

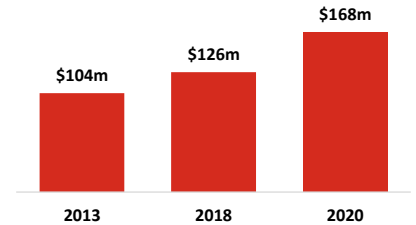
KANGAROO ISLAND

REGIONAL PROFILE



OVERVIEW

- Currently Kangaroo Island contributes \$126 million to the December 2018 South Australian expenditure of \$6.8 billion.
- The Kangaroo Island has achieved 75 per cent of their \$168 million 2020 target.



Annual Visitor Summary December 2016 - December 2018

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	66,000	45,000	110,000	44,000	154,000
%	60%	40%	71%	29%	100%
Nights	245,000	184,000	429,000	125,000	555,000
%	57%	43%	77%	23%	100%
Average Length of Stay	4	4	4	3	4
Domestic Day Trips					35,000
International Day Trips*					38,000

PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	125,000	9,000	19,000	1,000	154,000
%	81%	6%	12%	1%	100%
Nights	427,000	62,000	56,000	10,000	555,000
%	77%	11%	10%	2%	100%
Average Length of Stay	3	7	3	10	4
Expenditure					
Average Annual Expenditure				\$	126,000,000

- 71 per cent of visitors are Domestic visitors and 29 per cent International visitors.
- Domestically 60 per cent of visitors are from within the state compared to 40 per cent from Interstate.
- 87 per cent of visitors to Kangaroo Island are Leisure visitors (Holiday + VFR).
- On average 35,000 day trips are taken to Kangaroo Island each year, with an extra 38,000 international day trips.

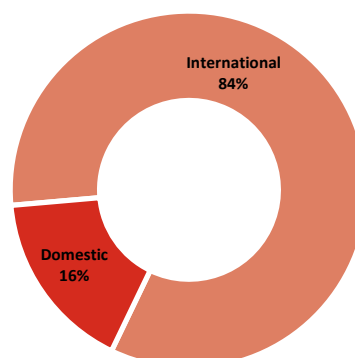
* International visitors counted as taking "International Day Trips" are also counted at the location of their overnight stay. Therefore, while they are visible as "feet on the ground" they cannot be added to the international visitor total for the region.

KANGAROO ISLAND TOURISM LISTINGS

Category	Kangaroo Island
Accommodation	50
Tour	17
Attraction	16
Food and Drink	13
Event	5
Hire	3
Transport	2
General Services	2
Grand Total	108

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

KANGAROO ISLAND MEDIA COVERAGE



Source: Advertising Space Rate - 2018

KANGAROO ISLAND

REGIONAL PROFILE



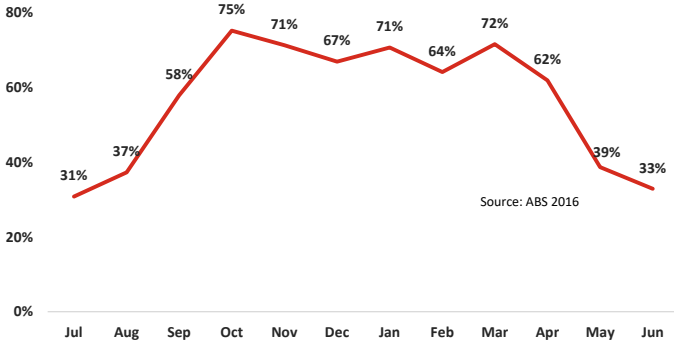
ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms

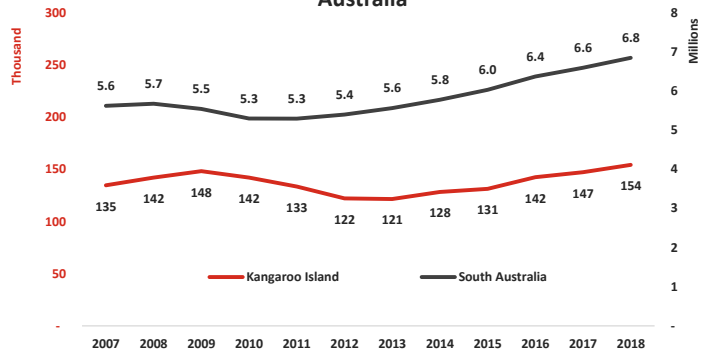
Establishments	8
Rooms	261
Occupancy	57%
Takings	\$16,800,000

- 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.

Monthly Occupancy Rates Year end June 2016 - Kangaroo Island

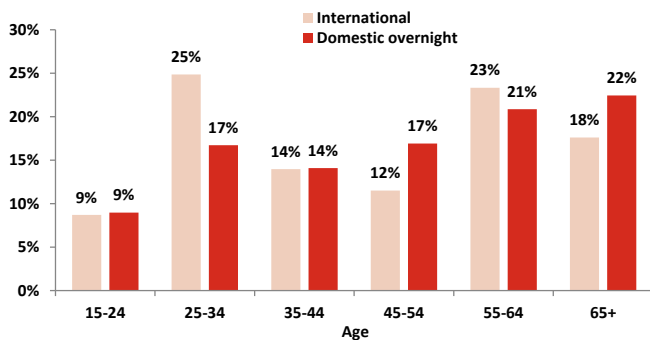


Total Overnight Visitation to Kangaroo Island & South Australia

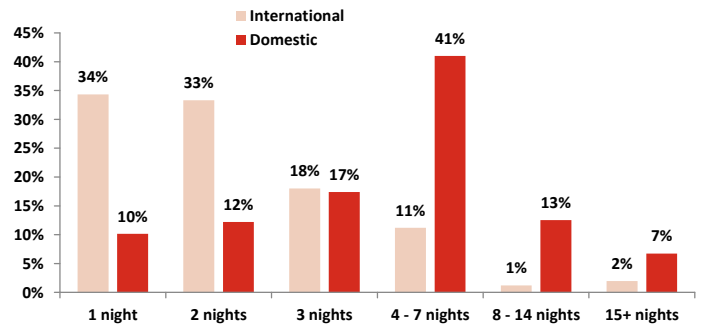


VISITOR PROFILE

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 only contributes 17 per cent of visitors.
- Domestically, Kangaroo Island peaks in the 65+ age group at 22 per cent.

- 67 per cent of International visitors prefer to stay 1 or 2 night on Kangaroo Island.
- 41 per cent of Domestic visitors prefer to stay 4 - 7 nights.

KANGAROO ISLAND

REGIONAL PROFILE



DOMESTIC VISITOR PROFILE

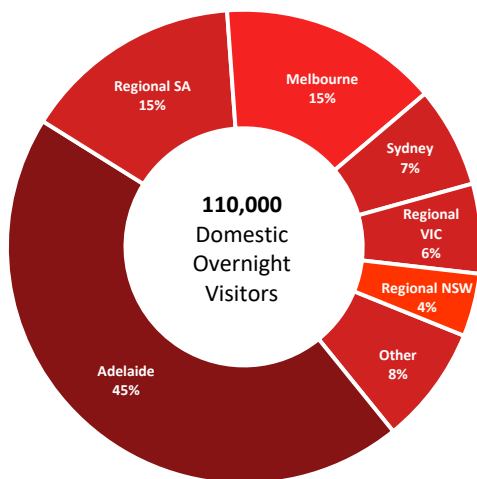
Purpose	Holiday	VFR	Other	Total
Visits	83,000	9,000	19,000	110,000
%	75%	8%	17%	100%
Nights	317,000	57,000	56,000	429,000
%	74%	13%	13%	100%
ALOS	4	6	3	4

INTERNATIONAL VISITOR PROFILE

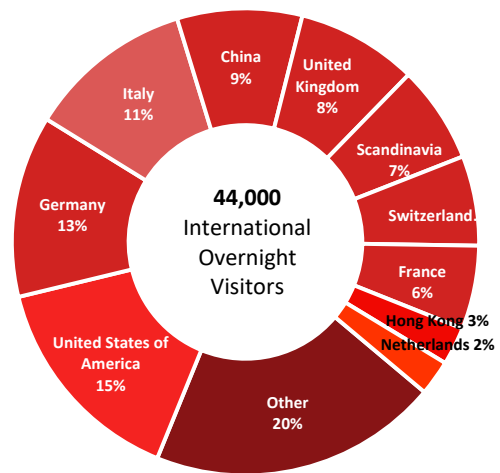
Purpose	Holiday	VFR	Other	Total
Visits	42,000	1,000	np	44,000
%	95%	2%	np	100%
Nights	110,000	6,000	10,000	125,000
%	88%	5%	8%	100%
ALOS	3	6	np	3

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Kangaroo Island



Origin of International Visitors to Kangaroo Island



- Victoria, at 21 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 15 per cent of visitors to Kangaroo Island and Adelaide visitors contribute 45 per cent.
- Internationally Europeans contribute 60 per cent of the visits to the Kangaroo Island, with Germany 13 per cent and Italy contributing 11 per cent .
- The United States of America and China contribute 15 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.

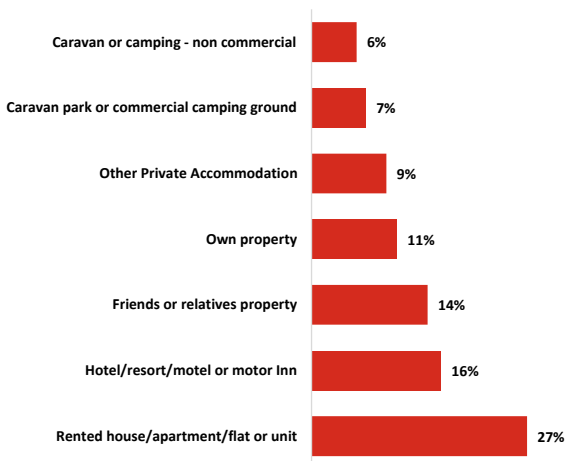
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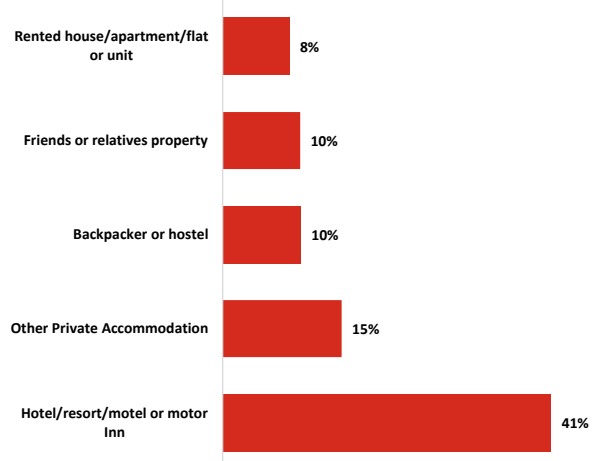


VISITOR USE OF ACCOMMODATION

Accommodation used in Kangaroo Island for Domestic Visitors



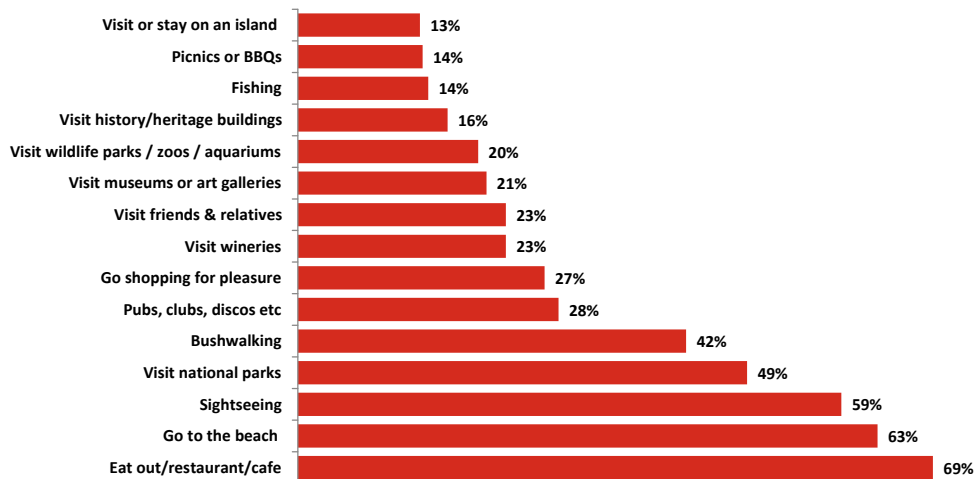
Accommodation used in Kangaroo Island for International Visitors



- 30 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.
- 51 per cent of International visitors stay either with Friends or Relatives or in Hotels and similar accommodation.
- 10 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.

KANGAROO ISLAND

REGIONAL PROFILE



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 2018

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 2016 to December 2018.
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. 865455001
Consumer Demand Product Testing Phase 1 - BDA Marketing

SOUTHERN OCEAN LODGE, KANGAROO ISLAND

TOURISM CHAMPIONS CASE STUDY

ABOUT SOUTHERN OCEAN LODGE

Established in 2008, Southern Ocean Lodge is a multi-award winning luxury travel experience on Kangaroo Island. The property is managed by John Hird and Alison Heath and consists of 21 luxury suites, spa facilities, a fine dining restaurant and bar as well as a breathtaking lounge area overlooking the great Southern Ocean, known as the 'Great Room'.

Southern Ocean Lodge offers guests a range of signature and bespoke experiences and is proud to generate a large percentage of its own energy from natural resources; the property relies on 225 solar panels and 1.5 million litres of rain water collected from all roof surfaces.

BUSINESS GROWTH

Over the past 10 years, Southern Ocean Lodge has welcomed more than 37,000 guests from across the world. Occupancy has grown from 61 per cent to 78-82 per cent, with almost 200 guests returning for ten or more stays.

Approximately 55 per cent of visitors are international and the remaining 45 per cent of visitors are made up of local travellers and people travelling from interstate.

Southern Ocean Lodge is the flagship of the Baillie Lodges luxury lodge portfolio and now employs 54 staff members in peak season and 47 staff members across the year.

CHALLENGES

Operating on an island is a strength for Southern Ocean Lodge but it can also be challenging from a logistics perspective. To help overcome this challenge the business strives to source as much produce as possible from local suppliers on Kangaroo Island.

THE FUTURE

Looking to the future, the business will continue to deliver service excellence and further grow occupancy rates.

COMMUNITY IMPACT

Southern Ocean Lodge works closely with many local businesses and tourism operators to source local produce, arrange bespoke Island experiences and organise fuel for their vehicles. Their walk-in cellar features an exclusively South Australian wine selection, many of which are from Kangaroo Island, as well as a custom-made gin, baillies 9, blended specially by KI Spirits.

"The most rewarding part of my job is working together with a wonderful family of staff and being able to deliver to our guests such an amazing product."

Service excellence at Southern Ocean Lodge is understated luxury, friendliness of staff, total attention to detail and delivering a wholesome sustainable product for the guest."

JOHN HIRD

Lodge Manager, Southern Ocean Lodge

The business has also recently offered a food and hospitality traineeship to a local resident on the Island.

SOUTH AUSTRALIAN TOURISM COMMISSION COLLABORATION

The business works very closely with the South Australian Tourism Commission and has hosted many trade familiarisation trips. Southern Ocean Lodge also recently featured in SATC's five-day Rewards Wonder campaign.

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South Australian
Tourism Commission

SOUTHERN OCEAN LODGE, KANGAROO ISLAND

TOURISM CHAMPIONS CASE STUDY

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