

# KANGAROO ISLAND

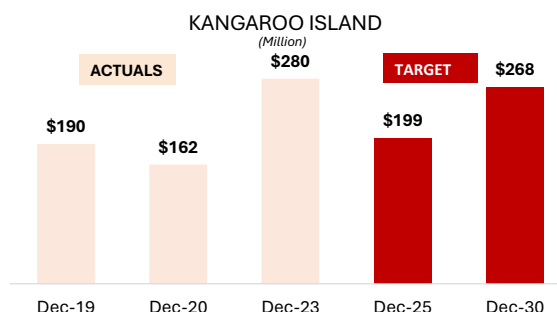
## REGIONAL PROFILE



### OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2023

- Currently, Kangaroo Island contributes \$280 million to the year end December 2023 South Australian expenditure of \$10.1 billion.
- Kangaroo Island has achieved 100 per cent of their 2025 target of \$199 million and their 2030 target of \$268 million.



### ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2023

ORIGIN						
	Intrastate	Interstate	Total Domestic	International	Total	
<b>Overnight Visits</b>	116,000	63,000	<b>179,000</b>	26,000	<b>205,000</b>	
% of visits	57%	31%	<b>87%</b>	13%	<b>100%</b>	
<b>Share of Regional SA</b>	2%	2%	<b>2%</b>	6%	<b>3%</b>	
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<b>% Across Regional SA</b>	60%	35%	<b>94%</b>	6%	<b>100%</b>	
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>						
<b>Nights</b>	435,000	348,000	<b>784,000</b>	87,000	<b>870,000</b>	
% of nights	50%	40%	<b>90%</b>	10%	<b>100%</b>	
<b>Share of Regional SA</b>	3%	3%	<b>3%</b>	1%	<b>2%</b>	
<hr/>						
<b>% Across Regional SA</b>	33%	31%	<b>65%</b>	35%	<b>100%</b>	
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>						
<b>Average Length of Stay</b>	3.8	5.5	<b>4.4</b>	3.3	<b>4.2</b>	
<b>ALOS Regional SA</b>	2.8	4.6	<b>3.5</b>	32.0	<b>5.1</b>	
<hr/>						
<b>Total Expenditure</b>					<b>\$279,000,000</b>	
<b>Overnight Expenditure</b>	\$100,000,000	\$140,000,000	<b>\$240,000,000</b>	\$31,000,000	<b>\$271,000,000</b>	
<b>Day Trip Expenditure</b>					<b>\$8,000,000</b>	
<hr/>						
<b>Domestic Day Trips</b>					<b>66,000</b>	

- Kangaroo Island saw 205,000 overnight visitors for the year end December 2023.
- 57 per cent of overnight visitors were from intrastate, 31 per cent from interstate and 13 per cent from overseas.
- The 116,000 intrastate overnight visitors stayed 435,000 nights with an average length of stay of 3.8 nights.
- There were 63,000 interstate overnight visitors who stayed 348,000 nights with an average length of stay of 5.5 nights
- The region saw 26,000 international visitors with an average length of stay of 3.3 nights and spend of \$31 million.
- 66,000 day trips were taken to and within Kangaroo Island for the year with spend of \$8 million.

ALOS = Average Length of Stay

# KANGAROO ISLAND

## REGIONAL PROFILE



### PURPOSE

	Holiday	VFR	Business	Other	Total
<b>Overnight Visits</b>	149,000	20,000	31,000	5,000	<b>205,000</b>
% of visits	73%	10%	15%	2%	<b>100%</b>
<b>Share of Regional SA</b>	5%	1%	2%	1%	<b>3%</b>
<b>% Across all regions</b>	41%	33%	21%	6%	<b>100%</b>

<b>Nights</b>	628,000	51,000	177,000	15,000	<b>870,000</b>
% of nights	72%	6%	20%	2%	<b>100%</b>
<b>Share of Regional SA</b>	5%	0%	3%	0%	<b>2%</b>
<b>% Across all regions</b>	31%	39%	15%	14%	<b>100%</b>

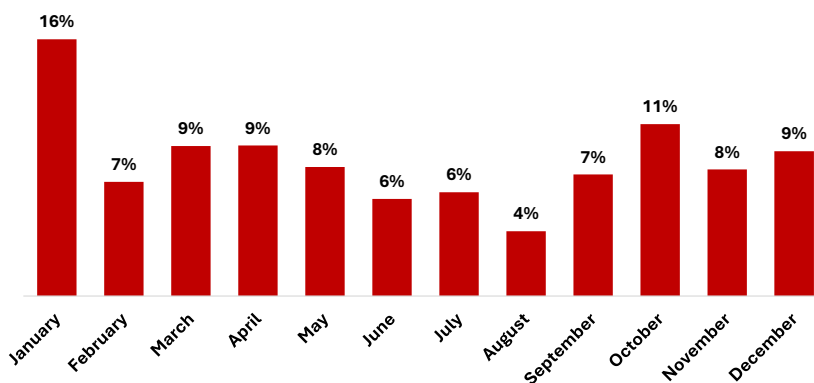
<b>Average Length of Stay</b>	4.2	2.6	5.7	3.0	<b>4.2</b>
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Expenditure					
<b>Annual Expenditure</b>	\$221,000,000	\$15,000,000	\$30,000,000	\$6,000,000	<b>\$271,000,000</b>
<b>Expenditure 2019</b>	\$147,000,000	\$13,000,000	\$9,000,000	\$5,000,000	<b>\$174,000,000</b>
<b>Av spend per night</b>	\$352	\$294	\$169	\$400	\$311
<b>Av spend per night Reg SA</b>	\$224	\$109	\$155	\$297	\$181
<b>Share of Regional SA</b>	3%	5%	1.3%	2%	<b>3%</b>

- 83 per cent of overnight visitors to Kangaroo Island are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$352 per night compared to VFR visitors who spend \$294 per night.
- Leisure overnight visitors spent \$236 million for the year, making up 87 per cent of all overnight expenditure.
- 11 per cent of spend is allocated to business visitation.

### SEASONALITY

#### SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO KANGAROO ISLAND



- National Visitor Survey data shows us that in 2023 January and October are the strongest months for visitation on Kangaroo Island.
- January is the busiest month for the year with the summer school holidays.
- April and October also strong with school holidays, Easter and the October long weekend.

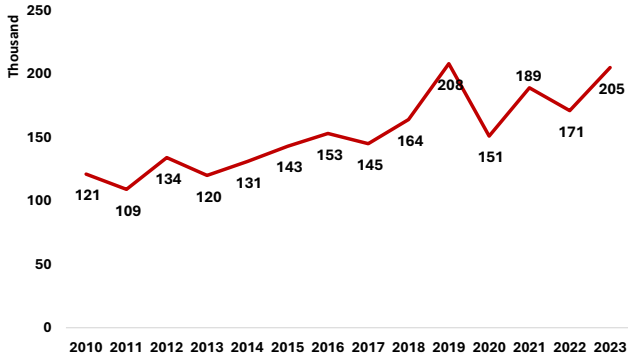
# KANGAROO ISLAND

## REGIONAL PROFILE

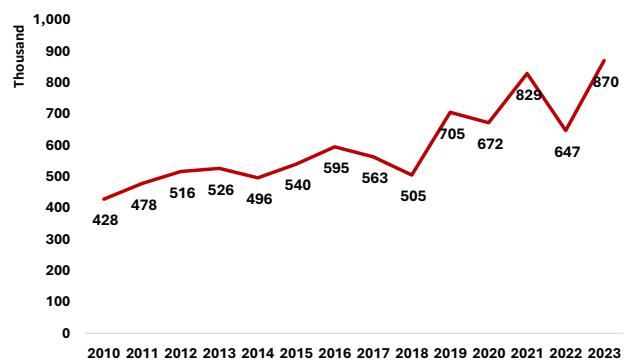


### TOTAL OVERNIGHT VISITATION 2010 - 2022

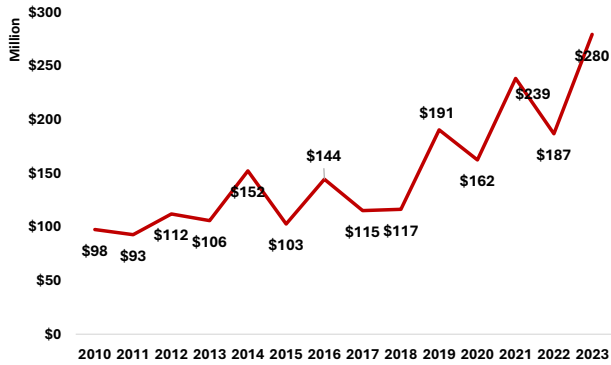
**VISITORS KANGAROO ISLAND 2010 - 2023 - International and Domestic**



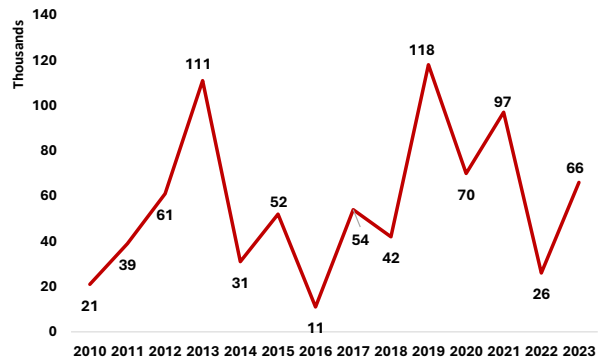
**NIGHTS KANGAROO ISLAND 2010 - 2023 - International and Domestic**



**TOTAL EXPENDITURE KANGAROO ISLAND 2010 - 2023 - International and Domestic**



**DAY TRIPS KANGAROO ISLAND 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. 81% of day trips are within the Island and 19% are from Adelaide.

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%
<b>South Australia</b>	<b>7,835,000</b>	<b>-9%</b>	<b>\$10,140,000,000</b>	<b>25%</b>





### KANGAROO ISLAND TOURISM LISTINGS

Category	# Listings
Accommodation	115
Attraction	101
Tour	39
Food & Drink	34
Event	13
Hire	7
Journey	7
Destination Information	5
General Services	5
Transport	3
Information Services	2
<b>Grand Total</b>	<b>329</b>

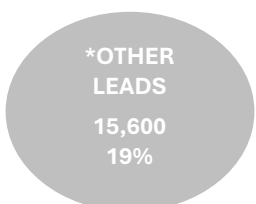
The **Australian Tourism Data Warehouse (ATDW)** is Australia's national platform for digital tourism information. Eligible tourism businesses can create a listing for their accommodation, tour, food and drink establishment, event and more, free of charge. These listings appear on websites such as [southaustralia.com](http://southaustralia.com)

An **ATDW lead** is generated when a user performs one of the following actions when viewing an ATDW product page on [southaustralia.com](http://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 -  
<http://tourism.sa.gov.au/support/atdw>

**KANGAROO ISLAND  
AUSTRALIAN TOURISM DATA WAREHOUSE  
LEADS  
80,000  
YEAR END DECEMBER 2023**



**TOP 5**

- WANDER ON KANGAROO ISLAND
- KANGAROO ISLAND SEAFRONT HOLIDAY PARK
- VIVONNE BAY CAMP GROUND
- SOUTHERN OCEAN LODGE
- STOWAWAY KANGAROO ISLAND

**TOP 5**

- GASTRONOMO THE ENCHANTED FIG TREE
- KANGAROO ISLAND SPIRITS
- SUNSET FOOD AND WINE
- PENNESHAW PUB ZONE
- RESTAURANT & BAR

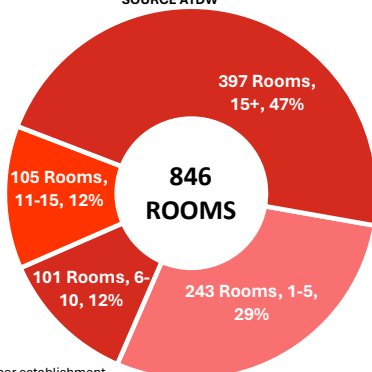
**TOP 5**

- KANGAROO ISLAND SEALINK TOURS AND PACKAGES
- KANGAROO ISLAND OCEAN SAFARI
- LITTLE SAHARA ADVENTURE CENTRE
- KANGAROO ISLAND OUTDOOR ACTION
- PENNESHAW PENGUIN CENTRE

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

### ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

#### ROOMS IN THE KANGAROO ISLAND SOURCE ATDW



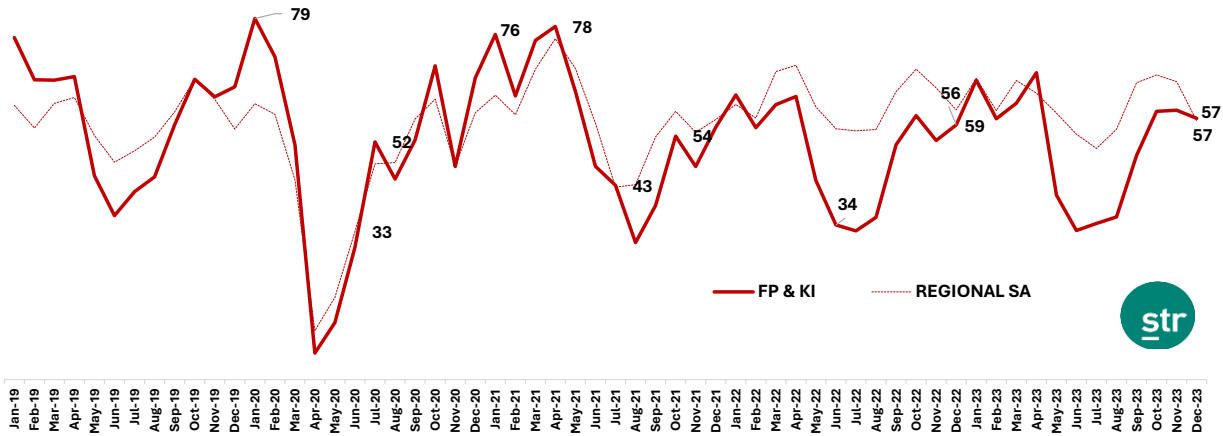
Rooms refers to rooms per establishment

- Currently there are 121 establishments on Kangaroo Island that accommodate guests.
- These 121 establishments account for 846 rooms across the region.
- 47 per cent of rooms fall into establishment with 15 or more rooms.
- 12 per cent of rooms fall into the 6-10 & the 11-15 room establishments.



**ACCOMMODATION STR**

**ACCOMMODATION OCCUPANCY FP & KI**

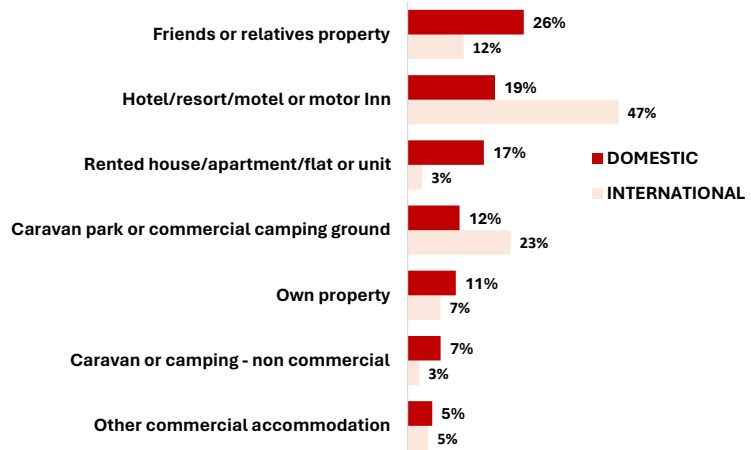


- The FP & KI regions include accommodation data for the Fleurieu Peninsula and Kangaroo Island. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the FP & KI regions was 57 per cent, this fell to 48 per cent in 2020, rose to 56 per cent in 2021 and fell in 2022 to 50 per cent. Currently at year end 2023 it has grown to 52%.

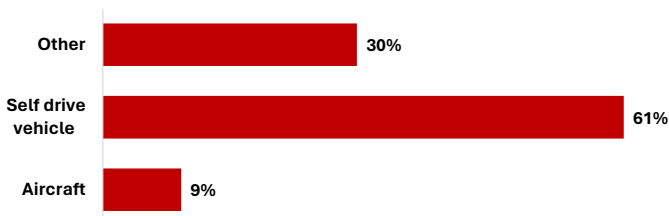
**VISITOR USE OF ACCOMMODATION**

**ACCOMMODATION USED IN KANGAROO ISLAND FOR DOMESTIC AND INTERNATIONAL VISITORS**

- 26 per cent of domestic overnight visitor nights on Kangaroo Island are spent with Friends or Relatives compared to the international average of 12 per cent.
- 19 per cent of domestic and 47 per cent of international visitors stayed in a Hotel/resort/motel or motor inn.
- 19 per cent of domestic visitors and 30 per cent of international visitors to Kangaroo Island stay in a caravan park.



**TRANSPORT**



- The main method of transport used on trips to Kangaroo Island was a self drive vehicle.
- 61 per cent of visitors used this type of transport.
- 9 per cent of people used an aircraft to get to the region.
- The 30 per cent for 'Other' relates to the Ferry across to the island.

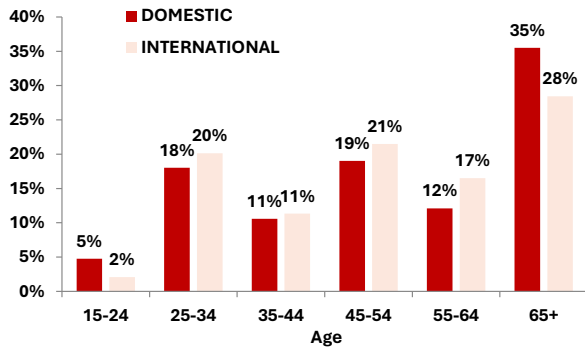
# KANGAROO ISLAND

## REGIONAL PROFILE



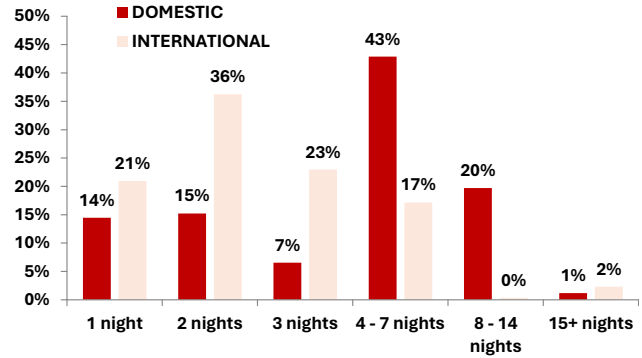
### VISITOR PROFILE

AGE OF VISITORS TO KANGAROO ISLAND



- In the domestic market the 65+ is the strongest age group with 35 per cent of visitors.
- The International market is also strongest for the 65+ age group with 28 per cent of all visits.

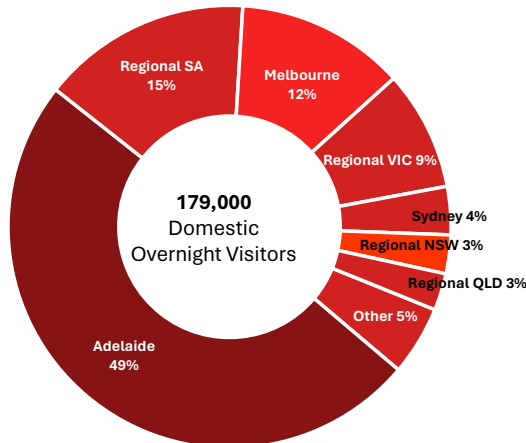
LENGTH OF VISIT TO KANGAROO ISLAND



- 43 per cent of domestic overnight visitors like to stay 4 to 7 nights.
- 57 per cent of international visitors stay 1-2 nights.

### VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO KANGAROO ISLAND

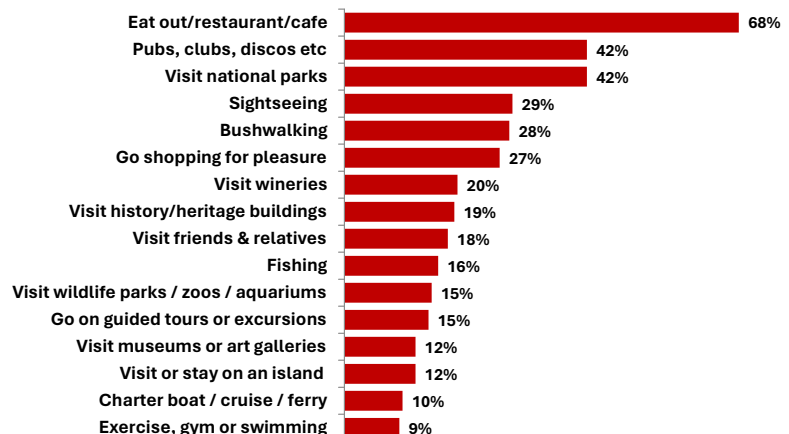


- Victoria at 21 per cent and NSW at 7 per cent are Kangaroo Islands biggest interstate overnight domestic markets.
- Regional South Australia contributes 15 per cent of visitors to Kangaroo Island.
- 49 per cent of visitors come from Adelaide.

### VISITOR ACTIVITIES

- The most popular activity when coming to Kangaroo Island is to eat out at a restaurant or cafe.
- Other popular activities include visiting a friend or relative, bushwalking, visiting national parks, visiting wineries, going to markets and seeing the sights.

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN KANGAROO ISLAND





# KANGAROO ISLAND

## REGIONAL PROFILE



### REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2021-22, the tourism industry contributed an estimated \$210 million to the Kangaroo Island regional economy and directly employed approximately 1,000 people.

#### Employment

- 1,000 jobs for people employed directly by the tourism industry, 300 indirect jobs and a total employment impact of 1,300 people.

#### Gross Value Added (GVA)

- \$68 million and \$42 million in direct and indirect tourism GVA, and \$110 million in total tourism GVA.

#### Gross Regional Product (GRP)

- \$78 million and \$54 million in direct and indirect tourism GRP and \$132 million in total tourism GRP.

#### Tourism Consumption

2021-22	
Tourism products - directly consumed	
• Takeaway and restaurant meals	18%
• Accommodation services	12%
• Long distance passenger transportation	11%
• Shopping (including gifts and souvenirs)	11%
• Fuel (petrol, diesel)	10%
• Actual and imputed rent on dwellings	10%
• Food products	7%
• Alcoholic beverages and other beverages	6%

#### Tourism Employment

2021-22	
Tourism Industries - 1,000 directly employed	
• Air, water and other transport	37%
• Cafes, restaurants and takeaway food services	19%
• Accommodation	14%
• Travel agency and tour operator services	10%
• Retail trade	11%
• Clubs, pubs, taverns and bars	4%
• Cultural services	2%
• Road transport and transport equipment rental	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

- Kangaroo Island is on almost every travellers bucket list. Promotions in recent years and availability of direct flights from interstate has boosted awareness of the region and positioned it as a destination in its own right among interstate travellers more so than ever.
- The major barrier to visiting Kangaroo Island is the perceived cost of getting there and the food and accommodation on the Island. Other barriers include the impact of bushfires in recent years, and concerns about being able to experience the full KI experience all year round. To drive increased visitation and expenditure, we recommend Kangaroo Island:

<b>Make sure everyone knows that KI is open again</b>	Recent bushfires on Kangaroo Island have impacted consideration of travelling to this region. Travellers, particularly interstate travellers, tend to feel as though the Island is still rebuilding, and that there is still damage and the region may not be ready for tourists. It's important to ensure that travellers know that KI is ready and open for business, and reassure travellers that the number, variety and location of attractions are consistent with the experience pre-fires.
<b>Price getting to KI is a major barrier</b>	Price came up across the board as one of the major barriers to visiting Kangaroo Island. Although some accommodation was cheaper than anticipated, the cost to get there was the major impact. For locals, this is the cost to take the car over on the ferry, and for interstate travellers it was more about the cost to get there. Offering packages, particularly in shoulder and off seasons may help shift perceptions of price.
<b>No events captured the interest of travellers. New events may motivate winter visitation</b>	Although there is a great deal of interest in Kangaroo Island, and in the experiences that can be had on the Island (food, drink, wildlife, nature etc.), there was extremely low awareness of events that take place on Kangaroo Island, and low interest in attending the events currently on offer. Unique, winter style event may appeal to adult travellers provided positioned as a luxury, rare event that showcases the unique attributes of Kangaroo Island – creating a sense of urgency.
<b>Region appeals to...</b>	<ul style="list-style-type: none"> <li>– Relaxation seekers</li> <li>– Nature lovers</li> <li>– Beach seekers</li> </ul>

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 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