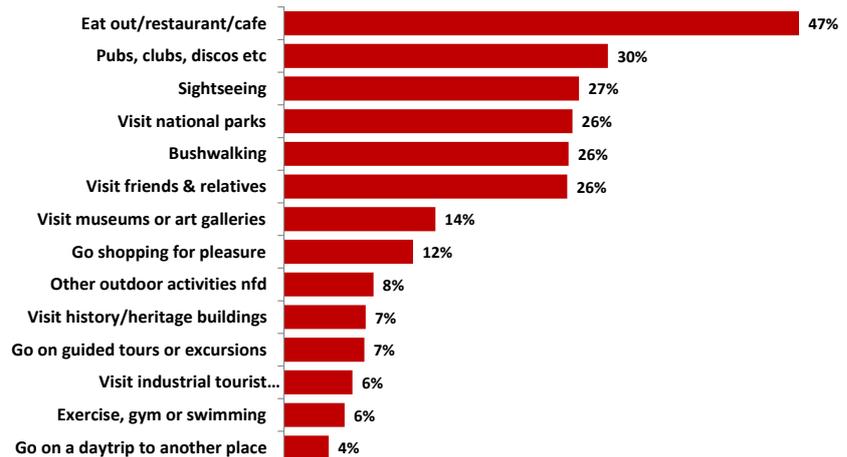


- Victoria at 8 per cent and New South Wales at 2 per cent are the Flinders Ranges and Outback's biggest interstate overnight domestic markets.
- Regional South Australia contributes 32 per cent of visitors to the Flinders Ranges and Outback.
- 37 per cent of visitors come from Adelaide.

### VISITOR ACTIVITIES

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN FLINDERS RANGES AND OUTBACK

- The most popular activity when coming to the Flinders Ranges and Outback is to eat out at a restaurant or cafe.
- Other popular activities include Sightseeing, Visiting national parks, Bushwalking, Visiting friends and relatives and going to museums and art galleries.



# FLINDERS RANGES & OUTBACK

## REGIONAL PROFILE



### REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2020-21, the tourism industry contributed an estimated \$523 million to the Flinders Ranges and Outback regional economy and directly employed approximately 2,500 people.

#### Employment

- 2,500 jobs for people employed directly by the tourism industry, 900 indirect jobs and a total employment impact of 3,500 people.

#### Gross Value Added (GVA)

- \$145 million and \$103 million in direct and indirect tourism GVA, and \$248 million in total tourism GVA.

#### Gross Regional Product (GRP)

- \$161 million and \$129 million in direct and indirect tourism GRP and \$290 million in total tourism GRP.

#### Tourism Consumption

2020-21

**Tourism products** - directly consumed

- Takeaway and restaurant meals 19%
- Shopping (including gifts and souvenirs) 14%
- Travel agency and tour operator services 12%
- Fuel (petrol, diesel) 10%
- Accommodation services 9%
- Food products 8%
- Long distance passenger transportation 7%
- Alcoholic beverages and other beverages 7%

#### Tourism Employment

2020-21

**Tourism Industries** - 2,500 directly employed

- Cafes, restaurants and takeaway food services 31%
- Accommodation 18%
- Retail trade 16%
- Travel agency and tour operator services 12%
- Clubs, pubs, taverns and bars 6%
- Air, water and other transport 6%
- Road transport and transport equipment rental 3%
- All other industries 3%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2021

### REGIONAL PERCEPTIONS REPORTING

- The Flinders Ranges & Outback is a somewhat intimidating, yet rewarding destination.
- The major barriers to visiting the Flinders Ranges & Outback are perceptions that the region is isolated, expensive, with limited attractions and activities and low quality food. It's perceived as a region where you either need to 'rough it', bring a caravan or camp.
- The rewards, however, are breathtaking views and scenery, seeing the natural beauty and history of the region and sleeping under the stars.

To drive increased visitation and expenditure, we recommend the Flinders Ranges & Outback:

#### Focus communications on the audiences with the highest potential

When promoting the region, target communications at the audiences most likely to visit. Adventurous groups and couples, and those with a caravan or tent who enjoy being in nature and hiking are the highest potential audience for the Flinders Ranges and Outback. Driving interest with this group and motivating a longer stay is more likely to be effective than targeting all traveller types.

#### Make the Flinders Ranges & Outback unmissable, by promoting the truly unique features

With a perception of such a long, boring trip to the Flinders Ranges & Outback, the reward received in exchange for the effort required needs to be significant. This could be through promoting the journey as much as the destination, or more powerfully, the truly unique features of the Flinders Ranges & Outback. What can you do there that you cannot do or see anywhere else?

#### Challenge perceptions that only fit people with caravans or 4WD's can enjoy the region

Showing people from all walks of life as part of communications promoting the Flinders Ranges & Outback will help potential travellers to see themselves there. Challenging misconceptions about the type of vehicle or transport required, or fitness levels needed to enjoy the Flinders Ranges might also minimise barriers to visitation. Similarly, promoting organised tours for more unsure traveller types may also increase appeal and visitation.

#### Region appeals to...

- Adventurers
- Caravanners and campers

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 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 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 intrastate 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