

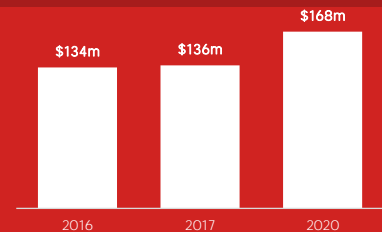
KANGAROO ISLAND

Regional Profile December 2014-2016



OVERVIEW

- Currently Kangaroo Island contributes \$134 million to the December 2016 South Australian expenditure of \$5.8 billion.
- The Kangaroo Island has achieved 80 per cent of their \$168 million 2020 target.



Annual Visitor Summary December 2014 - December 2016

ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Visits	75,000	29,000	103,000	40,000	143,000
%	73%	28%	72%	28%	100%
Nights	293,000	123,000	416,000	132,000	547,000
%	70%	30%	76%	24%	100%
Average Length of Stay	3.9	4.2	4.0	3.3	3.8

Day Trips

Average Annual Day Trips to Kangaroo Island 31,000

PURPOSE

	Holiday	VFR	Business	Other	Total
Visits	124,000	13,000	6,000	1,000	143,000
%	87%	9%	4%	1%	100%
Nights	420,000	72,000	25,000	30,000	547,000
%	77%	13%	5%	5%	100%
Average Length of Stay	3.4	5.5	4.2	30.0	3.8

Expenditure

Average Annual Expenditure \$ 134,000,000

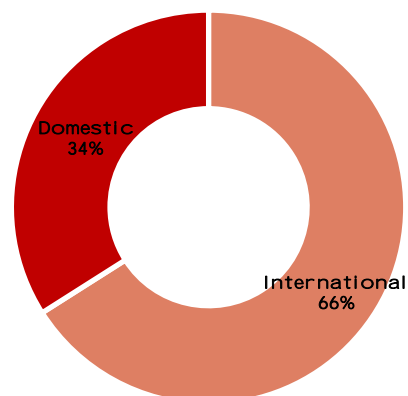
- 72 per cent of visitors are Domestic Visitors and 28 per cent International Visitors.
- Domestically 73 per cent are from within the state compared to 28 per cent from Interstate.
- 96 per cent of visitors to Kangaroo Island are Leisure visitors (Holiday + VFR).

KANGAROO ISLAND TOURISM LISTINGS

Category	Kangaroo Island
Accommodation	187
Attraction	41
Tour	22
Event	15
Food and Drink	14
Information Services	2
Transport	1
Hire	1
Grand Total	283

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

KANGAROO ISLAND MEDIA COVERAGE



Source: Item Count - SATC Internal - 2016

KANGAROO ISLAND

Regional Profile December 2014-2016

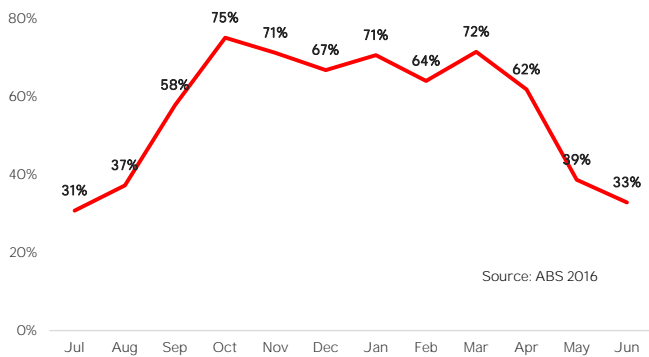


ACCOMMODATION SUPPLY

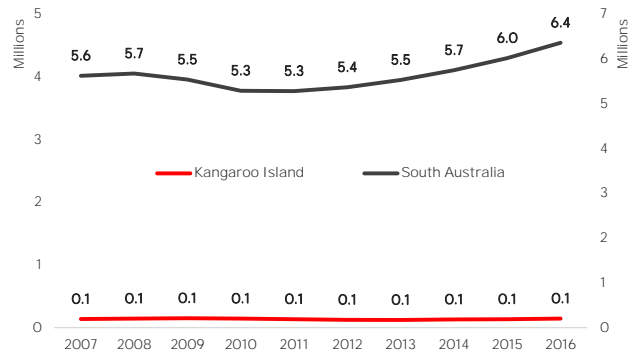
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	8
Rooms	261
Occupancy	57%
Takings	\$ 16,800,000

- Average occupancy for the year is 57 per cent over 8 establishment and 261 rooms.
- The peak months are October and March with occupancy at 75 and 72 per cent respectively.
- Low point of the year comes in July where occupancy drops to 31%.
- Occupancy through the winter months averages 34 per cent.

Monthly Occupancy Rates Year end June 2016 - Kangaroo Island

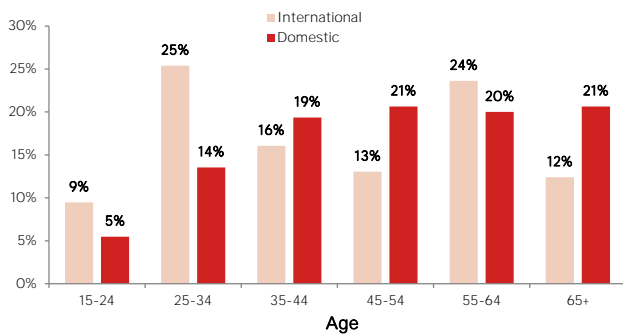


Total Overnight Visitation to Kangaroo Island & South Australia

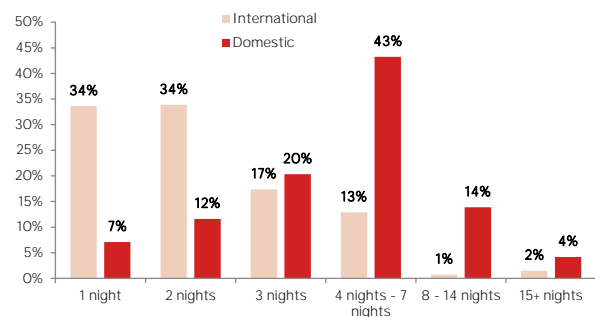


VISITOR PROFILE

Age of Visitors to Kangaroo Island



Length of Visit to Kangaroo Island



- International Visitors peak in the 25-34 age group at 25 per cent. For Domestic visitors this age group contributes 14 per cent of visitors.
- Domestically, Kangaroo Island peaks in the 45-54 and the 65+ age group at 21 per cent.
- 68 per cent of International Visitors prefer to stay 1 or 2 night on Kangaroo Island.
- 43 per cent of Domestic Visitors prefer to stay 4 - 7 nights.

KANGAROO ISLAND

Regional Profile December 2014-2016



DOMESTIC VISITOR PROFILE

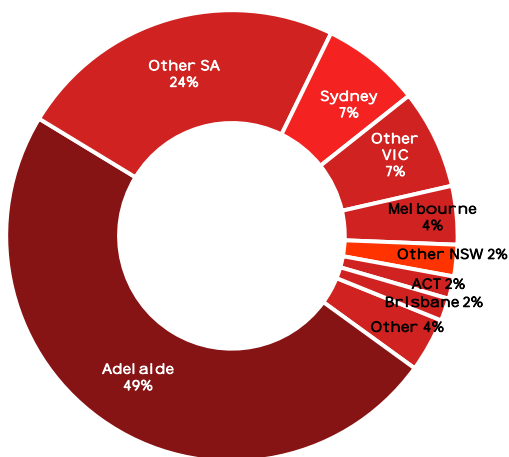
Purpose	Holiday	VFR	Other	Total
Visits	84,000	13,000	6,000	104,000
%	81%	13%	6%	100%
Nights	320,000	71,000	25,000	416,000
%	77%	17%	6%	100%
ALOS	3.8	5.5	4.2	4.0

INTERNATIONAL VISITOR PROFILE

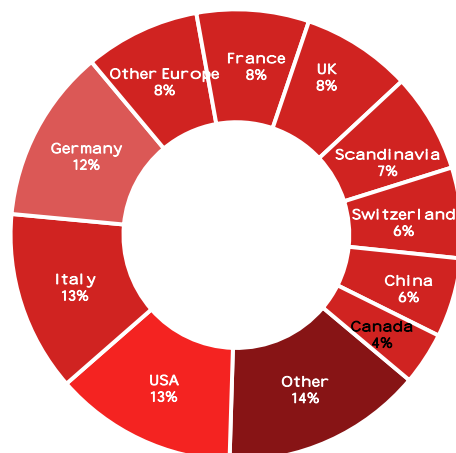
Purpose	Holiday	VFR	Other	Total
Visits	39,000	np	np	40,000
%	98%	np	np	100%
Nights	100,000	2,000	30,000	132,000
%	76%	2%	23%	100%
ALOS	2.6	np	np	3.3

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Kangaroo Island



Origin of International Visitors to Kangaroo Island



- Victoria, at 11 per cent and New South Wales at 9 per cent are Kangaroo Island's biggest Interstate markets.
- Regional South Australia contributes 24 per cent of visitors to Kangaroo Island and Adelaide visitors contribute 49 per cent.
- Internationally Europeans contribute 66 per cent of the visits to the Kangaroo Island, with Italy contributing 13 per cent and Germany 12 per cent.
- The United States of America and China contribute 13 and 6 per cent of visitors to Kangaroo Island.

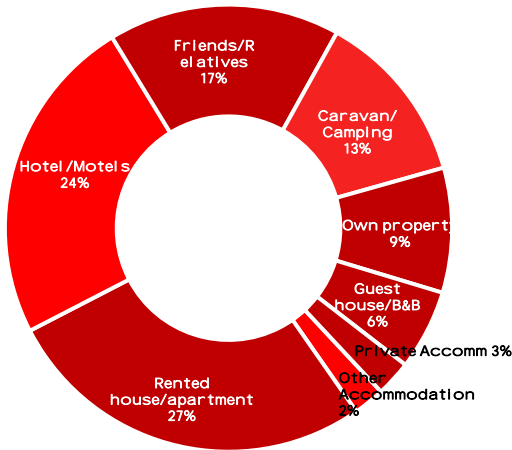
KANGAROO ISLAND

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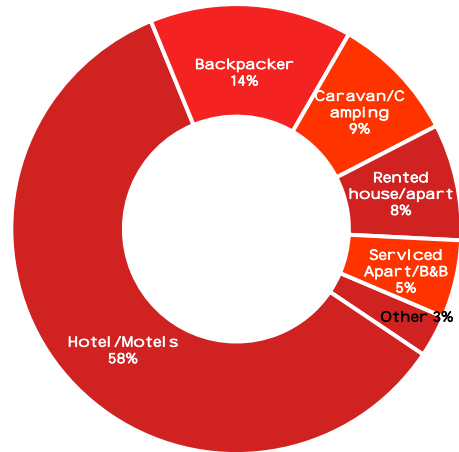


VISITOR USE OF ACCOMMODATION

Accommodation used in Kangaroo Island for Domestic Visitors



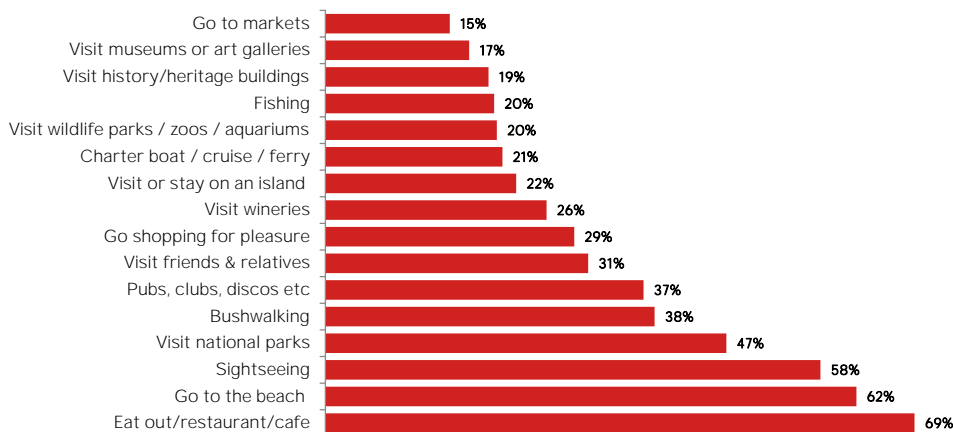
Accommodation used in Kangaroo Island for International Visitors



- 41 per cent of Domestic Visitor nights on Kangaroo Island are spent either with Friends or Relatives or in Hotels and similar accommodation.
- Domestically, renting a house is also popular with 27 per cent of visitors preferring this accommodation.
- The other major accommodation choice for Domestic Visitors on Kangaroos Island are Holiday Houses and Camping.
- 58 per cent of International Visitors stay in Hotels and similar accommodation.
- 14 per cent of International Visitors to Kangaroo Island are Backpackers.

VISITOR ACTIVITIES

Domestic Visitor Activities in Kangaroo Island



- The most popular activity when visiting Kangaroo Island is to Eat out or Dine at a restaurant and or cafe.
- Other popular activities include Going to the Beach, Bushwalking, Visiting the National Parks and Sightseeing.

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REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

- In 2013-14, the tourism industry contributed an estimated \$134 million to the Kangaroo Island regional economy (60.8 per cent of gross regional product) and directly employed approximately 500 people (22.9 per cent of regional employment).

In 2013-14, the tourism activity in Kangaroo Island generated:

- \$68 million and \$212 million in direct and indirect tourism output, and \$279 million in total tourism output;
- \$33 million and \$87 million in direct and indirect tourism GVA, and \$120 million in total tourism GVA;
- \$36 million and \$98 million in direct and indirect tourism GRP and \$134 million in total tourism GRP; and
- 500 jobs for people employed directly by the tourism industry, 900 indirect jobs and a total employment impact of 1,300 people.

REGIONAL INSIGHTS

- Word is getting out about a great secret.

Interstate

- Positive word of mouth and winning awards.
- Highly appealing; the destination itself is described as spectacular.
- Interactive nature experiences and pristine beaches along with fine produce and being not crowded generate very high appeal.

Intrastate

- Very high appeal.
- Australian wildlife icons in abundance and living in their natural environment, including the beach.
- Local produce also endorsed.
- Expense of getting there is a known barrier.

International

- Kangaroo Island has one of the strongest appeals.
- Island wildlife dominates the appealing elements of Kangaroo Island.
- Local produce and rock formations in the top five appealing elements.

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 9 priority markets, with a sample of 500 per market.

Prepared by the South Australian Tourism Commission, December 2016

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 Annual Average results for the 3 years from December 2014 to December 2016
Consumer Demand Product Testing - 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. 86 35455001