

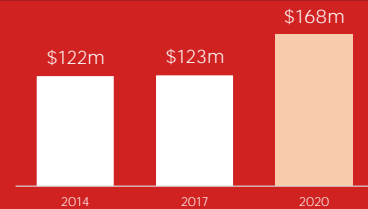
KANGAROO ISLAND

Regional Profile



OVERVIEW

- Currently Kangaroo Island contributes \$123 million to the December 2017 South Australian expenditure of \$6.6 billion.
- The Kangaroo Island has achieved 73 per cent of their \$168 million 2020 target.



Annual Visitor Summary December 2015 - December 2017

ORIGIN

	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	70,000	36,000	106,000	43,000	148,000
%	66%	34%	72%	28%	100%
Nights	273,000	148,000	421,000	148,000	570,000
%	65%	35%	74%	26%	100%
Average Length of Stay	4	4	4	3	4
Domestic Day Trips					38,000
International Day Trips*					40,000

PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	125,000	11,000	12,000	1,000	148,000
%	84%	7%	8%	1%	100%
Nights	425,000	66,000	44,000	34,000	570,000
%	75%	12%	8%	6%	100%
Average Length of Stay	3	6	4	34	4
Expenditure					
Average Annual Expenditure					123,000,000

- 72 per cent of visitors are Domestic visitors and 28 per cent International visitors.
- Domestically 66 per cent of visitors are from within the state compared to 34 per cent from Interstate.
- 91 per cent of visitors to Kangaroo Island are Leisure visitors (Holiday + VFR).
- On average 38,000 day trips are taken to Kangaroo Island each year, with an extra 40,000 international day trips.

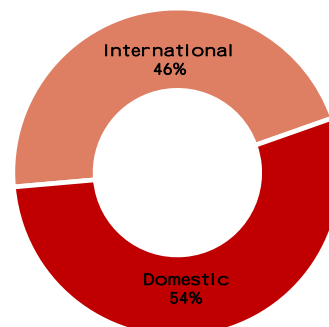
*International visitors counted as taking 'International Day Trips' are also counted at the location of their overnight stay. Therefore, while they are visible as 'feet on the ground' they cannot be added to the international visitor total for the region.

KANGAROO ISLAND TOURISM LISTINGS

Category	Kangaroo Island
Accommodation	136
Attraction	22
Destination Information	1
Event	12
Food and Drink	19
General Services	1
Hire	2
Tour	19
Transport	1
Grand Total	213

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

KANGAROO ISLAND MEDIA COVERAGE



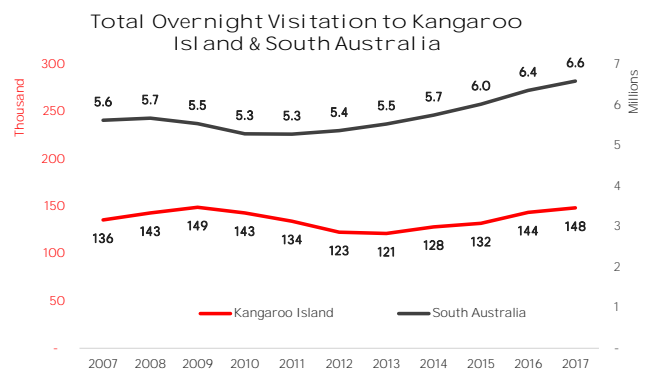
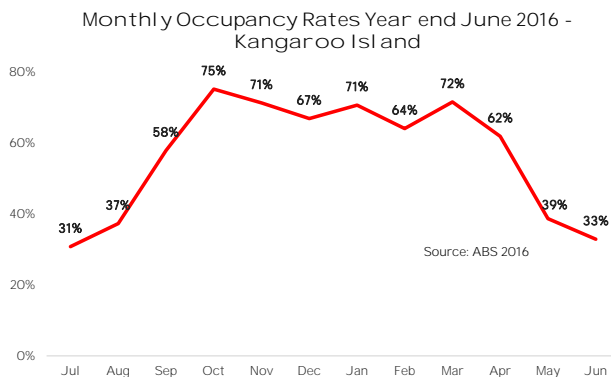
Source: Item Count - SATC Internal - 2017



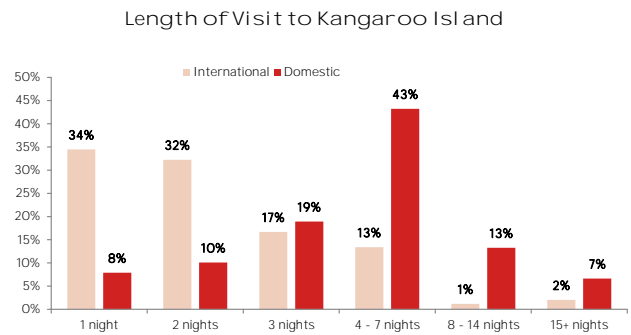
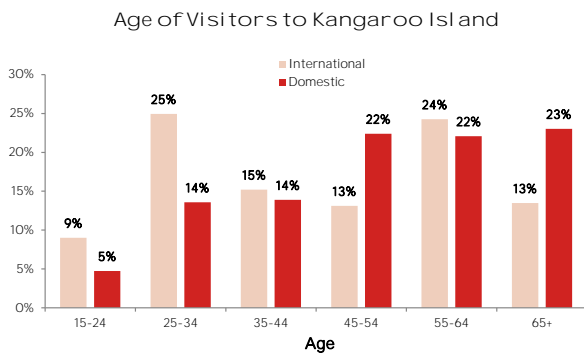
ACCOMMODATION SUPPLY

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 establishments 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.



VISITOR PROFILE



- International visitors peak in the 25-34 age group at 25 per cent. For Domestic visitors this age group only contributes 14 per cent of visitors.
- Domestically, Kangaroo Island peaks in the 65+ age group at 23 per cent.

- 66 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.



DOMESTIC VISITOR PROFILE

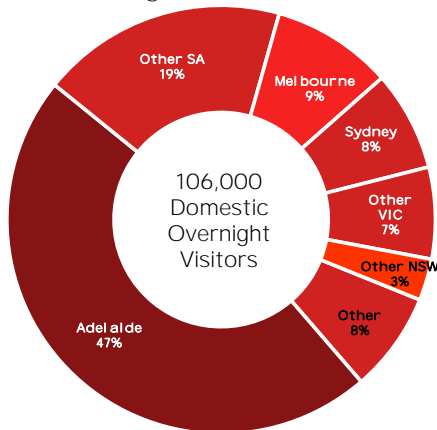
Purpose	Holiday	VFR	Other	Total
Visits	84,000	10,000	12,000	106,000
%	79%	9%	11%	100%
Nights	316,000	60,000	44,000	421,000
%	75%	14%	10%	100%
ALOS	4	6	4	4

INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	42,000	1,000	np	43,000
%	98%	2%	np	100%
Nights	108,000	5,000	35,000	148,000
%	73%	3%	24%	100%
ALOS	3	5	np	3

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Kangaroo Island



Origin of International Visitors to Kangaroo Island

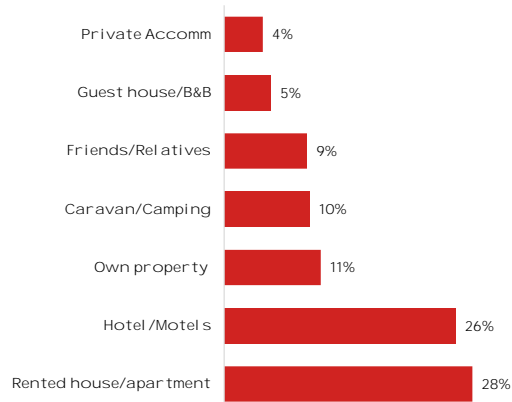


- Victoria, at 16 per cent and New South Wales at 11 per cent are Kangaroo Island's biggest Interstate markets. Visitors from Victoria have increased with direct flights from Melbourne to Kangaroo Island.
- Regional South Australia contributes 19 per cent of visitors to Kangaroo Island and Adelaide visitors contribute 47 per cent.
- Internationally Europeans contribute 62 per cent of the visits to the Kangaroo Island, with Germany 12 per cent and Italy contributing 11 per cent .
- The United States of America and China contribute 14 and 9 per cent of visitors to Kangaroo Island.
- Kangaroo Island has a higher proportion of international visitors than anywhere else in the South Australia.

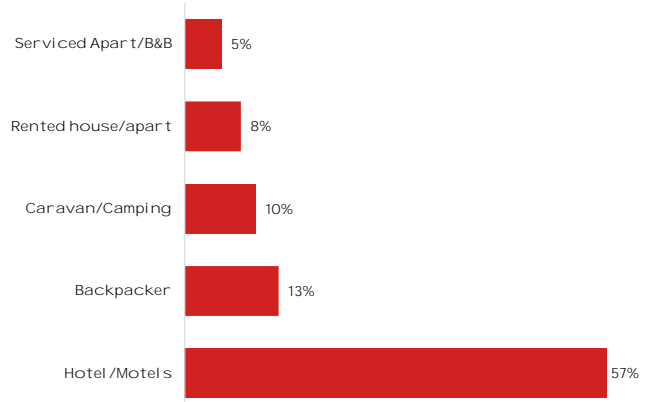


VISITOR USE OF ACCOMMODATION

Accommodation used in Kangaroo Island for Domestic Visitors



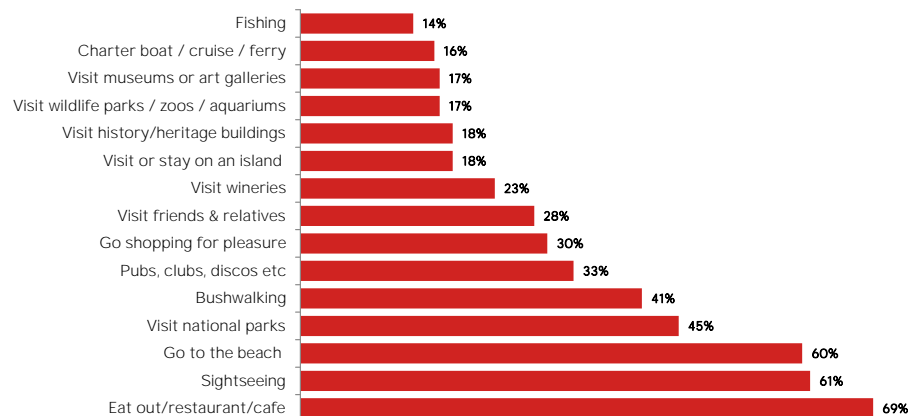
Accommodation used in Kangaroo Island for International Visitors



- 35 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 28 per cent of visitors preferring this accommodation.
- The other major accommodation choice for Domestic visitors on Kangaroo Island are Holiday Houses and Camping.
- 57 per cent of International visitors stay in Hotels and similar accommodation.
- 13 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.



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2016-17, the tourism industry contributed an estimated \$102 million to the Kangaroo Island regional economy and directly employed approximately 800 people.

Employment

- 800 jobs for people employed directly by the tourism industry, 300 indirect jobs and a total employment impact of 1,100 people.

Tourism output

- \$106 million and \$79 million in direct and indirect tourism output, and \$186 million in total tourism output.

Gross Value Added (GVA)

- \$57 million and \$34 million in direct and indirect tourism GVA, and \$91 million in total tourism GVA.

Gross Regional Product (GRP)

- \$63 million and \$39 million in direct and indirect tourism GRP and \$102 million in total tourism GRP.

REGIONAL INSIGHTS

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.

Regional Visitor Strategy Priorities

- As an established and thriving visitor region, the focus for Kangaroo Island is to exceed visitor expectations, deliver on the Island's brand proposition, grow visitor yield, dispersal and manage the sustainable development of tourism on the island.
- With highly seasonal visitation, growing visits during the quieter months of May-August continues to be important.

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.

Prepared by the South Australian Tourism Commission, December 2017

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 2015 to December 2017.
Consumer Demand Product Testing Phase 1 - 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. 8635455001
Consumer Demand Product Testing Phase 1 - BDA Marketing

Reference for further insights into Kangaroo Island please see the attached link to the KI TOMM <https://www.tourkangarooisland.com.au/sites/tki5/media/banner/pdf/ki-tomm-residents-survey-2016-17-final.pdf>