

FLINDERS RANGES & OUTBACK

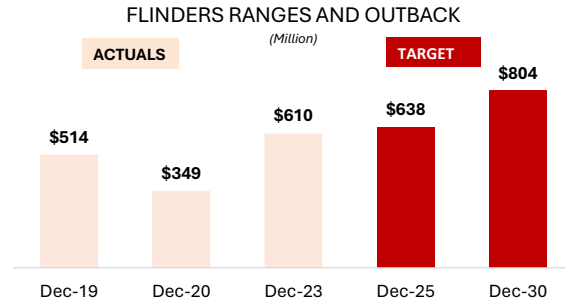
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2023

- Currently, the Flinders Ranges and Outback contributes \$610 million to the year end December 2023 South Australian expenditure of \$10.1 billion.
- The Flinders Ranges and Outback has achieved 96 per cent of their 2025 target of \$638 million and 76 per cent of their 2030 target of \$804 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2023

ORIGIN						
	Intrastate	Interstate	Total Domestic	International	Total	
Overnight Visits	533,000	197,000	730,000	30,000	761,000	
% of visits	70%	26%	96%	4%	100%	
Share of Regional SA	11%	7%	10%	7%	10%	
<hr/>						
% Across Regional SA	60%	35%	94%	6%	100%	
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>						
Nights	2,418,000	1,035,000	3,453,000	513,000	3,965,000	
% of nights	61%	26%	87%	13%	100%	
Share of Regional SA	18%	8%	13%	4%	10%	
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% Across Regional SA	33%	31%	65%	35%	100%	
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>						
Average Length of Stay	4.5	5.3	4.7	17.1	5.2	
ALOS Regional SA	2.8	4.6	3.5	32.0	5.1	
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Total Expenditure					\$609,000,000	
Overnight Expenditure	\$185,000,000	\$312,000,000	\$497,000,000	\$23,000,000	\$520,000,000	
Day Trip Expenditure					\$89,000,000	
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Domestic Day Trips					577,000	

- The Flinders Ranges and Outback saw 761,000 overnight visitors for the year end December 2023.
- 70 per cent of overnight visitors were from intrastate, 26 per cent from interstate and 4 per cent from overseas.
- The 533,000 intrastate overnight visitors stayed 2.4 million nights with an average length of stay of 4.5 nights.
- There were 197,000 interstate overnight visitors who stayed 1.0 million nights with an average length of stay of 5.3 nights
- The region saw 30,000 international visitors with an average length of stay of 17.1 nights and spend of \$23 million.
- 577,000 day trips were taken to and within the Flinders Ranges and Outback for the year with spend of \$89 million.

ALOS = Average Length of Stay

FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	247,000	78,000	399,000	52,000	761,000
% of visits	32%	10%	52%	7%	100%
Share of Regional SA	8%	3%	24%	11%	10%
% Across all regions	41%	33%	21%	6%	100%

Nights	968,000	394,000	2,346,000	257,000	3,965,000
% of nights	24%	10%	59%	6%	100%
Share of Regional SA	8%	3%	39%	5%	10%
% Across all regions	31%	39%	15%	14%	100%

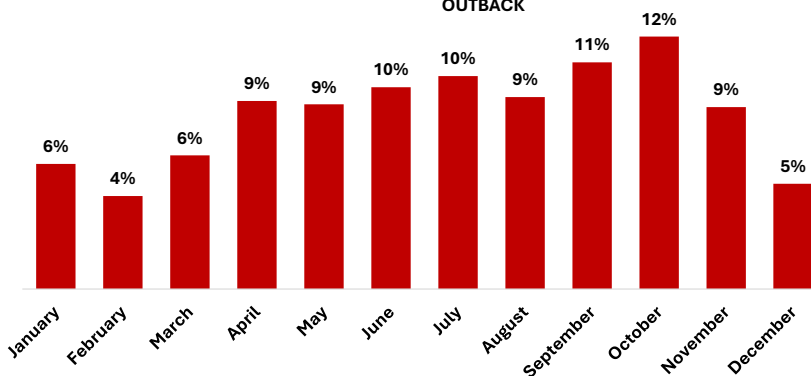
Average Length of Stay	3.9	5.1	5.9	4.9	5.2
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Expenditure					
Annual Expenditure	\$157,000,000	\$45,000,000	\$278,000,000	\$41,000,000	\$520,000,000
Expenditure 2019	\$256,000,000	\$37,000,000	\$110,000,000	\$37,000,000	\$441,000,000
Av spend per night	\$162	\$114	\$118	\$160	\$131
Av spend per night Reg SA	\$224	\$109	\$155	\$297	\$181
Share of Regional SA	3%	5%	1.3%	2%	3%

- 42 per cent of overnight visitors to the Flinders Ranges and Outback are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$162 per night compared to VFR visitors who spend \$114 per night.
- Leisure overnight visitors spent \$202 million for the year, making up 39 per cent of all overnight expenditure.
- 53 per cent of spend is allocated to business visitation on the back of the large mining community.

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.

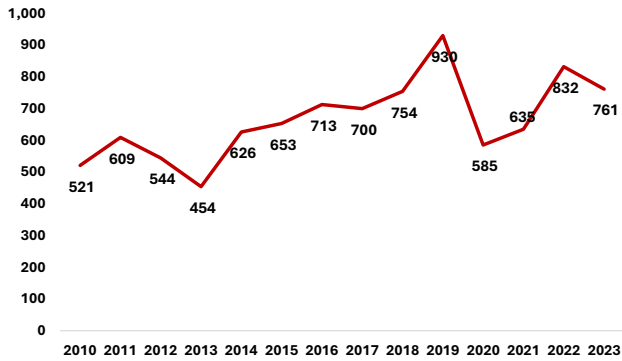
FLINDERS RANGES & OUTBACK

REGIONAL PROFILE

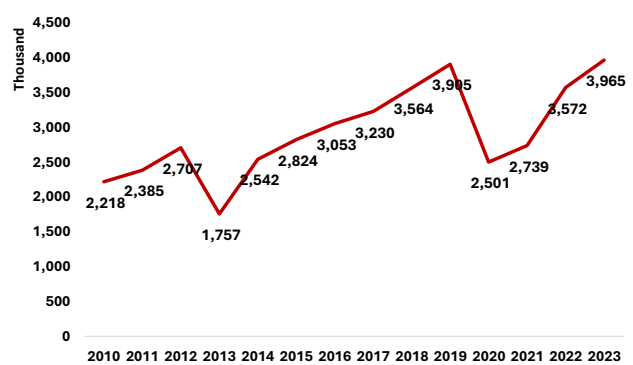


TOTAL OVERNIGHT VISITATION 2010 - 2022

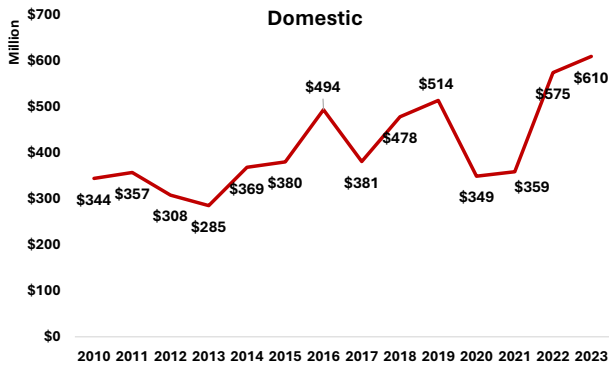
VISITORS FLINDERS RANGES AND OUTBACK 2010 - 2023 - International and Domestic



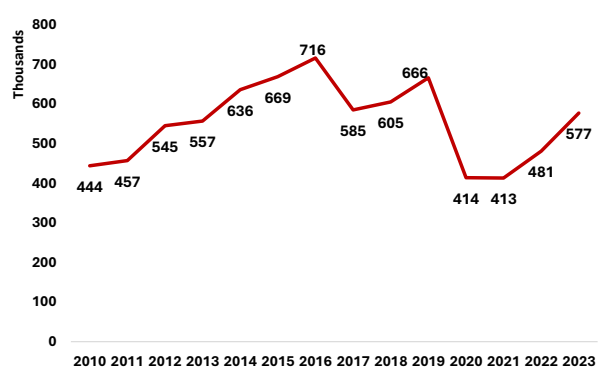
NIGHTS FLINDERS RANGES AND OUTBACK 2010 - 2023 - International and Domestic



TOTAL EXPENDITURE FLINDERS RANGES AND OUTBACK 2010 - 2023 - International and Domestic



DAY TRIPS FLINDERS RANGES AND OUTBACK 2010 - 2023 - 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-23	Change on Dec-19	Dec-23	Change on Dec-19
Adelaide	3,422,000	-13%	\$5,500,000,000	22%
Adelaide Hills	233,000	3%	\$293,000,000	42%
Barossa	343,000	8%	\$261,000,000	16%
Clare Valley	226,000	11%	\$191,000,000	62%
Eyre Peninsula	537,000	-8%	\$591,000,000	7%
Fleurieu Peninsula	868,000	-4%	\$837,000,000	50%
Flinders Ranges and Outback	761,000	-18%	\$610,000,000	19%
Kangaroo Island	205,000	-1%	\$280,000,000	47%
Limestone Coast	763,000	-2%	\$520,000,000	24%
Murray River, Lakes and Coorong	363,000	-20%	\$373,000,000	33%
Riverland	322,000	-25%	\$239,000,000	22%
Yorke Peninsula	530,000	-11%	\$384,000,000	60%
Regional SA	4,830,000	-7%	\$4,630,000,000	30%
South Australia	7,835,000	-9%	\$10,140,000,000	25%

FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



FLINDERS RANGES AND OUTBACK TOURISM LISTINGS

Category	# Listings
Accommodation	126
Attraction	103
Tour	35
Food & Drink	17
Event	14
Information Services	11
Hire	5
General Services	4
Destination Information	2
Transport	1
Journey	1
Grand Total	318

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)

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

FLINDERS RANGES AND OUTBACK AUSTRALIAN TOURISM DATA WAREHOUSE LEADS

75,000

YEAR END DECEMBER 2023

ACCOMMODATION
LEADS
53,000
71%

FOOD & DRINK
LEADS
3,500
5%

TOUR
LEADS
4,500
6%

*OTHER
LEADS
14,000
18%

TOP 5

- WILPENA POUND RESORT
- RAWNSLEY PARK STATION
- ARKARoola WILDERNESS SANCTUARY
- ACCOMMODATION PORT PIRIE BEACH CARAVAN PARK
- ARKABA

TOP 5

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

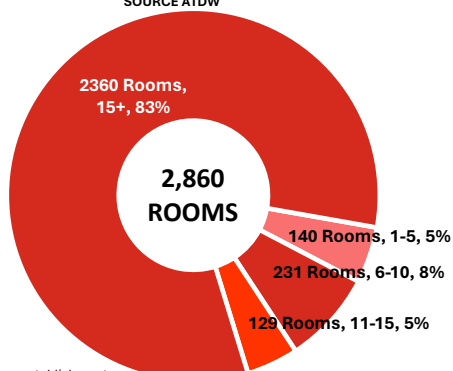
TOP 5

- RAWNSLEY PARK STATION HELICOPTER EXPERIENCES
- ABORIGINAL CULTURAL TOURS WILPENA POUND RESORT
- 4WD RAWNSLEY PARK STATION DISCOVERY TOURS
- WRIGHTSAIR PTY LTD
- ANDAMOOKA OBSERVATORY EXPERIENCES

* 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 125 establishments in the Flinders Ranges and Outback that accommodate guests.
- These 125 establishments account for 2,860 rooms across the region.
- 83 per cent of rooms fall into establishment with 15 or more rooms.
- 8 per cent of rooms fall into the 6-10 room establishments.

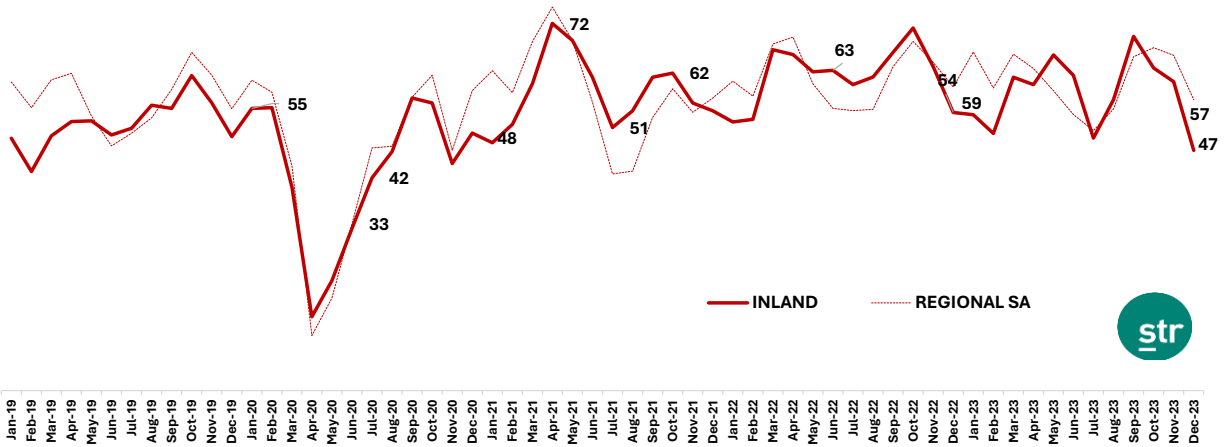
FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY INLAND

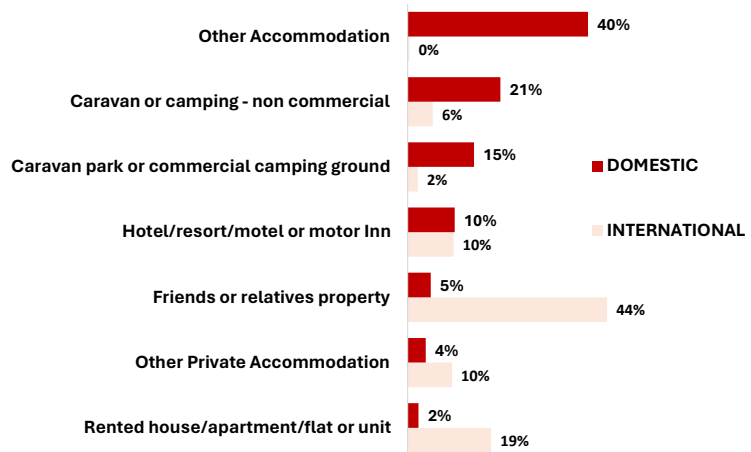


- The Inland regions include accommodation data for the Riverland, MRLC and the Flinders. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the Inland regions was 52%, this fell to 43% in 2020, rose to 58% in 2021 and grew again in 2022 to 62%. Currently at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

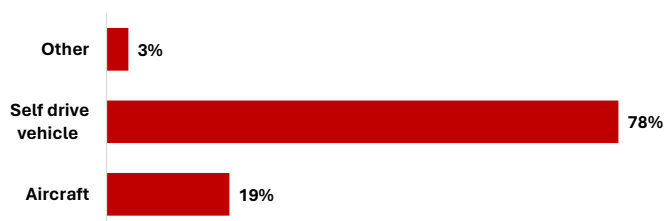
VISITOR USE OF ACCOMMODATION

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

- 5 per cent of domestic overnight visitor nights in the Flinders Ranges and Outback are spent with Friends or Relatives compared to the international average of 44 per cent.
- 10 per cent of domestic and international visitors stayed in a Hotel/resort/motel or motor inn.
- 36 per cent of domestic visitors to the Flinders Ranges and Outback stay in a caravan park.



TRANSPORT



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

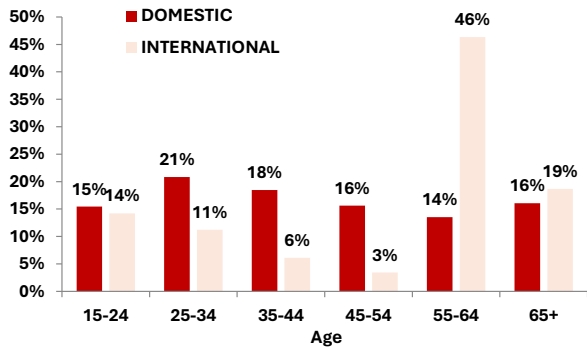
FLINDERS RANGES & OUTBACK

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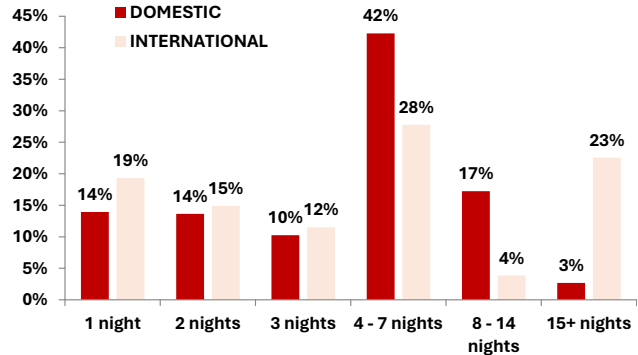
VISITOR PROFILE

AGE OF VISITORS TO FLINDERS RANGES AND OUTBACK



- In the domestic market the 25-44 is the strongest age group.
- The International market is strongest for the 55-64 age group with 46% of all visits.

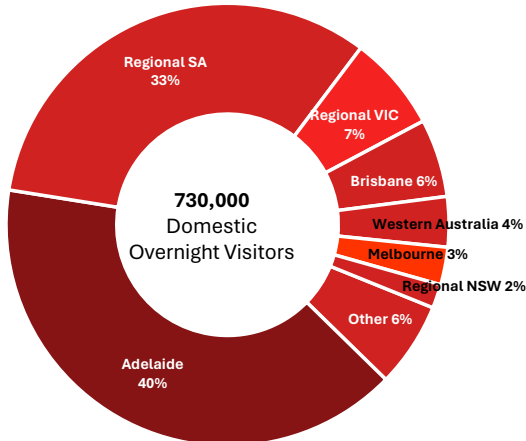
LENGTH OF VISIT TO FLINDERS RANGES AND OUTBACK



- 42 per cent of domestic overnight visitors like to stay 4 to 7 nights.
- 23 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

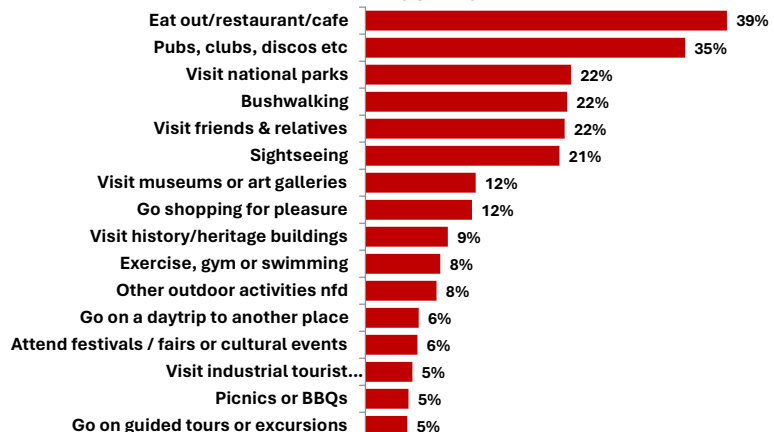


- Victoria at 10 per cent and Western Australia at 4 per cent are the Flinders Ranges and Outback's biggest interstate overnight domestic markets.
- Regional South Australia contributes 33 per cent of visitors to the Flinders Ranges and Outback.
- 40 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

- 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.

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN FLINDERS RANGES AND OUTBACK



FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2021-22, the tourism industry contributed an estimated \$465 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, 700 indirect jobs and a total employment impact of 2,800 people.

Gross Value Added (GVA)

- \$119 million and \$85 million in direct and indirect tourism GVA, and \$204 million in total tourism GVA.

Gross Regional Product (GRP)

- \$131 million and \$109 million in direct and indirect tourism GRP and \$239 million in total tourism GRP.

Tourism Consumption

2021-22 Tourism products - directly consumed	
• Takeaway and restaurant meals	19%
• Shopping (including gifts and souvenirs)	14%
• Fuel (petrol, diesel)	12%
• Long distance passenger transportation	11%
• Accommodation services	11%
• Food products	7%
• Alcoholic beverages and other beverages	7%
• Travel agency and tour operator services	6%

Tourism Employment

2021-22 Tourism Industries - 2,100 directly employed	
• Cafes, restaurants and takeaway food services	40%
• Accommodation	22%
• Retail trade	12%
• Clubs, pubs, taverns and bars	9%
• Air, water and other transport	6%
• Travel agency and tour operator services	5%
• All other industries	2%
• Other sports and recreation services	2%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2022

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...	<ul style="list-style-type: none"> – Adventurers – Caravanners and campers

Prepared by the South Australian Tourism Commission, December 2023

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 2023.

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 Intra-state participants (70% metro, 30% regional), - 20 Inter-state 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 intra-state).

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