

FLINDERS RANGES & OUTBACK

REGIONAL PROFILE

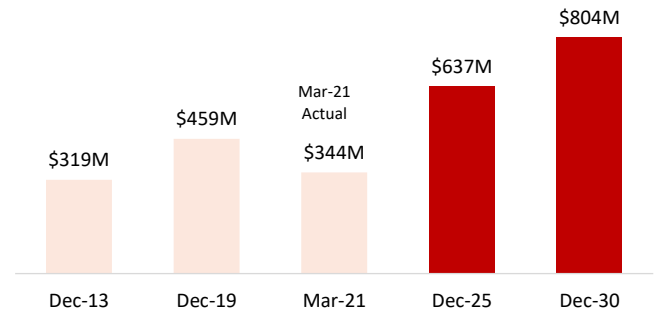


OVERVIEW

ALL DATA BASED ON THE YEAR END MARCH 2021 - FULL YEARS WORTH OF COVID AFFECTED DATA

FLINDERS RANGES AND OUTBACK

- Currently the Flinders Ranges and Outback contributes \$344 million to the year end March 2021 South Australian expenditure of \$4.4 billion.
- The Flinders Ranges and Outback has achieved 54 per cent of their 2025 target of \$637 million and 43 per cent of their 2030 target of \$804 million.



ANNUAL VISITOR SUMMARY YEAR END MARCH 2021

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	491,000	92,000	583,000	-	583,000
%	84%	16%	100%	0%	100%
% Across all regions	90%	10%	100%	0%	100%
Share of Regional SA	13%	21%	14%	0%	14%
Nights	2,097,000	433,000	2,530,000	-	2,530,000
%	83%	17%	100%	0%	100%
% Across all regions	82%	18%	100%	0%	100%
Share of Regional SA	17%	17%	17%	0%	17%
ALOS	4.3	4.7	4.3	-	4.3
ALOS Regional SA	3.2	6.0	3.5	-	3.5
Total Expenditure					\$344,000,000
Overnight Expenditure	\$232,000,000	\$56,000,000	\$288,000,000	\$0	\$288,000,000
Day Trip Expenditure					\$56,000,000
Domestic Day Trips					372,000

- The Flinders Ranges and Outback saw 583,000 domestic overnight visitors for the year end March 2021.
- 84 per cent of overnight visitors were from intrastate and 16 per cent from Interstate.
- The 491,000 intrastate overnight visitors stayed 2.1 million nights with an average length of stay of 4.3 nights.
- There were 92,000 interstate overnight visitors who stayed 433,000 nights with an average length of stay of 4.7 nights
- There have been no international arrivals with the borders closed.
- 372,000 day trips were taken to the Flinders Ranges and Outback for the year with spend of \$56 million.

FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



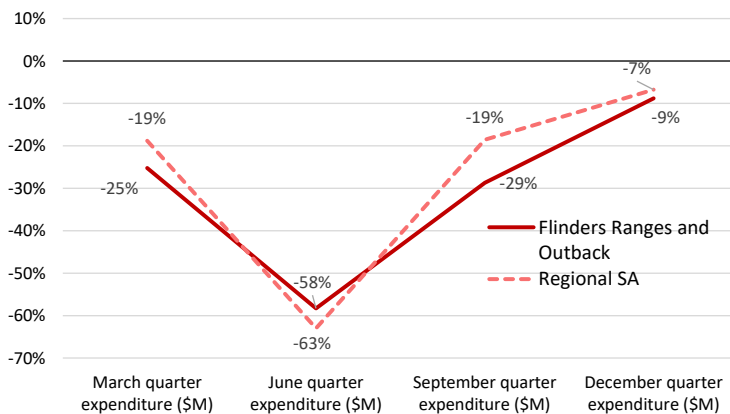
PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	213,000	84,000	254,000	38,000	583,000
%	37%	14%	44%	7%	100%
% Across all regions	56%	22%	18%	5%	100%
Share of Regional SA	13.0%	21.3%	13.9%	0%	13.9%
Nights	831,000	245,000	1,392,000	62,000	2,530,000
%	33%	10%	55%	2%	100%
% Across all regions	58%	18%	20%	3%	100%
Share of Regional SA	9.7%	9.2%	46.8%	12.6%	17.2%
Average Length of Stay	3.9	2.9	5.5	1.6	4.3
Expenditure					
Annual Expenditure	\$120,000,000	\$18,000,000	\$127,000,000	\$24,000,000	\$288,000,000
Av spend per night	\$144	\$73	\$91	\$387	\$114
Av spend per night Regional SA	\$213	\$126	\$132	\$511	\$191
Share of Regional SA	8.7%	6.4%	32.6%	12.4%	12.1%

- 51 per cent of overnight visitors to the Flinders Ranges and Outback are leisure visitors (Holiday + VFR).
- 44 percent of overnight visitors are for business. This relates to Roxby Downs and the mining FIFO workers.
- Overnight holiday visitors on average spend \$144 per night compared to VFR visitors who spend \$73 per night.
- Holiday visitors spent \$120 million for the year and Business Visitors \$127 million, making up 42 and 44 per cent of total overnight expenditure.

SPEND 2020 VERSUS 2019

CHANGE IN SPEND - 2020 COMPARED TO 2019



- March quarter 2020 prior to COVID-19 was down 25 per cent on the March quarter in 2019.
- The Flinders Ranges and Outback saw expenditure fall 58 per cent for the June quarter in 2020 compared to June quarter in 2019.
- The September quarter saw a recovery from June, however still down 29 per cent on 2019.
- The December 2020 quarter was below pre COVID levels, down 9 per cent compared to the December quarter in 2019.

FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



FLINDERS RANGES AND OUTBACK TOURISM LISTINGS

Category	# Listings
ACCOMMODATION	127
ATTRACTION	98
TOUR	36
RESTAURANT	19
INFORMATION	11
DESTINATION INFORMATION	8
EVENT	8
HIRE	4
GENERAL SERVICE	2
TRANSPORT	1
Grand Total	314

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

130,000

YEAR END MARCH 2021

ACCOMMODATION LEADS

92,000
71%

FOOD & DRINK LEADS

1,400
1%

TOUR LEADS

12,000
9%

*OTHER LEADS

24,000
19%

TOP 5

- WILPENNA POUND RESORT
- FLINDERS BUSH RETREATS
- RAWNSLEY PARK STATION
- ARKAROOA WILDERNESS SANCTUARY
- ARKABA

TOP 5

- THE WOOLSHED RESTAURANT AT RAWNSLEY PARK
- TRANSCONTINENTAL HOTEL
- PRAIRIE HOTEL
- AUSTRALIAN ARID LANDS BOTANIC GARDEN BLUEBUSH CAFE
- OVER THE EDGE MELROSE

TOP 5

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

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

FLINDERS RANGES & OUTBACK

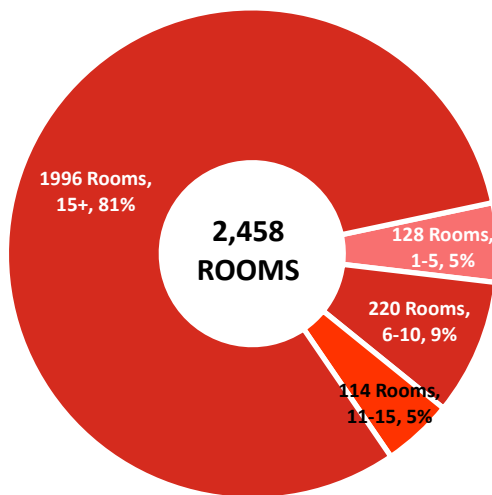
REGIONAL PROFILE



ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS IN THE FLINDERS RANGES AND OUTBACK

SOURCE ATDW



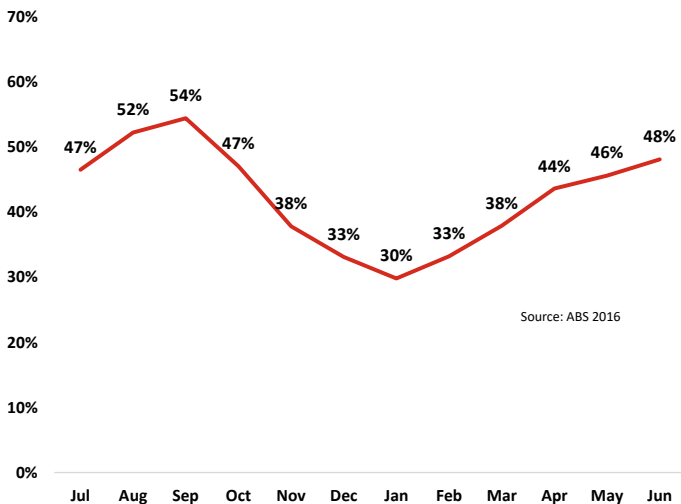
- Currently there are 126 establishments in the Flinders Ranges and Outback that accommodate guests.
- These 126 establishments account for 2,458 rooms ranging from 1 room to over 50.
- 81 per cent of rooms fall into establishment with 15 or more rooms.
- 9 per cent of rooms fall into the 6-10 room establishments.

ACCOMMODATION SUPPLY

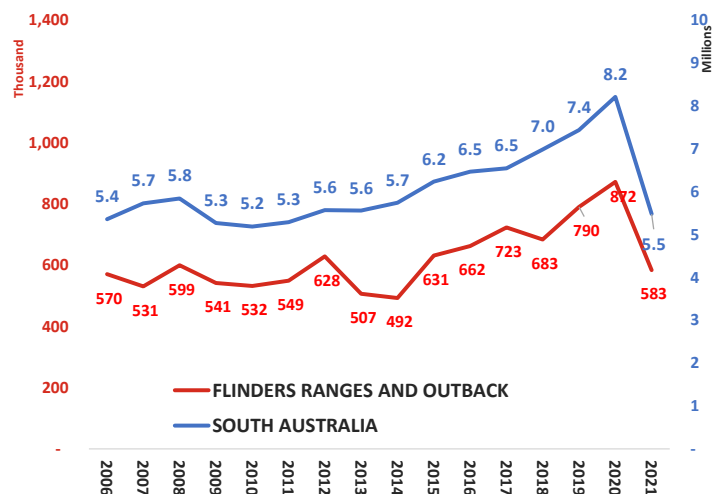
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	33
Rooms	1,268
Occupancy	42%
Takings	\$24,000,000

- 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



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.

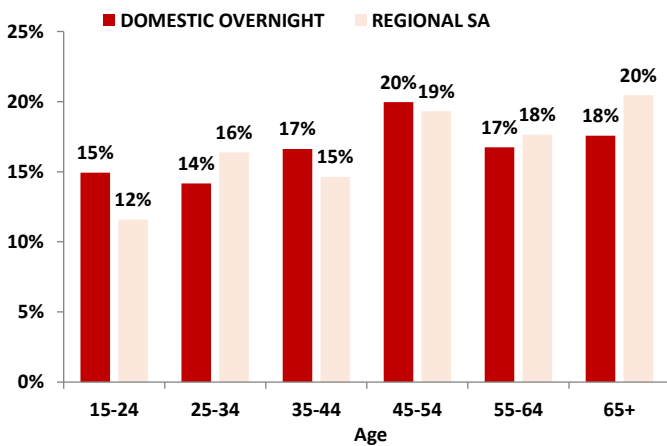
FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



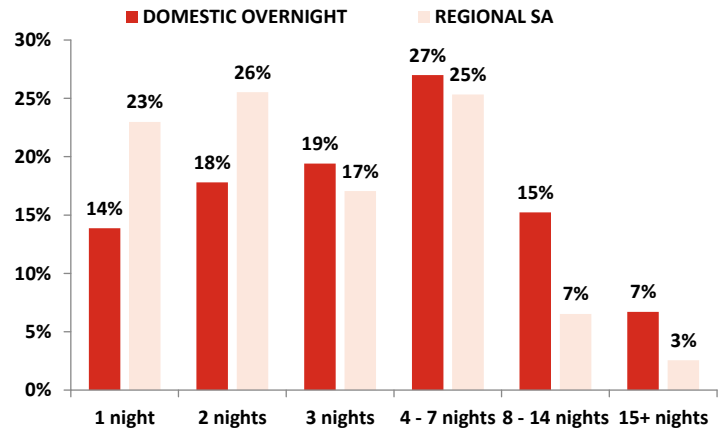
VISITOR PROFILE

AGE OF VISITORS TO FLINDERS RANGES AND OUTBACK



- Domestically there is a peak in 35-44 age group at 17 per cent above the regional average of 15 per cent.
- Prior to COVID-19 the 15-24 age group accounted for 10 per cent of visitors.

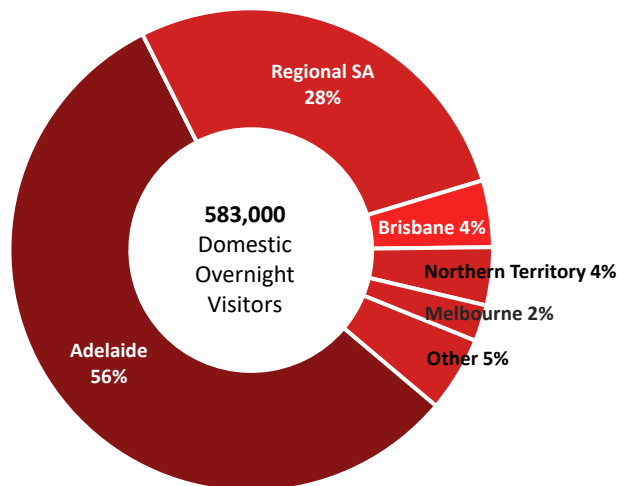
LENGTH OF VISIT TO FLINDERS RANGES AND OUTBACK



- 27 per cent of visitors prefer to stay between 4 and 7 nights.
- 22 per cent of domestic visitors like to stay more than 8 nights, over indexing compared to the regional average.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO FLINDERS RANGES AND OUTBACK



- Brisbane and the Northern Territory each accounted for 4 per cent of visitors to the Flinders Ranges and Outback. Pre COVID Victoria, at 12 per cent and New South Wales at 6 per cent, were the Flinders Ranges and Outback's biggest interstate markets.
- Regional South Australia contributes 28 per cent of overnight visitors to the Flinders Ranges and Outback.
- 56 per cent of visitors come from Adelaide, however prior to COVID this was 40 per cent.

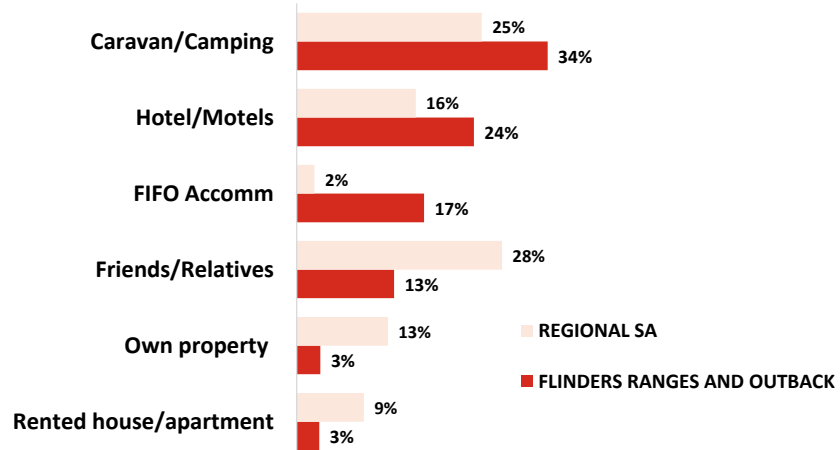
FLINDERS RANGES & OUTBACK

REGIONAL PROFILE



VISITOR USE OF ACCOMMODATION

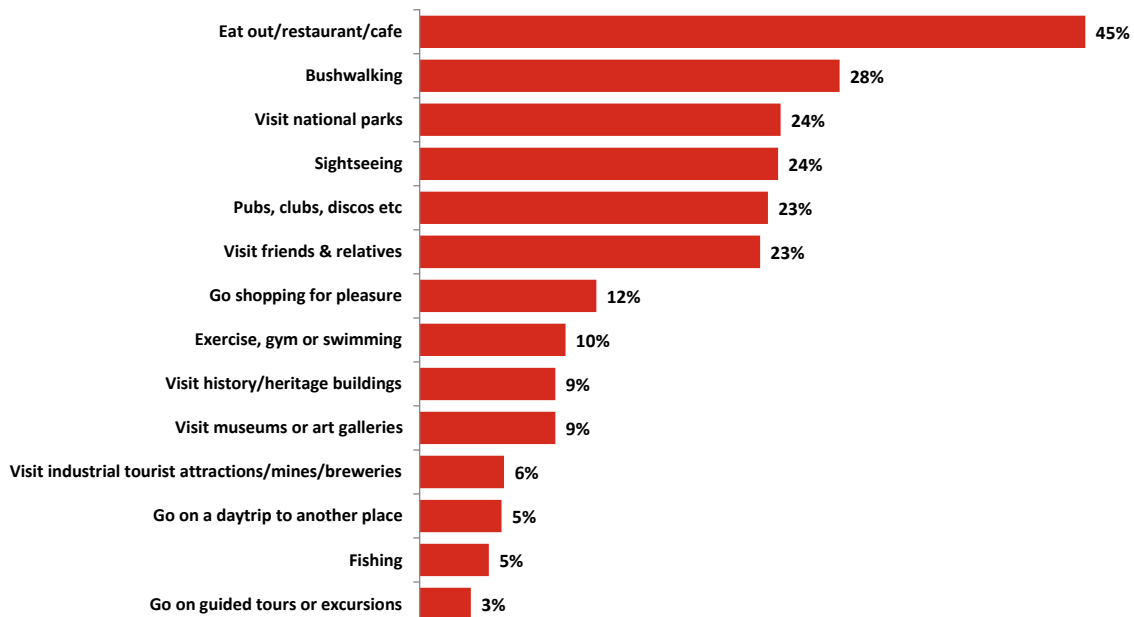
ACCOMMODATION USED IN FLINDERS RANGES AND OUTBACK FOR DOMESTIC VISITORS



- 34 per cent of Domestic visitor nights in the Flinders Ranges and Outback are spent Caravan and Camping, this is up on the pre COVID 31 per cent and above the regional average of 25 percent.
- The Flinders Ranges and Outback over indexes for Hotels/Motels at 24 per cent, pre COVID this was 13 per cent.
- The region also has a large FIFO population well above the regional average for South Australia.

VISITOR ACTIVITIES

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN THE 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

REGIONAL PROFILE



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, March 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 March 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. 86 35455001
Consumer Demand Product Testing Phase 1 - BDA Marketing