

# KANGAROO ISLAND

## REGIONAL PROFILE

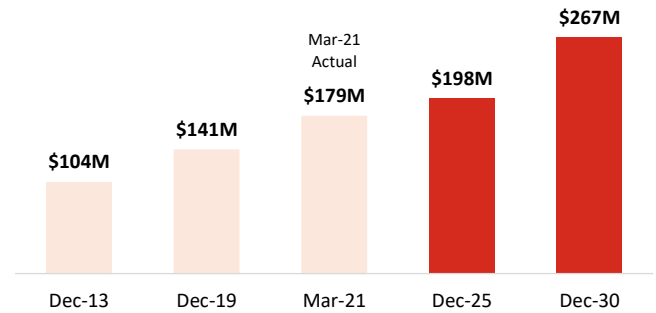


### OVERVIEW

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

### KANGAROO ISLAND

- Currently Kangaroo Island contributes \$179 million to the year end March 2021 South Australian expenditure of \$4.4 billion.
- The Kangaroo Island has achieved 90 per cent of their 2025 target of \$198 million and 67 per cent of their 2030 target of \$267 million.



### ANNUAL VISITOR SUMMARY YEAR END MARCH 2021

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
<b>Overnight Visits</b>	130,000	24,000	<b>154,000</b>	-	<b>154,000</b>
%	84%	16%	<b>100%</b>	0%	<b>100%</b>
% Across all regions	90%	10%	<b>100%</b>	0%	<b>100%</b>
Share of Regional SA	3%	6%	<b>4%</b>	0%	<b>3.7%</b>
<b>Nights</b>	561,000	131,000	<b>692,000</b>	-	<b>692,000</b>
%	81%	19%	<b>100%</b>	0%	<b>100%</b>
% Across all regions	82%	18%	<b>100%</b>	0%	<b>100%</b>
Share of Regional SA	5%	5%	<b>5%</b>	0%	<b>5%</b>
<b>ALOS</b>	4.3	5.5	<b>4.5</b>	-	<b>4.5</b>
<b>ALOS Regional SA</b>	3.2	6.0	<b>3.5</b>	-	<b>3.5</b>
<b>Total Expenditure</b>					<b>\$179,000,000</b>
Overnight Expenditure	\$145,000,000	\$25,000,000	<b>\$171,000,000</b>	\$0	<b>\$171,000,000</b>
Day Trip Expenditure					<b>\$8,000,000</b>
<b>Domestic Day Trips</b>					<b>105,000</b>

- Kangaroo Island saw 154,000 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 130,000 intrastate overnight visitors stayed 561,000 nights with an average length of stay of 4.3 nights.
- There were 24,000 interstate overnight visitors who stayed 131,000 nights with an average length of stay of 5.5 nights
- There have been no international arrivals with the borders closed.
- 105,000 day trips were taken to Kangaroo Island for the year with spend of \$8 million.

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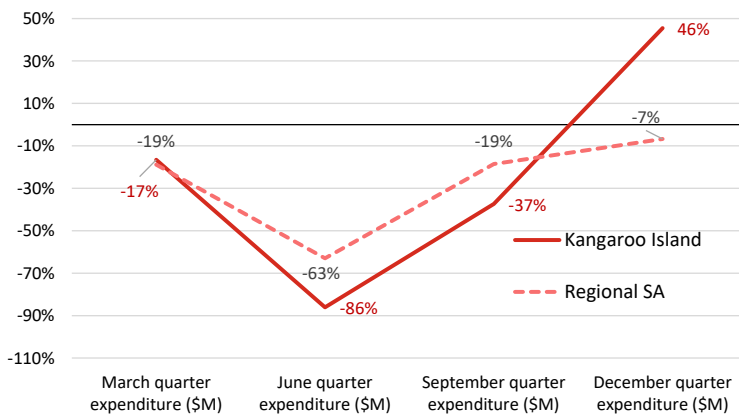
### PURPOSE

	Holiday	VFR	Business	Other	Total
<b>Overnight Visits</b>	123,000	13,000	13,000	5,000	<b>154,000</b>
%	80%	8%	8%	3%	<b>100%</b>
% Across all regions	56%	22%	18%	5%	<b>100%</b>
Share of Regional SA	3%	6%	4%	0%	<b>4%</b>
<b>Nights</b>	580,000	47,000	51,000	14,000	<b>692,000</b>
%	84%	7%	7%	2%	<b>100%</b>
% Across all regions	58%	18%	20%	3%	<b>100%</b>
Share of Regional SA	7%	2%	2%	3%	<b>5%</b>
<b>Average Length of Stay</b>	4.7	3.6	3.9	2.8	<b>4.5</b>
<b>Expenditure</b>					
Annual Expenditure	\$137,000,000	\$4,000,000	\$18,000,000	\$11,000,000	<b>\$171,000,000</b>
Av spend per night	\$236	\$85	\$353	\$786	<b>\$247</b>
Av spend per night Regional SA	\$213	\$126	\$132	\$511	<b>\$191</b>
Share of Regional SA	8%	1%	4%	5%	<b>6%</b>

- 88 per cent of overnight visitors to the Kangaroo Island are leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$236 per night compared to VFR visitors who spend \$85 per night.
- Holiday visitors spent \$137 million for the year and Leisure Visitors \$4 million, making up 82 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 Kangaroo Island saw expenditure fall 86 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 37 per cent on 2019.
- The December 2020 quarter was above the pre COVID levels, up 46 per cent compared to the December quarter in 2019.

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### KANGAROO ISLAND TOURISM LISTINGS

Category	# Listings
ACCOMMODATION	132
ATTRACTION	98
RESTAURANT	39
TOUR	35
EVENT	8
DESTINATION INFORMATION	8
HIRE	7
JOURNEY	6
GENERAL SERVICE	5
INFORMATION	2
TRANSPORT	2
<b>Grand Total</b>	<b>342</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](https://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>

**KANGAROO ISLAND  
 AUSTRALIAN TOURISM DATA WAREHOUSE  
 LEADS  
 113,000  
 YEAR END MARCH 2021**

**ACCOMMODATION  
 LEADS  
 67,000  
 59%**

**FOOD & DRINK  
 LEADS  
 17,000  
 15%**

**TOUR  
 LEADS  
 13,000  
 12%**

**\*OTHER  
 LEADS  
 15,000  
 14%**

#### TOP 5

- SEA DRAGON LODGE VILLAS
- HAMILTON DUNE
- STOWAWAY KANGAROO ISLAND
- WANDERING SOULS AUSTRALIA
- CLIFF HOUSE LIFETIME PRIVATE RETREATS

#### TOP 5

- GASTRONOMO THE ENCHANTED FIG TREE
- THE OYSTER FARM SHOP KANGAROO ISLAND SHELLFISH
- KANGAROO ISLAND SPIRITS
- PENNESHAW HOTEL
- KANGAROO ISLAND BREWERY

#### TOP 5

- KANGAROO ISLAND SEALINK
- KANGAROO ISLAND OUTDOOR ACTION
- KANGAROO ISLAND MARINE ADVENTURES
- KANGAROO ISLAND OCEAN SAFARI
- PENNESHAW PENGUIN CENTRE

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

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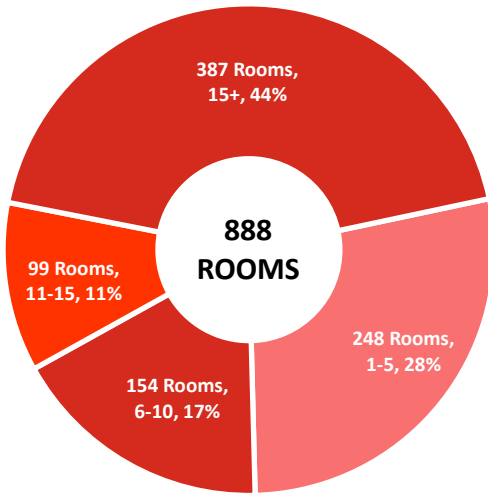
## REGIONAL PROFILE



### ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

#### ROOMS ON KANGAROO ISLAND

SOURCE ATDW



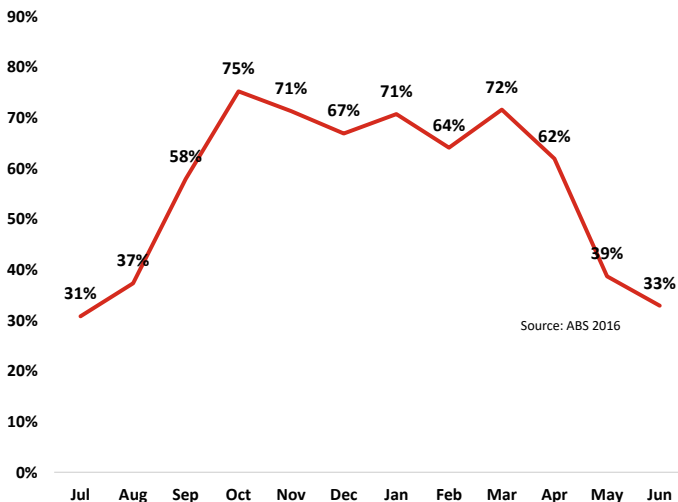
- Currently there are 131 establishments in Kangaroo Island that accommodate guests.
- These 131 establishments account for 888 rooms ranging from 1 room to over 50.
- 44 per cent of rooms fall into establishment with 15 or more rooms.
- 28 per cent of rooms fall into the 1-5 room establishments.

#### ACCOMMODATION SUPPLY

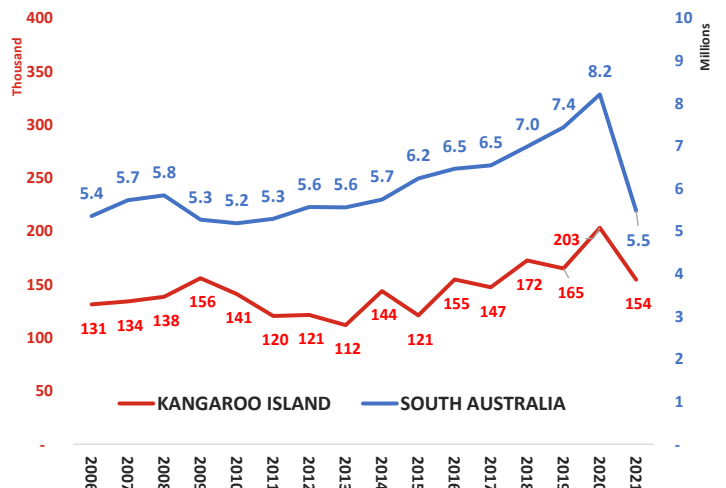
Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	8
Rooms	261
Occupancy	57%
Takings	\$16,800,000

- 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



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.

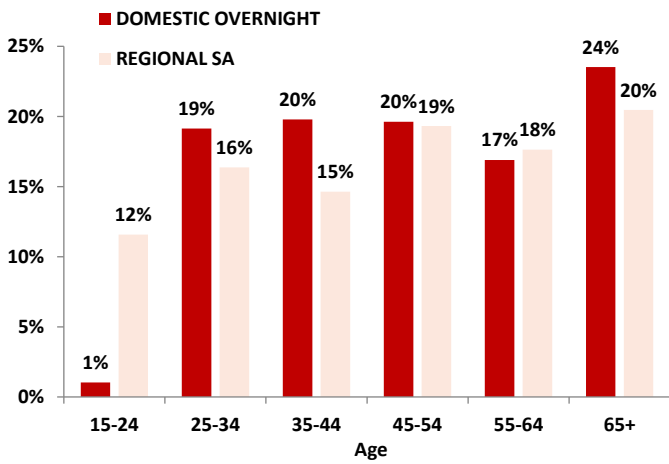
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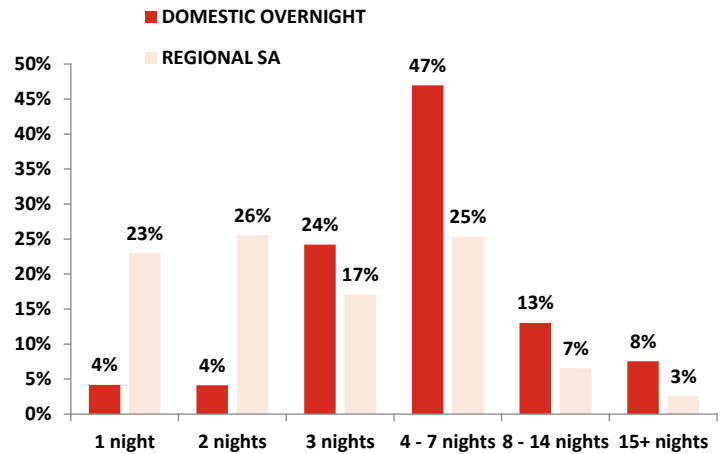
### VISITOR PROFILE

AGE OF VISITORS TO KANGAROO ISLAND



- Domestically there is a peak in 65+ age group at 24 per cent above the regional average of 20 per cent.
- Prior to COVID-19 the 35-44 age group accounted for 12 per cent of visitors.

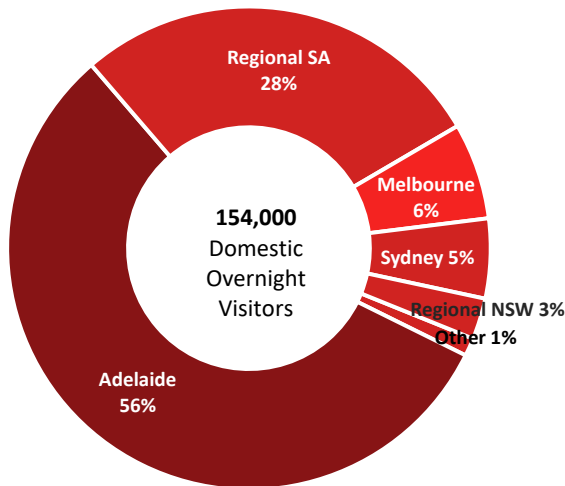
LENGTH OF VISIT TO KANGAROO ISLAND



- 47 per cent of visitors prefer to stay between 4 and 7 nights, well above the regional average. This compares to pre COVID-19 where 36 per cent of visitors stayed 4 to 7 nights.
- 24 per cent of domestic visitors like to stay 3 nights.

### VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO KANGAROO ISLAND



- Melbourne and New South Wales each accounted for 4 per cent and 8 per cent of visitors to Kangaroo Island. Pre COVID Victoria, at 24 per cent and New South Wales at 12 per cent, were Kangaroo Island biggest Interstate markets.
- Regional South Australia contributes 28 per cent of visitors to Kangaroo Island.
- 56 per cent of visitors come from Adelaide, however prior to COVID this was 47 per cent.
- Pre COVID-19 Kangaroo Island had a higher proportion of international visitors than anywhere else in the South Australia.

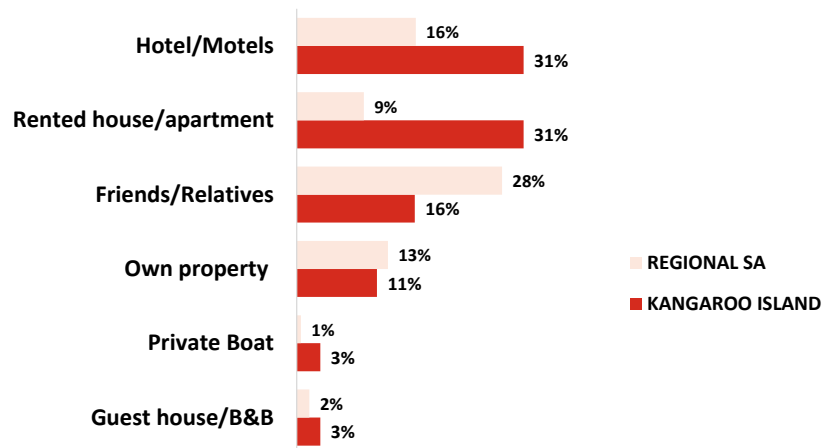
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### VISITOR USE OF ACCOMMODATION

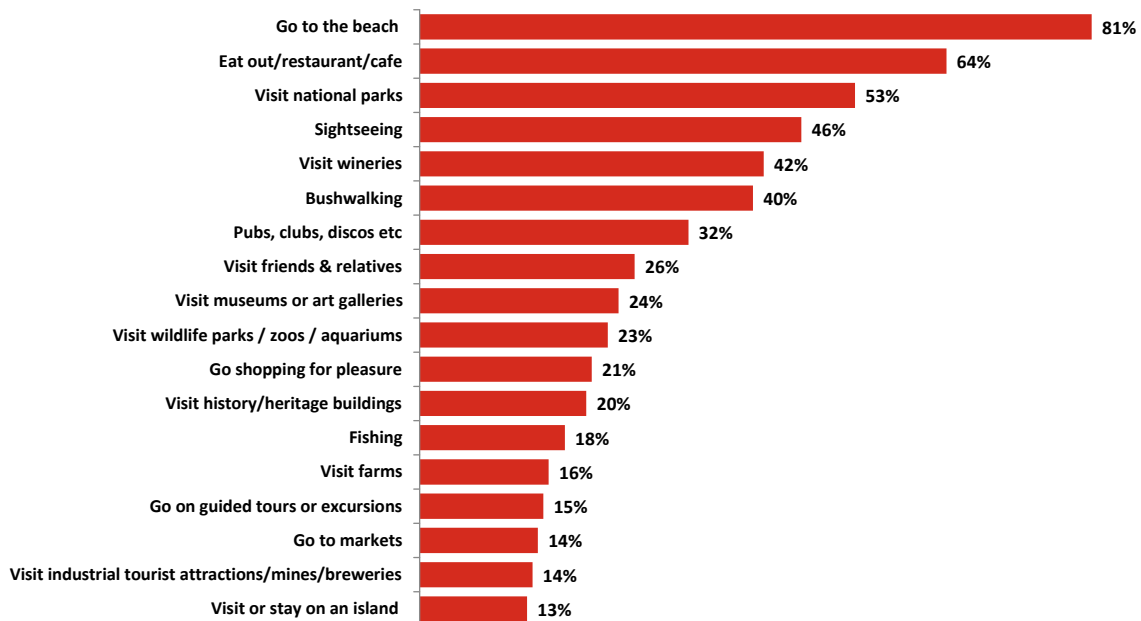
#### ACCOMMODATION USED IN KANGAROO ISLAND FOR DOMESTIC VISITORS



- 31 per cent of domestic visitor nights are spent in Hotels/Motels, above the regional average of 16 per cent.
- 31 per cent of people rent and house or apartment on the island, above the regional average of 9 per cent.
- Pre COVID, 19 per cent of visitor nights were spent caravan or camping. This has fallen to 3 per cent in the latest year.

### VISITOR ACTIVITIES

#### DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN KANGAROO ISLAND



- The most popular activities when coming to Kangaroo Island is to go to the beach.
- Other popular activities include eating out, visiting national parks, sightseeing, visiting wineries, bush walking, visiting friends and relatives and visiting museums and art galleries.

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### REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2019-20, the tourism industry contributed an estimated \$191 million to the Kangaroo Island regional economy and directly employed approximately 1,100 people.

#### Employment

- 1,100 jobs for people employed directly by the tourism industry, 300 indirect jobs and a total employment impact of 1,400 people.

#### Gross Value Added (GVA)

- \$67 million and \$38 million in direct and indirect tourism GVA, and \$105 million in total tourism GVA.

#### Gross Regional Product (GRP)

- \$73 million and \$49 million in direct and indirect tourism GRP and \$122 million in total tourism GRP.

#### Tourism Consumption

2019–20

*Tourism products* - directly consumed

- 17% Long distance passenger transportation
- 13% Takeaway and restaurant meals
- 11% Shopping (including gifts and souvenirs)
- 10% Accommodation services
- 9% Travel agency and tour operator services
- 8% Education services
- 8% Fuel (petrol, diesel)
- 6% Food products

#### Tourism Employment

2019–20

*Tourism Industries* - 1,100 directly employed

- 33% - 358 - Air, water and other transport
- 15% - 160 - Travel agency and tour operator services
- 12% - 129 - Cafes, restaurants and takeaway food services
- 10% - 105 - Accommodation
- 9% - 100 - Retail trade
- 8% - 84 - Education and training

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2020

### REGIONAL INSIGHTS

#### Interstate

- 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 with Island wildlife dominating the appeal 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.

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