

FLINDERS RANGES & OUTBACK

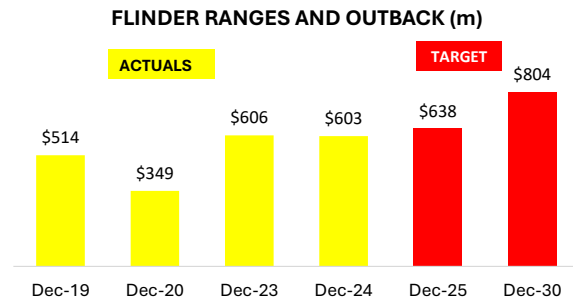
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2024

- Currently, the Flinders Ranges and Outback contributes \$603 million to the year end December 2024 South Australian expenditure of \$9.8 billion.
- The Flinders Ranges and Outback has achieved 95 per cent of their 2025 target of \$638 million and 75 per cent of their 2030 target of \$804 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2024

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	460,000	202,000	662,000	37,000	699,000
% of visits	66%	29%	95%	5%	100%
Share of Regional SA	14%	18%	15%	28%	15%
% Across Regional SA	73%	24%	97%	3%	100%
% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international					
Nights	1,809,000	917,000	2,726,000	545,000	3,272,000
% of nights	55%	28%	83%	17%	100%
Share of Regional SA	19%	19%	19%	21%	19%
% Across Regional SA	57%	28%	85%	15%	100%
% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international					
Average Length of Stay	3.9	4.5	4.1	14.7	4.7
ALOS Regional SA	2.9	4.2	3.2	19.8	3.7
Total Expenditure					\$603,000,000
Overnight Expenditure	\$279,000,000	\$158,000,000	\$437,000,000	\$24,000,000	\$461,000,000
Day Trip Expenditure					\$142,000,000
Domestic Day Trips					556,000

- The Flinders Ranges and Outback saw 699,000 overnight visitors for the year end December 2024.
- 66 per cent of overnight visitors were from intrastate, 29 per cent from interstate and 5 per cent from overseas.
- The 460,000 intrastate overnight visitors stayed 1.8 million nights with an average length of stay of 3.9 nights.
- There were 202,000 interstate overnight visitors who stayed 917,000 nights with an average length of stay of 4.5 nights
- The region saw 37,000 international visitors with an average length of stay of 14.7 nights and spend of \$24 million.
- 556,000 day trips were taken to the Flinders Ranges and Outback for the year with spend of \$142 million.

ALOS = Average Length of Stay

FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	233,000	138,000	268,000	70,000	699,000
% of visits	33%	20%	38%	10%	100%
Share of Regional SA	10%	12%	30%	23%	15%
% Across all regions	53%	24%	19%	7%	100%

Nights	919,000	621,000	1,416,000	316,000	3,272,000
% of nights	28%	19%	43%	10%	100%
Share of Regional SA	11%	15%	49%	21%	19%
% Across all regions	49%	25%	17%	9%	100%

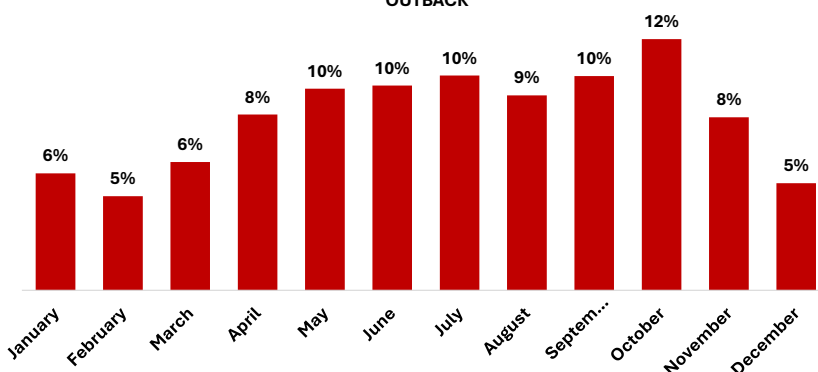
Average Length of Stay	3.9	4.5	5.3	4.5	4.7
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Expenditure					
Annual Overnight Exp	\$175,000,000	\$37,000,000	\$202,000,000	\$46,000,000	\$461,000,000
Expenditure 2019	\$256,000,000	\$37,000,000	\$110,000,000	\$37,000,000	\$441,000,000
Av spend per night	\$190	\$60	\$143	\$146	\$141
Av spend per night Reg SA	\$190	\$103	\$176	\$218	\$169
Share of Regional SA	3%	5%	1.3%	2%	3%

- 53 per cent of overnight visitors to the Flinders Ranges and Outback are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$190 per night compared to VFR visitors who spend \$60 per night.
- Leisure overnight visitors spent \$212 million for the year, making up 46 per cent of all overnight expenditure.
- 38 per cent of visitors are Business visitors and they contribute \$202 million of the \$461 million regional overnight spend.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO FLINDERS RANGES AND OUTBACK



- National Visitor Survey data shows us that June, July, September and October are the strongest months for visitation in the Flinders Ranges and Outback.
- The region is strongest in the cooler months of the year as summer is too hot for the region.
- October and July are strong on the back of the school holidays.

Source: NVS year end December 2024

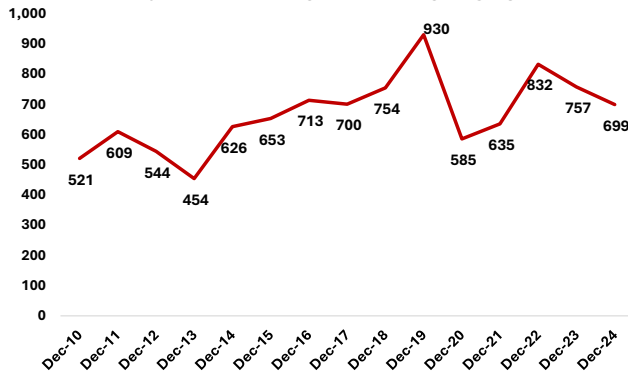
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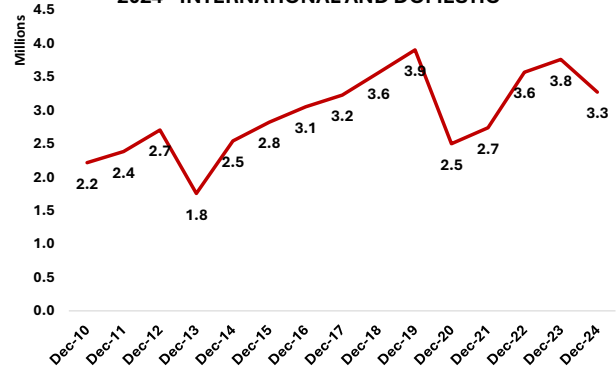


TOTAL OVERNIGHT VISITATION 2010 - 2024

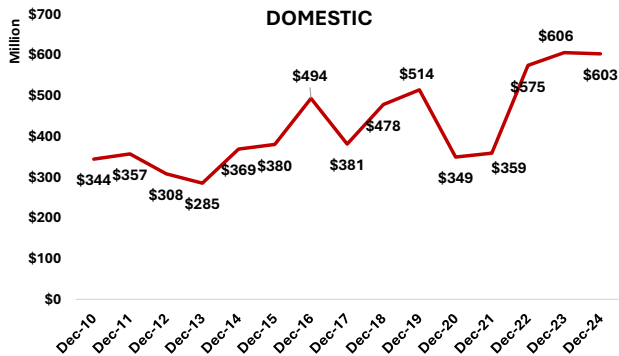
VISITORS FLINDERS RANGES AND OUTBACK 2010 - 2024 - INTERNATIONAL AND DOMESTIC



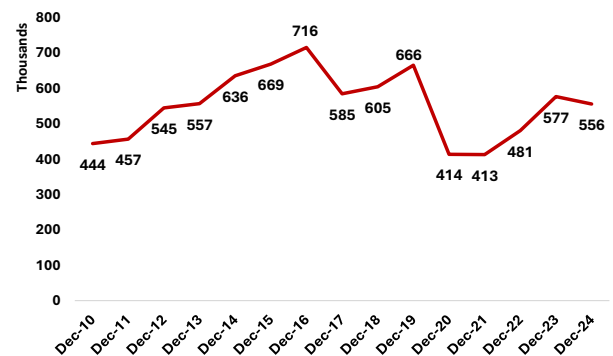
NIGHTS FLINDERS RANGES AND OUTBACK 2010 - 2024 - INTERNATIONAL AND DOMESTIC



TOTAL EXPENDITURE FLINDERS RANGES AND OUTBACK 2010 - 2024 - INTERNATIONAL AND DOMESTIC



DAY TRIPS FLINDERS RANGES AND OUTBACK 2010 - 2024 - 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-24	Change on Dec-19	Dec-24	Change on Dec-19
Adelaide	3,933,000	0%	\$5,800,000,000	29%
Adelaide Hills	200,000	-12%	\$192,000,000	-7%
Barossa	244,000	-23%	\$287,000,000	27%
Clare Valley	222,000	9%	\$162,000,000	38%
Eyre Peninsula	455,000	-22%	\$455,000,000	-17%
Fleurieu Peninsula	727,000	-19%	\$519,000,000	-7%
Flinders Ranges and Outback	699,000	-25%	\$603,000,000	17%
Kangaroo Island	182,000	-12%	\$197,000,000	4%
Limestone Coast	807,000	4%	\$662,000,000	57%
Murray River, Lakes and Coorong	396,000	-12%	\$223,000,000	-20%
Riverland	464,000	8%	\$236,000,000	21%
Yorke Peninsula	620,000	4%	\$358,000,000	49%
Regional SA	4,615,000	-11%	\$3,950,000,000	11%
South Australia	8,034,000	-6%	\$9,800,000,000	21%

FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



FLINDERS RANGES & OUTBACK TOURISM LISTINGS

Category	# Listings
ACCOMM	126
ATTRACTION	110
TOUR	42
RESTAURANT	28
EVENT	22
GENSERVICE	20
INFO	11
HIRE	4
DESTINFO	1
TRANSPORT	1
JOURNEY	1
Grand Total	366

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 & OUTBACK AUSTRALIAN TOURISM DATA WAREHOUSE LEADS

175,000

YEAR END DECEMBER 2024

ACCOMMODATION LEADS

120,000
69%

FOOD & DRINK LEADS

7,000
4%

TOUR LEADS

18,000
10%

*OTHER LEADS

30,000
17%

TOP 5

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

TOP 5

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

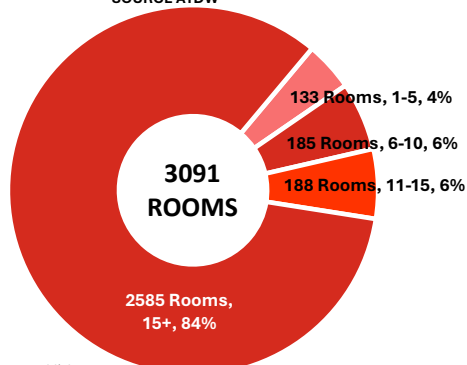
TOP 5

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

* 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 & OUTBACK

SOURCE ATDW



Rooms refers to rooms per establishment

- Currently there are 125 establishments in the Flinders Ranges and Outback that accommodate guests.
- These 125 establishments account for 3,091 rooms across the region.
- 84 per cent of rooms fall into establishment with 15 or more rooms.
- 4 per cent of rooms fall into the 1-5 room

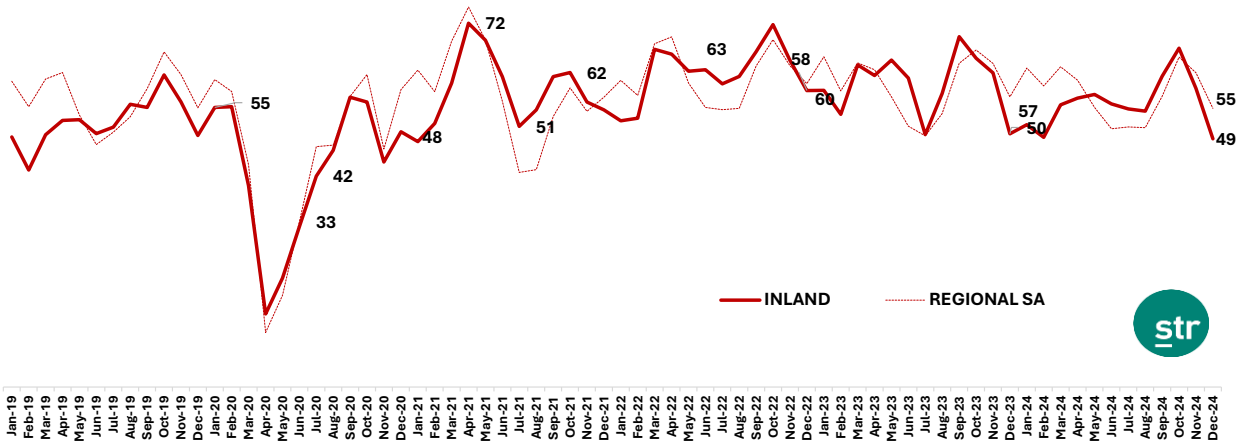
FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY INLAND

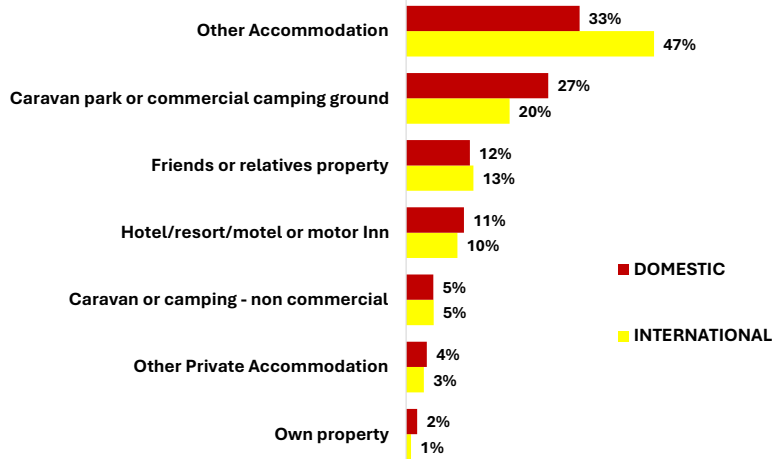


- The Inland regions include accommodation data for the Riverland, MRLC and the Flinders. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Inland regions was 52%, this fell to 43% in 2020, rose to 58% in 2021 and grew again in 2022 to 62%, fell to 60% in 2023 and 56% in 2024.

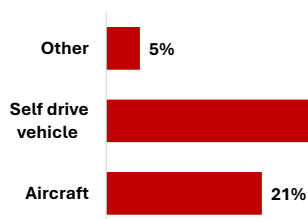
VISITOR USE OF ACCOMMODATION

- 33 per cent of domestic overnight visitor nights in the Flinders Ranges and Outback are spent in 'Other Accommodation' compared to the international average of 47 per cent. The majority of this relates to FIFO accommodation.
- 27 per cent of domestic visitors to the Flinders Ranges and Outback stay in a caravan park.
- 11 per cent of domestic and international visitors stayed in a Hotel/resort/motel or motor inn.

ACCOMMODATION USED IN FLINDERS RANGES AND OUTBACK FOR DOMESTIC VISITORS



TRANSPORT - DOMESTIC OVERNIGHT



- The main method of transport used on trips to the Flinders Ranges and Outback was a self drive vehicle.
- 75 per cent of visitors used this type of transport.
- 21 per cent of people used an aircraft to get to the region.

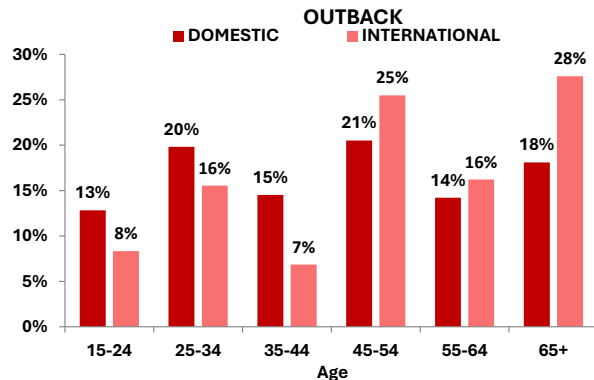
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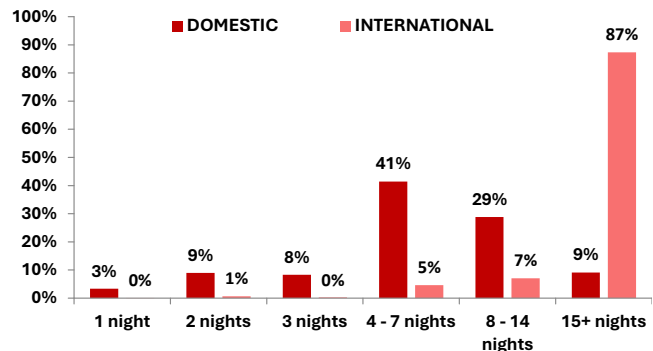
VISITOR PROFILE

AGE OF VISITORS TO FLINDERS RANGES AND OUTBACK



- In the domestic market the 25-34 and 45-54 are the strongest age group.
- The International market is strongest for the 65+ age group with 28% of all visits.

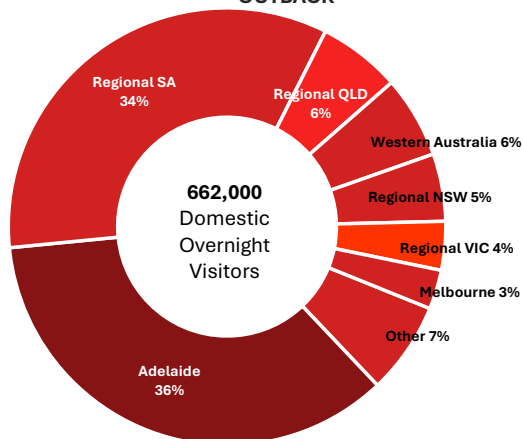
LENGTH OF VISIT TO FLINDERS RANGES AND OUTBACK



- 41 per cent of domestic overnight visitors like to stay 4 to 7 nights.
- 87 per cent of international visitors stay 15+ nights, this would be skewed by employment.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO FLINDERS RANGES AND OUTBACK

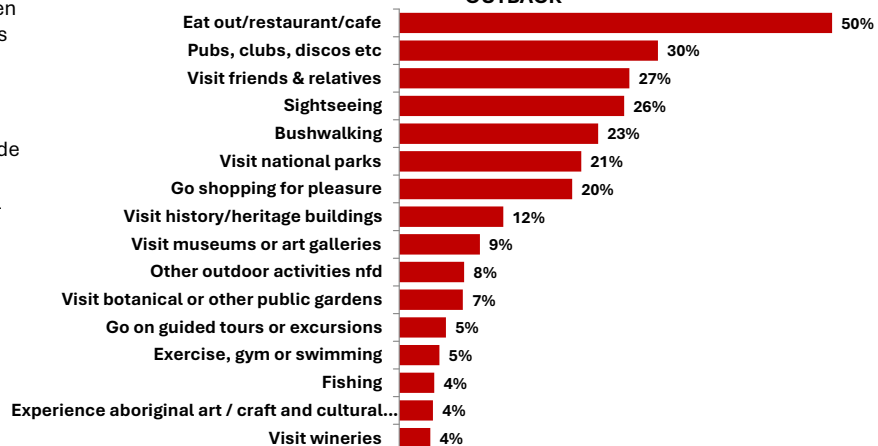


- Victoria at 7 per cent and Western Australia at 8 per cent are the Flinders Ranges and Outback's biggest interstate overnight domestic markets.
- Regional South Australia contributes 34 per cent of visitors to the Flinders Ranges and Outback.
- 36 per cent of visitors come from Adelaide.

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 visiting a friend or relative, bushwalking, visiting national parks, going to markets and seeing the sights.



FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2023-24, the tourism industry contributed an estimated \$779 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, 1,200 indirect jobs and a total employment impact of 3,700 people.

Gross Value Added (GVA)

\$183 million and \$159 million in direct and indirect tourism GVA, and \$342 million in total tourism GVA.

Gross Regional Product (GRP)

\$216 million and \$195 million in direct and indirect tourism GRP and \$411 million in total tourism GRP.

Tourism Consumption

2023-24

Tourism products - directly consumed

- Long distance passenger transportation 18%
- Takeaway and restaurant meals 18%
- Fuel (petrol, diesel) 13%
- Accommodation services 11%
- Shopping (including gifts and souvenirs) 9%
- Food products 6%
- Alcoholic beverages and other beverages 6%
- Travel agency and tour operator services 5%

Tourism Employment

2023-24

Tourism Industries -2,500 directly employed

- Cafes, restaurants and takeaway food services 40%
- Accommodation 23%
- Retail trade 13%
- Clubs, pubs, taverns and bars 8%
- Air, water and other transport 5%
- Road transport and transport equipment rental 3%
- Travel agency and tour operator services 2%
- Education and training 2%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2024

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 2024

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 2024.

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