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# Visitor Exit Survey 2023/24

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# Addressing the TOMM Indicators

At the core of TOMM is a practical set of indicators that monitor the status of tourism on Kangaroo Island. A review of indicators was completed in the 2015/16 financial year to improve the monitoring of the impact of tourism on Kangaroo Island. The indicators that relate to the visitor experience have been measured through the annual Visitor Exit Survey since 2002.

This document outlines the findings of the 2023/24 Visitor Exit Survey (VES).

# Summary of TOMM Indicators

## Summary of Economic Indicators

Optimal Conditions	Ref	Indicators	Acceptable Range	Wave 22 (23/24)	
Tourism optimises economic benefits for Kangaroo Island	EC1d	Annual average number of nights stayed	4-7 nights	4.3 nights	✓
	EC1e	Proportion of visitors that would recommend Kangaroo Island to others as a holiday destination	90% - 100%	96%	✓
	EC1f	Average annual total expenditure per visit	5% - 10%↑	\$845.67 [2.1% increase]	✗
	EC1g	Annual number of visitors to Kangaroo Island	0% - 20%*↑	-10%	✗
Tourism operators excel in their business professionalism	EC2c	Proportion of visitors that are very satisfied with the level of customer service they receive	65% - 100%	72%	✓
	EC2d	Proportion of customers that are highly satisfied with the professionalism of tourism operators	65% - 100%	68%	✓
	EC2e	The number of compliments and complaints received from visitors	↑ in positive comments ↓ in negative comments	↓ in positive comments ≈ in negative comments	✗
Island attracts Kangaroo its high yield target markets	EC3c	Proportion of visitors whose average spend per night exceeds \$200	40% - 60%	53%	✓

## Summary of Experiential Indicators

Optimal Conditions	Ref	Indicators	Acceptable Range	Wave 22 (23/24)	
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	EX1a	Proportion of visitors that believe they experienced an authentic wilderness holiday	80% - 100%	Question removed in 2013/14	
	EX1b	Proportion of visitors that viewed wildlife in the natural environment	90% - 100%	93%	✓
	EX1c	Proportion of visitors that experienced scenic variety without crowds	90% - 100%	96%	✓
	EX1d	Proportion of visitors that experienced cultural heritage and history of settlement	70% - 100%	71%	✓
	EX1e	Proportion of visitors that experienced spectacular scenery and coastal landscapes	90% - 100%	99%	✓
	EX1f	Proportion of visitors that experienced areas of untouched natural beauty	90% - 100%	94%	✓
	EX1g	Proportion of visitors that experienced farming and rural landscapes	90% - 100%	89%	✓

Optimal Conditions	Ref	Indicators	Acceptable Range	Wave 22 (23/24)	
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	EX1h	Proportion of visitors that experienced local Kangaroo Island produce	80% - 100%	86%	✓
	EX1i	Proportion of visitors that believe Kangaroo Island offers one of Australia's top three nature & wildlife experiences	70% - 100%	75%	✓
	EX1j	Proportion of visitors that believe Kangaroo Island has a friendly local community	80% - 100%	94%	✓
	EX1k	Proportion of visitors who agree that Kangaroo Island is a wild and welcoming destination, that will surprise and amaze you, relax your mind, refresh your spirit and make you feel totally alive. It provides an opportunity to view and to discover all the scenic variety of mainland Australia	70% - 100%	89%	✓
	EX1l	Proportion of visitors that state that their experience matched or exceeded the expectation set by marketing materials	80% - 100%	97%	✓
	EX1m	Proportion of visitors very satisfied with their overall experience on Kangaroo Island	90% - 100%	85%	✗

Optimal Conditions	Ref	Indicators	Acceptable Range	Wave 22 (23/24)	
The majority of visitors leave the island highly satisfied with their experience	EX2a	Proportion of visitors who were very satisfied with seeing native wildlife in its natural environment	70% - 100%	71%	✓
	EX2b	Proportion of visitors who were very satisfied with their opportunity to learn more about the Island's natural environment	70% - 100%	59%	✗
	EX2c	Proportion of visitors who were very satisfied with their opportunity to learn more about the Island's history	70% - 100%	50%	✗
	Ex2d	Proportion of visitors who were very satisfied with the range, quality and availability of activities available	70% - 100%	Range: 59% Quality: 60% Avail: 55%	✗
	EX2e	Proportion of visitors who were very satisfied with the quality of accommodation	70% - 100%	62%	✗
	EX2f	Proportion of visitors who were very satisfied with the range, quality and availability of Kangaroo Island produce	70% - 100%	Range: 59% Quality: 64% Avail: 56%	✗
	EX2g	Proportion of visitors that are very satisfied with the level of customer service they receive	80% - 100%	72%	✗
	EX2h	Proportion of visitors that are very satisfied with the quality of public tourism infrastructure (toilets, roads, campgrounds, picnic areas and signage) provided on Kangaroo Island	60% - 100%	Picnic: 54% Sign: 44% Toilets: 53% Road sign: 45% Camp: 52% Road: 27%	✗
	EX2i	Proportion of visitors that would recommend Kangaroo Island as a holiday destination to others as a result of their experience	90% - 100%	96%	✓
	EX2j	Proportion of repeat visitation	30% - 50%	36%	✓

## Summary of Environmental Indicators

Optimal Conditions	Ref	Indicators	Acceptable Range	Wave 22 (23/24)	
Visitor activity has minimal negative impacts on the natural environment	EN2b	Proportion of visitations to natural areas occurring on managed sites	70% - 100%	73%	✓
	EN2e	Proportion of visitors aware of quarantine regulations prior to arriving on Kangaroo Island	70% - 100%	73%	✓

# Introduction

## Background

Tourism is a key contributor to economic growth and development on Kangaroo Island, next to agriculture, with both boosting productivity and providing a source of stable employment for residents.

TOMM (the Tourism Optimisation Management Model) was developed to monitor the effect of tourism from a variety of perspectives (including environmental, economic, socio-cultural and visitor experience) in the interests of both residents and visitors. The model is a community-based initiative responsible for monitoring and managing the long-term sustainability of tourism on the island. The initiative is overseen by a Management Committee with support and representatives from the community, industry and Government agencies.

At the core of TOMM is a practical set of indicators that monitor tourism on Kangaroo Island. These indicators measure changes in the economic, environmental, socio-cultural and experiential environments. A review of indicators was completed in the 2015/16 financial year.

The Visitor Exit Survey (VES) is a critical source of information with respect to measuring and monitoring the TOMM indicators each year as well as collecting a raft of other information about tourism on the Island. Trends demonstrated through these indicators are provided to agencies in order to facilitate strategic planning for Kangaroo Island.

Colmar Brunton, which merged into the Kantar Public brand during 2020 and then became Verian in 2024, has carried out research with Kangaroo Island visitors as part of the TOMM monitor for the past sixteen financial years. The following report details the findings from the TOMM Visitor Exit Survey conducted throughout the 2023/24 period. Where possible, tracking has been performed on questions that have been kept comparable across the previous waves of the Visitor Exit Survey.



# Research objectives

## Research aim

The main aim of this research project is to monitor the effects of tourism on Kangaroo Island.

## Specific research objectives

The specific objectives of the Visitor Exit Survey are to assess the following:

- Profiles of origin and seasonality of visitors to the island;
- Travel behaviour and experiences on the island;
- Reasons for visiting Kangaroo Island;
- Expectations and important factors influencing the decision to visit Kangaroo Island;
- Valued aspects and visitor satisfaction with those aspects;
- Overall satisfaction with Kangaroo Island experience;
- Transportation;
- Expenditure on Kangaroo Island;
- Awareness of Kangaroo Island's quarantine regulations; and
- Demographic profile of visitors.

## Research methodology

The methodology for the latest waves of the project has remained consistent, with data collected via a self-completion survey, which visitors collected at entry and exit points to the Island (airport and ferry departure points) from July 2023 to June 2024. In addition to the self-complete surveys available at entry and exit points, the survey was available to complete online and was offered in five languages other than English. This online version of the survey was also available on iPad's at the entry and exit points to the island and available for completion on one's own device via QR code to scan.

From approximately midway through the 2013/14 data collection period surveys were also distributed on tour buses on the island in addition to the entry and exit points (airport and ferry departure points). The aim of this was to increase data collection from day trip visitors.

In 23/24, a tailored version of the survey was developed to capture relevant feedback from cruise ship visitors to Kangaroo Island.

Similar to the VES 22/23, the response to the 23/24 wave of the VES was strong, with n=3397 surveys completed. This reflects the continued work that the TOMM Management Committee has put into promoting the VES across the various touch points. Not surprisingly, the majority of responses were received via the online version of the survey (n=2891, 87%), which highlights appetite for digital completion.

A prize incentive of \$500 worth of local Kangaroo Island produce was employed to increase respondent participation. On receipt of all completed questionnaires, the Verian team edited, coded and entered the data. Questionnaires that had a number of questions incomplete were ignored. Analysis consisted predominantly of frequencies, cross tabulations and general tables.

## Weighting

It was recognised from previous reports that there are significant differences between those visitors reaching the Island by air and ferry, as well as between bus tour visitors and non-bus-tour visitors. Data has therefore been weighted based on visitor population figures for air, sea, and tour bus departures.

The total number of returned surveys in 23/24 that have been included in analysis is n=3397.

Weighting is the procedure to correct the distributions in the sample data to approximate those of the population from which it is drawn. This is partly a matter of expansion and partly a matter of correction or adjustment for both non-response and non-coverage. It serves the purpose of providing data that represents the population rather than the sample.

The total population figures have not been provided to Verian. Instead, the Kangaroo Island Council was provided with a file that automatically calculates weights based on population data that is filled in. The Council filled in the commercially sensitive information and provided Verian with the resulting weights. The population figures are not provided to Verian or included in this report due to the commercial sensitivity of this information. Unless otherwise specified, all analysis has been based on weighted data.

## Questionnaire design

The questionnaire has remained unchanged since 2017/18, though in 2019 'sea' options to arrive/depart the island were further distinguished with 'ferry' and 'cruise ships'. Results have been split in the 23/24 version of the report where relevant.

## Restructuring & reanalysis of previous wave data

The reader should be aware that before analysis was conducted for the survey data for the 2004/2005 year, the TOMM committee expressed their desire to restructure previous data in accordance with each financial year. The board requested this to allow for more accurate trending and tracking information to be obtained. In response to this request, the previous wave's data (2001 and 2002) was restructured to fit into financial years.

## Confidence intervals

Overall findings from the 23/24 sample of  $n=3397$  can be reported within a  $\pm 1.7\%$  margin of error ('n' in statistics refers to the size of the sample, i.e., the number of respondents). This means that if 50% of visitors say they stayed on the island overnight, the 'real' response would fall between 48.3% and 51.7%. The table below illustrates the different margins of error associated with a series of sample sizes. The reader should be mindful of these margins for error when analysing specific questions and trended information within this report. Additionally, figures presented in this report are subjected to rounding errors.

**Table 1: Margin of Error per number of responses**

Number of responses per cell	Margin of Error 95% Confidence
3397	$\pm 1.7\%$
2000	$\pm 2.2\%$
1500	$\pm 2.5\%$
1000	$\pm 3.1\%$
500	$\pm 4.4\%$
200	$\pm 6.9\%$

## Data cleaning

In some cases, the data has been cleaned to improve the overall quality of the data. In case of questions which haven't been completed by a respondent, the results for the incomplete question have been removed from the data. This is particularly evident for the expenses data where calculations of total expenses are based on all the questions on the financial subject. Respondents that have left out information might influence the overall result leading to a less accurate overall analysis.

For example, respondent expenditure data has excluded in rare cases where they indicated that they travelled to the Island as part of a travel package yet failed to specify the

Kangaroo Island component of the travel package. In order to make more valid comparisons over time, this data cleaning procedure was applied to not only the 2023/24 wave, but the prior waves as well.

## Statistical significance

Where applicable, statistically significant results ( $p < 0.05$ ) have been reported between the current and previous year (i.e., whether a result is meaningfully higher or lower than the previous year). Also note that a multiple comparison correction has been used in order to reduce the incidence of false positives.

## Limitations of the research

The current methodology employed for the Visitor Exit Survey involves visitors being able to collect or access self-completion questionnaires at exit points from Kangaroo Island. Self-completion questionnaires are cost effective and allow for ample distribution to the sample but often suffer from respondent bias as there is less control over how it is completed.

Trained staff are not present to ensure accurate interpretation of the questions and individuals will often skip over sections resulting in non-response bias while also requiring the questionnaire to be short and simple, potentially leaving out important information. Furthermore, self-completion surveys often suffer from low response rates as the encouragement to complete the survey is often not there. This results in additional respondent bias as certain demographics are more likely to complete self-completion surveys than others (e.g., females).

Whilst the data in the research was weighted to account for differentiation of ferry, air, and tour bus sample sizes from the actual figures, the findings must be considered with regard to the overall reasonably low response rate. Differences analysed to be statistically significant have not been reported where base sizes are less than 30.

There were significant differences in the methodology used between 00/01, 01/02 and subsequent years. Again, trends should be considered indicative only, as many of the questions or code frames have differed over time, along with the methodology used to collect data. Unlike the methodology currently used, surveys in 00/01 and 01/02 were not distributed throughout the financial year meaning that statistical consistency is lost when trying to compare datasets from current years.

Finally, the reader should also be aware that some tracked results in this report will differ from the results in previous reports. This is primarily due to the restructuring of the datasets into financial years and the adaptation of analysis techniques for consistency across years.

# Key findings

## 2023/24 in a nutshell

The results of Wave 22 of the VES are largely consistent with the 2022/23 survey and continue to show positive outcomes across a range of areas.

Various upgrades have occurred on the island, such as the re-opening of Southern Ocean Lodge, the Wilderness Trail and new toilets across the island. Additionally, in 2023 Stokes Bay was named 'Best Beach in Australia' by Tourism Australia and in 2024 the film 'Kangaroo Island' debuted at the Adelaide Film Festival.

Most notably, a trend of Australians preferring to travel overseas (rather than domestically) was also noted (despite the cost-of-living crisis), which some have termed 'revenge travel'. These results may account for the decrease from interstate and increase from international visitors.

**Economic indicators:** Almost all indicators, except the average annual total expenditure, were found to be within the acceptable range. Findings for EC1g are pending.

The annual average number of nights stayed on the island remained stable at 4.3, as did the proportion of visitors who would recommend Kangaroo Island to others as a holiday destination (96%). Despite not reaching the desired increase, there was an increase nonetheless in the average annual expenditure (+2.1%, from \$828.66 to \$845.67).

Economic indicators relating to whether tourism operators excel in their business professionalism (72%) and the proportion of visitors who were very satisfied with the professionalism of tourism operators (68%) also remained stable. The level of positive comments dropped slightly, however the number of negative comments remained consistent.

Positively, the proportion of visitors whose average spend per night exceeds \$200 increased again from 48% in 22/23 to 53% in the 23/24 wave.

**Experiential indicators:** The indicators under '**Kangaroo Island delivers authentic and credible experiences consistent with its positioning**' are within the acceptable range, with the exception of EX1m '**Proportion of visitors very satisfied with their overall experience on Kangaroo Island**' (86%) and Ex1g '**Proportion of visitors that experienced farming and rural landscapes**' (89%). While not in the acceptable range, these result is consistent with previous years. Repeat visitation has decreased again (38% to 36%) but remains within the acceptable range and continues to be higher than earlier years (e.g. 2018/19 was 31%).

Regarding indicators under '**the majority of visitors leave the island highly satisfied with their experience**', while close, many are outside of the acceptable range. However, the improvements made in 22/23 continue to be observed across these measures in the 23/24 wave. Of note, EX2a (proportion of visitors who were very satisfied with seeing native wildlife in its natural environment) was again in the acceptable range.

# Economic Indicators

## Overview

The 2023/24 results relating to the first economic condition '**Tourism optimises economic benefits for Kangaroo Island**' continued to show the positive outcomes observed in the 2022/23 wave.

Overnight visitation remained similar at 87% (compared to 88% in 22/23) and the average number of nights also remained stable at 4.3 (compared to 4.5 in 22/23 and within the acceptable range). The proportion of visitors recommending Kangaroo Island as a holiday destination also remained high, at 96%, well within the acceptable range.

In the second condition, 'Tourism operators excel in their business professionalism', the proportion of visitors who were very satisfied with the level of customer service they received, and the professionalism of the tourism operators, remained high, once again within the acceptable range.

The number of compliments from visitors remained high at 94%. While the number of negative comments was unchanged at 44%.

Finally, the third economic condition 'Kangaroo Island attracts its high yield target markets' increased slightly from 48% to 53% of surveyed visitors spending more than \$200 per night.

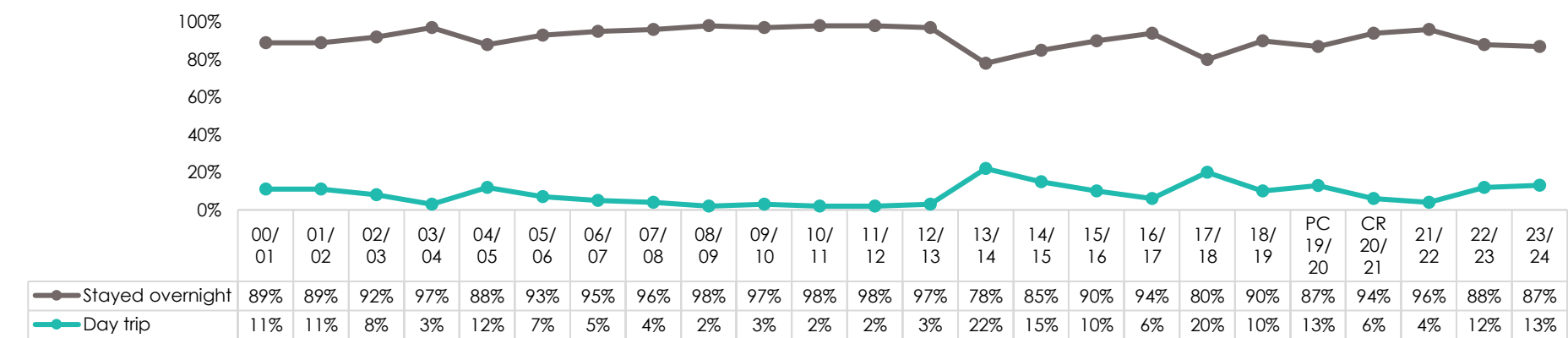
# Annual average number of nights stayed (EC1d)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Tourism optimises economic benefits for Kangaroo Island	The annual average number of nights stayed on Kangaroo Island	4 to 7 nights	✓

## Incidence of overnight stays

Consistent with previous waves, most visitors to KI were overnight visitors (staying at least one night on the island), and the portion of overnight visitors and day trippers has remained relatively stable since 22/23.

Figure 1: Length of stay over time



Q6. Did you stay one or more nights or was it a day trip?  
Base: Visitors responding (23/24 n= 3243)  
Note: Arrows indicate significant change in score from previous year.

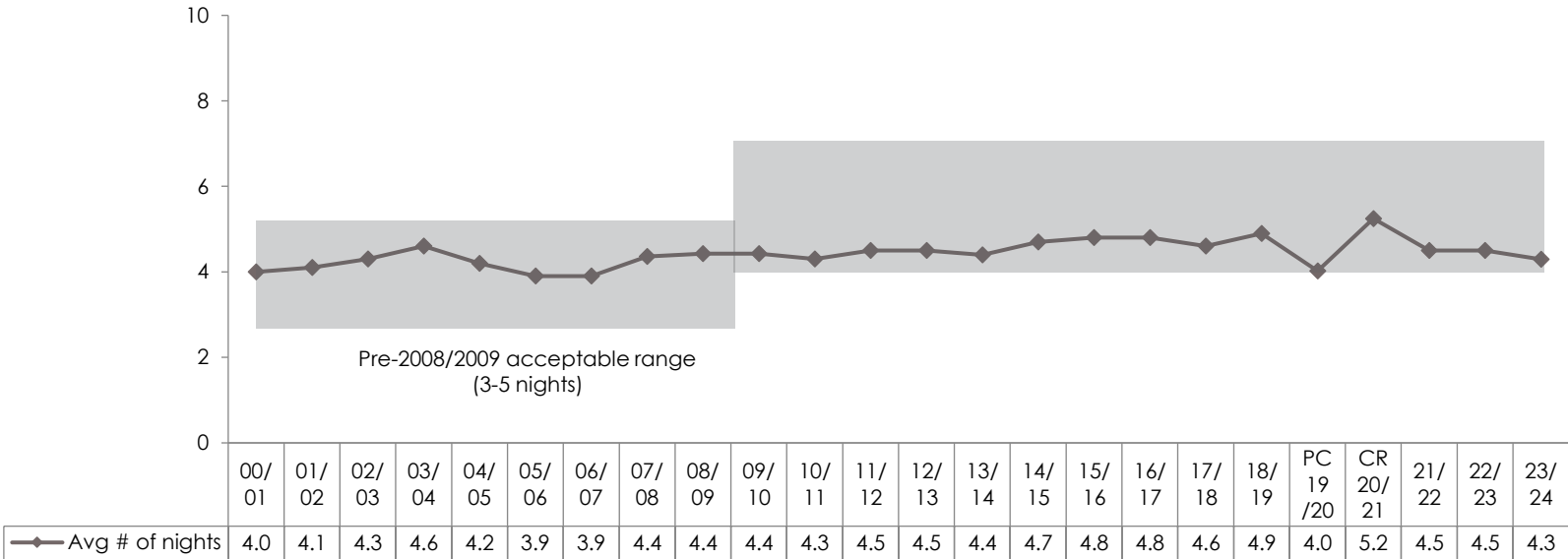
### Significant and notable differences between subgroups:

- Consistencies with observations from the previous wave:
  - More intrastate (93%) and interstate (86%) visitors stayed one or more nights than international visitors (68%); whereas more international (32%) and interstate (14%) visitors only stayed for a day trip compared to intrastate (7%); and
  - More air arrivals (98%) stayed one or more nights than sea arrivals (86%); and
  - More repeat visitors stayed one or more nights compared to first-time visitors (91% vs 85%).
- New in 23/24
  - More winter visitors (19%) were day trippers than those who visited in other seasons (spring 10%, summer 14%, autumn 12%), and

# Length of stay

The average number of nights stayed on Kangaroo Island has dropped slightly since the last wave, though not significant (4.3 vs 4.5). Please note that day trip visitors are excluded from the calculation of the average number of nights.

Figure 2: Average Number of Nights over Time



Q6. Did you stay one or more nights or was it a day trip?  
Base: Visitors responding (23/24 n=2829)

Note: Missing cases excluded. Day visitors excluded from calculation.  
Note: Arrows indicate significant change in score from previous year

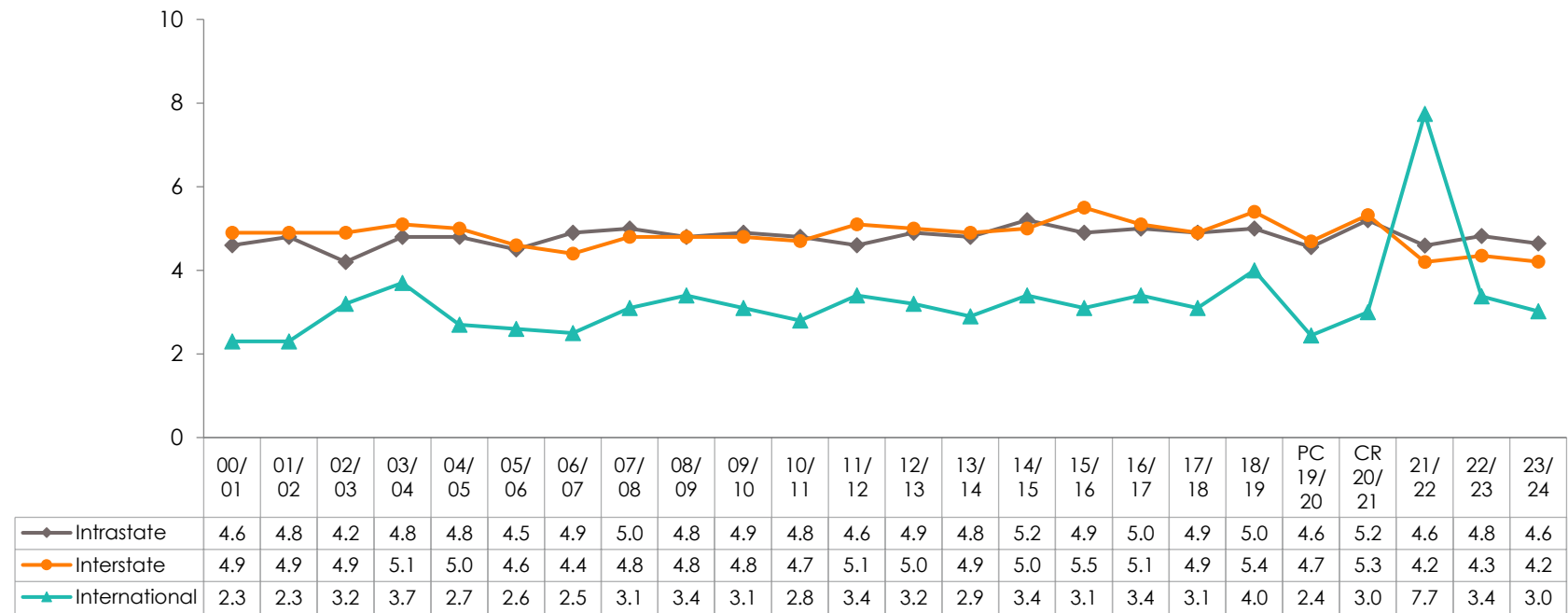
Significant and notable differences between subgroups:

- Consistent with observations from the previous wave:
  - Visitors who spent up to \$200 a night stayed significantly longer (avg. 5.5 nights) than those who spent more than \$200 a night (3.2);
  - Repeat visitors stayed longer (4.9 nights) than first time visitors (3.9); and
  - Intrastate (4.6) and interstate visitors (4.2) stayed significantly longer compared to international visitors (3.0).
- New in 23/24:
  - Summer visitors stayed longer (4.8 nights) than visitors in other seasons (autumn 4.2, winter 3.7, spring 4.0).

# Average number of nights by visitor origin

The length of stay slightly decreased for all visitors since the previous wave (though none are statistically significant).

Figure 3: Average number of nights by visitor origin over time



Q6.

Base:

Did you stay one or more nights or was it a day trip?  
Visitors responding, 23/24 Intrastate n=1115, Interstate n=1433,  
International n=276

Note:

Note:

Missing cases excluded.  
Arrows indicate significant change in score from previous year.

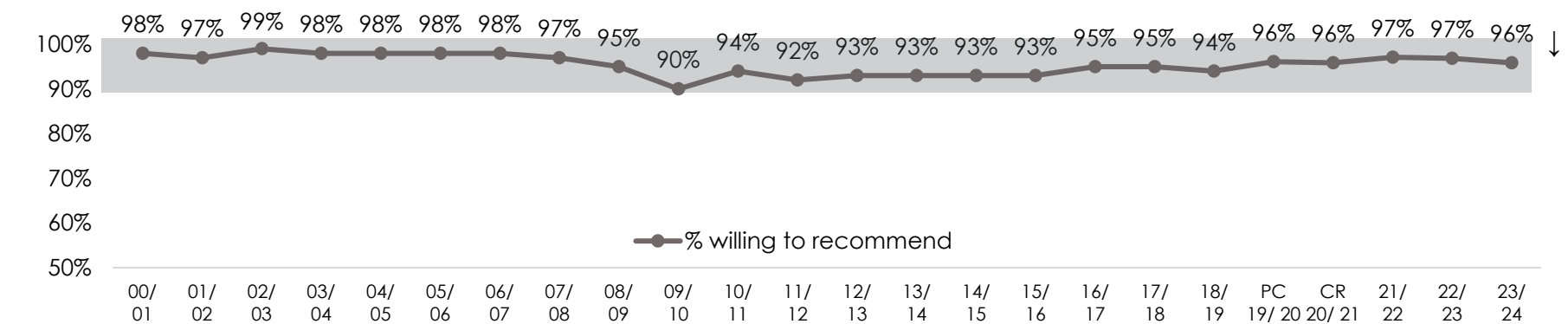


# Recommendation of Kangaroo Island to others as a holiday destination (EC1e)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Tourism optimises economic benefits for Kangaroo Island	Proportion of visitors that would recommend Kangaroo Island to others as a holiday destination	90% - 100%	✓

The willingness to recommend scores have remained relatively consistent since the last wave (96%); this result sits at the upper end of the acceptable range of 90-100%, with a significant decrease from 2022/23 figures (from 97% to 96%).

Figure 4: Willingness to recommend



Q23. Would you recommend Kangaroo Island as a holiday destination to others based on this trip?

Base: Visitors responding, (23/24 n=3386)

Note: Missing cases excluded.

Note: Arrows indicate significant change in score from previous year.

## Significant and notable differences between subgroups:

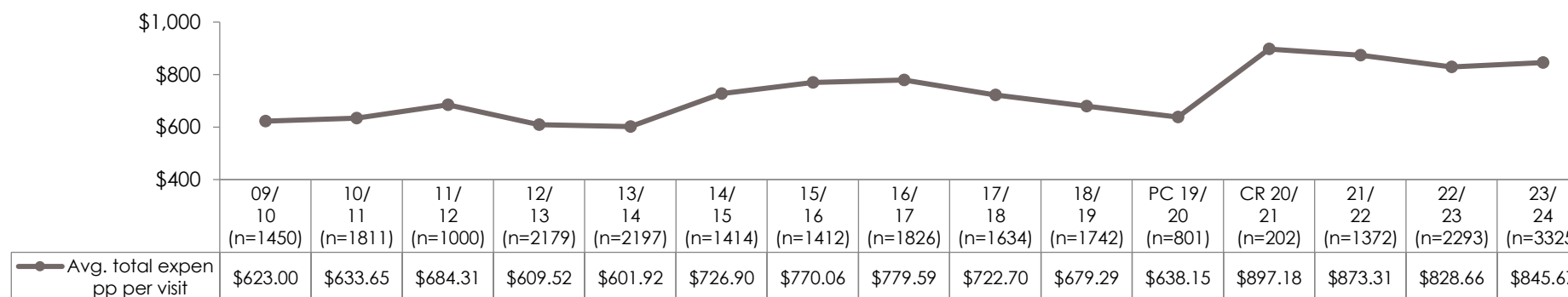
- Consistent with observations from the previous wave:
  - More visitors who stayed one or more nights (96%) would recommend Kangaroo Island to others than those that came for a day trip (93%);
  - More people who spent \$200 or less (97%) were likely to recommend Kangaroo Island to others compared to those who spent more than \$200 (96%);
  - More intrastate visitors were likely to recommend (97%) than interstate (95%) and international visitors (94%); and
  - More non-cruise ship visitors were likely to recommend than cruise ship arrivals (96% vs 89%).
- New in 2023/24:
  - More repeat visitors are likely to recommend than first-time visitors (97% vs 94%).

## Average expenditure per visit (EC1f)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Tourism optimises economic benefits for Kangaroo Island	Average annual total expenditure per visit	5% - 10% increase	✗

The average spend in the 2023/24 period (\$845.67) increased by 2.1% compared to the last wave (\$828.66), therefore it does not meet the acceptable range of 5% to 10% increase.

**Figure 5: Increase in average annual total expenditure per person per visit**



Q6 Did you stay one or more nights or was it a way trip?

Q8 What was the cost of the total package?

Q11 What is your best guess of the total Kangaroo Island component of the package?

Q13 What additional money did you spend on top of the package whilst on the Island?

Q14 Please indicate how much you spent on your trip to Kangaroo Island?

Q15 How many people did these costs cover?

Base: Visitors responding, (23/24 n=3325)

Note: Missing cases excluded.

Note: Visitors who indicated that their trip was part of a package yet did not specify the KI component of the package have been excluded from all expenditure calculations in this report

### Significant and notable differences between subgroups:

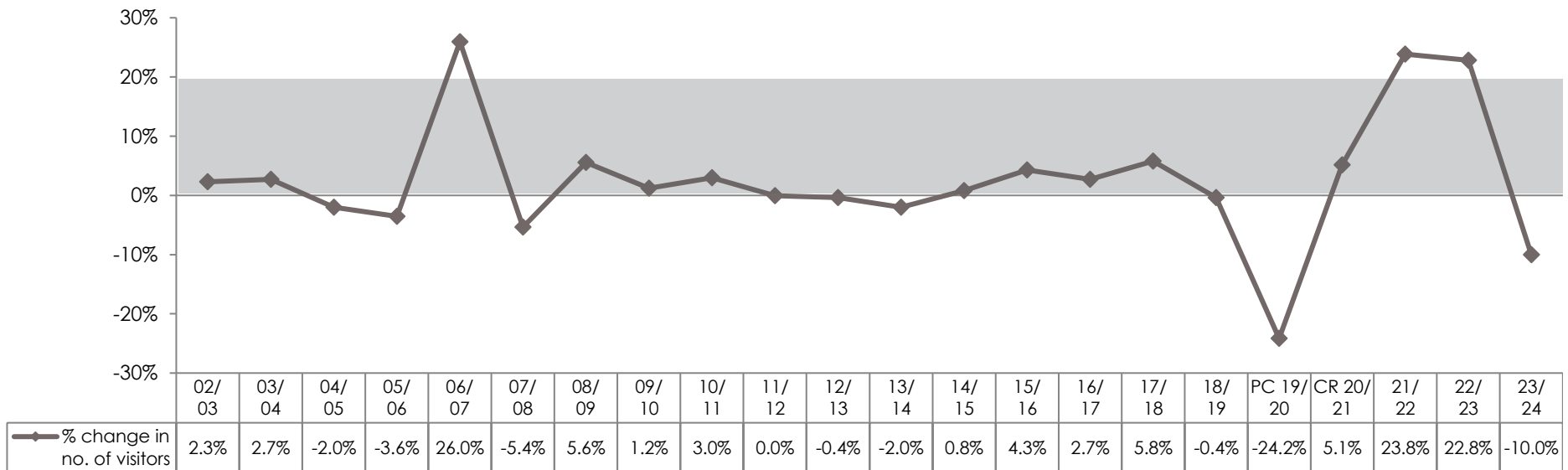
- Consistent with observations from the previous wave:
  - Interstate spent more (\$889.62) than intrastate (\$777.8).
  - Air arrivals (\$1,763.88) spent significantly more than sea arrivals (\$824.95);
  - First time visitors (\$898.52) spent significantly more than repeat visitors (\$752.06);
  - Visitors that spent more than \$200 per night (\$1277.14) spent significantly more than visitors that spent only up to \$200 (\$561.26); and
  - Those that stayed one or more nights (\$936.26) spent significantly more than day trippers (\$417.65).

## Annual number of visitors (EC1g)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Tourism optimises economic benefits for Kangaroo Island	Annual number of visitors to Kangaroo Island	0% - 20% increase	<b>X</b>

Results below depict only up to 2022/23. Results from the current year are pending.

**Figure 6: Increase in annual number of visitors**



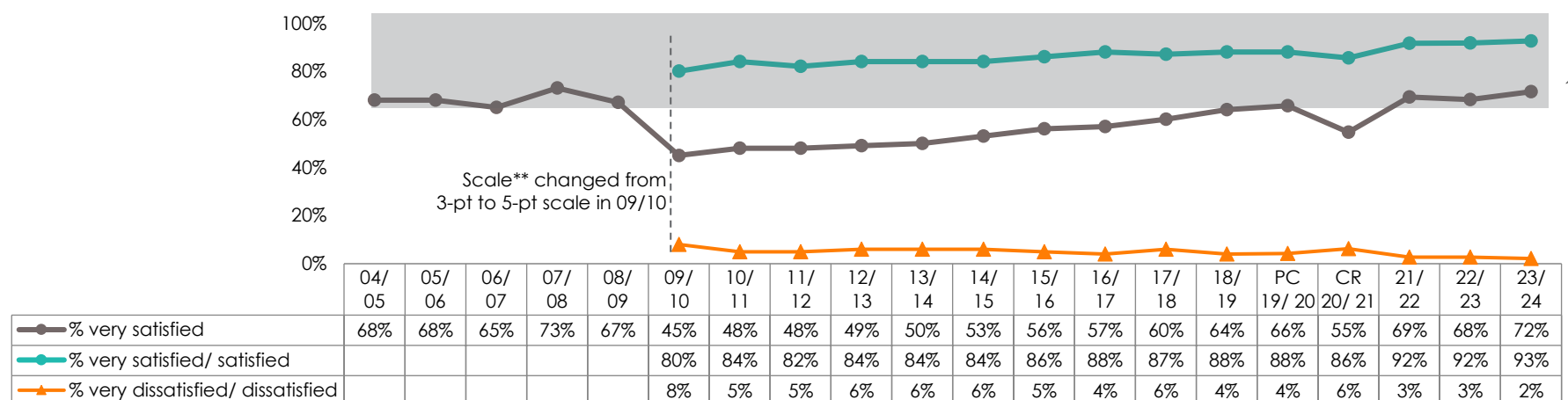
Note: Data provided by TOMM Committee.

## Satisfaction with customer service received (EC2c)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Tourism operators excel in their business professionalism	Proportion of visitors that are very satisfied with the level of customer service they receive	65% - 100%	✓

Most of the visitors to Kangaroo Island in the 2023/24 period (93%) were satisfied/ very satisfied with the level of customer service they received which has remained relatively consistent since the last wave. The percentage of visitors who reported being very satisfied with the customer service they received has increased significantly since the last wave (72% vs 68%) and is therefore still in the acceptable range.

**Figure 7: Satisfaction with customer service received**



Q19.7 Please indicate how satisfied you were with the level of customer service you received.

Base: Visitors responding, (23/24 n=3326)

Note: Don't know, didn't experience and missing cases excluded.

\*\*

In 2008/2009 satisfaction was measured with a score out of 3

Note: This measure is also used for indicator EX2g with an acceptable range of 80% - 100%.

Note: The scale changed from a 3-point scale to a 5-point scale in 2009/10, please exercise caution when interpreting these results

### Significant and notable differences between subgroups:

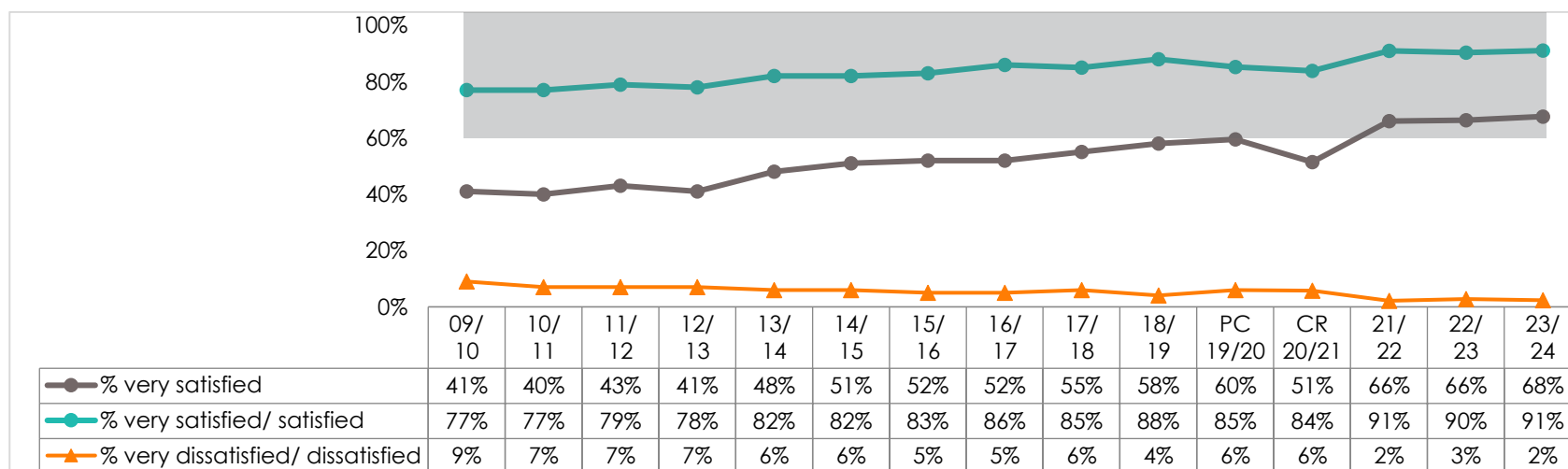
- Consistent with observations from the previous wave:
  - Day trippers were more likely to report they were very satisfied with the customer service they received compared to those that stayed one or more nights (76% vs 71%).
- New in 2023/24:
  - Interstate visitors were more satisfied/very satisfied (94%) than intrastate (92%) and international (89%) visitors; this was driven by more interstate visitors being very satisfied (74%) than intrastate (70%) and international (67%) visitors.

## Satisfaction with professionalism of tourism operators (EC2d)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Tourism operators excel in their business professionalism	Proportion of customers that are highly satisfied with the professionalism of tourism operators	65% - 100%	✓

Most of the visitors to Kangaroo Island in the 2023/24 period (91%) were satisfied/very satisfied with the professionalism of tourism operators which continues to remain in the acceptable range. The percentage of visitors who reported being very satisfied with the professionalism of tourist operators in the 2023/24 period (68%) has remained consistent with the previous wave and continues to remain in the acceptable range.

**Figure 8: Satisfaction with professionalism of tourism operators**



Q19.12 Please indicate how satisfied you were with the professionalism of tourism businesses.

Base: Visitors responding, (23/24 n=3023)

Note: Don't know, didn't experience and missing cases excluded.

### Significant and notable differences between subgroups:

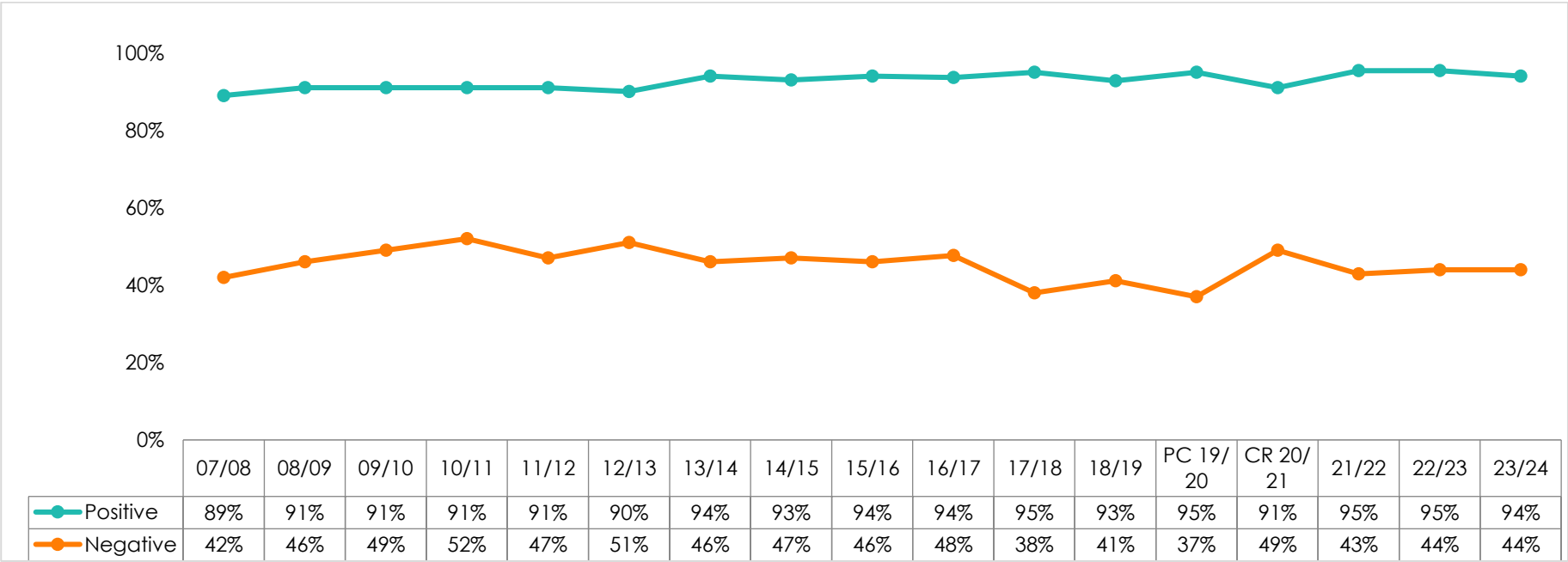
- New in 2023/24:
  - Spring visitors (94%) are more likely to be very satisfied than winter (90%) and spring visitors (89%);
  - Day trippers (77%) are more likely to be very satisfied than overnight visitors (66%); and
  - International visitors (3%) are more likely to be very dissatisfied than intrastate and interstate visitors (both 1%).
  - More cruise passengers are very dissatisfied (3%) compared to non-cruise passengers (1%).

# Compliments and complaints (EC2e)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Tourism operators excel in their business professionalism	The number of compliments and complaints received from visitors	↑ in positive comments ↓ in negative comments	✗

The number of positive and negative comments in 2023/24 remained relatively consistent with the previous wave and are not in the acceptable range.

Figure 9: Number of compliments and complaints received



Q25. Are there any individuals or businesses you would like to draw our attention to for compliments/improvement?

Base: Visitors responding, (23/24 n=2256)  
Note: Don't know and missing cases excluded.

Significant and notable differences between subgroups:

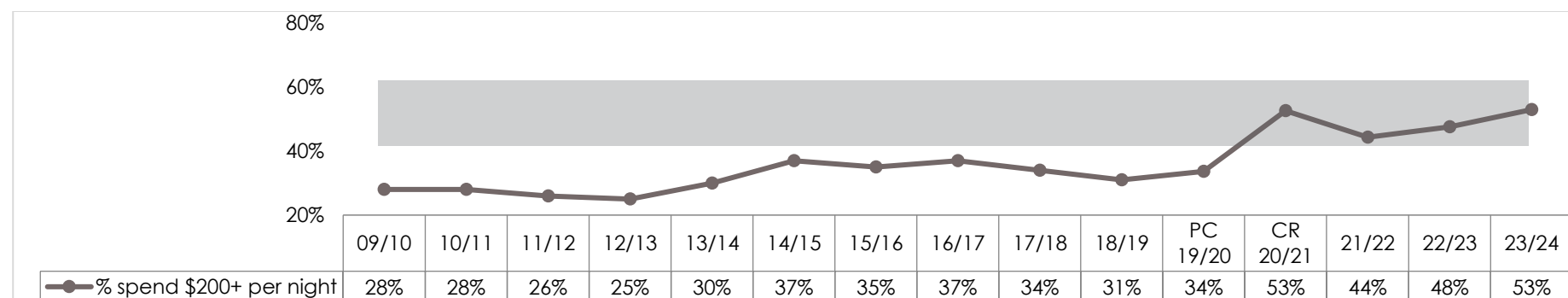
- New in 2023/24:
  - More summer visitors (47%) had negative comments than winter visitors (38%).

## Average spend per night over \$200 (EC3c)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Kangaroo Island attracts its high yield target markets	Proportion of visitors for whom average spend per night exceeds \$200	40% - 60%	✓

The proportion of visitors in 2023/24 who reported an average spend of over \$200 per night has significantly increased since the previous wave (53% vs 48%) and continues to meet the 40-60% goal for the fourth time to date.

**Figure 10: Average spend per night over \$200**



Q6 Did you stay one or more nights or was it a day trip?

Q8 What was the cost of the total package?

Q11 What is your best guess of the total Kangaroo Island component of the package?

Base: Visitors responding. (23/24 n=2766)

Note: Day trippers excluded.

Note: Missing cases excluded.

Q13 What additional money did you spend on top of the package whilst on the Island?

Q14 Please indicate how much you spent on your trip to Kangaroo Island?

Q15 How many people did these costs cover?

Note: Visitors who indicated that their trip was part of a package yet did not specify the KI component of the package have been excluded from all expenditure calculations in this report

### Significant and notable differences between subgroups:

- Consistent with observations from the previous wave:
  - More air arrivals (79%) spent over \$200 per night on average than those arriving by sea (51%); and
  - More first time visitors (61%) spent over \$200 per night than repeat visitors (39%).
- New in 2023/24:
  - More intrastate visitors (59%) spent only up to \$200 a night than interstate (40%) and international visitors (33%). As such, more interstate (60%) and international (67%) visitors spent more than \$200 per night than intrastate visitors.
  - More winter visitors (59%) spent over \$200 per night (on average) than spring (51%) and summer visitors (49%).

## Summary of sub-group scores for economic indicators (23/24)

Indicator		Sub-groups who were within the Acceptable range for the indicator	Sub-groups who scored more highly for the indicator (compared to their comparative sub-group)	
EC1d	Annual average number of nights stayed (4-7 nights)	<ul style="list-style-type: none"> <li>Intrastate and interstate visitors</li> <li>Spring, summer and autumn visitors</li> <li>Non-bus visitors</li> <li>Sea and air arrivals</li> <li>Repeat visitors</li> <li>Spent up to \$200 per night</li> </ul>	<ul style="list-style-type: none"> <li>Intrastate visitors</li> <li>Summer visitors</li> <li>Non bus survey (low base size)</li> <li>Repeat visitors</li> <li>Those who spent up to \$200 a night</li> </ul>	
EC1e	Proportion of visitors that would recommend Kangaroo Island to others as a holiday destination (90-100%)	<ul style="list-style-type: none"> <li>All subgroups except cruise ship visitors</li> </ul>	<ul style="list-style-type: none"> <li>Intrastate visitors</li> <li>Repeat visitors</li> <li>Those who spent up to \$200 a night</li> <li>Stayed one or more nights</li> <li>Non-cruise ship visitors</li> </ul>	
EC1f	Average annual total expenditure per visit (5-10% increase)	<ul style="list-style-type: none"> <li>Autumn visitors</li> <li>Cruise ship visitors</li> <li>International and intrastate visitors</li> <li>Air arrivals</li> <li>Day trippers</li> </ul>	<ul style="list-style-type: none"> <li>Non-bus visitors</li> <li>Interstate visitors</li> <li>First time visitors</li> <li>Air arrivals</li> </ul>	<ul style="list-style-type: none"> <li>More than \$200 per night</li> <li>Stay one or more nights</li> <li>Non-cruise ship</li> </ul>
EC2c	Proportion of visitors that are very satisfied with the level of customer service they receive (65-100%)	<ul style="list-style-type: none"> <li>All subgroups</li> </ul>	<ul style="list-style-type: none"> <li>Interstate visitors</li> <li>Day trippers</li> </ul>	
EC2d	Proportion of customers that are highly satisfied with the professionalism of tourism operators (65-100%)	<ul style="list-style-type: none"> <li>All subgroups</li> </ul>	<ul style="list-style-type: none"> <li>Day trippers</li> </ul>	
EC2e	The number of compliments and complaints received from visitors	<ul style="list-style-type: none"> <li>There are no statistically significant differences for <b>increases</b> to compliments or <b>decreases</b> to complaints amongst any subgroups from the previous year.</li> </ul>	<ul style="list-style-type: none"> <li>Summer visitors (complaints)</li> <li>Non-bus visitors (complaints)</li> </ul>	
EC3c	Proportion of visitors whose average spend per night exceeds \$200 (40-60%)	<ul style="list-style-type: none"> <li>All subgroups except intrastate and repeat visitors</li> </ul>	<ul style="list-style-type: none"> <li>International and interstate visitors</li> <li>Summer visitors</li> <li>First-time visitors</li> <li>Air arrivals</li> </ul>	



# Experiential Indicators

## Overview

All but one of the 'Kangaroo Island delivers authentic and credible experiences consistent with its positioning' indicators fell within their respective acceptable ranges in the 2023/24 period.

The indicators which did not fall within the acceptable range were the proportion of visitors 'very satisfied with their overall experience on Kangaroo Island', which remain unchanged at 86%, and the proportion of visitors that 'experienced farming and rural landscapes' (89%).

With respect to the condition 'The majority of visitors leave the island highly satisfied with their experience' Seeing native wildlife in natural environment (72%) remained in the acceptable range.

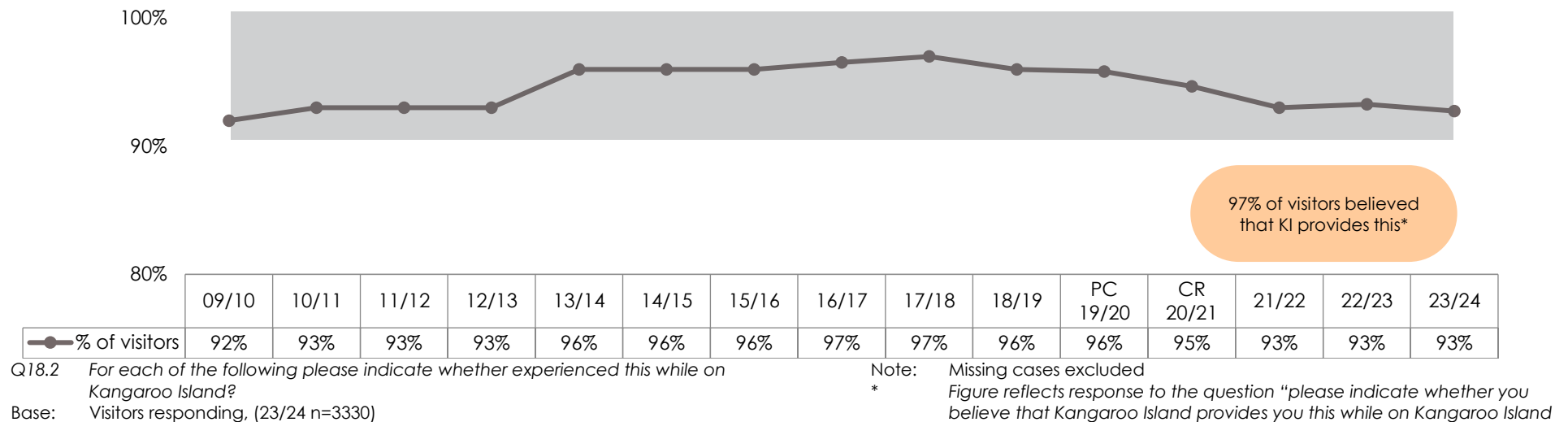
The proportion of visitors that would recommend Kangaroo Island as a holiday destination (96%) and the proportion of repeat visitation (36%) both remained within the acceptable range, despite the level of repeat visitation decreasing slightly.

## Viewed wildlife in natural environment (EX1b)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors that viewed wildlife in the natural environment	90% - 100%	✓

The majority (93%) of the visitors surveyed in 2023/24 viewed Australia's wildlife in natural surroundings during their visit to Kangaroo Island; this result is consistent with the previous wave and remains within the acceptable range of 90%-100%.

**Figure 11: Visitors that viewed Australia's wildlife in natural surroundings**



### Significant and notable differences between subgroups:

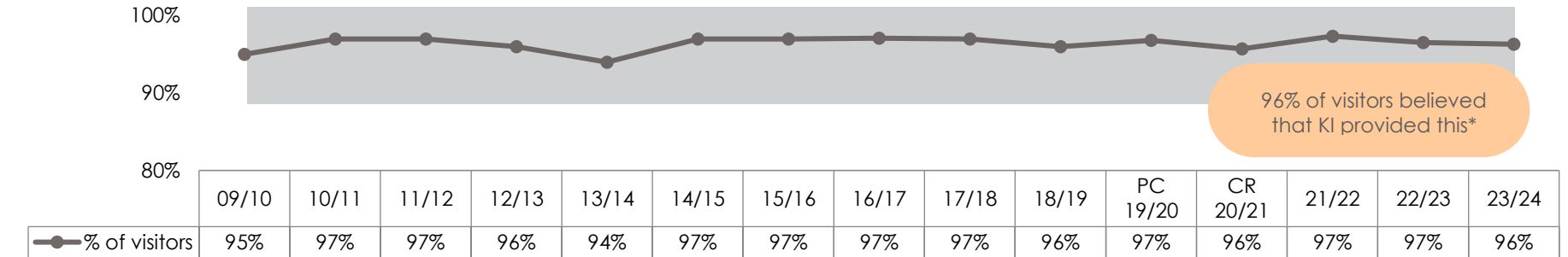
- Consistent with the previous year:
  - More visitors staying one or more nights saw wildlife in natural surroundings than day trippers (95% vs 90%);
  - More international visitors (95%) saw wildlife in natural surroundings than intrastate visitors (93%); and
  - More non-cruise ship arrivals saw wildlife in natural surroundings than cruise ship arrivals (94% vs 64%).
- New in 2023/24:
  - More international visitors saw wildlife in natural surroundings than interstate visitors (96% vs 92%);
  - More winter (95%), spring (94%), and autumn (93%) visitors saw wildlife in their natural surrounds than summer visitors (90%); and
  - More of those who spent up to \$200 per night saw wildlife in natural surroundings than those who spent more than \$200 (96% vs 94%).

## Experienced scenic variety without crowds (EX1c)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors that experienced scenic variety without crowds	90% - 100%	✓

The majority (96%) of the visitors surveyed during 23/24 experienced scenic variety without crowds; this is consistent with the previous years and falls within the acceptable range of 90%-100%.

Figure 12: Visitors that experienced scenic variety without crowds



Q18.3 For each of the following please indicate whether experienced this while on Kangaroo Island?

Base: Visitors responding, (23/24 n=3334)

\*

Note: Missing cases excluded.

Figure reflects response to the question "please indicate whether you believe that Kangaroo Island provides you this while on Kangaroo Island."

### Significant and notable differences between subgroups:

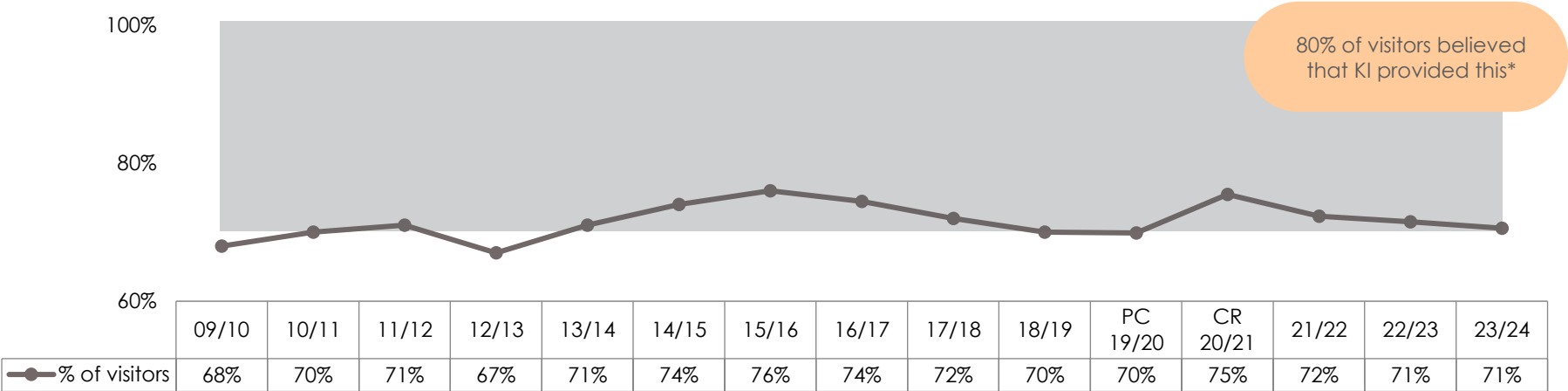
- Consistent with the previous year:
  - More visitors staying one or more nights experienced scenic variety without crowds than day trippers (98% vs 93%); and
  - Those who did not arrive by cruise ship were more likely to experience scenic variety without crowds compared to cruise ship arrivals (97% vs 85%).

## Experienced cultural heritage and history of settlement (EX1d)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors that experienced cultural heritage and history of settlement	70% - 100%	✓

Most of the surveyed visitors in the 2023/24 period indicated they experienced the cultural heritage and history of the settlement (71%). This result remains within the acceptable range of 70-100% and is consistent with the 2022/23 result.

**Figure 13: Visitors that experienced cultural heritage and history of settlement**



Q18.4 For each of the following please indicate whether you experienced this while on Kangaroo Island?

Base: Visitors responding, (23/24 n=3303)

Note: Missing cases excluded.

\* Figure reflects response to the question "please indicate whether you believe that Kangaroo Island provides you this while on Kangaroo Island."

### Significant and notable differences between subgroups:

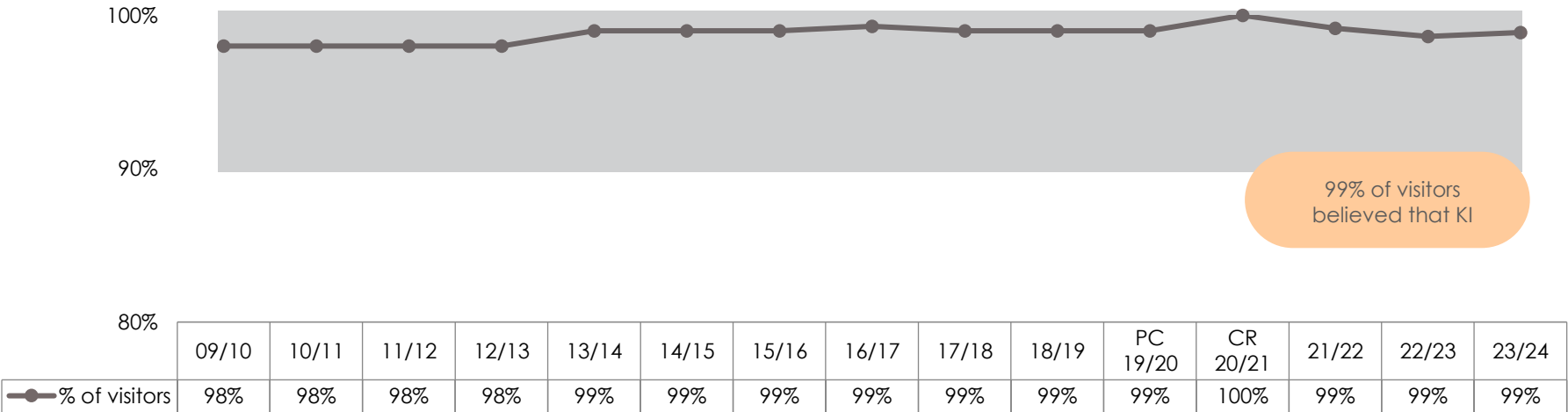
- Consistent with the previous year:
  - Both interstate (75%) and intrastate (68%) visitors were more likely to experience the cultural heritage and history of settlement than international visitors (59%); and
  - More first time visitors experienced Kangaroo Island's cultural heritage and history of settlement compared to repeat visitors (72% vs 68%).
- New in 2023/24:
  - More interstate visitors (75%) experienced Kangaroo Island's cultural heritage and history of settlement compared to intrastate (68%).

## Experienced spectacular scenery and coastal landscapes (EX1e)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors that experienced spectacular scenery and coastal landscapes	90% - 100%	✓

In line with previous years, almost all 2023/24 visitors surveyed (99%) experienced spectacular scenery and coastal landscapes and believe Kangaroo Island provides this. This has remained in the acceptable range of 90%-100%.

Figure 14: Visitors that experienced spectacular scenery and coastal landscapes



Q18.5 For each of the following please indicate whether you experienced this while on Kangaroo Island?

Base: Visitors responding, (23/24 n= 3331)

Note: Missing cases excluded.  
\* Figure reflects response to the question "please indicate whether you believe that Kangaroo Island provides you this while on Kangaroo Island."

### Significant and notable differences between subgroups:

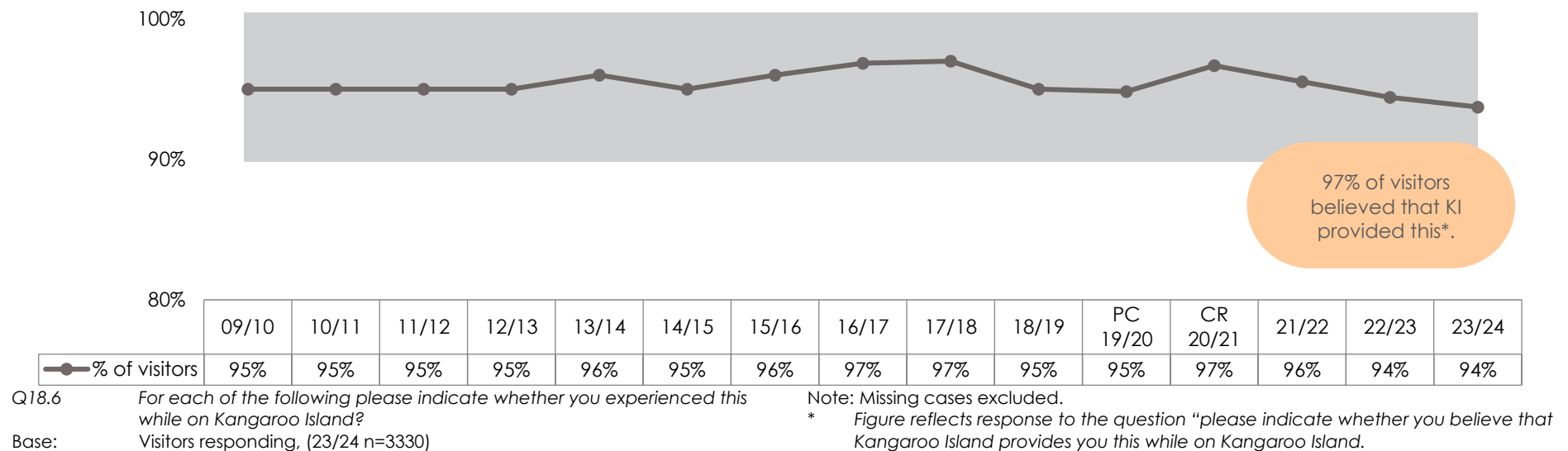
- Consistent with the previous year:
  - More of those that stayed one or more nights experienced spectacular scenery and coastal landscapes compared to day trippers (99% vs 97%); and
  - More non-cruise ship arrivals experienced Kangaroo Island's cultural heritage and history of settlement compared to those who arrived on a cruise ship (99% vs 96%).

## Experienced areas of untouched natural beauty (EX1f)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors that experienced areas of untouched natural beauty	90% - 100%	✓

The proportion of surveyed visitors that reported experiencing areas of untouched natural beauty in 2023/24 has remained consistent with the last wave (both 94%). This result continues to be within the acceptable range of 90-100%.

**Figure 15: Visitors that experienced areas of untouched natural beauty**



### Significant and notable differences between subgroups:

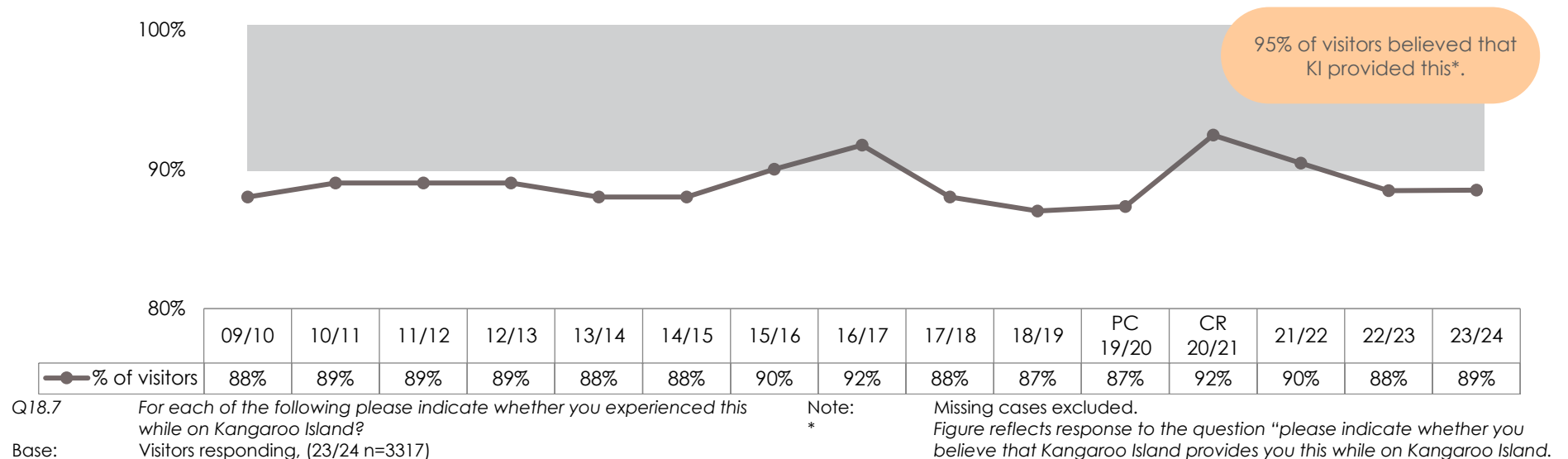
- Consistent with the previous year:
  - Visitors who stayed one or more nights (95%) were more likely to experience areas of untouched natural beauty compared to day trippers (90%); and
  - More non-cruise ship arrivals (95%) experienced areas of untouched natural beauty than cruise ship arrivals (77%).
- New in 2023/24:
  - More spring (95%), winter (95%), and autumn (95%) visitors experienced areas of untouched natural beauty than summer visitors (91%).

## Experienced farming and rural landscapes (EX1g)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors that experienced farming and rural landscapes	90% - 100%	✗

The proportion of visitors who experienced farming and rural landscapes has increased slightly to 89%, however this change is not significant and is still outside the acceptable range of 90-100%. Additionally, those that believe Kangaroo Island provides this has dropped slightly to 95%.

**Figure 16: Visitors that experienced farming and rural landscapes**



### Significant and notable differences between subgroups:

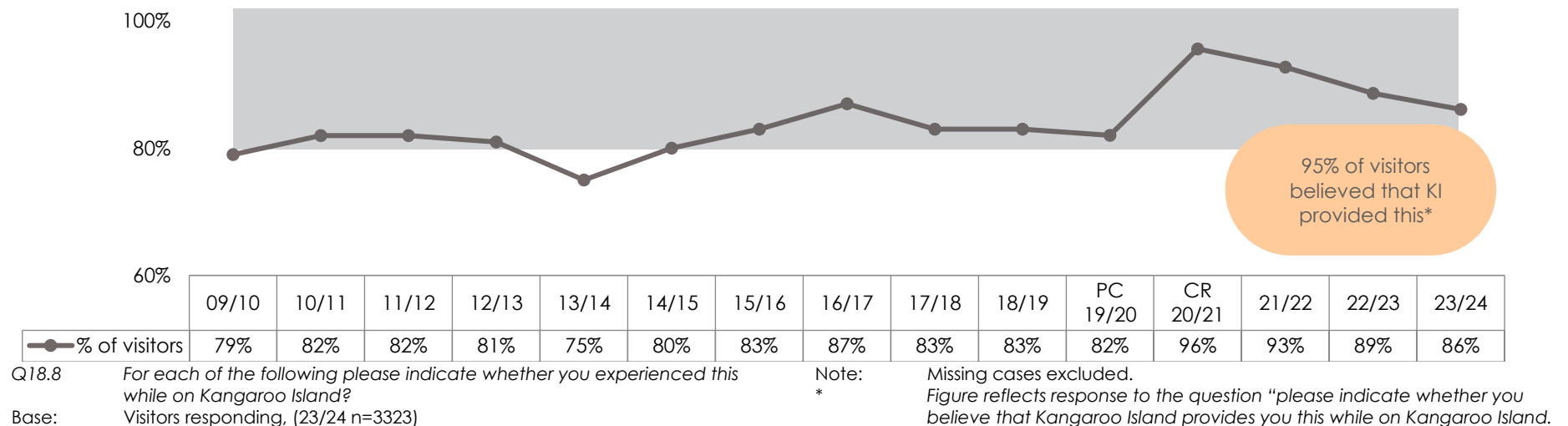
- Consistent with the previous year:
  - More interstate (89%) and intrastate (90%) visitors experienced farming and rural landscapes than international visitors (83%);
  - More winter (92%), spring (92%) and autumn (89%) visitors experienced farming and rural landscapes than summer visitors (85%);
  - More of those who stayed one or more nights experienced farming and rural landscapes than day trippers (92% vs 81%); and
  - More non-cruise ship arrivals (90%) experienced farming and rural landscapes than cruise ship arrivals (54%).
- New in 2023/24:
  - More spring visitors (95%) experienced farming and rural landscapes than autumn visitors (89%).

## Experienced local Kangaroo Island produce (EX1h)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors that experienced local Kangaroo Island produce	80% - 100%	✓

The proportion of surveyed visitors who experienced local Kangaroo Island produce remains high and in the acceptable range but has decreased significantly since the previous wave from 89% to 86%.

**Figure 17: Visitors that experienced local Kangaroo Island produce**



### Significant and notable differences between subgroups:

- Consistent with the previous year:
  - More intrastate (91%) and interstate visitors (86%) experienced Kangaroo Island produce than international visitors (70%);
  - More spring visitors experienced Kangaroo Island produce than summer visitors (89% vs 84%);
  - More repeat visitors experienced Kangaroo Island's produce than first-time visitors (91% vs 84%);
  - More visitors who stayed one or more nights experienced Kangaroo Island produce than day trippers (91% vs 64%); and
  - More non-cruise ship arrivals experienced farming and rural landscapes than cruise ship arrivals (87% vs 65%).
- New in 2023/24:
  - More interstate visitors (91%) experienced Kangaroo Island produce than interstate visitors (86%).

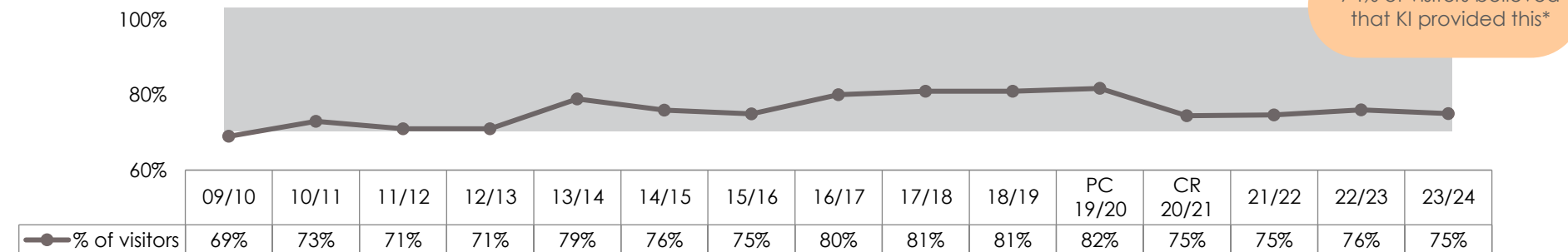


## Kangaroo Island offers one of Australia's top three nature & wildlife experiences (EX1i)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors that believe Kangaroo Island offers one of Australia's top three nature & wildlife experiences	70% - 100%	✓

The proportion of visitors who experienced Kangaroo Island as one of Australia's top three nature and wildlife experiences has decreased by one percent since the previous wave (75% vs 76%) - though this is not statistically significant and continues to remain within the acceptable range of 70%-100%.

**Figure 18: Visitors that experienced Kangaroo Island as one of Australia's top three nature & wildlife experiences**



Q18.9 For each of the following please indicate whether you experienced this while on Kangaroo Island?

Base: Visitors responding, (23/24 n=3270)

Note:

\*

Missing cases excluded.

Figure reflects response to the question "please indicate whether you believe that Kangaroo Island provides you this while on Kangaroo Island."

### Significant and notable differences between subgroups:

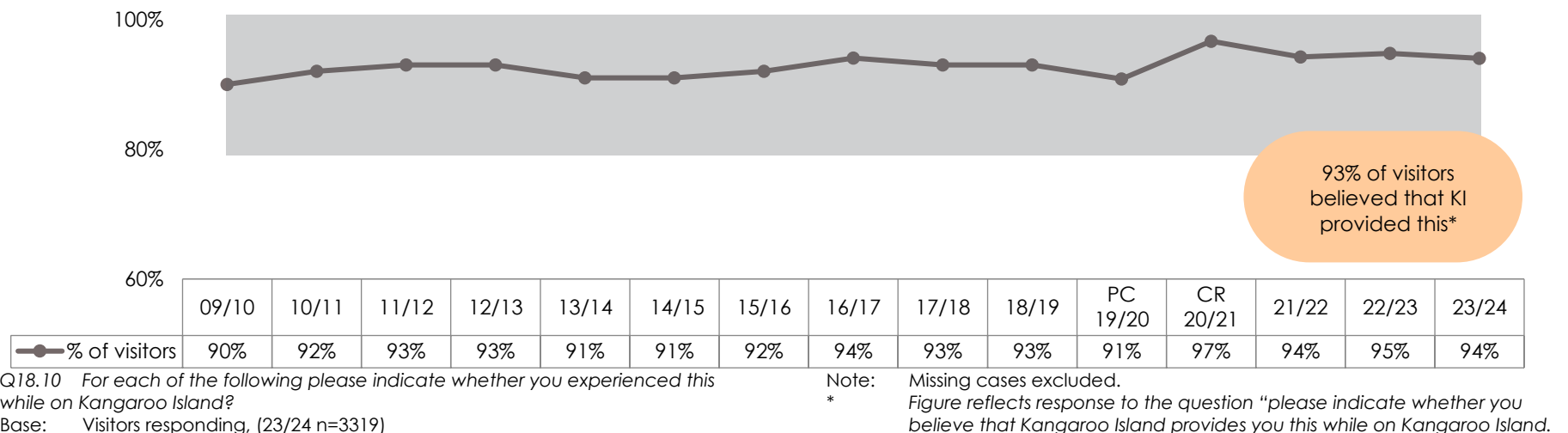
- Consistent with the previous year:
  - More first-time visitors experienced Kangaroo Island as one of Australia's top three nature and wildlife experiences than repeat visitors (78% vs 70%); and
  - More non-cruise ship arrivals (77%) experienced Kangaroo Island as one of Australia's top three nature and wildlife experiences than cruise ship arrivals (44%).
- New in 2023/24:
  - More visitors in winter (82%) and spring (79%) experienced Kangaroo Island as one of Australia's top three nature and wildlife experiences compared to those who visited in autumn (74%) and summer (71%).
  - More international visitors (84%) experienced Kangaroo Island as one of Australia's top three nature and wildlife experiences compared to interstate visitors (75%), who in turn were more likely to experience Kangaroo Island as one of Australia's top three nature and wildlife experiences than intrastate visitors (72%).

## Kangaroo Island has a friendly local community (EX1j)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors that believe Kangaroo Island has a friendly local community	80% - 100%	✓

The proportion of visitors who experienced a friendly local community on Kangaroo Island was 94% in 2023/24; this has decreased by one percent since the last wave (95%), though this is not statistically significant. This continues to remain within the acceptable range of 80%-100%.

**Figure 19: Visitors that experienced a friendly local community on Kangaroo Island**



### Significant and notable differences between subgroups:

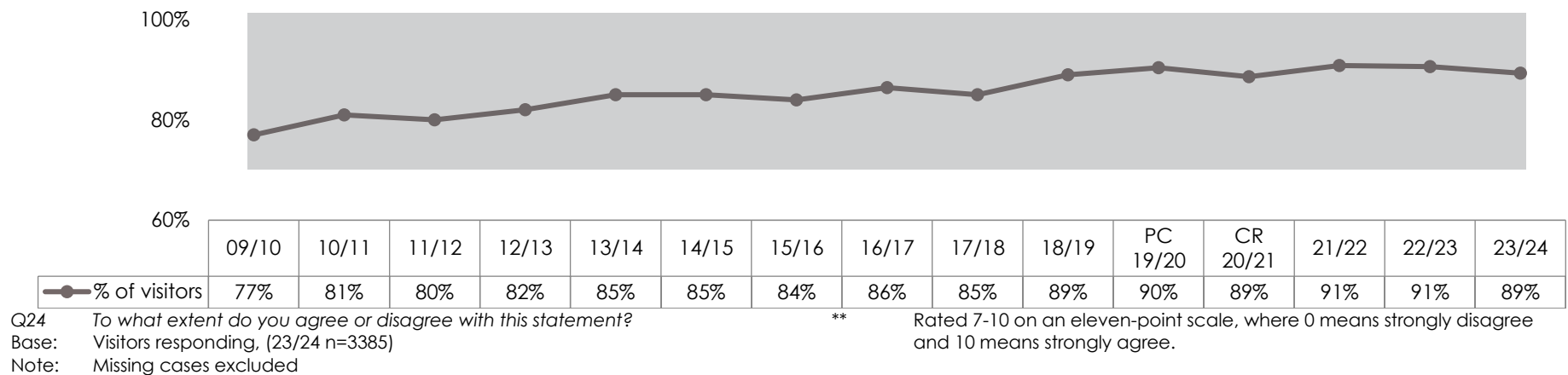
- Consistent with the previous year:
  - More visitors who stayed one or more nights reported experiencing a friendly local community compared to day trippers (96% vs 83%);
  - More intrastate (96%) and interstate (94%) visitors reported experiencing a friendly local community compared to international visitors (86%); and
  - Repeat visitors were more likely to report experiencing a friendly local community than first-time visitors (96% vs 93%).

## Agreement with positioning statement (EX1k)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors who agree** that Kangaroo Island is a wild and welcoming destination, that will surprise and amaze you, relax your mind, refresh your spirit and make you feel totally alive. It provides an opportunity to view and to discover all the scenic variety of mainland Australia	70% - 100%	✓

Most visitors agreed with the positioning statement (89%). Although this is a slight (not significant) decrease from the previous year, the result safely falls within the acceptable range of 70%-100%.

**Figure 20: Visitors who agree that Kangaroo Island is a wild and welcoming destination**



### Significant and notable differences between subgroups:

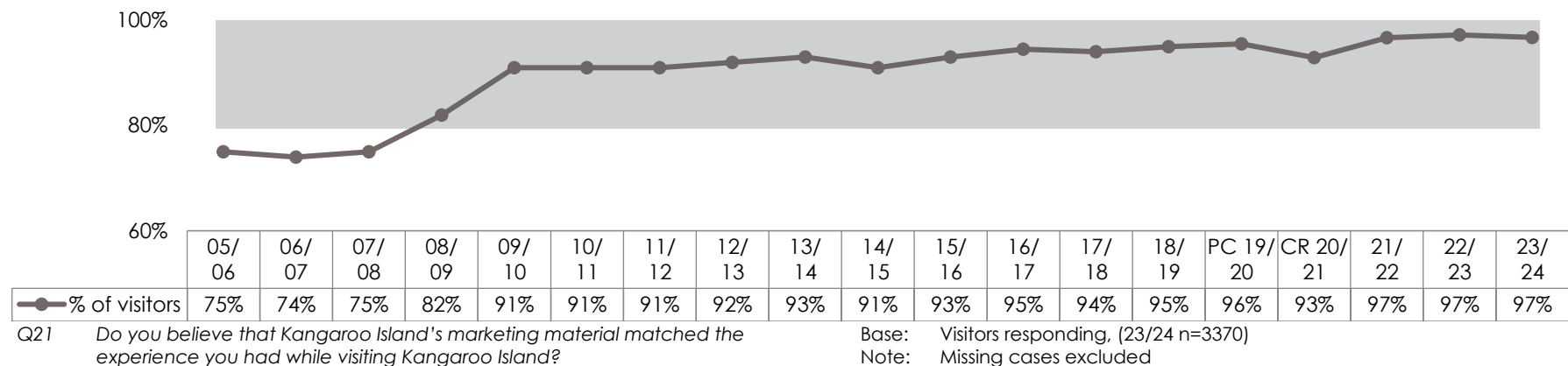
- Consistent with the previous year:
  - Visitors who stayed one or more nights (91%) were more likely to agree with the statement compared day trippers (85%);
  - Intrastate visitors (91%) were more likely to agree with the statement than international visitors (86%); and
  - More non-cruise ship arrivals agreed with the statement than cruise ship arrivals (90% vs 78%).
- New in 2023/24:
  - More repeat visitors agreed with the statement than first time visitors (92% vs 88%); and
  - Winter visitors were more likely to agree with the statement than summer visitors (93% vs 88%).

## Matching expectation set by marketing materials (EX11)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors that state that their experience matched or exceeded expectation set by marketing materials	80% - 100%	✓

Most visitors (97%) to Kangaroo Island who stated that their experience matched or exceeded expectations set by marketing materials has remained consistent with the previous wave; therefore, this result continues to remain within the acceptable range of 80-100%.

**Figure 21: Visitors stating that their experience matched or exceeded the expectation set by marketing materials**



### Significant and notable differences between subgroups:

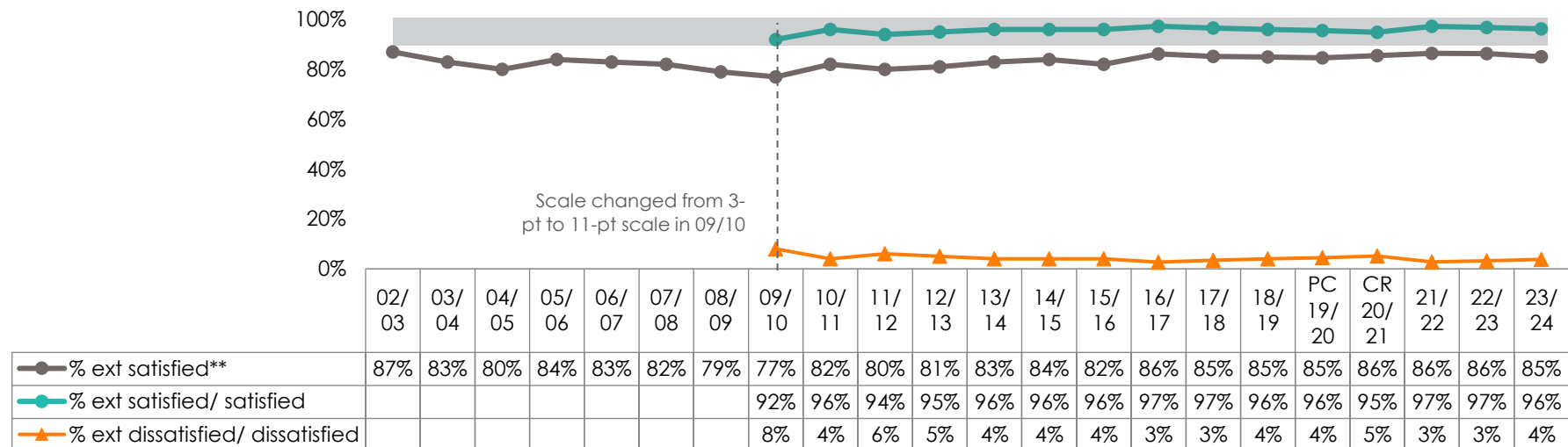
- Consistent with the previous year:
  - More repeat visitors reported their visit as meeting or exceeding expectations than first time visitors (98% vs 96%). Additionally, more first-time visitors found their visit worse than expected than repeat visitors (4% vs 2%), however positively in 2023/24 more first time visitors reported their visit was better than expected than repeat visitors (32% vs 23%); and
  - More interstate (30%) and international (31%) visitors reported their visit as exceeding expectations than intrastate visitors (26%).
- New in 2023/24:
  - More winter visitors (35%) reported their visit as exceeding expectations than summer (28%) and autumn (27%) visitors; and
  - Those that stayed one or more nights were more likely to report their visit as meeting expectations than day trippers (68% vs 63%), and more day trippers reported their visit was better than expected than those who stayed one or more nights (33% vs 28%).

## Satisfaction with overall experience (EX1m)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors very satisfied** with their overall experience on Kangaroo Island	90% - 100%	✗

The proportion of surveyed visitors who stated they were very satisfied with their overall experience on Kangaroo Island in this wave (85%) was a slight decrease from the previous three waves of research (86%). This result continues to put the score just outside of the acceptable range of 90%-100%.

**Figure 22: Visitors who were very satisfied\*\* with their overall experience on Kangaroo Island**



Q22 Taking into account all aspects of your visit to Kangaroo Island, how would you rate your overall satisfaction?

Base: Visitors responding, (23/24 n=3382)

Note:  
\*\*

Missing cases excluded.

Rated 8-10 on an eleven-point scale, where 0 means extremely dissatisfied and 10 means extremely satisfied.

### Significant and notable differences between subgroups:

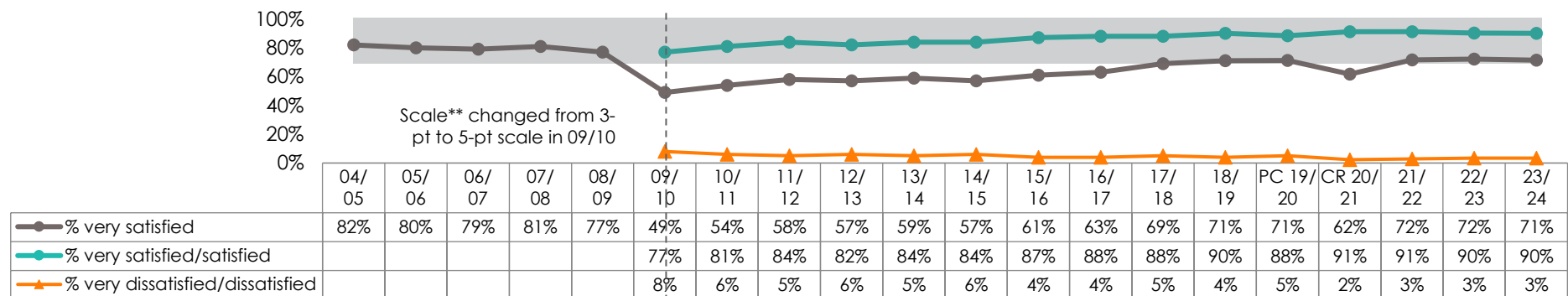
- Consistent with the previous year:
  - Those that stayed one or more nights were more likely to be satisfied (97%) and very satisfied (87%) with their overall experience compared to day trippers (94%, 78% respectively); and
  - More non-cruise ship arrivals were very satisfied with their overall experience than cruise ship arrivals (86% vs 72%).

## Seeing native wildlife in its natural environment (EX2a)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
The majority of visitors leave the island highly satisfied with their experience	Proportion of visitors who were very satisfied with seeing native wildlife in its natural environment	70% - 100%	✓

Most visitors (71%) were very satisfied with seeing native wildlife in its natural environment. This is a 1% decrease from the previous wave, however the score continues to fall within the acceptable range of 70-100%.

**Figure 23: Visitors who were satisfied with seeing native wildlife in its natural environment**



Q19.1 Please indicate how satisfied you were with....

Base: Visitors who experienced it, (23/24 n=3246)

Note: Don't know, didn't experience and missing cases excluded.

Note: \*\*In 2006/07, 2007/08 and 2008/09 satisfaction was measured with a score out of 3.

Note: In 2005/06 statement read 'To see native wildlife, nature and the natural environment', measured with a score out of 3.

Note: In 2004/05 statement read 'General interest in native wildlife, nature and the natural environment, measured with a score out of 3.

Note: In 2003/04 measured with attributes (general interest in native wildlife, nature and the natural environment), with a score out of 3.

Note: In 2002/03 satisfaction was measured with a score out of 10.

### Significant and notable differences between subgroups:

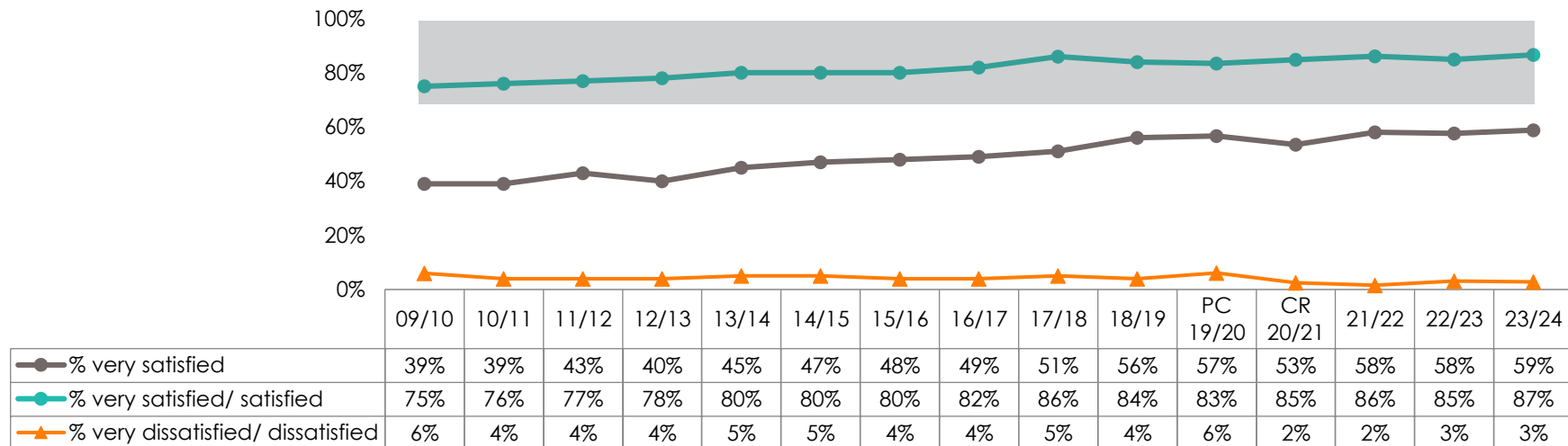
- Consistent with the previous year:
  - More visitors who stayed one or more nights were satisfied/very satisfied (72%) and very satisfied (91%) with seeing native wildlife in its natural environment compared to day trippers (64% and 87% respectively); and
  - More interstate (90%) and intrastate (91%) visitors were satisfied/very satisfied compared to international visitors (84%). Additionally, intrastate (73%) were more likely to be very satisfied compared to international visitors (65%).
- New in 2023/24:
  - Those who spent up to \$200 per night were more likely to be satisfied or very satisfied than those who spent more than \$200 per night (92% vs 90%); and
  - More repeat visitors were very satisfied than first time visitors (74% vs 70%).

## Opportunity to learn more about the Island's natural environment (EX2b)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
The majority of visitors leave the island highly satisfied with their experience	Proportion of visitors who were very satisfied with their opportunity to learn more about the Island's natural environment	70% - 100%	✗

Over half (59%) of visitors reported they were very satisfied with the opportunity to learn more about the Island's natural environment which has increased slightly (not significant) since the previous wave but continues to be outside the acceptable range of 70-100%.

**Figure 24: Visitors who were very satisfied with their opportunity to learn more about the Island's natural environment**



Q19.2 Please indicate how satisfied you were with....  
Base: Visitors who experienced it, (23/24 n=3151)

Note: Don't know, didn't experience and missing cases excluded.

### Significant and notable differences between subgroups:

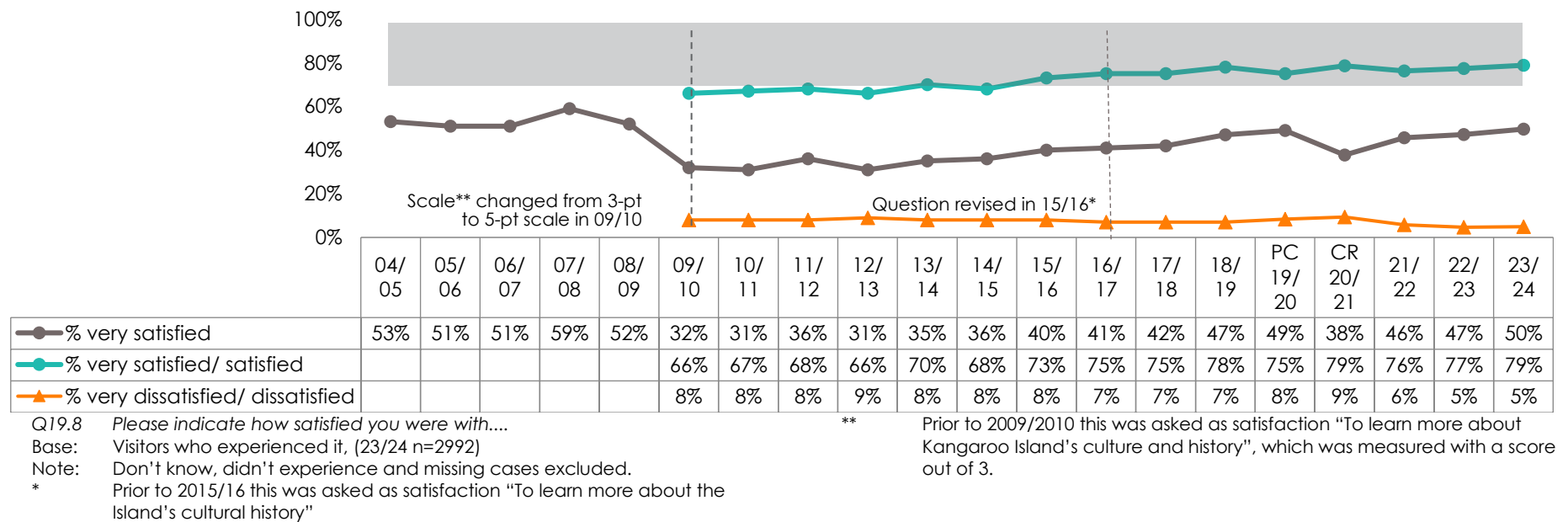
- New in 2023/24:
  - More of those who visited in winter (66%) were very satisfied with their opportunity to learn more about the Island's natural environment than those who visited in summer (56%) or spring (58%).
  - More of those who visited for one or more nights were satisfied/very satisfied with their opportunity to learn more about the Island's natural environment than day trippers (87% vs 83%).

## Opportunity to learn more about the Island's history (EX2c)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
The majority of visitors leave the island highly satisfied with their experience	Proportion of visitors who were very satisfied with their opportunity to learn more about the Island's history*	70% - 100%	✗

Half (50%) of visitors surveyed this wave were very satisfied with their opportunity to learn more about the Island's history; this has continued to increase to its highest point since the COVID recovery period (38% in CR). Despite this, the score continues to remain outside the acceptable range of 70%-100%.

**Figure 25: Satisfaction with opportunity to learn more about the Island's history**



### Significant and notable differences between subgroups:

- New in 2023/24:
  - Winter visitors (57%) were more likely to be very satisfied than spring (49%), summer (49%) and autumn (48%) visitors; and
  - More day trippers were satisfied/very satisfied (84%) and very satisfied (66%) than those who stayed one night or more (78% and 47% respectively).

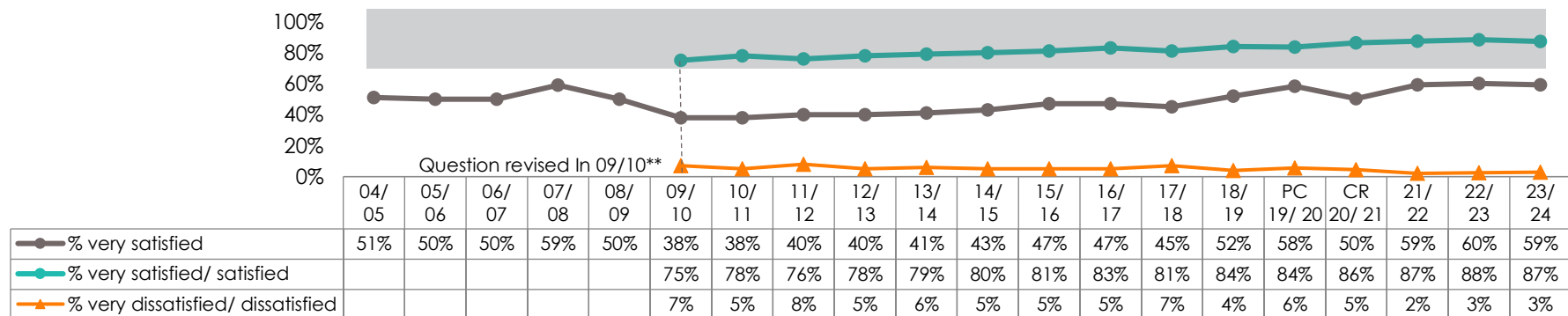


## Range, quality and availability of activities (EX2d)

Optimal Conditions	Indicator	Acceptable Range	22/23 Result
The majority of visitors leave the island highly satisfied with their experience	Proportion of visitors who were very satisfied with the range, quality and availability of activities available	70% - 100%	✗

The proportion of surveyed visitors that indicated they were very satisfied with the range of activities on the Island decreased (not significantly) by one percent since the previous wave from 60% to 59%, however, visitors who were very satisfied with the quality of activities remained consistent (both 60%). The availability of activities also decreased (not significantly) from the previous wave (65% vs 55%). Consistent with previous waves, results for all three measures fall outside the acceptable range of 70%-100%.

**Figure 26: Satisfaction with the range activities**



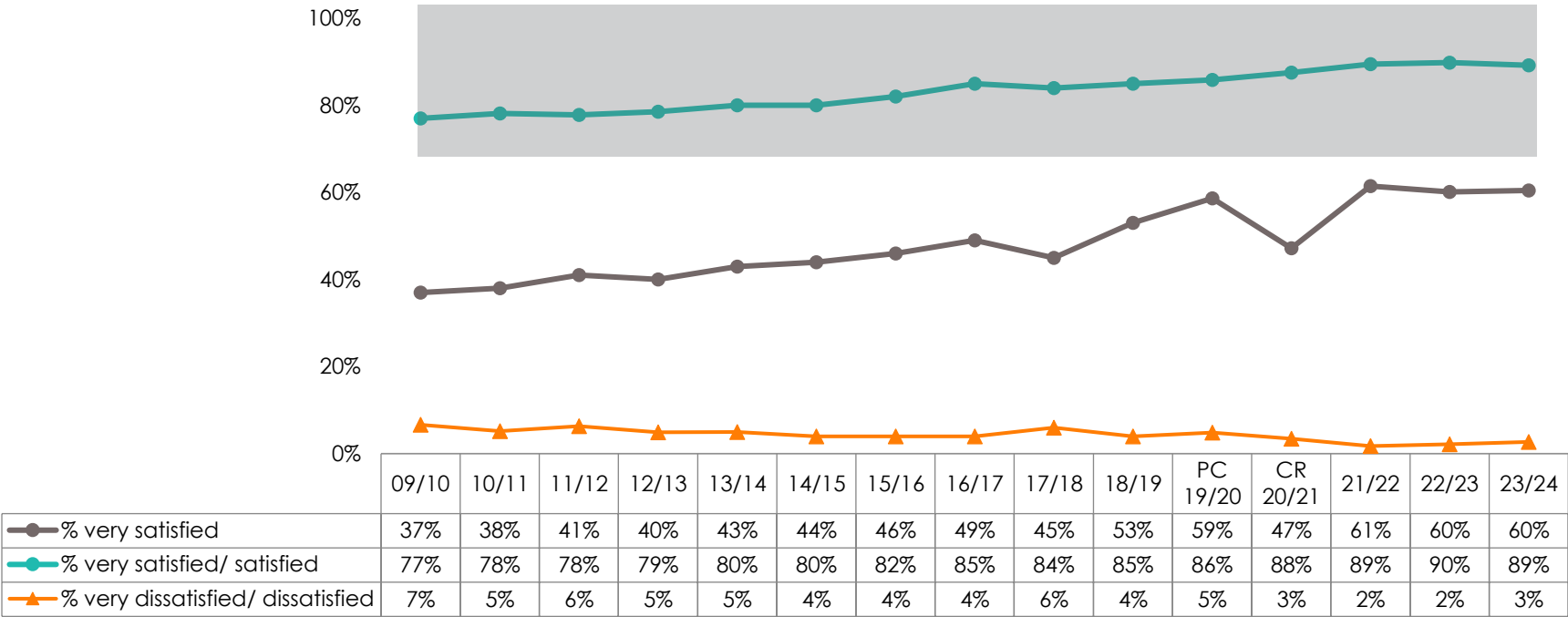
Q19.9 Please indicate how satisfied you were with....  
 Base: Visitors who experienced it, (23/24 n=3113)  
 Note: Don't know, didn't experience and missing cases excluded.

\*\* Prior to 2009/2010 the satisfaction with range was asked as "The range of activities on the island that were available".

### Significant and notable differences between subgroups:

- Consistent with the previous year:
  - More intrastate visitors (63%) were very satisfied with the range of activities compared to international (53%) and interstate (58%) visitors.
- New in 2023/24:
  - More repeat visitors were very satisfied with the range of activities than first time visitors (63% vs 57%); and
  - More sea arrivals were very satisfied with the range of activities than air arrivals (60% vs 52%).

Figure 27: Satisfaction with the quality of activities

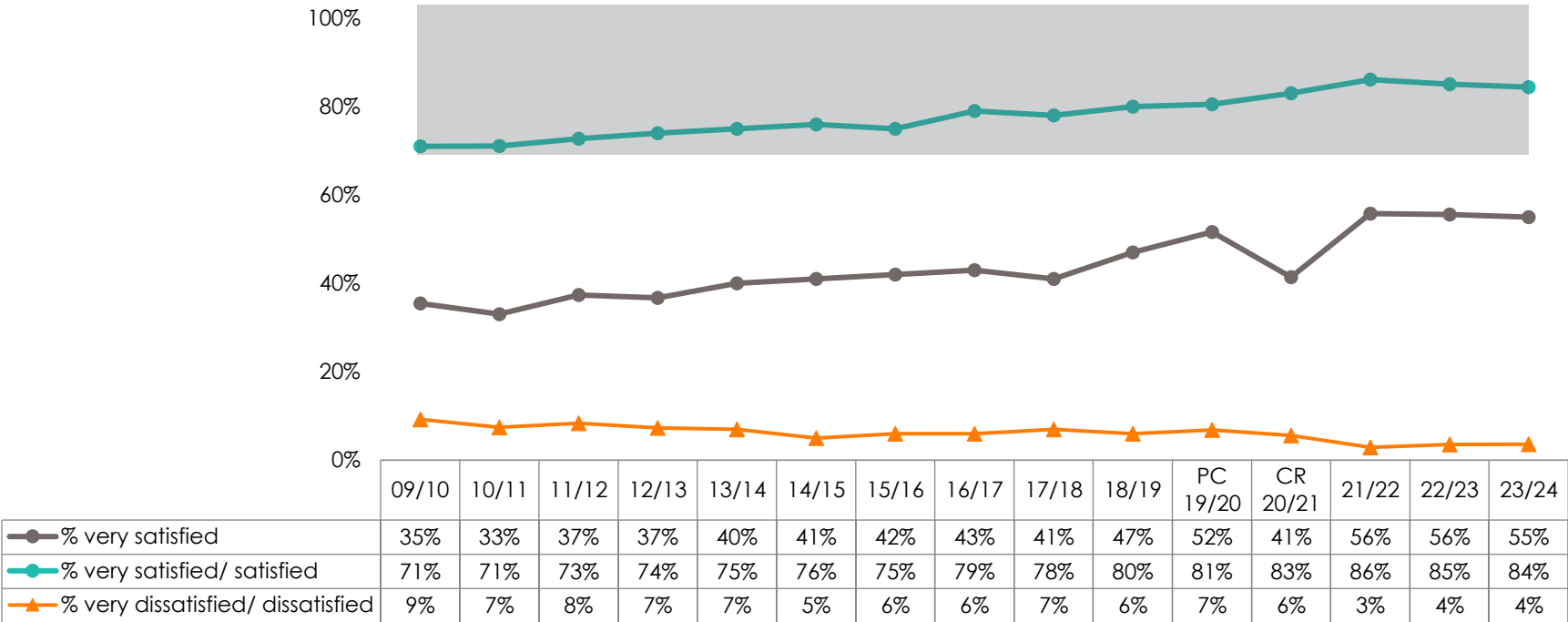


Q19.10      Please indicate how satisfied you were with....  
Base:        Visitors who experienced it, (23/24 n=3050)  
Note:        Don't know, didn't experience and missing cases excluded.

Significant and notable differences between subgroups:

- New in 2023/24:
  - More repeat visitors were very satisfied with the quality of activities than first time visitors (64% vs 59%).

Figure 28: Satisfaction with the availability of activities



Q19.11 Please indicate how satisfied you were with....  
Base: Visitors who experienced it, (23/24 n=2927)  
Note: Don't know, didn't experience and missing cases excluded

Significant and notable differences between subgroups:

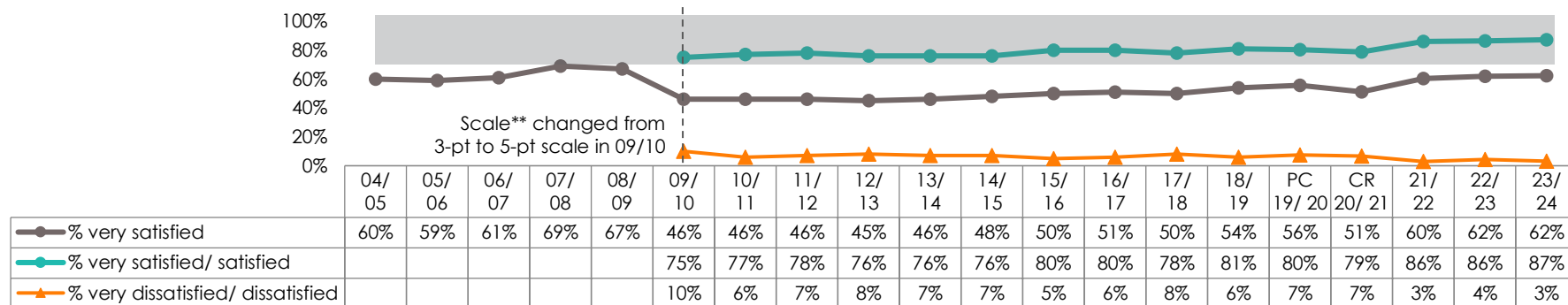
- Consistent with the previous year:
  - Intrastate (86%) and interstate (84%) visitors were more likely to be satisfied/very satisfied with the availability of the activities compared to international visitors (79%).
- New in 2023/24:
  - More repeat visitors were very satisfied with the availability of activities than first time visitors (59% vs 53%).

## Quality of accommodation (EX2e)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
The majority of visitors leave the island highly satisfied with their experience	Proportion of visitors who were very satisfied with the quality of accommodation	70% - 100%	✗

The proportion of surveyed visitors that were very satisfied with the quality of accommodation in 2023/24 has remained consistent with the previous wave (both 62%). Unfortunately, the results continue to remain outside the acceptable range of 70%-100%.

**Figure 29: Satisfaction with quality of accommodation**



Q19.3 Please indicate how satisfied you were with....

Base: Visitors who experienced it, (23/24 n=2771)

Note: Don't know, didn't experience and missing cases excluded.

\*\* In 2006/2007, 2007/2008 and 2008/2009 satisfaction was measured with a score out of 3

### Significant and notable differences between subgroups

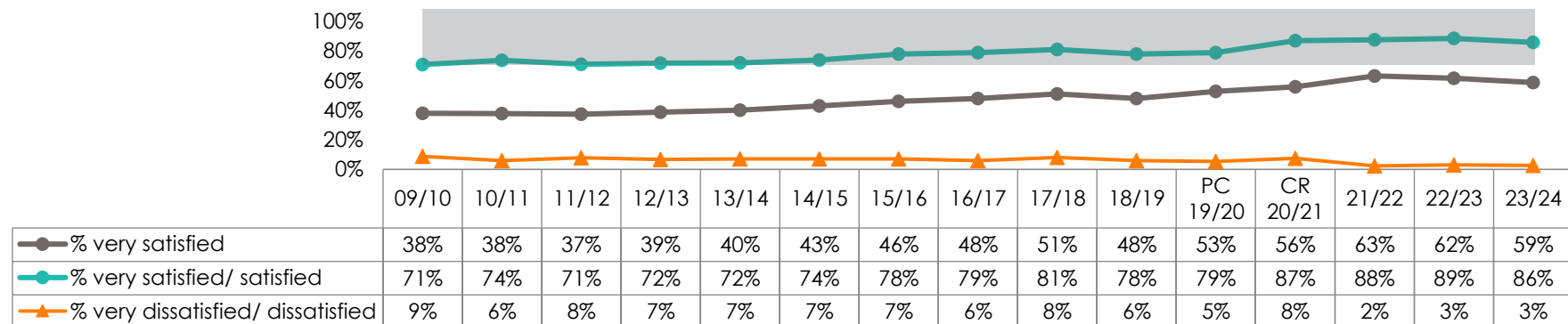
- Consistent with the previous year:
  - The group that was most satisfied (i.e., rated 'very satisfied') were the intrastate visitors (66% very satisfied), who were more satisfied than the interstate group (61% very satisfied). Both of these groups were more satisfied/very satisfied than international visitors (intrastate – 89%, interstate – 87%, international 80%);
  - More repeat visitors were satisfied/very satisfied (90%) and very satisfied (68%) compared to first time visitors (respectively, 86%, 59%).
- New in 2023/24:
  - More of those who spent up to \$200 per night were satisfied/very satisfied (89%) compared to those who spent more than \$200 per night (86%).

## Range, quality and availability of Kangaroo Island produce (EX2f)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
The majority of visitors leave the island highly satisfied with their experience	Proportion of visitors who were very satisfied with the range, quality and availability of local Kangaroo Island products	70% - 100%	✗

Satisfaction (i.e., ratings of 'very satisfied') in this wave has decreased since the previous wave across range (from 62% to 59% - a significant decrease), quality (from 66% to 64%) and availability (from 57% to 56%) of Kangaroo Island produce. All these indicators are outside of the acceptable range (70%-100%).

**Figure 30: Satisfaction with the range of local Kangaroo Island produce**



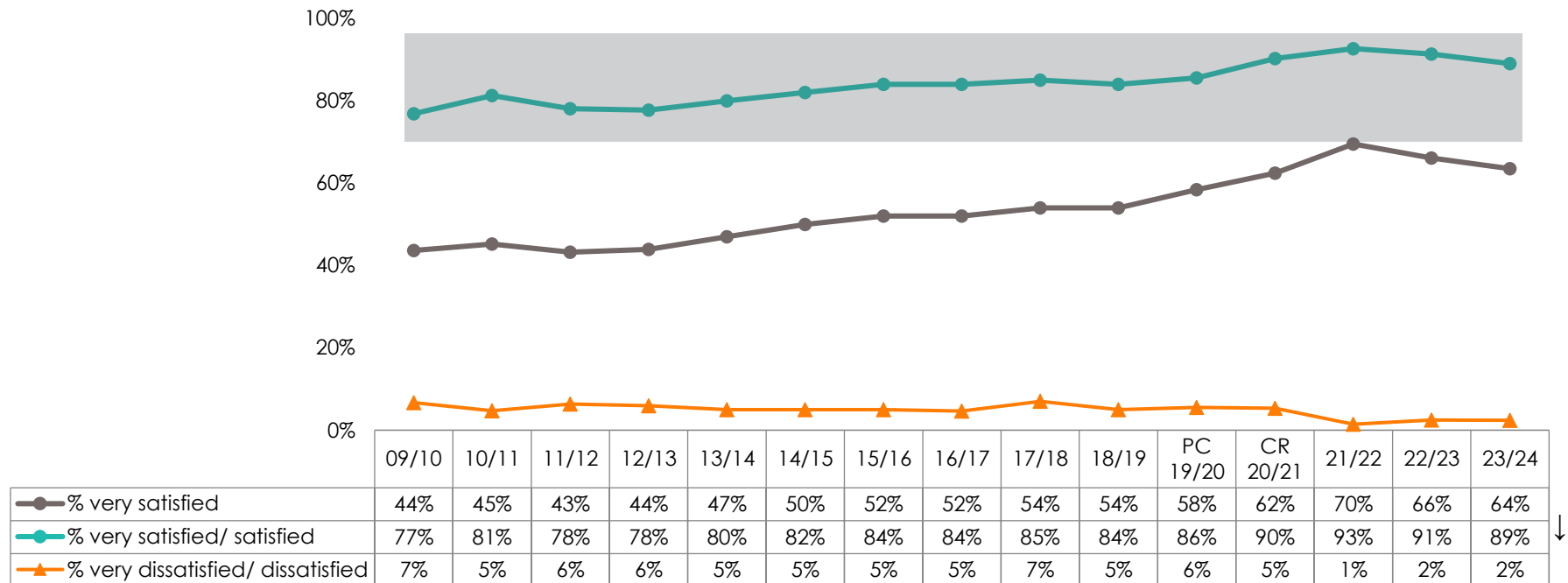
Q19.4 Please indicate how satisfied you were with....  
Base: Visitors who experienced it, (23/24 n=3034)

Note: Don't know, didn't experience and missing cases excluded

### Significant and notable differences between subgroups:

- Consistent with the previous year:
  - More intrastate visitors were satisfied/very satisfied (88%) and very satisfied (64%) with the Kangaroo Island produce range (e.g., food and wine) compared to interstate visitors (88% and 60% respectively); and
  - More repeat visitors were satisfied/very satisfied (90%) and very satisfied (66%) compared to first time visitors (84% and 55% respectively).
- New in 2023/24:
  - More intrastate visitors were satisfied/very satisfied (88%) and very satisfied (64%) with the Kangaroo Island produce range (e.g., food and wine) compared to international visitors (82% and 47% respectively). Additionally, interstate visitors were more likely to be very satisfied (57%) than international visitors (47%); and
  - More of those who spent up to \$200 per night were very satisfied (61%) than those who spent more than \$200 per night (57%).

Figure 31: Satisfaction with the quality of local Kangaroo Island produce



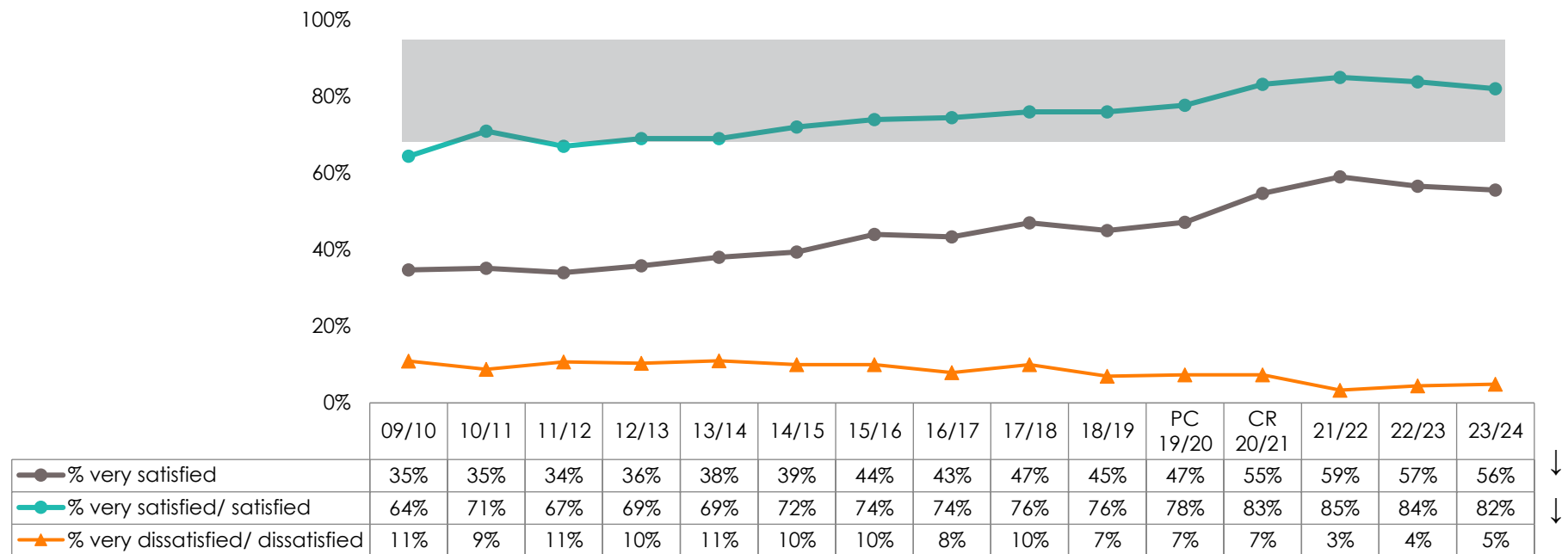
Q19.5 Please indicate how satisfied you were with....  
Base: Visitors who experienced it, (23/24 n=3019)

Note: Don't know, didn't experience and missing cases excluded.

**Significant and notable differences between subgroups:**

- Consistent with the previous year:
  - More intrastate visitors (69%) were very satisfied with the quality of Island produce compared to interstate visitors (61%); and
  - More repeat visitors were satisfied/very satisfied (92%) and very satisfied (70%) compared to first time visitors (87% and 60% respectively).
- New in 2023/24:
  - More intrastate visitors (69%) and interstate visitors (61%) were very satisfied than international visitors (53%).

**Figure 32: Satisfaction with the availability of local Kangaroo Island produce**



Q19.6 Please indicate how satisfied you were with....  
 Base: Visitors who experienced it, (23/24 n=3012)

Note: Don't know, didn't experience and missing cases excluded.

**Significant and notable differences between subgroups:**

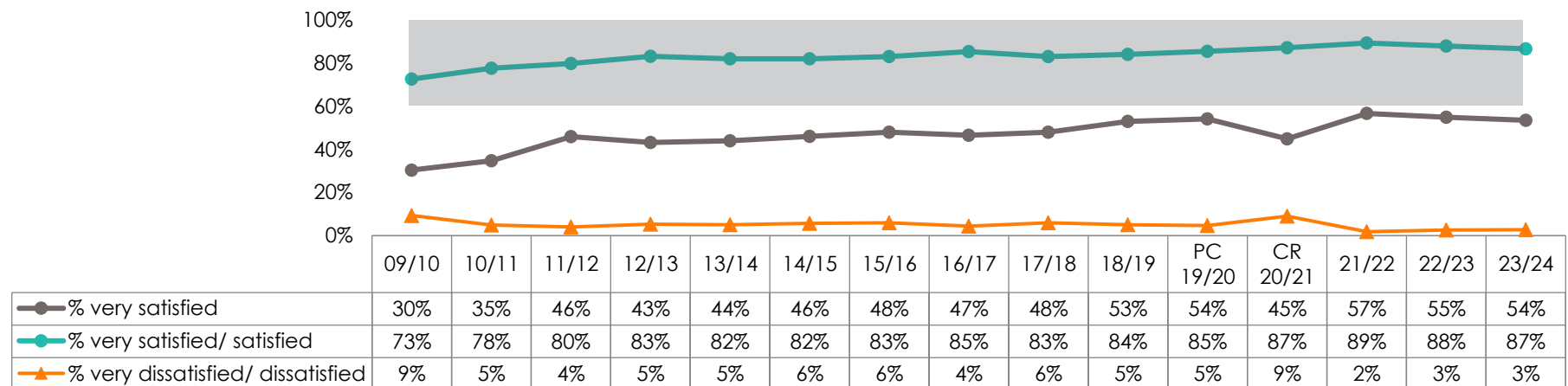
- Consistent with the previous year:
  - More repeat visitors were satisfied/very satisfied (86%) and very satisfied (61%) compared to first time visitors (80% and 53% respectively).
- New in 2023/24:
  - More intrastate visitors (61%) were very satisfied than interstate visitors (54%) who in turn were more likely to be very satisfied than international visitors (47%).

## Quality of public tourism infrastructure (EX2h)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
The majority of visitors leave the island highly satisfied with their experience	Proportion of visitors who were very satisfied with the quality of public tourism infrastructure (toilets, roads, campgrounds, public parks, picnic and signage) provided on Kangaroo Island	60%-100%	✗

The proportion of visitors who were very satisfied with the quality of various elements of Kangaroo Island's public tourism infrastructure increased in 2023/24 from the previous wave for public toilets (from 52% to 53%). On the other hand, satisfaction levels have decreased for picnic and day use areas (from 55% to 54%), interpretive/educational signage (45% to 44%), road signage (from 48% to 45%), roads (28% to 26%), and campgrounds (53% to 52%), however only the quality of road signage difference is statistically significant. All elements of public tourism infrastructure continue to remain below the acceptable range of 60-100%.

**Figure 33: Satisfaction with the quality of picnic & day use areas**



Q19.18 Please indicate how satisfied you were with....  
Base: Visitors who experienced it, (23/24 n=1920)

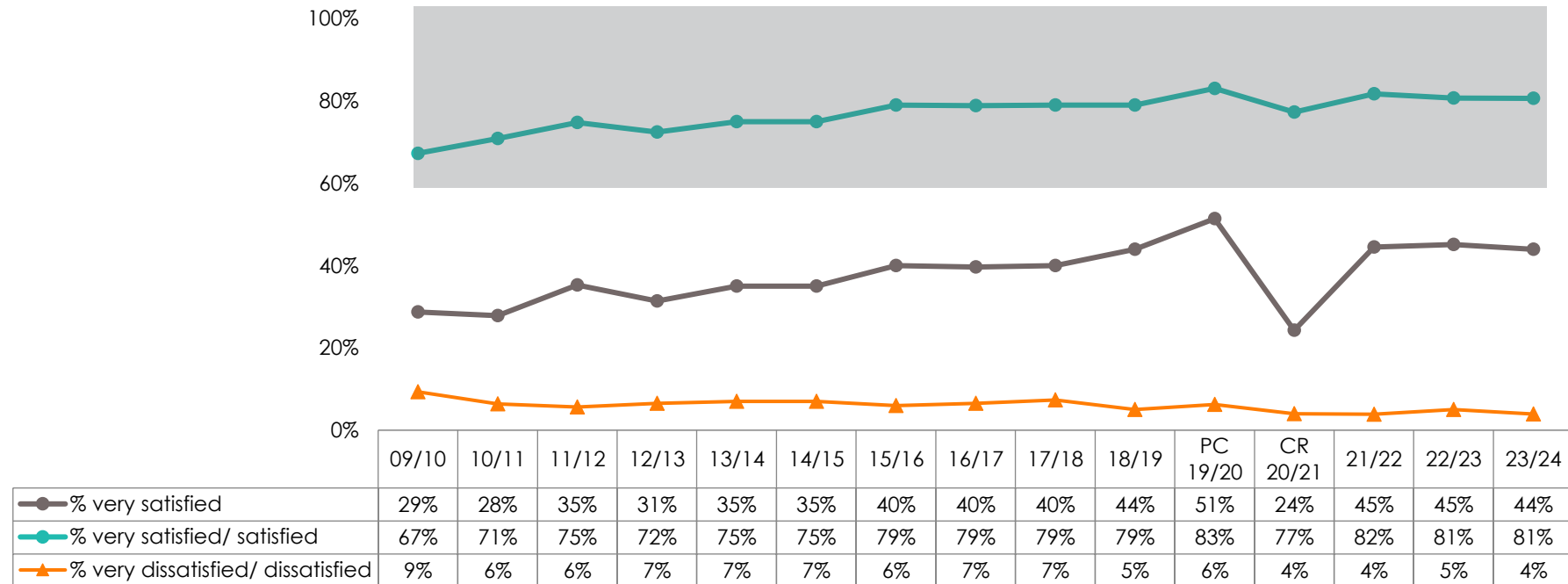
Note: Don't know, didn't experience and missing cases excluded.

### Significant and notable differences between subgroups:

- New in 2023/24:
  - More international visitors (64%) were very satisfied than interstate (53%) and intrastate (52%) visitors;
  - More first time visitors were satisfied/very satisfied than repeat visitors (88% vs 84%); and
  - More day trippers were very satisfied than those who stayed one or more nights (64% vs 52%).



**Figure 34: Satisfaction with the quality of interpretive & educational signage**



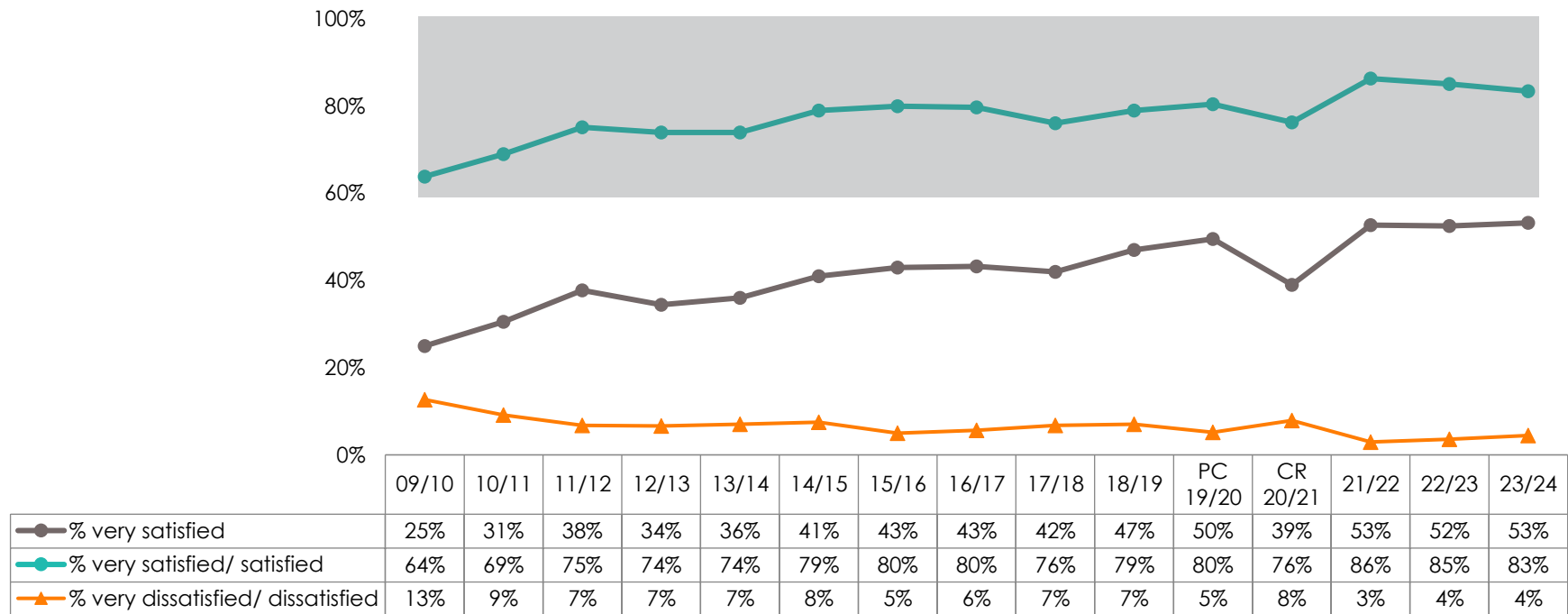
Q19.17 Please indicate how satisfied you were with....  
Base: Visitors who experienced it, (23/24 n=2346)

Note: Don't know, didn't experience and missing cases excluded.

**Significant and notable differences between subgroups:**

- Consistent with the previous year:
  - More day trippers were very satisfied than those who stayed one or more nights (54% vs 43%).
- New in 2023/24:
  - More intrastate (5%) and international (6%) visitors were dissatisfied/very dissatisfied than interstate visitors (3%); and
  - More first-time visitors were very satisfied than repeat visitors (46% vs 41%).

**Figure 35: Satisfaction with the quality of public toilets**



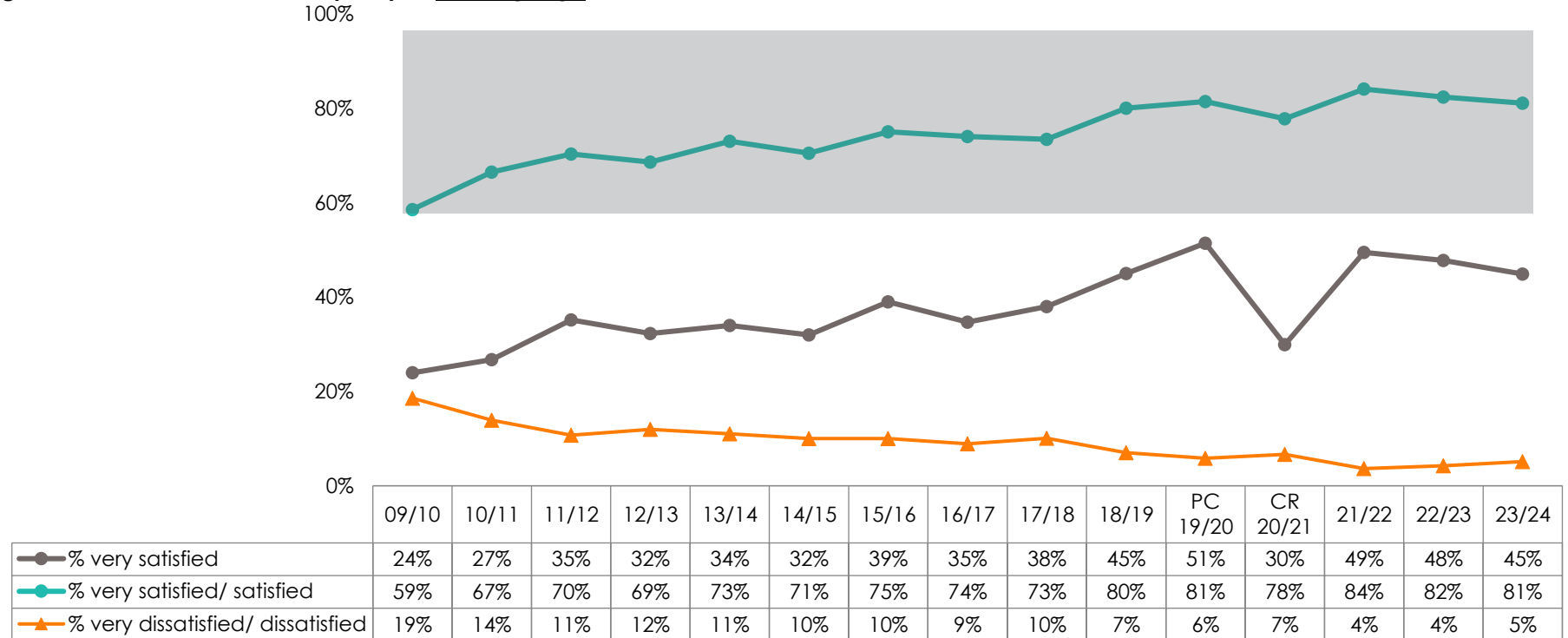
Q19.13 Please indicate how satisfied you were with....  
Base: Visitors who experienced it, (23/24 n=3048)

Note: Don't know, didn't experience and missing cases excluded.

**Significant and notable differences between subgroups:**

- Consistent from the previous year:
  - More interstate visitors were satisfied/very satisfied (85%) and very satisfied (56%) compared to intrastate (80% and 48% respectively); and
  - First-time visitors were more likely to be satisfied/very satisfied (85%) and very satisfied (56%) compared to repeat visitors (80% and 48% respectively).
- New in 2023/24:
  - Winter and spring visitors are more likely to be satisfied/very satisfied (89% and 87%) and very satisfied (59% and 58%) than summer (79% and 50%) and autumn (83% and 50%) visitors. Autumn visitors were also more satisfied/very satisfied (83%) than summer visitors (79%); and
  - Those who stayed one or more nights were more likely to be satisfied/very satisfied than day trippers (84% vs 80%).

**Figure 36: Satisfaction with the quality of road signage**



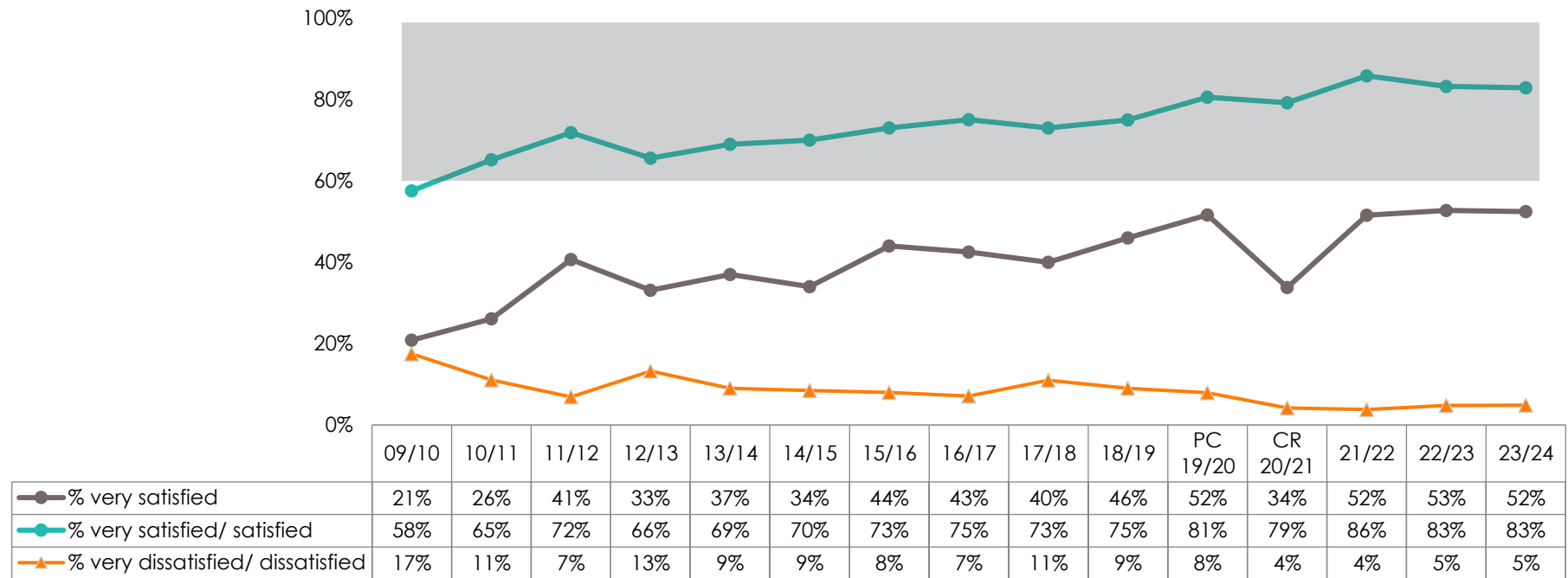
Q19.16 Please indicate how satisfied you were with....  
 Base: Visitors who experienced it, (23/24 n=3025)

Note: Don't know, didn't experience and missing cases excluded.

**Significant and notable differences between subgroups:**

- Consistent from the previous year
  - More day trippers were very satisfied than who that stayed one or more nights (54% vs 44%).
- New in 2023/24:
  - More winter visitors were satisfied/very satisfied (87%) and very satisfied (51%) than autumn visitors (80% and 41%). Additionally, more winter visitors were satisfied/very satisfied than summer visitors (87% vs 83%); and
  - More cruise ship arrivals were very satisfied than non-cruise ship arrivals (56% vs 45%).

**Figure 37: Satisfaction with the quality of campgrounds**



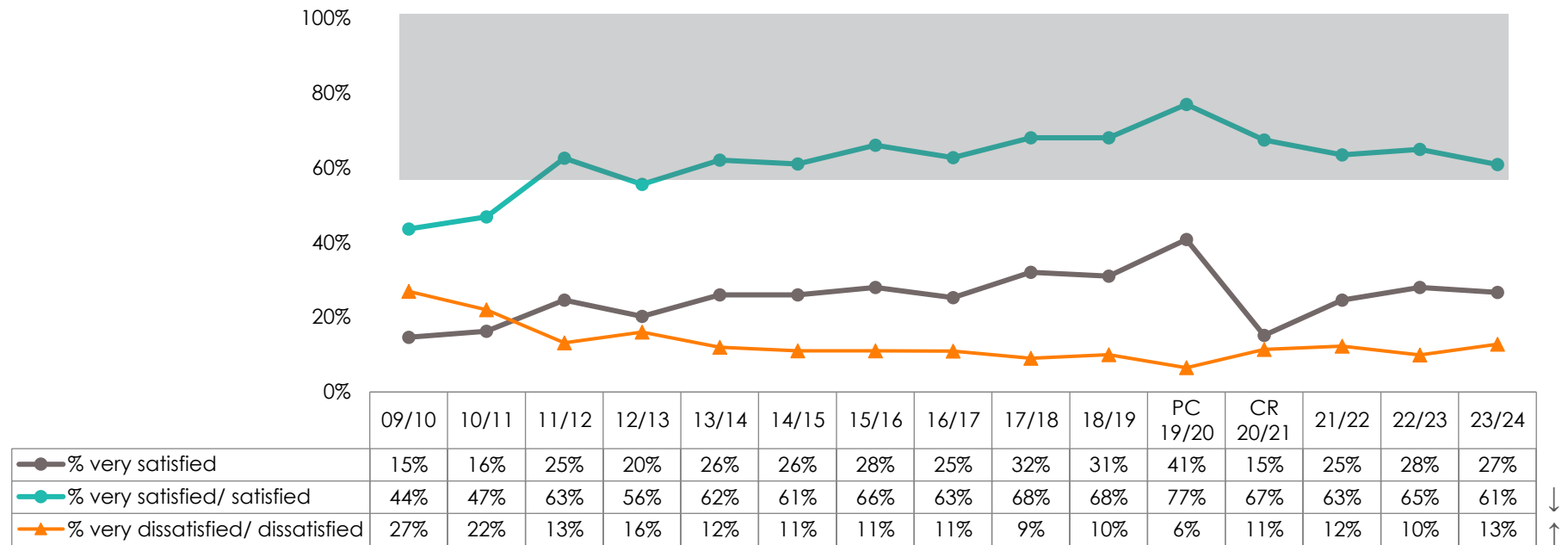
Q19.15 Please indicate how satisfied you were with....  
 Base: Visitors who experienced it, (23/24 n=844)

Note: Don't know, didn't experience and missing cases excluded.

**Significant and notable differences between subgroups:**

No significant differences were observed.

**Figure 38: Satisfaction with the quality of roads**



Q19.14 Please indicate how satisfied you were with....  
Base: Visitors who experienced it, (23/24 n=3301)

Note: Don't know, didn't experience and missing cases excluded.

**Significant and notable differences between subgroups:**

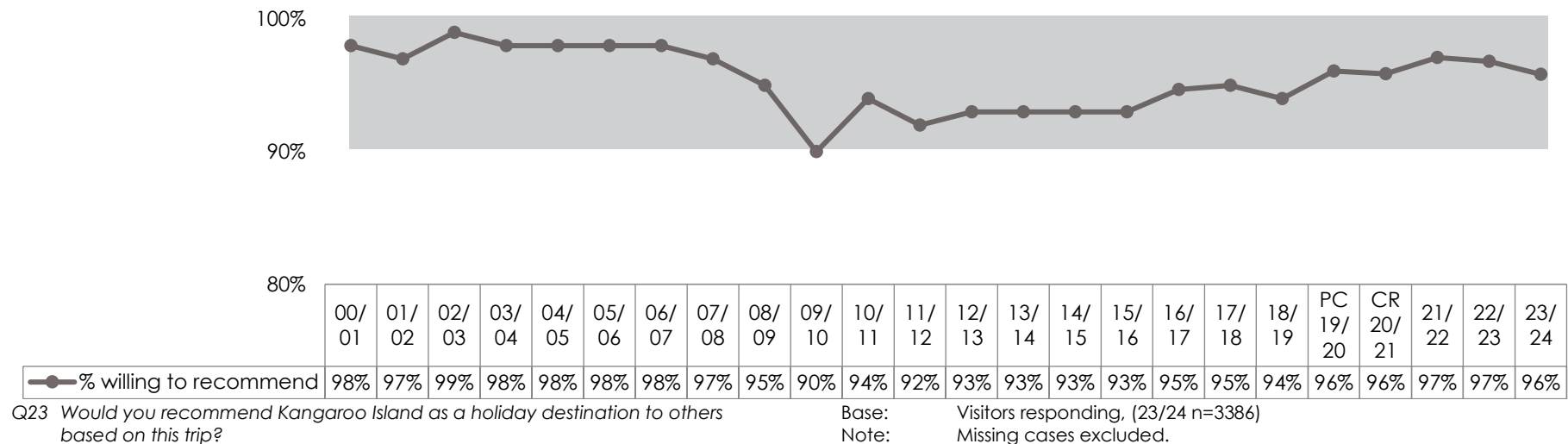
- Consistent with the previous year:
  - More interstate visitors were very satisfied than intrastate visitors (30% vs 21%). More international (68%) and interstate visitors (65%) were satisfied/very satisfied than intrastate visitors (53%);
  - More first-time visitors were satisfied/very satisfied (64%) and very satisfied (29%) than repeat visitors (56% and 23% respectively); and
  - Day trippers were more satisfied/very satisfied (75%) and very satisfied (44%) than those who stayed one or more nights (58% and 23% respectively).
- New in 2023/24:
  - More international visitors were very satisfied than intrastate visitors (33% vs 21%);
  - More winter visitors were satisfied/very satisfied (72%) and very satisfied (34%) than spring (60% and 24%), summer (58% and 28%), and autumn (60% and 24%) visitors;
  - More of those who spent more than \$200 per night were satisfied/very satisfied than those who spent up to \$200 per night (61% vs 55%); and
  - More cruise ship arrivals were satisfied/very satisfied (77%) and very satisfied (42%) than non-cruise ship arrivals (60% and 26% respectively).

## Recommendation of Kangaroo Island as holiday destination (EX2i)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
The majority of visitors leave the island highly satisfied with their experience	Proportion of visitors that would recommend Kangaroo Island as a holiday destination to others as a result of their experience	90% - 100%	✓

The proportion of visitors who would recommend Kangaroo Island as a destination to others has dropped by 1% (not significant) since the last wave and continues to sit well within the acceptable range of 90%-100%.

**Figure 39: Willingness to recommend**



### Significant and notable differences between subgroups:

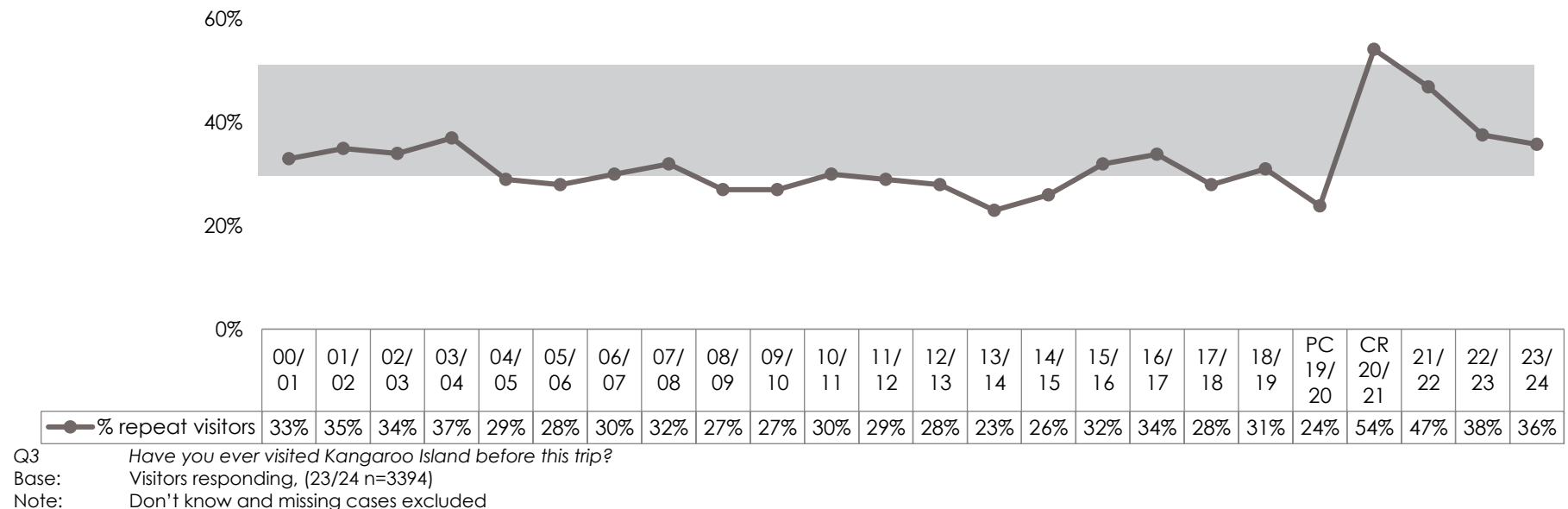
- Consistent with the previous year:
  - More intrastate visitors (97%) would recommend than interstate visitors (95%) and international visitors (94%);
  - Those who spent up to \$200 per night (97%) were more likely to recommend than those who spent more than \$200 per night (96%);
  - More visitors who stayed one or more nights would recommend than day trippers (96% vs 93%); and
  - More non-cruise ship arrivals (96%) would recommend than cruise ship arrivals (89%).
- New in 2023/24:
  - More repeat visitors would recommend than first time visitors (97% vs 94%).

## Repeat visitation (EX2j)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
The majority of visitors leave the island highly satisfied with their experience	Proportion of repeat visitation	30% - 50%*	✓

The proportion of repeat visitors to Kangaroo Island in 2023/24 has decreased slightly since the previous wave yet remains in the acceptable range (from 38% to 36%). \*The acceptable range was formerly 30%-60% to cover the COVID recovery result but has returned to 30-50%.

**Figure 40: Repeat visitation**



### Significant and notable differences between subgroups:

- Consistent with the previous year:
  - More intrastate visitors were repeat visitors (69%) compared to interstate (17%) and international visitors (10%);
  - A greater proportion of those who spent up to \$200 per night were repeat visitors than those who spent more than \$200 per night (49% vs 28%);
  - More of those that had stayed one or more nights on the island were repeat visitors compared to day-trippers (37% vs 25%); and
  - More sea arrivals were repeat visitors than air arrivals (37% vs 21%).
  - More summer visitors were repeat visitors (39%) compared to spring visitors (33%).

## Summary of sub-groups scores for experiential condition 'Kangaroo Island delivers authentic and credible experiences consistent with its positioning' – (23/24)

Indicator		Sub-groups who were within the Acceptable range for the indicator	Sub-groups who scored more highly for the indicator (compared to their comparative sub-group)
EX1b	Proportion of visitors that viewed wildlife in the natural environment	<ul style="list-style-type: none"> <li>All sub-groups except cruise ship arrivals</li> </ul>	<ul style="list-style-type: none"> <li>International visitors</li> <li>Winter, spring and autumn visitors</li> <li>Spent up to \$200 per night</li> <li>Stayed one or more nights</li> <li>Non-cruise ship arrivals</li> </ul>
EX1c	Proportion of visitors that experienced scenic variety without crowds	<ul style="list-style-type: none"> <li>All sub-groups except cruise ship arrivals</li> </ul>	<ul style="list-style-type: none"> <li>Stayed one or more nights</li> <li>Non-cruise ship arrivals</li> </ul>
EX1d	Proportion of visitors that experienced cultural heritage and history of settlement	<ul style="list-style-type: none"> <li>Interstate visitors</li> <li>Winter, spring and autumn visitors</li> <li>First-time visitors</li> <li>Sea arrivals</li> <li>All levels of spend per night</li> <li>Stayed one or more nights</li> <li>Cruise ship and non-cruise ship arrivals</li> </ul>	<ul style="list-style-type: none"> <li>Interstate visitors</li> <li>First-time visitors</li> <li>Non-cruise ship visitors</li> </ul>
EX1e	Proportion of visitors that experienced spectacular scenery and coastal landscapes	<ul style="list-style-type: none"> <li>All sub-groups</li> </ul>	<ul style="list-style-type: none"> <li>Stayed one or more nights</li> <li>Non-cruise ship arrivals</li> </ul>
EX1f	Proportion of visitors that experienced areas of untouched natural beauty	<ul style="list-style-type: none"> <li>All sub-groups except cruise ship arrivals and day trippers</li> </ul>	<ul style="list-style-type: none"> <li>Stayed one or more nights</li> <li>Non-cruise ship arrivals</li> </ul>
EX1g	Proportion of visitors that experienced farming and rural landscapes	<ul style="list-style-type: none"> <li>Intrastate visitors</li> <li>Winter and spring visitors</li> <li>Repeat visitors</li> <li>Air and sea arrivals</li> <li>All levels of spend per night</li> <li>Stayed one or more nights</li> <li>Non-cruise ship arrivals</li> </ul>	<ul style="list-style-type: none"> <li>Intrastate and Interstate visitors</li> <li>Winter, spring, autumn visitors</li> <li>Winter and spring visitors</li> <li>Stayed one or more nights</li> <li>Non-cruise ship arrivals</li> </ul>



## Summary of sub-groups scores for experiential condition 'Kangaroo Island delivers authentic and credible experiences consistent with its positioning' (continued) – (23/24)

Indicator		Sub-groups who were within the Acceptable range for the indicator	Sub-groups who scored more highly for the indicator (compared to their comparative sub-group)
EX1h	Proportion of visitors that experienced local Kangaroo Island produce	<ul style="list-style-type: none"> <li>All sub-groups except international visitors, day trippers and cruise ship arrivals</li> </ul>	<ul style="list-style-type: none"> <li>Intrastate visitors</li> <li>Spring visitors</li> <li>Repeat visitors</li> <li>Stayed one or more nights</li> <li>Non-cruise ship arrivals</li> </ul>
EX1i	Proportion of visitors that believe Kangaroo Island offers one of Australia's top three nature & wildlife experiences	<ul style="list-style-type: none"> <li>All sub-groups except cruise ship arrivals</li> </ul>	<ul style="list-style-type: none"> <li>International visitors</li> <li>Winter and spring visitors</li> <li>First-time visitors</li> <li>Non-cruise ship arrivals</li> </ul>
EX1j	Proportion of visitors that believe Kangaroo Island has a friendly local community	<ul style="list-style-type: none"> <li>All sub-groups</li> </ul>	<ul style="list-style-type: none"> <li>Intrastate and interstate visitors</li> <li>Repeat visitors</li> <li>Stayed one or more nights</li> </ul>
EX1k	Proportion of visitors who agree that Kangaroo Island is a wild and welcoming destination, that will surprise and amaze you, relax your mind, refresh your spirit and make you feel totally alive. It provides an opportunity to view and to discover all the scenic variety of mainland Australia	<ul style="list-style-type: none"> <li>All sub-groups</li> </ul>	<ul style="list-style-type: none"> <li>Intrastate visitors</li> <li>Winter visitors</li> <li>Repeat visitors</li> <li>Stayed one or more nights</li> <li>Non-cruise ship arrivals</li> </ul>
EX1l	Proportion of visitors that state that their experience matched or exceeded expectation set by marketing materials	<ul style="list-style-type: none"> <li>All sub-groups</li> </ul>	<ul style="list-style-type: none"> <li>Interstate and international visitors</li> <li>Repeat visitors</li> </ul>
EX1m	Proportion of visitors very satisfied with their overall experience on Kangaroo Island	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Stayed one or more nights</li> <li>Non-cruise ship arrivals</li> </ul>

## Summary of sub-groups scores for experiential condition 'The majority of visitors leave the Island highly satisfied with their experience' – (23/24)

Indicator		Sub-groups who were within the Acceptable range for the indicator	Sub-groups who scored more highly for the indicator (compared to their comparative sub-group)
EX2a	Proportion of visitors who were very satisfied with seeing native wildlife in its natural environment	<ul style="list-style-type: none"> <li>All subgroups except international visitors, day trippers and cruise ship arrivals</li> </ul>	<ul style="list-style-type: none"> <li>Intrastate visitors</li> <li>Repeat visitors</li> <li>Stayed one or more nights</li> </ul>
EX2b	Proportion of visitors who were very satisfied with their opportunity to learn more about the Island's natural environment	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Winter visitors</li> </ul>
EX2c	Proportion of visitors who were very satisfied with their opportunity to learn more about the Island's cultural history	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Winter visitors</li> <li>Day trippers</li> </ul>
EX2d	Proportion of visitors who were very satisfied with the range, quality and availability of activities available	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Range: intrastate visitors, repeat visitors, sea arrivals</li> <li>Quality: repeat visitors</li> <li>Availability: repeat visitors</li> </ul>
EX2e	Proportion of visitors who were very satisfied with the quality of accommodation	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Intrastate visitors</li> <li>Repeat visitors</li> </ul>
EX2f	Proportion of visitors who were very satisfied with the range, quality and availability of Kangaroo Island produce	<ul style="list-style-type: none"> <li>Quality: repeat visitors</li> </ul>	<ul style="list-style-type: none"> <li>Range, quality and availability: intrastate and repeat visitors</li> <li>Range: Those who spent up to \$200 per night</li> </ul>
EX2g	Proportion of visitors that are very satisfied with the level of customer service they receive	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Interstate visitors</li> <li>Day trippers</li> </ul>
EX2h	Proportion of visitors that are very satisfied with the quality of public tourism infrastructure (toilets, roads, campgrounds, picnic areas and signage) provided on Kangaroo Island	<ul style="list-style-type: none"> <li>Picnic areas: international visitors, winter visitors, day trippers, cruise ship arrivals</li> <li>Campgrounds: winter visitors</li> </ul>	<ul style="list-style-type: none"> <li>Picnic areas: International visitors, day trippers</li> <li>Interpretative/educational signage: first time visitors, day trippers</li> <li>Public toilets: interstate and first time visitors, winter, spring arrivals</li> <li>Road signage: winter visitors, day trippers and cruise ship arrivals</li> <li>Roads: interstate, international, winter and first time visitors, day trippers and cruise ship arrivals</li> </ul>

Indicator		Sub-groups who were within the Acceptable range for the indicator	Sub-groups who scored more highly for the indicator (compared to their comparative sub-group)
EX2i	Proportion of visitors that would recommend Kangaroo Island as a holiday destination to others as a result of their experience	<ul style="list-style-type: none"> <li>All subgroups except cruise ship arrivals</li> </ul>	<ul style="list-style-type: none"> <li>Intrastate visitors</li> <li>Repeat visitors</li> <li>Those who spent up to \$200 per night</li> <li>Stayed one or more nights</li> <li>Non-cruise ship arrivals</li> </ul>

Summary of sub-groups scores for experiential condition 'The majority of visitors leave the Island highly satisfied with their experience' (continued) – (23/24)

Indicator		Sub-groups who were within the Acceptable range for the indicator	Sub-groups who scored more highly for the indicator (compared to their comparative sub-group)
EX2j	Proportion of repeat visitation	<ul style="list-style-type: none"> <li>• All subgroups except interstate, international visitors, air arrivals and those who spent more than \$200 per night, day trippers</li> <li>• Note intrastate and cruise ship arrivals exceeded range</li> </ul>	<ul style="list-style-type: none"> <li>• Intrastate visitors</li> <li>• Summer visitors</li> <li>• Sea arrivals</li> <li>• Those who spent up to \$200 per night</li> <li>• Stayed one or more nights</li> </ul>

# Environmental Indicators

## Overview

With respect to the condition 'Visitor activity has minimal negative impacts on the natural environment', both measures fell within the acceptable range in the 2023/24 wave.

The proportion of visitations to natural areas occurring on managed sites was consistent at 73%, and the proportion of visitors aware of quarantine regulations prior to arriving on Kangaroo Island increased slightly from 69% to 73%.

In 23/24, the most commonly visited location was the Penneshaw township (76%), however this was significantly lower than in 22/23 (80%), followed by the Kingscote township (67%), also lower than in 22/23 (73%), then Admirals Arch (65%). Other significant changes from last year's results include a decrease in visitation to Vivonne Bay (58% to 54%), American River Township (from 53% to 48%), Emu Bay (from 60% to 56%), Parndana Township (from 36% to 32%), Cape Willoughby Light Station (from 34% to 30%), Cape Borda Light Station (20% to 18%), Western River Cove (from 11% to 8%), Prospect Hill (from 27% to 23%) and Pennington Bay (from 30% to 27%). Increases in visitation to the Kingscote Silos (from 34% to 37%) and Kelly Hill Caves (from 4% to 11%) were observed.

Awareness amongst repeat visitors of the quarantine regulations increased slightly from 95% to 97%, indicating still a strong overall awareness.

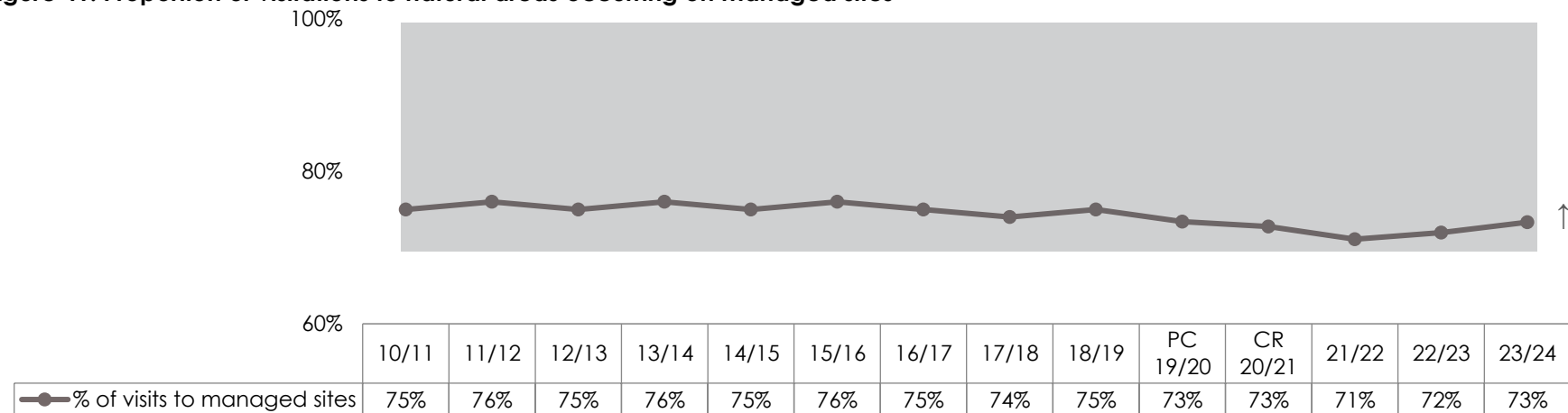
Awareness levels for specific prohibited items remained relatively consistent with no statistically significant differences noted.

## Visits to natural areas occurring on managed sites (EN2b)

Optimal Conditions	Indicator	Acceptable Range	23/24
Visitor activity has minimal negative impacts on the natural environment	Proportion of visitations to natural areas occurring on managed sites	70% - 100%	✓

The proportion of visits to managed sites remains within the acceptable range (73%) and has increased significantly since last wave (from 72% to 73%).

**Figure 41: Proportion of visitations to natural areas occurring on managed sites**



Q17 Which of these locations did you visit while on Kangaroo Island this time?

Base: Visitors responding (23/24 n=3396)

### Significant and notable differences between subgroups:

- Consistent with previous wave
  - More interstate visitors visited managed sites than intrastate visitors (74% vs 70%);
  - More day trippers visited managed sites than those visiting for one or more nights (86% vs 72%); and
  - More first time visitors visited managed sites than repeat visitors (75% vs 70%)
- New in 2023/24:
  - More international visitors visited managed sites than interstate visitors (79% vs 74%).

## Locations visited

Consistent with the previous wave, the most visited location was the Penneshaw township (75%), however visitation has decreased significantly from 2022/23 across various locations noted in the chart and increased for Kelly Hill Caves (from 4% to 11%).

**Table 2: Locations Visited on Kangaroo Island over time**

	07/08 (n=1609)	08/09 (n=1635)	09/10 (n=1653)	10/11 (n=2034)	11/12 (n=1108)	12/13 (n=2452)	13/14 (n=2547)	14/15 (n=1607)	15/16 (n=1604)	16/17 (n=2148)	17/18 (n=2042)	18/19 (n=1832)	PC 19/20 (n=915)	CR 20/21 (n=212)	21/22 (n=1394)	22/23 (n=3722)	23/24 (n=3397)
Kingscote Township	85%	88%	85%	88%	84%	85%	65%	74%	78%	78%	70%	73%	67%	87%	78%	73%	67%
Flinders Chase National Park	76%	81%	80%	80%	79%	80%	82%	80%	82%	76%	81%	76%	72%	51%	55%	52%	53%
Penneshaw Township	78%	85%	79%	81%	78%	79%	68%	74%	77%	77%	74%	73%	65%	81%	82%	80%	76%↓
Admirals Arch	-	-	77%	80%	77%	79%	83%	82%	80%	78%	82%	80%	77%	72%	66%	65%	65%
Remarkable Rocks	-	-	77%	79%	77%	78%	82%	80%	78%	77%	80%	76%	71%	65%	63%	64%	63%
Seal Bay	73%	76%	69%	71%	68%	67%	77%	69%	70%	68%	71%	68%	72%	56%	58%	63%	62%
Vivonne Bay	62%	66%	69%	66%	65%	67%	62%	63%	59%	57%	63%	58%	51%	53%	62%	58%	54%↓
American River Township	49%	58%	55%	58%	57%	58%	44%	53%	58%	58%	50%	53%	49%	75%	60%	53%	48%↓
Emu Bay	48%	48%	52%	52%	51%	57%	42%	44%	51%	47%	47%	51%	51%	68%	64%	60%	54%↓
Parndana Township	47%	52%	51%	52%	53%	50%	39%	45%	49%	45%	42%	38%	36%	45%	41%	36%	32%↓
Stokes Bay	43%	41%	47%	45%	44%	51%	39%	43%	46%	45%	43%	45%	36%	51%	49%	49%	45%↓
Kelly Hill Caves	-	-	32%	30%	30%	22%	22%	21%	24%	26%	23%	27%	24%	1%	2%	4%	11%↑
Cape Willoughby Light Station	31%	33%	31%	33%	33%	32%	25%	34%	37%	37%	28%	30%	31%	47%	37%	34%	30%↓
Little Sahara	22%	25%	28%	24%	22%	22%	18%	18%	16%	17%	13%	19%	19%	15%	22%	20%	17%
Hanson Bay	28%	32%	27%	27%	25%	30%	39%	35%	34%	33%	42%	37%	37%	12%	14%	16%	16%
Pennington Bay	23%	27%	27%	29%	29%	28%	21%	24%	26%	26%	24%	27%	24%	33%	29%	30%	27%↓

	07/08 (n=1609)	08/09 (n=1635)	09/10 (n=1653)	10/11 (n=2034)	11/12 (n=1108)	12/13 (n=2452)	13/14 (n=2547)	14/15 (n=1607)	15/16 (n=1604)	16/17 (n=2148)	17/18 (n=2042)	18/19 (n=1832)	PC 19/20 (n=915)	CR 20/21 (n=212)	21/22 (n=1394)	22/23 (n=3722)	23/24 (n=3397)
Cape Borda Light Station	20%	23%	25%	29%	26%	23%	24%	24%	26%	23%	26%	23%	21%	7%	21%	20%	18%↓
Snelling Beach	19%	17%	20%	19%	16%	19%	13%	14%	17%	18%	18%	16%	11%	22%	17%	19%	17%
Antechamber Bay	19%	22%	18%	23%	22%	20%	16%	18%	20%	16%	13%	13%	11%	22%	19%	16%	14%
Brown's Beach	-	-	18%	20%	21%	21%	13%	17%	23%	17%	17%	18%	15%	23%	19%	18%	16%
Island Beach	18%	18%	14%	18%	20%	18%	13%	14%	16%	14%	15%	16%	14%	19%	19%	15%	14%
Western River Cove	14%	10%	14%	12%	11%	13%	10%	13%	12%	12%	10%	10%	8%	13%	11%	11%	8%↓
Baudin Conservation Park	-	-	12%	17%	16%	17%	12%	16%	19%	18%	16%	16%	13%	13%	16%	14%	13%
Murray Lagoon	-	-	12%	13%	12%	13%	4%	11%	11%	9%	10%	9%	8%	7%	7%	8%	7%
Latham Conservation Park	-	-	8%	9%	8%	8%	8%	8%	9%	8%	8%	7%	7%	8%	7%	8%	7%
Prospect Hill**	-	-	-	-	-	-	-	-	-	7%	7%	5%	25%	33%	30%	27%	23%↓
Raptor Domain^^	-	-	-	-	-	-	-	3%	3%	2%	2%	1%	<1%	1%	2%	1%	1%
Kingscote Silos#	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	34%	36%

Q17 Which of these locations did you visit while on Kangaroo Island this time?

Base: Visitors responding, (23/24 n=3397) ^^New in 2014/15, \*\*New in 2016/17, #New in 2022/23

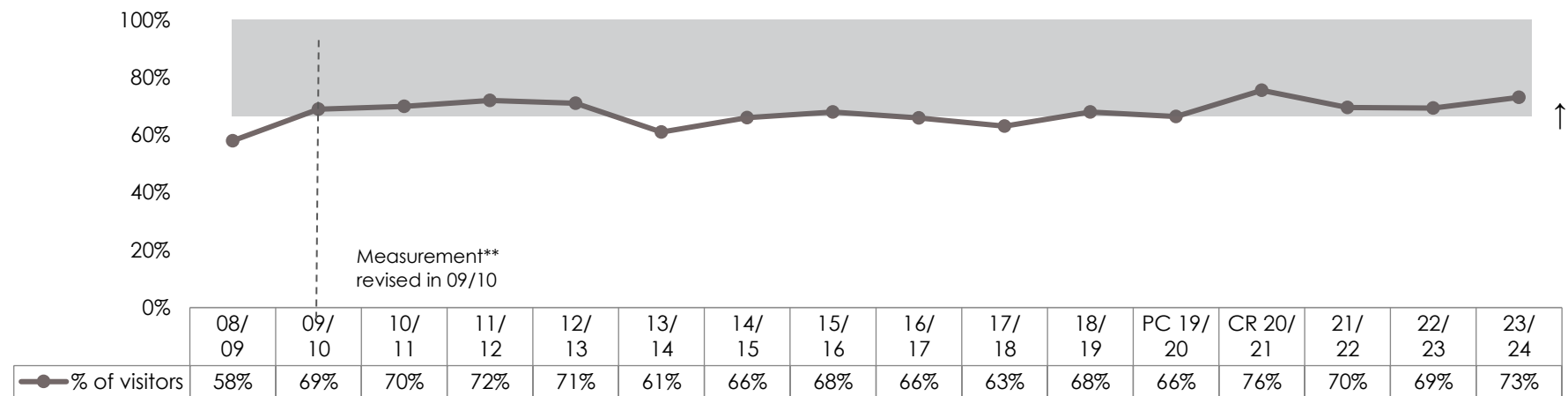


## Awareness of quarantine regulations prior to arriving (EN2e)

Optimal Conditions	Indicator	Acceptable Range	23/24 Result
Visitor activity has minimal negative impacts on the natural environment	Proportion of visitors aware of quarantine regulations prior to arriving on Kangaroo Island	70% - 100%	✓

The proportion of visitors aware of quarantine regulations prior to arrival in this wave has increased significantly and moved into the acceptable range (from 69% to 74%).

**Figure 42: Awareness of quarantine regulations prior to visitation**



Q16a Were you aware of all Kangaroo Island's quarantine regulations

Q16b If yes, when did you find out this information

Base: Visitors responding, (23/24 n=3397)

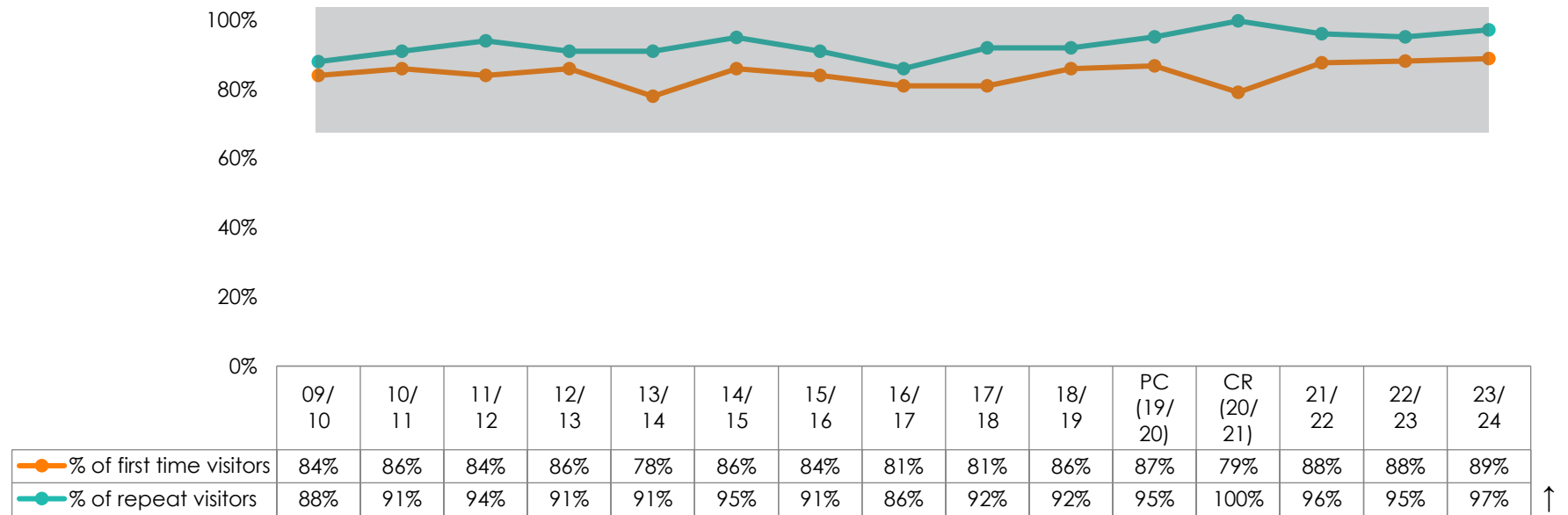
Note:

\*\*The measurement method was different in 2007/2008 and 2008/2009, so these figures were slightly changed to enable tracking of this indicator. The current awareness measurement used is the percentage of all respondents that were aware of the quarantine regulations

### Significant and notable differences between subgroups:

- Consistent with the previous year:
  - More intrastate (82%) and interstate (71%) visitors were aware before their visit to the island compared with international visitors (55% were aware prior). Additionally, more intrastate visitors were aware prior to their visit than interstate visitors;
  - More repeat visitors were aware prior to their visit (84%) than first time visitors (67%);
  - More cruise ship arrivals were aware after arriving (46%) compared to non-cruise ship arrivals (26%);
  - More visitors who spent up to \$200 were aware before their visit (83%) in contrast to those who spent more than \$200 (73%); and
  - More visitors that stayed one or more nights (77%) were aware before their visit compared to those that stayed for only a day trip (52%).
- New in 2023/24
  - Visitors in autumn (78%) were more likely to be aware prior to their visit than winter (69%) and summer (70%) visitors.

**Figure 43: Awareness of any quarantine regulations by repeat and first-time visitors**



Q16a Were you aware of Kangaroo Island's quarantine regulations, prohibiting the import of....

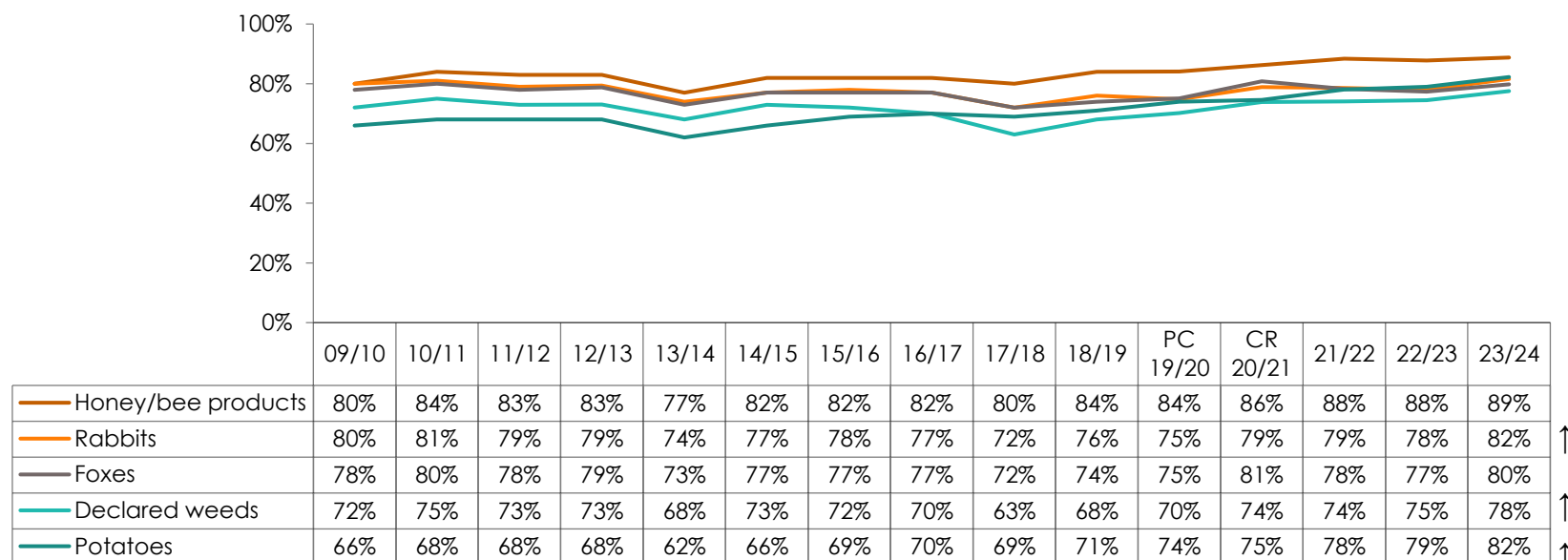
\* The current awareness measurement used is the percentage of all respondents that were aware of any of the quarantine regulations.

Base: Repeat visitors responding, (23/24 n=2189), first time visitors responding, (23/24 n=1180).

## Awareness of specific prohibited items

Awareness of each item in 2023/24 has increased significantly from the previous year. Similar to previous waves, awareness of honey/bee products being prohibited is highest (89%), whereas declared weeds has the lowest awareness (78%).

**Figure 44: Awareness of Prohibited Items**



Q16a Were you aware of Kangaroo Island's quarantine regulations, prohibiting the import of ...

Base: Visitors responding, (23/24 n=3372)  
Note: Missing cases excluded.

### Significant and notable differences between subgroups:

- Consistent with the previous year:
  - More repeat visitors were aware of the regulations around all prohibited items than first time visitors;
  - More ferry arrivals were aware of the regulations prior to arriving than those arriving by air or cruise ship;
- New in 2023/24
  - More intrastate visitors were aware of all the quarantine regulations than international visitors. Furthermore, more intrastate visitors were aware of all the quarantine regulations than interstate visitors. More interstate visitors were aware of all the quarantine regulations than international visitors;
  - More visitors who spent only up to \$200 were aware of all the regulations compared to visitors who spent more than \$200; and
  - More of those who stayed one or more nights were aware of all the regulations than day trippers.

**Table 3: Awareness of quarantine regulations by first time and repeat visitors this wave**

Repeat visitors were significantly more aware of regulations prohibiting the import of all prohibited items when compared to repeat visitors.

Aware of regulations prohibiting the import of...	(a) First time visitors n=2189	(b) Repeat visitors n=1180
Honey/bee products	85%	95%↑
Rabbits	76%	88%↑
Potatoes	80%	86%↑
Foxes	76%	85%↑
Declared weeds	75%	81%↑

Q16a Were you aware of Kangaroo Island's quarantine regulations, prohibiting the import of ...

Note: Missing cases excluded.

Note: Significant differences between visitor type indicated by arrows

## Sources of information about quarantine regulations

There was a slight increase (from 14% to 15%) of visitors in this wave provided further comment about where they had sourced information about quarantine regulations for Kangaroo Island. Information on the ferry / ferry terminal was the most prominent source (7%), followed by previous trip experience (2%) and the internet (2%).

## Summary of sub-groups scores for environmental condition ‘Visitor activity has minimal negative impacts on the natural environment’

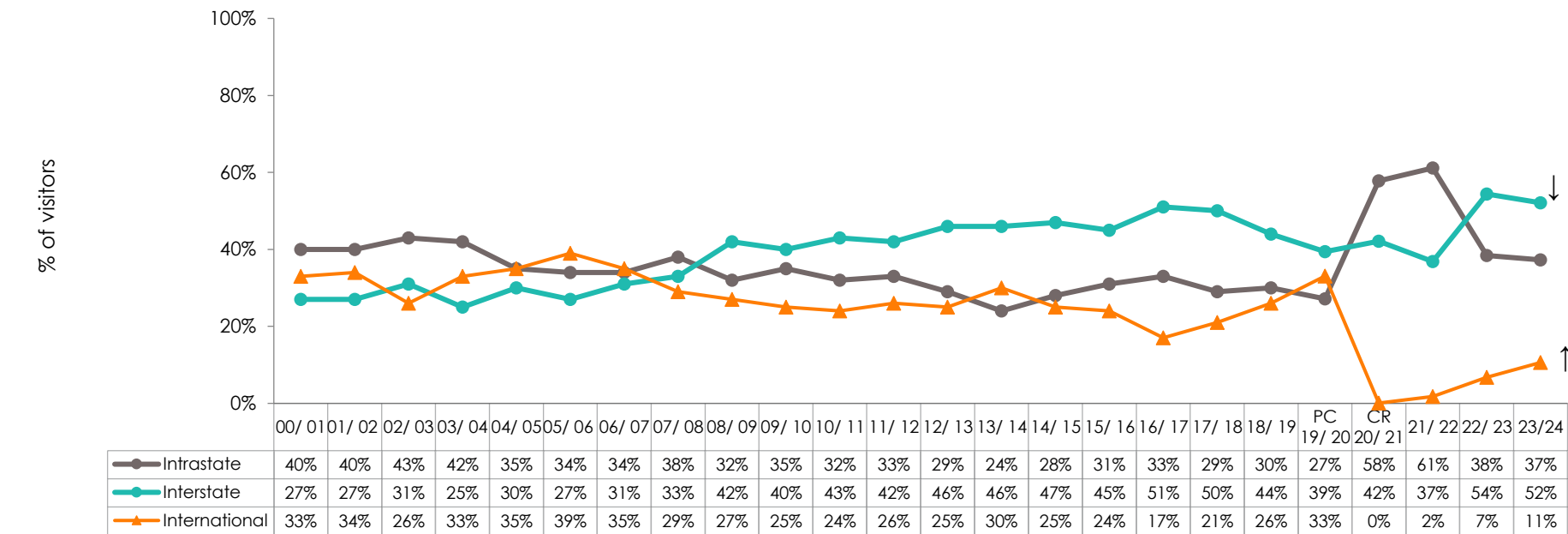
Indicator		Sub-groups who were within the Acceptable range for the indicator	Sub-groups who scored more highly for the indicator (compared to their comparative sub-group)
EN2b	Proportion of visitations to natural areas occurring on managed sites	<ul style="list-style-type: none"> <li>All sub-groups</li> </ul>	<ul style="list-style-type: none"> <li>International visitors</li> <li>Autumn visitors</li> <li>Day trippers</li> </ul>
EN2e	Proportion of visitors aware of quarantine regulations prior to arriving on Kangaroo Island	All groups except: <ul style="list-style-type: none"> <li>International visitors</li> <li>Winter visitors</li> <li>First time visitors</li> <li>Air arrivals</li> <li>Day trippers</li> <li>Cruise ship arrivals</li> </ul>	<ul style="list-style-type: none"> <li>Intrastate visitors</li> <li>Autumn visitors</li> <li>Repeat visitors</li> <li>Those who spent up to \$200 per night</li> <li>Stayed one or more nights</li> <li>Non-cruise ship arrivals</li> </ul>

# Visitor profile

## Visitor Origin

The proportion of international visitors compared with interstate and international visitors has continued to increase significantly (7% in 2022/23 to 11% in 2023/24) and is getting closer to pre-Covid levels. While levels of interstate travellers are still high at 52% of all visitors although has decreased slightly since the previous wave. The proportion of intrastate travellers has remained consistent with the previous wave.

Figure 45: Visitor Origin over time



Q4 Where do you live?

Base: Visitors responding, (23/24 n=3392)

Note: \*It is important to note that the survey was made available in multiple languages in 2018/19 and may have played a role in the /increased proportion of international visitors in the sample.

Note: \*\*A complete closure of Australia's international borders commenced in March 2020 with travel limited to visitors from New Zealand in 2021, therefore only n=3 international visitors are present in the COVID recovery 2020/21 wave.

## Interstate visitor origin

In the 2023/24 period, results are largely consistent with previous years. There was a small increase in the proportion of NSW and VIC visitors, but none of these differences were statistically significant.

**Table 4: Interstate Visitor Origin over time**

	02/03 (n=447)	03/04 (n=66)	04/05 (n=362)	05/06 (n=463)	06/07 (n=543)	07/08 (n=538)	08/09 (n=682)	09/10 (n=597)	10/11 (n=819)	11/12 (n=465)	12/13 (n=1088)	13/14 (n=1119)	14/15 (n=696)	15/16 (n=654)	16/17 (n=957)	17/18 (n=1,030)	18/19 (n=832)	PC 19/20 (n=340)	CR 20/21 (n=124)	21/22 (n=554)	22/23 (n=2054)	23/24 (n=1780)
VIC	39%	27%	36%	45%	36%	42%	43%	34%	39%	36%	41%	34%	34%	31%	37%	33%	36%	32%	28%	30%	35%	36%
NSW	43%	52%	40%	36%	38%	35%	29%	36%	35%	35%	32%	39%	33%	34%	35%	38%	36%	37%	37%	32%	32%	33%
QLD	11%	8%	13%	7%	10%	11%	15%	14%	12%	13%	13%	13%	17%	20%	14%	12%	15%	17%	11%	24%	19%	18%
WA	3%	3%	6%	7%	7%	5%	8%	9%	8%	8%	9%	9%	10%	10%	7%	11%	8%	8%	5%	6%	8%	8%
ACT	1%	4%	1%	4%	5%	3%	3%	4%	3%	4%	2%	2%	3%	3%	3%	2%	3%	3%	7%	3%	2%	2%
TAS	2%	0%	2%	0%	2%	2%	1%	2%	2%	3%	1%	1%	2%	1%	2%	2%	2%	2%	5%	3%	2%	2%
NT	1%	7%	2%	1%	2%	3%	<1%	1%	1%	1%	3%	1%	2%	1%	1%	1%	1%	1%	7%	3%	2%	1%

Q4 Where do you live?  
 Base: Interstate visitors responding.  
 Note: Missing cases excluded.

## International visitor origin

The number of international visitors continues to increase to pre-COVID-19 levels (PC 2019/20 n=283, 2023/24 n=386). Unlike last wave, most international visitors in this wave came from USA/Canada (26%), while there was a slight decrease (not significant) decrease in the proportion of visitors from the UK and other European countries (17% and 16%, respectively).

**Table 5: International Visitor Origin over Time**

	09/10 (n=674)	10/11 (n=729)	11/12 (n=363)	12/13 (n=830)	13/14 (n=947)	14/15 (n=583)	15/16 (n=597)	16/17 (n=711)	17/18 (n=478)	18/19 (n=475)	PC 19/20 (n=283)	CR 20/21 (n=3)	21/22 (n=22)	22/23 (n=285)	23/24 (n=391)
USA / Canada	29%	24%	24%	23%	19%	25%	23%	24%	22%	20%	14%	-	5%	21%	26%
Other European countries	13%	14%	16%	15%	22%	16%	15%	22%	8%	19%	11%	-	9%	18%	16%
United Kingdom	22%	22%	19%	18%	12%	21%	20%	16%	22%	12%	13%	-	14%	22%	17%
Germany	12%	10%	10%	12%	15%	12%	14%	9%	15%	10%	13%	-	-	7%	7%
Other Asia	5%	3%	6%	3%	8%	3%	4%	3%	2%	7%	6%	-	27%	7%	6%
New Zealand	2%	2%	2%	2%	4%	3%	3%	3%	13%	2%	5%	100%	23%	5%	3%
Other countries	0%	1%	1%	1%	2%	1%	1%	1%	3%	1%	3%	-	-	3%	1%
France	8%	10%	8%	9%	5%	7%	6%	5%	5%	8%	12%	-	23%	5%	3%
Italy	9%	11%	12%	15%	9%	7%	9%	14%	4%	12%	12%	-	-	9%	13%
India	0%	1%	1%	1%	1%	1%	0%	<1%	4%	0%	2% <sup>1</sup>	-	-	1%	1%
China / Hong Kong	1%	1%	1%	2%	3%	4%	5%	3%	2%	8%	9%	-	-	2%	5%
Japan	1%	0%	1%	0%	1%	1%	1%	1%	0%	0%	0%	-	-	-	1%

Q4 Where do you live?

Base: International visitors responding.

Note: Missing cases excluded.

<sup>1</sup> <https://covid19.homeaffairs.gov.au/new-zealand-safe-travel-zone>



## Age profile

### Profile of respondents taking the survey

At a total level, 2023/24 age profile has remained consistent with the previous wave with no significant changes. For interstate visitors there was a significant decrease for this age group (from 30% to 26%). There were no significant changes for intrastate or international visitors.

**Figure 46: Profile of respondents**

Total visitors	09/10 (n=1611)	10/11 (n=1976)	11/12 (n=1069)	12/13 (n=2366)	13/14 (n=2408)	14/15 (n=1528)	15/16 (n=1528)	16/17 (n=1907)	17/18 (n=1976)	18/19 (n=1784)	PC 19/20 (n=817)	CR 20/21 (n=202)	21/22 (n=1379)	22/23 (n=3702)	23/24 (n=3352)
15 – 24 years	6%	4%	6%	6%	6%	4%	5%	4%	5%	6%	7%	1%	8%	6%	6%
25 – 44 years	31%	29%	27%	31%	31%	25%	25%	21%	23%	28%	29%	15%	35%	32%	32%
45 – 64 years	47%	47%	44%	44%	42%	44%	45%	45%	43%	40%	42%	47%	41%	41%	43%
65+ years	16%	19%	23%	19%	21%	27%	26%	31%	29%	25%	19%	37%	16%	21%	20%

Intrastate visitors	09/10 (n=378)	10/11 (n=477)	11/12 (n=276)	12/13 (n=515)	13/14 (n=456)	14/15 (n=309)	15/16 (n=343)	16/17 (n=418)	17/18 (n=526)	18/19 (n=503)	PC 19/20 (n=198)	CR 20/21 (n=80)	21/22 (n=808)	22/23 (n=1362)	23/24 (n=1209)
15 – 24 years	6%	4%	5%	7%	4%	3%	5%	5%	6%	7%	9%	2%	9%	9%	8%
25 – 44 years	31%	31%	32%	32%	30%	27%	30%	19%	25%	30%	38%	11%	38%	34%	38%
45 – 64 years	52%	49%	40%	43%	47%	50%	41%	47%	43%	40%	37%	53%	39%	40%	40%
65+ years	12%	16%	22%	18%	18%	19%	24%	29%	26%	21%	14%	34%	13%	16%	15%

Interstate visitors	09/10 (n=588)	10/11 (n=796)	11/12 (n=450)	12/13 (n=1059)	13/14 (n=1056)	14/15 (n=659)	15/16 (n=636)	16/17 (n=858)	17/18 (n=989)	18/19 (n=816)	PC 19/20 (n=335)	CR 20/21 (n=119)	21/22 (n=545)	22/23 (n=2042)	23/24 (n=1756)
15 – 24 years	4%	3%	3%	4%	5%	2%	3%	2%	2%	3%	5%	0%	5%	4%	4%
25 – 44 years	25%	21%	15%	23%	26%	18%	15%	17%	22%	18%	23%	20%	31%	30%	26%↓
45 – 64 years	51%	51%	55%	51%	42%	46%	52%	45%	43%	46%	45%	38%	45%	41%	46%↑
65+ years	20%	25%	27%	22%	27%	34%	30%	36%	33%	32%	23%	42%	19%	24%	24%

International visitors	09/10 (n=643)	10/11 (n=703)	11/12 (n=343)	12/13 (n=791)	13/14 (n=894)	14/15 (n=553)	15/16 (n=549)	16/17 (n=631)	17/18 (n=461)	18/19 (n=459)	PC 19/20 (n=282)	CR 20/21 (n=3)*	21/22 (n=22)*	22/23 (n=282)	23/24 (n=382)
15 – 24 years	10%	7%	13%	8%	9%	9%	8%	6%	10%	8%	8%	-	14%	9%	7%
25 – 44 years	42%	43%	39%	43%	38%	34%	37%	35%	22%	42%	31%	-	27%	32%	38%
45 – 64 years	34%	35%	33%	34%	37%	33%	35%	40%	44%	31%	43%	-	27%	41%	39%
65+ years	14%	15%	16%	16%	15%	23%	19%	19%	24%	18%	17%	100%	32%	17%	16%

Q27 Please record the number of people you are travelling with in each of the following categories.

Base: Visitors responding.

Note: Missing cases excluded.

\* Exercise caution when interpreting figures: Very small base size

## Profile of visitors (includes entire travel party)

**Table 6: Age profile of visitors (includes entire travel party)**

	12/13 (n=2452)	13/14 (n=2252)	14/15 (n=1584)	15/16 (n=1,554)	16/17 (n=2,148)	17/18 (n=1,872)	18/19 (n=1,832)	PC 19/20 (n=829)	CR 20/21 (n=212)	21/22 (n=1394)	22/23 (n=3722)	23/24 (n=3397)
<b>Total Female</b>	<b>55%</b>	<b>55%</b>	<b>53%</b>	<b>55%</b>	<b>52%</b>	<b>54%</b>	<b>51%</b>	<b>52%</b>	<b>52%</b>	<b>51%</b>	<b>50%</b>	<b>50%</b>
Under 15 years	5%	9%	7%	7%	7%	7%	10%	9%	3%	8%	9%	8%
15 - 24 years	4%	6%	4%	2%	4%	3%	4%	6%	4%	9%	5%	5%
25 - 44 years	14%	12%	9%	10%	8%	8%	11%	12%	3%	13%	11%	12%
45 - 64 years	22%	17%	18%	15%	17%	17%	14%	16%	21%	13%	14%	14%
65 plus years	11%	11%	15%	20%	16%	17%	12%	9%	21%	8%	10%	10%
<b>Total Male</b>	<b>45%</b>	<b>45%</b>	<b>47%</b>	<b>45%</b>	<b>48%</b>	<b>46%</b>	<b>49%</b>	<b>48%</b>	<b>48%</b>	<b>49%</b>	<b>50%</b>	<b>50%</b>
Under 15 years	4%	8%	7%	5%	7%	5%	8%	10%	1%	9%	9%	9%
15 - 24 years	3%	3%	2%	3%	4%	2%	4%	5%	3%	5%	5%	5%
25 - 44 years	11%	10%	9%	9%	8%	7%	11%	11%	7%	14%	12%↓	12%
45 - 64 years	17%	14%	16%	15%	17%	16%	15%	14%	18%	13%	15%	15%
65 plus years	10%	10%	13%	14%	16%	15%	11%	9%	20%	8%	10%	10%

Q27 Please record the number of people you are travelling with in each of the following categories.

Base: All responses – entire travel party accounted for

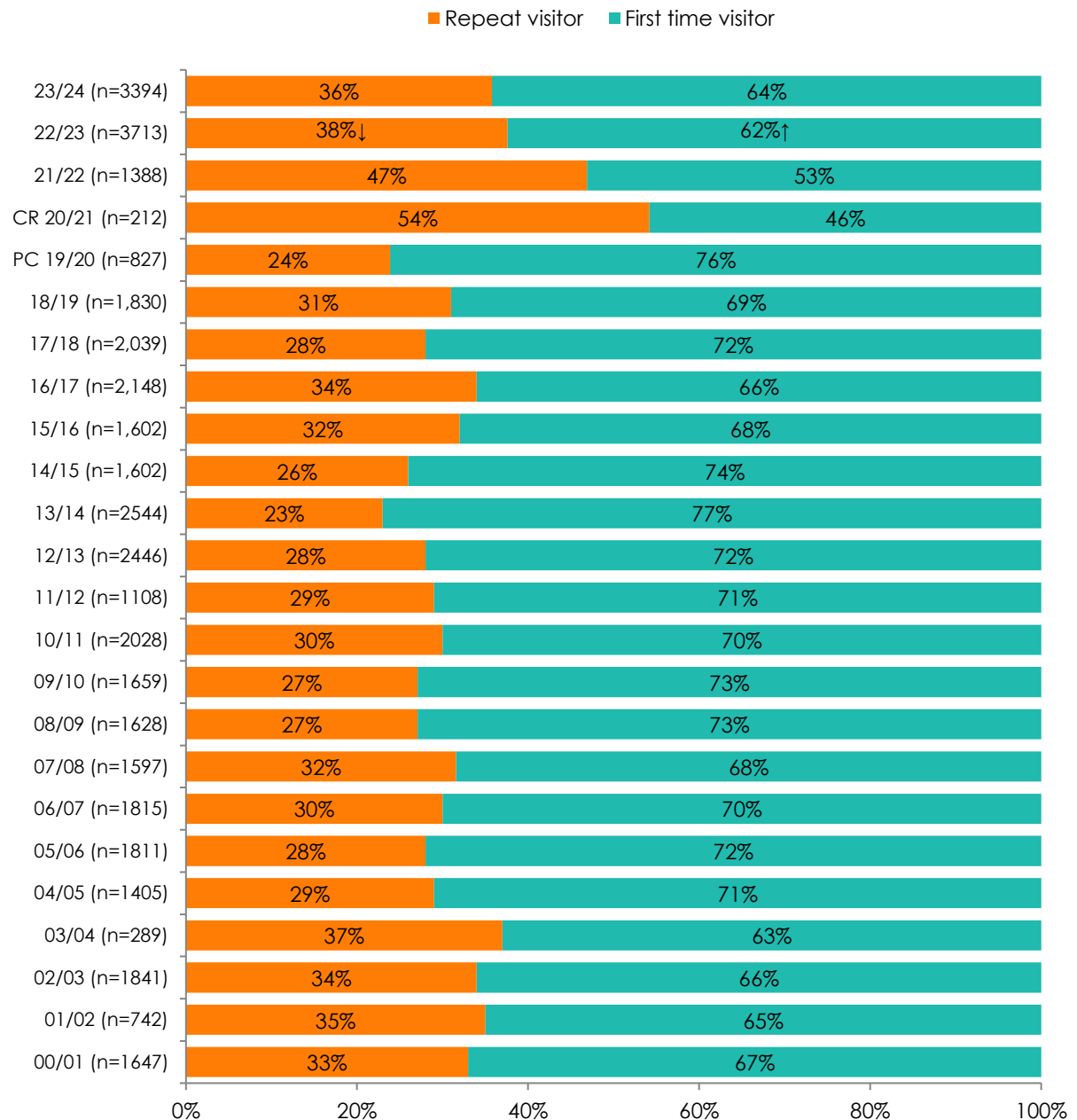
Note: Missing cases excluded.

Note: Question revised in 2010/11 to ask age and gender of entire travel party.

## Incidence of repeat visitation

Since the COVID-19 recovery period in 2020/21 there has been a continuous increase in first time visitation to Kangaroo Island. Since the previous wave, this has increased slightly (not significant) from 62% to 64%.

**Figure 47: Incidence of repeat visitation to Kangaroo Island over time**



## Incidence of repeat visitation by visitor origin

Repeat visitation in this wave has remained consistent for interstate visitors since the previous wave (both 16%) and decreased for intrastate visitors back to 2021/22 levels (from 72% to 69%) - though this is not significant. Visitation has also decreased, again, not significantly, for international visitors from 15% to 11%.

Table 7: Repeat Visitation to Kangaroo Island by Visitor Origin over time

	Intrastate	Interstate	International
00/01	68%	17%	5%
01/02	70%	18%	8%
02/03	67%	14%	6%
03/04	79%	19%	4%
04/05	68%	14%	4%
05/06	63%	16%	5%
06/07	68%	16%	5%
07/08	68%	14%	5%
08/09	60%	15%	6%
09/10	61%	11%	4%
10/11	67%	16%	4%
11/12	66%	14%	8%
12/13	65%	17%	6%
13/14	69%	12%	4%
14/15	67%	12%	3%
15/16	71%	16%	8%
16/17	74%	16%	9%
17/18	73%	11%	5%
18/19	70%	18%	10%
PC 19/20	58%	15%	7%
CR 20/21	82%	16%	33%*
21/22	67%	15%	5%*
22/23	72%	16%	15%
23/24	69%	17%	10%

Q3 Have you ever visited Kangaroo Island before this trip?

Base: Visitors responding.

Note: Don't know and missing cases excluded.

\*Interpret percentages with caution given small sample sizes. COVID recovery n=3, 21/22 n=22.

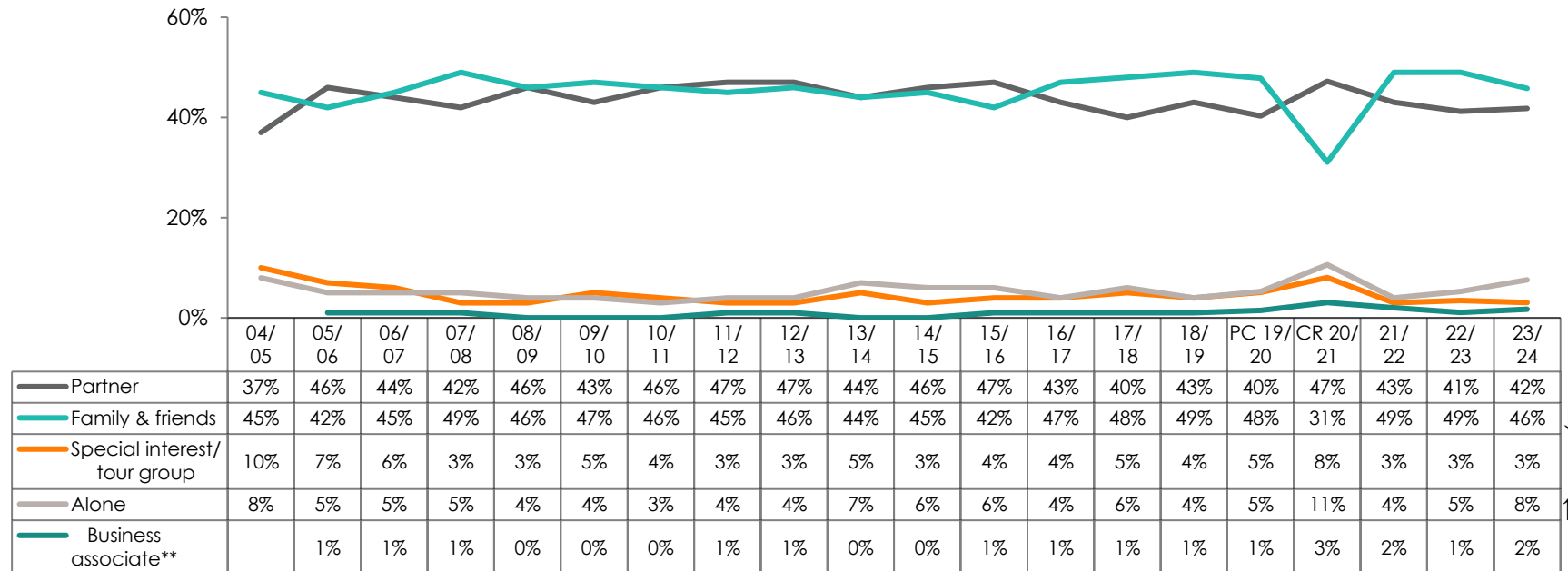
## Travel party

While travelling with family and friends (46%) and with a partner (42%) remain the most prevalent travel parties, there has been a significant decrease in the proportion of visitors travelling with family and friends (from 49% to 46%) and a significant increase in the proportion of visitors travelling alone (from 5% to 8%).

Looking exclusively at the 'alone' group for 2023/24, there is evidence that this may be related to a sub-contractor cohort working on island infrastructure.

- Travelled to KI more in winter (20%) than non-alone travellers (13%) and less in summer (29% vs 37%)
- 52% were repeat visitors (vs 34% non-alone travellers)
- More likely to be intrastate (49%) or international (19%) than non-alone travellers (36%, 10%, respectively)
- More likely to arrive by air (7% vs 4%).
- Visited fewer locations than non-alone travellers (average of 6 vs 9)

**Figure 48: Travel party over Time**



Q2 On this trip, who did you travel with?

Base: Visitors responding, (23/24 n=3244)

Note: Missing cases excluded.

\*\* Added category in 05/06.

## Travel party by visitor origin

**Table 8: Travel party by visitor origin over time**

Intrastate Visitors	08/09 (n=516)	09/10 (n=384)	10/11 (n=483)	11/12 (n=280)	12/13 (n=527)	13/14 (n=476)	14/15 (n=326)	15/16 (n=353)	16/17 (n=476)	17/18 (n=534)	18/19 (n=516)	PC 19/20 (n=201)	CR 20/21 (n=85)	21/22 (n=813)	22/23 (n=1367)	23/24 (n=1198)
With family and friends	54%	56%	58%	65%	58%	61%	60%	55%	54%	63%	60%	54%	35%	55%	57%	51%↓
With a partner	40%	36%	36%	30%	36%	30%	35%	38%	34%	27%	31%	31%	40%	36%	34%	35%
With a special interest group	1%	3%	2%	1%	2%	3%	2%	3%	5%	3%	3%	4%	12%	2%	2%	1%↓
Alone	4%	5%	3%	2%	3%	5%	3%	4%	5%	6%	4%	6%	7%	4%	5%	10%↑
With business associate (with or without spouse)	<1%	<1%	1%	1%	1%	1%	1%	<1%	2%	1%	1%	5%	5%	2%	2%	4%

Interstate Visitors	08/09 (n=682)	09/10 (n=598)	10/11 (n=819)	11/12 (n=465)	12/13 (n=1088)	13/14 (n=1123)	14/15 (n=696)	15/16 (n=653)	16/17 (n=956)	17/18 (n=1030)	18/19 (n=832)	PC 19/20 (n=340)	CR 20/21 (n=124)	21/22 (n=553)	22/23 (n=2054)	23/24 (n=1655)
With family and friends	43%	46%	42%	35%	44%	40%	39%	37%	44%	42%	42%	49%	25%	37%	45%	44%
With a partner	51%	48%	51%	57%	49%	49%	54%	51%	47%	45%	50%	43%	57%	54%	47%	47%
With a special interest group	3%	3%	5%	2%	2%	5%	2%	4%	5%	6%	4%	4%	2%	6%	3%	3%
Alone	3%	3%	2%	6%	4%	6%	5%	7%	4%	7%	3%	4%	15%	3%	4%	5%
With business associate (with or without spouse)	<1%	<1%	<1%	<1%	<1%	<1%	<1%	1%	<1%	<1%	<1%	-	<1%	<1%	<1%	1%

International Visitors	08/09 (n=434)	09/10 (n=672)	10/11 (n=728)	11/12 (n=361)	12/13 (n=829)	13/14 (n=942)	14/15 (n=584)	15/16 (n=596)	16/17 (n=714)	17/18 (n=478)	18/19 (n=475)	PC 19/20 (n=285)	CR 20/21 (n=3)	21/22 (n=22)	22/23 (n=285)	23/24 (n=386)
With family and friends	42%	38%	38%	37%	36%	38%	38%	34%	43%	42%	45%	41%	67%	59%	37%	36%
With a partner	46%	45%	51%	51%	54%	48%	43%	52%	49%	48%	44%	45%	33%	32%	38%	43%
With a special interest group	6%	12%	4%	7%	4%	5%	6%	5%	4%	3%	4%	7%	-	-	10%	7%
Alone	7%	5%	5%	5%	5%	9%	13%	7%	4%	6%	6%	6%	-	9%	15%	13%
With business associate (with or without spouse)	<1%	<1%	<1%	1%	<1%	<1%	<1%	2%	<1%	1%	<1%	-	-	-	<1%	<1%

Q2      *On this trip, who did you travel with?*  
Base:    Visitors responding.  
Note:    Missing cases excluded.



## Types of Accommodation

In 2023/24, hotel/motel accommodation was significantly more used (from 22% to 25%), as was friends/relatives (9%). The most common types of accommodation continue to be a hotel/motel (25%) and holiday home (23%).

**Table 9: Accommodation used over time**

	02/03 (n=1848)	03/04 (n=290)	04/05 (n=1474)	05/06 (n=1690)	06/07 (n=1729)	07/08 (n=1536)	08/09 (n=1635)	09/10 (n=1592)	10/11 (n=1931)	11/12 (n=1072)	12/13 (n=2372)	13/14 (n=2092)	14/15 (n=1,392)	15/16 (n=1,380)	16/17 (n=1607)	17/18 (n=1,933)	18/19 (n=1,699)	PC 19/20 (n=765)	CR 20/21 (n=202)	21/22 (n=1344)	22/23 (n=3294)	23/24 (n=2836)
Hotel / motel	28%	29%	26%	32%	30%	25%	25%	23%	25%	22%	24%	25%	25%	25%	26%	24%	24%	28%	38%	24%	22%	25%↑
Holiday home	28%	13%	19%	26%	27%	21%	21%	22%	21%	26%	23%	22%	22%	27%	25%	25%	24%	23%	20%	25%	23%	23%
Apartment / unit	-	-	-	-	-	-	-	12%	10%	10%	9%	11%	9%	7%	10%	13%	13%	11%	14%	11%	11%	10%
Camping, caravan or motorhome	16%	21%	11%	16%	10%	13%	14%	17%	18%	14%	18%	17%	17%	16%	15%	17%	18%	12%	10%	13%	15%	15%
Cabin / Cottage	18%	18%	17%	11%	12%	11%	10%	15%	11%	13%	13%	12%	12%	10%	12%	11%	11%	11%	7%	9%	8%	8%
Luxury lodge / retreat^	-	-	-	-	-	-	-	9%	8%	8%	8%	8%	10%	7%	9%	8%	5%	8%	4%	4%	4%	4%
Hosted Bed and Breakfast/ Farm Stay*+	8%	12%	10%	14%	14%	10%	10%	7%	11%	10%	10%	8%	7%	7%	8%	10%	9%	10%	6%	12%	11%	10%
Backpacker hostel	3%	5%	7%	4%	4%	3%	2%	6%	4%	5%	4%	5%	4%	4%	3%	1%	1%	1%	-	<1%	-	<1%
Friends / relatives	7%	16%	8%	5%	5%	6%	4%	4%	4%	5%	4%	6%	6%	6%	5%	5%	4%	4%	1%	6%	7%	9%↑
Own property	-	-	-	-	-	-	-	<1%	1%	<1%	1%	1%	1%	<1%	1%	1%	<1%	1%	<1%	2%	2%	1%

Q7 What type of accommodation did you stay in while on Kangaroo Island?

Base: Visitors responding.

Note: Don't know and missing cases excluded.

Note: ^ Category was added in 2009/2010.

\* Categories were changed in 05/06, with some being merged to allow indicative comparison with previous years.

+ Bed and Breakfast / Farm Stay include both hosted and self-contained bed and breakfast / farm stay responses.

## Types of accommodation by visitor origin

Again, accommodation use was largely consistent in 2022/23 with no statistically significant differences noted amongst interstate or international visitors. Amongst intrastate visitors, there was a significant increase in those staying with friends and relatives (from 12% to 16%).

**Table 10: Accommodation Used by Visitor Origin**

	Intrastate							Interstate							International						
	17/18 (n=501)	18/19 (n=356)	PC 19/20 (n=203)	CR 20/21 (n=81)	21/22 (n=795)	22/23 (n=1241)	23/24 (n=1119)	17/18 (n=990)	18/19 (n=722)	PC 19/20 (n=328)	CR 20/21 (n=118)	21/22 (n=526)	22/23 (n=1811)	23/24 (n=1435)	17/18 (n=442)	18/19 (n=417)	PC 19/20 (n=252)	CR 20/21 (n=3)	21/22 (n=19)	22/23 (n=228)	23/24 (n=277)
Hotel / motel	16%	15%	16%	34%	21%	15%↓	16%	27%	24%	27%	45%	29%	26%	29%	35%	39%	42%	67%	26%	40%	44%
Holiday home	34%	36%	31%	21%	30%	32%	28%	23%	21%	24%	18%	17%	18%	20%	11%	13%	12%	33%	5%	14%	15%
Apartment / unit	16%	12%	15%	13%	11%	11%	10%	11%	13%	8%	15%	11%	12%	10%	11%	12%	11%	-	5%	8%	11%
Camping, caravan or motorhome	13%	11%	7%	6%	9%	10%	11%	22%	24%	18%	15%	18%	20%	18%	10%	14%	9%	-	37%	12%↓	10%
Cabin	10%	11%	9%	9%	8%	8%	7%	12%	12%	13%	3%	10%	8%	9%	11%	10%	10%	-	5%	8%	6%
Luxury lodge/Retreat	5%	3%	4%	2%	5%	3%	3%	9%	5%	6%	6%	3%	5%	4%	9%	8%	13%	-	-	5%	8%
Bed & breakfast or farm stay	9%	7%	11%	9%	12%	12%	12%	9%	9%	10%	<1%	11%	11%	9%	5%	5%	6%	-	16%	9%	9%
Backpacker hostel	1%	1%	-	-	1%	-	0%	1%	1%	1%	-	<1%		<1%	2%	2%	1%	-	-	-	-
Friends / relatives	10%	8%	6%	2%	8%	12%	16%↑	3%	4%	5%	1%	3%	4%	4%	4%	1%	1%	-	5%	5%	1%
Own property	1%	1%	3%	-	2%	4%	3%	1%	<1%	1%	<1%	1%	1%	<1%	<1%	<1%	-	-	-	1%	-

Q7 What type of accommodation did you stay in while on Kangaroo Island?  
 Note: Don't know and missing cases excluded.

## Satisfaction with accommodation

Overall satisfaction with accommodation in 2023/24 has remained consistent with the previous wave (87%). There have been overall improvements in satisfaction of accommodation types other than for hotel/motels (from 83% to 80%) and luxury lodge/retreats (from 95% to 93%).

**Table 11: Satisfaction with accommodation types across waves**

	11/12 (n=1072)	12/13 (n=2372)	13/14 (n=1965)	14/15 (n=1318)	15/16 (n=1314)	16/17 (n=1254)	17/18 (n=1855)	18/19 (n=1,642)	PC 19/20 (n=829)	CR 20/21 (n=212)	21/22 (n=1311)	22/23 (n=758)	23/24 (n=2771)
<b>Total Satisfaction</b>	<b>78%</b>	<b>76%</b>	<b>77%</b>	<b>80%</b>	<b>80%</b>	<b>80%</b>	<b>79%</b>	<b>78%</b>	<b>79%</b>	<b>75%</b>	<b>86%</b>	<b>86%</b>	<b>87%</b>
Hotel / motel	79%	66%	75%	71%	71%	73%	71%	77%	74%	82%	78%	83%	80%
Holiday home	84%	91%	87%	87%	93%	85%	88%	88%	89%	73%	94%	91%	92%
Rented apartment or flat or unit	82%	84%	81%	78%	93%	84%	86%	84%	77%	77%	83%	85%	89%
Camping, caravan or motor home	67%	60%	59%	64%	70%	72%	66%	71%	76%	67%	80%	82%	86%
Cabin	68%	67%	72%	63%	85%	77%	75%	80%	84%	51%	91%	77%	86%
Luxury lodge/Retreat	80%	80%	87%	86%	84%	86%	87%	88%	81%	99%	96%	95%	93%
Hosted bed & breakfast or farm stay	87%	89%	93%	92%	82%	84%	73%	82%	89%	99%	95%	85%	93%
Self-contained bed & breakfast or farm stay	77%	93%	82%	96%	79%	95%	88%	83%	75%	100%	86%	91%	90%
Backpacker hostel	63%	72%	56%	69%	52%	69%	80%	59%	100%	-	80%	-	100%
Friends / relatives	78%	87%	94%	91%	89%	93%	95%	86%	80%	96%	95%	93%	94%

Q7 What type of accommodation did you stay in while on Kangaroo Island?

Q19.3 Please indicate how satisfied you were with the quality of accommodation.

Base: Visitors who stayed in each accommodation type and responded.

Note: Don't know and missing cases excluded.

Note: Top 2 box reported

**Table 12: Satisfaction with accommodation types for the recent waves**

	2023/24
A) Holiday home	92% ↑H, ↑I, ↑F
B) Luxury Lodge / Retreat	93% ↑H
C) Friends / relatives	94% ↑H, ↑I, ↑F
D) Rented apartment or flat or unit	89% ↑H
E) Self-contained bed & breakfast or farm stay	89% ↑H
F) Cabin	86%
G) Hosted bed & breakfast or farm stay	93%
H) Hotel / motel	80%
I) Camping, caravan or motorhome	86%

Q7 What type of accommodation did you stay in while on Kangaroo Island?

Q19.3 Please indicate how satisfied you were with the quality of accommodation.

Base: Visitors who stayed in each accommodation type and responded.

Note: Don't know and missing cases excluded.

Note: Top 2 box reported

Significant differences between accommodation types indicated by letter (A-K), except where base sizes are less than 30.

## Credible vs. Experienced Attributes & Attractions

Overall, the proportion of visitors who experienced the Island's numerous attributes and attractions and found them to be credible has remained largely consistent since the previous wave; however, the portion of visitors who believe the Island offers produce, and who actually experienced it, both dropped (from 97% to 95% and from 89% to 86% respectively).

**Table 13: Credible vs. experienced attributes and attractions**

	Credible									Experienced								
	15/16 (min n=1532)	16/17 (min n=1327)	17/18 (min n=1364)	18/19 (min n=1295)	PC 19/20 (min n=630)	CR 20/21 (min n=135)	21/22 (min n=1043)	22/23 (min n=2823)	23/24 (min n=2499)	15/16 (min n=1290)	16/17 (min n=1303)	17/18 (min n=1299)	18/19 (min n=1196)	PC 19/20 (min n=550)	CR 20/21 (min n=138)	21/22 (min n=994)	22/23 (min n=2599)	23/24 (min n=2327)
Spectacular scenery and coastal beauty	99%	99%	99%	99%	99%	100%	99%	99%	99%	99%	99%	99%	99%	99%	100%	99%	99%	99%
Areas of untouched natural beauty	96%	97%	97%	97%	96%	97%	97%	97%	97%	96%	97%	97%	95%	95%	97%	96%	94%	94%
Viewing Aus' wildlife in natural surroundings	97%	98%	98%	98%	99%	97%	97%	98%	98%	96%	97%	97%	96%	96%	95%	93%	93%	93%
Scenic variety without crowds of people	96%	96%	96%	95%	96%	98%	99%	97%	96%↓	97%	97%	97%	96%	97%	96%	97%	97%	96%
Farming and rural landscapes	94%	94%	94%	93%	93%	97%	97%	96%	95%	90%	92%	88%	87%	87%	92%	90%	88%	89%
Island produce (food & wine)	91%	94%	91%	93%	91%	99%	98%	97%	95%↓	83%	87%	83%	83%	82%	96%	93%	89%↓	86%↓
A friendly local community	90%	91%	92%	91%	91%	94%	94%	94%	93%	92%	94%	93%	93%	91%	97%	94%	95%	94%
The cultural heritage and history of settlement	80%	80%	80%	78%	78%	78%	81%	83%	80%↓	76%	74%	72%	70%	70%	75%	72%	71%	71%
One of Australia's top 3 nature and wildlife exp'	64%	66%	67%	72%	77%	65%	76%	77%	74%	75%	80%	81%	81%	82%	75%	75%	76%	75%

Q18a For each of the following, please indicate whether you believe that Kangaroo Island provides this.

Q18b For each of the following, please indicate whether you experienced this while on Kangaroo Island.

Base: Visitors responding to each attribute.

Note: Missing cases excluded.

Note: Top 2 box reported

## Satisfaction with attributes

Satisfaction with the attributes has remained relatively consistent with the previous wave, except for decreased satisfaction with the quality (91% to 89%) and range (89% to 86%) of island produce since last wave. Satisfaction with quality of roads also saw a significant decrease (from 65% to 61%).

**Table 14: Satisfaction with Attributes**

	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	PC 19/20	CR 20/21	21/22	22/23	23/24
The level customer service you received	82%	84%	84%	84%	86%	88%	87%	88%	88%	86%	92%	92%	93%
Seeing wildlife in the natural environment	84%	82%	84%	84%	87%	88%	88%	90%	88%	91%	91%	90%	90%
The quality of Island produce (food & wine)	78%	78%	80%	82%	84%	84%	85%	84%	86%	90%	93%	91%	89%↓
The quality of activities available	78%	79%	80%	80%	82%	85%	84%	85%	86%	88%	89%	90%	89%
The professionalism of tourism businesses	79%	78%	82%	82%	83%	86%	85%	88%	85%	84%	91%	90%	91%
The range of activities available	76%	78%	79%	80%	81%	83%	81%	84%	84%	86%	87%	88%	87%
The quality of accommodation	78%	76%	76%	76%	80%	80%	78%	81%	80%	79%	86%	86%	87%
Your opportunity to learn more about the Island's natural environment	77%	78%	80%	80%	80%	82%	86%	84%	83%	85%	86%	85%	87%
The quality of picnic/day use areas	80%	83%	82%	82%	83%	85%	83%	84%	85%	87%	89%	88%	87%
The range of island produce (food & wine)	71%	72%	72%	74%	78%	79%	81%	78%	79%	87%	88%	89%	86%↓
The availability of activities	73%	74%	75%	76%	75%	79%	78%	80%	81%	83%	86%	85%	84%
The quality of interpretive/ educational signage	75%	72%	75%	76%	79%	79%	79%	79%	83%	77%	82%	81%	81%
Your opportunity to learn more about the Island's history**	68%	66%	70%	68%	73%	75%	75%	78%	75%	79%	76%	77%	79%
The availability of island produce (food & wine)	67%	69%	69%	72%	74%	74%	76%	76%	78%	83%	85%	84%	82%
The quality of public toilets	75%	74%	74%	79%	80%	80%	76%	79%	80%	76%	86%	85%	83%
The quality of road signage	70%	69%	73%	70%	75%	74%	73%	80%	81%	78%	84%	82%	81%
The quality of campgrounds	72%	66%	69%	70%	73%	75%	73%	75%	81%	79%	86%	83%	83%
The quality of roads	63%	56%	62%	61%	66%	63%	68%	68%	77%	67%	63%	65%	61%↓

Q19. Please indicate how satisfied you were with ...

Base: Visitors responding to each attribute.

Note: \*\*Changed in 2015/16 from 'Your opportunity to learn more about the Island's cultural history' in previous waves (emphasis added)

Note: Don't know, didn't experience and missing cases excluded.

Note: Top 2 box reported

## Reasons for Dissatisfaction

Visitors who reported dissatisfaction with a particular aspect of their Kangaroo Island experience were asked to provide further detail about their reasons for dissatisfaction. Since the previous wave, dissatisfaction with road infrastructure has increased significantly (29% to 39%).

**Table 15: Reasons for dissatisfaction**

	11/12 (n=1108)	12/13 (n=2452)	13/14 (n=2547)	14/15 (n=1607)	15/16 (n=1604)	16/17 (n=2148)	17/18 (n=2042)	18/19 (n=1832)	PC 19/20 (n=125)	CR 20/21 (n=55)	21/22 (n=215)	22/23 (n=483)	23/24 (n=497)
Road Infrastructure	13%	10%	6%	9%	9%	8%	7%	6%	24%	26%	33%	29%	39%↑
Better road signage (attractions/ airport/ ferry)^	—	7%	5%	9%	7%	6%	8%	4%	10%	19%	14%	16%	15%
Quality of Accommodation / or lack of	5%	5%	2%	3%	3%	4%	2%	4%	4%	6%	12%	11%	7%
Bad quality / availability public toilets / bins / picnic areas	3%	4%	3%	3%	3%	4%	3%	3%	4%	22%	7%	9%	8%
Customer service and friendless/ or lack of	4%	3%	3%	3%	3%	3%	2%	1%	6%	10%	13%	8%	6%
Limited Trading Hours	3%	4%	3%	4%	5%	3%	4%	1%	10%	7%	10%	7%	8%
Expenses at KI	5%	3%	2%	4%	4%	3%	2%	1%	11%	-	5%	9%	7%
Lack of restaurants, cafes, other eating places	1%	1%	1%	2%	2%	3%	2%	1%	5%	6%	11%	6%↓	8%
More / better tourist information	3%	3%	3%	3%	4%	3%	3%	2%	27%	7%	15%	10%	10%
Habitat / Wildlife	2%	1%	1%	2%	1%	1%	1%	1%	6%	3%	2%	3%	3%
Too much roadkill	1%	1%	1%	2%	1%	1%	1%	0%	5%	3%	3%	3%	1%
Availability of local produce	1%	2%	1%	2%	3%	2%	1%	1%	3%	3%	4%	6%	3%
Quality/ availability of activities/ tour guides	3%	3%	1%	3%	2%	3%	3%	3%	13%	6%	5%	11%↑	9%
Bad/ lack of food options in restaurants	2%	2%	1%	3%	1%	2%	1%	1%	1%	13%	7%	4%	4%
Mobile phone coverage	<1%	<1%	<1%	<1%	<1%	1%	0%	0%	3%	<1%	1%	1%	2%
Other	2%	3%	8%	4%	6%	2%	0%	1%	9%	10%	10%	6%	3%
Everything fine / not dissatisfied	2%	2%	1%	2%	4%↑	3%	7%	1%	4%	6%	2%	2%	2%
Did not comment	60%	56%	67%	60%	59%	63%	70%	78%	5%	-	1%	1%	6%↑

Q20. For any item in question 19 above that you have expressed dissatisfaction with, please provide further comment.

Base: Total visitors.

^ Code added in 2012/13.

## Suggestions for Improvement

Visitors were asked to make any suggestions to improve their travel experience on Kangaroo Island and generally, suggestions made were in line with previous years; however, since the previous wave there has been a significant increase in suggested improvements for transport (4% to 6%) and decrease in suggested improvements for quality/availability of accommodation (5% to 3%).

**Table 16: Suggestions for improvement**

	11/12 (n=1108)	12/13 (n=2452)	13/14 (n=2547)	14/15 (n=1607)	15/16 (n=1604)	16/17 (n=2148)	17/18 (n=2042)	18/19 (n=1832)	PC 19/20 (n=316)	CR 20/21 (n=104)	21/22 (n=796)	22/23 (n=2145)	23/24 (n=1957)
Improve road infrastructure	10%	9%	6%	10%	8%	5%	7%	7%	9%	18%	13%	13%	14%
Improve road signage/ attraction signage/ improve map/ provide map^	—	6%	3%	6%	5%	3%	5%	4%	10%	10%	6%	7%	7%
Improve quality/ number of stores, restaurants, takeaway shops	4%	4%	3%	4%	3%	4%	5%	3%	8%	14%	14%	9%	9%
Lower the cost of travel	9%	8%	5%	7%	7%	3%	6%	4%	3%	2%	6%	8%	8%
More/ accurate tourist information	8%	8%	5%	9%	9%	5%	6%	6%	11%	14%	10%	11%	12%
Reduce expenses on the Island (activities, food, petrol etc.)	5%	4%	3%	3%	3%	2%	1%	1%	4%	2%	3%	3%	4%
Extend length of stay	2%	2%	3%	3%	4%	2%	1%	2%	3%	-	3%	5%	5%
Improve public transport, bus/ taxi / infrastructure	2%	1%	1%	1%	1%	1%	2%	1%	4%	2%	1%	4%	6%↑
Extend trading hours (shops/ restaurants/ tours/ petrol stations)	2%	3%	3%	2%	4%	3%	3%	3%	6%	6%	4%	5%	4%
Improve quality/ availability of accommodation	1%	1%	1%	3%	3%	1%	2%	1%	3%	4%	3%	5%	3%↓
More activities / wildlife viewing opportunities	1%	2%	3%	4%	1%	2%	3%	3%	7%	<1%	4%	5%	7%
Improve mobile phone/ Internet coverage	1%	1%	1%	1%	2%	2%	1%	2%	2%	2%	3%	3%	2%



	11/12 (n=1108)	12/13 (n=2452)	13/14 (n=2547)	14/15 (n=1607)	15/16 (n=1604)	16/17 (n=2148)	17/18 (n=2042)	18/19 (n=1832)	PC 19/20 (n=316)	CR 20/21 (n=104)	21/22 (n=796)	22/23 (n=2145)	23/24 (n=1957)
Improve public infrastructure (public toilets, rubbish bins, picnic areas etc.)	1%	3%	2%	1%	1%	1%	5%	4%	3%	14%	3%	4%	5%
Reduce roadkill/ speed limits	1%	3%	2%	2%	2%	2%	1%	1%	3%	6%	1%	3%	3%
More/ better local produce	2%	2%	1%	2%	3%	2%	1%	1%	3%	0%	2%	2%	2%
Improve customer service/ friendliness of locals	1%	1%	2%	1%	2%	1%	1%	1%	2%	2%	2%	2%	2%
Keep KI untouched/ limit development	3%	3%	1%	1%	2%	2%	2%	2%	4%	12%	2%	3%	3%
Car rental - reduce costs/ availability/ provide more information	1%	1%	1%	<1%	1%	1%	1%	1%	<1%	<1%	<1%	1%	<1%
Other suggestions	5%	6%	10%	8%	10%	5%	<1%	2%	8%	4%	24%	21%	5%↓
No Comment / no suggestion	49%	47%	55%	41%	46%	60%	56%	62%	25%	17%	11%	10%	10%

Q26 What suggestions do you have for improving your Kangaroo Island travel experience?  
Base: Total visitors.  
^ Code added in 2012/13.

## Exploration of those dissatisfied overall

A small number (n=125) of the total sample were dissatisfied overall in 2023/24, scoring a 5 or below out of 10 for Q22: Overall Satisfaction. Compared to the total sample, these visitors tended to be in a special interest/tour group (6% vs 3%), in summer (36%), had not visited KI previously (65%), coming from interstate (51%), arriving by sea (95%) or staying one or more nights (78%).

**Table 17: Who was dissatisfied?**

	23/24 respondents (min n=111)	Total 22/23 respondents (min n=3244)
<b>Travel party</b>		
Travelling with family or friends	46%	46%
Travelling with partner	40%	42%
Travelling with special interest/tour group	6%	3%
Travelling alone	5%	8%
Travelling with business associates (with or without spouse)	3%	2%
<b>Season visited</b>		
Winter	9%	14%
Spring	24%	23%
Summer	43%	36%
Autumn	24%	27%
<b>Previous visitation</b>		
Yes	34%	36%
No	66%	64%
<b>Visitor Origin</b>		
Intrastate	36%	37%
Interstate	53%	52%
International	11%	11%
<b>Arrival transportation</b>		
Air	3%	5%
Sea	97%	95%
<b>Type of stay</b>		
Day trip	22%	13%
Overnight	78%	87%

	23/24 respondents (min n=111)	Total 22/23 respondents (min n=3244)
Trip as part of package		
Yes	16%	13%
No	84%	87%
Spend		
Up to \$200 per night	51%	47%
More than \$200 per night	49%	53%

In 2023/24, the levels of satisfaction amongst the satisfied visitors (i.e. scoring Q22: Overall Satisfaction as 5 or below out of 10) tended to be lower towards all elements of their trip compared to the total sample.

**Table 18: What were they dissatisfied with?**

	23/24 respondents (min n=26)	Total 23/24 respondents (min n=844)
	% Very satisfied / satisfied (Top 2 box out of 5)	
The quality of road signage	56%	56%
The level of customer service you received	53%	53%
The quality of public toilets	50%	50%
Your opportunity to learn more about the Island's natural environment	49%	49%
The range of Island produce (food & wine)	48%	48%
The professionalism of tourism businesses	47%	47%
Seeing wildlife in the natural environment	46%	46%
The quality of accommodation	45%	45%
The availability of Island produce (food & wine)	43%	43%
The quality of Island produce (food & wine)	43%	43%
The quality of interpretive/ educational signage	42%	42%
Your opportunity to learn more about the Island's cultural history	40%	40%
The quality of picnic/ day use areas	39%	39%
The quality of campgrounds	33%	33%
The quality of activities available	31%	31%
The quality of roads	30%	30%
The availability of activities	29%	29%
The range of activities available	28%	28%

**Table 19: Reasons for dissatisfaction (Q20)**

	23/24 respondents n=497
Road Infrastructure	39%
Better road signage (attractions/ airport/ ferry)	15%
More / better tourist information	7%
Quality/ availability of activities/ tour guides	8%
Bad quality / availability public toilets / bins / picnic areas	6%
Limited Trading Hours	8%
A lack of restaurants, cafes and other eating places	7%
Expenses at KI	8%
Quality of Accommodation / or lack of	10%
Customer service and friendless/ or lack of	3%
Habitat / Wildlife	1%
Bad/ lack of food options in restaurants	3%
More local produce	9%
Mobile phone coverage	4%
Too much roadkill	2%
Other	3%
Everything fine / not dissatisfied	2%
No Comment	6%

Q20 For any item in question 19 above that you have expressed dissatisfaction with, please provide further comment.  
 Base: Total visitors.

# Seasonal variances

## The proportion of visitors by season

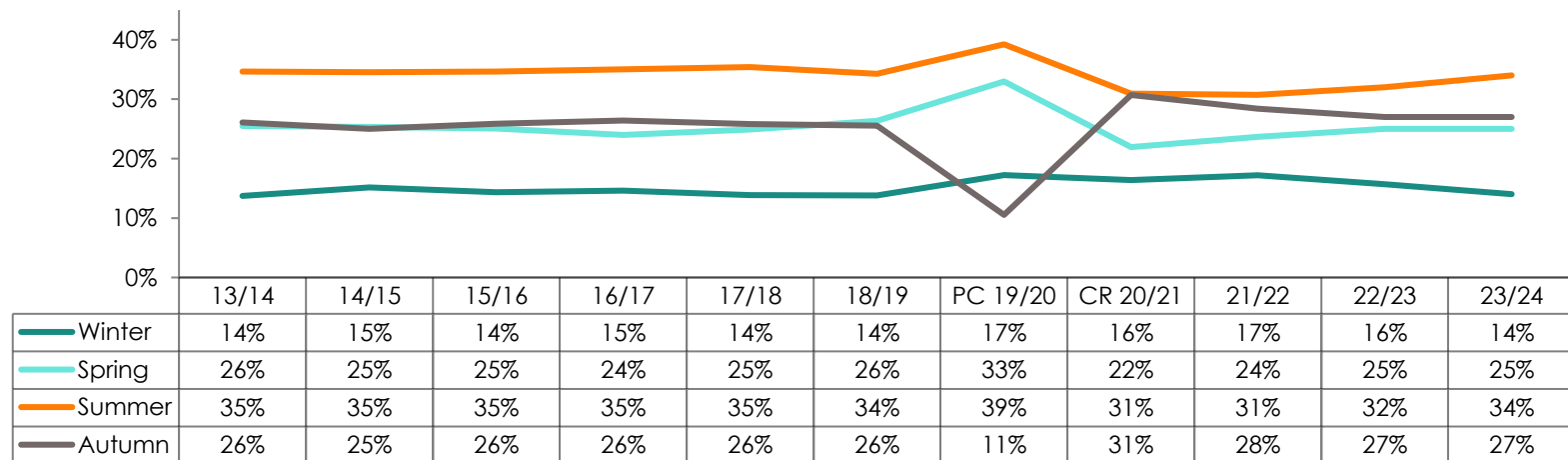
The distribution of visitors to Kangaroo Island who completed a survey across each season varies and should be considered when viewing the results throughout this section. Most surveys for the 2023/24 period were completed in summer, the lowest number of completes in winter.

**Table 20: Base size by season**

Season	23/24
Winter	465
Spring	793
Summer	1212
Autumn	926
<b>Total</b>	<b>3,396</b>
These figures are direct from the KI Visitor Exit Survey	

Summer continues to be the most popular season to visit Kangaroo Island, accounting for 34% visitors in 2023/24. The seasonal proportions in visitation have remained relatively consistent across waves, besides the major disruptions in pre-COVID 19/20.

**Figure 49: Proportion of visitors by season**

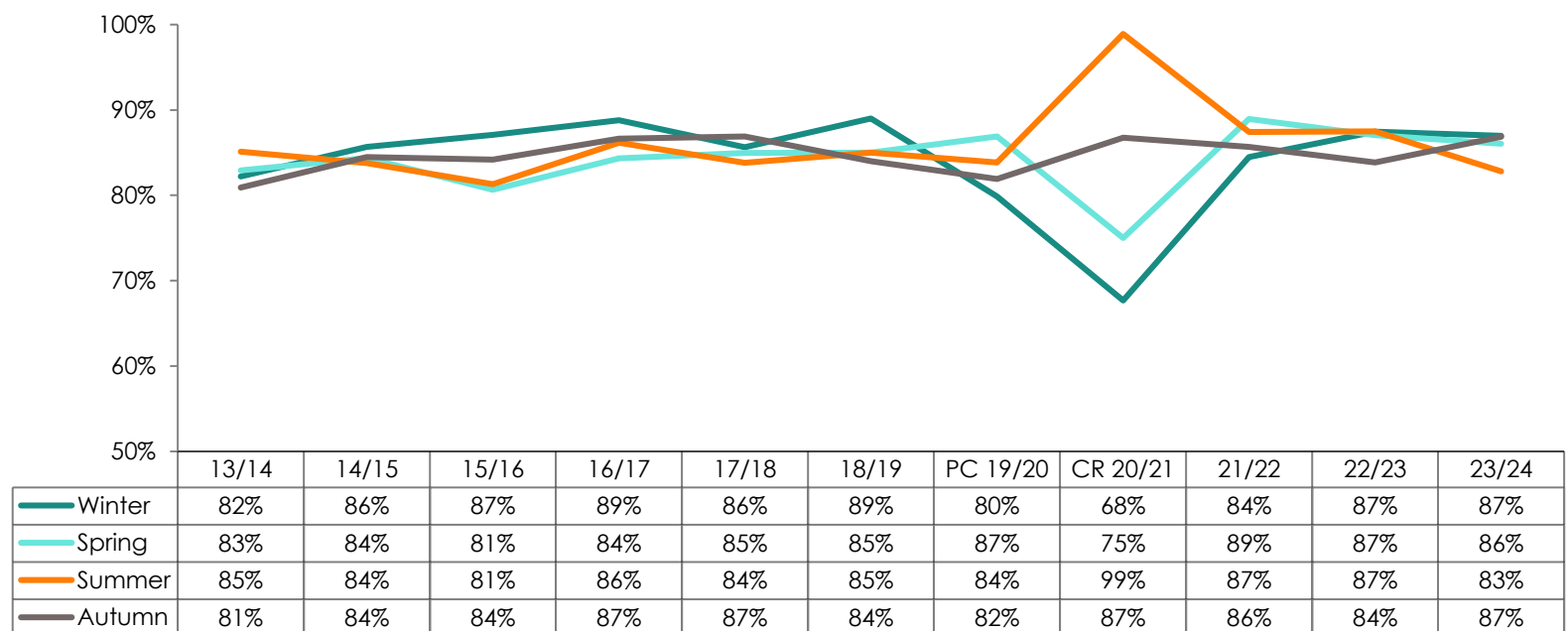


Note: These figures have been updated in accordance with data provided by the TOMM Committee.

## Satisfaction with overall experience by season

The proportion of visitors who stated that they were very satisfied with their overall experience on the Island is similar for winter, spring and autumn (86-87%) and slightly lower for summer (83%). The satisfaction levels in autumn and summer have reversed since the previous wave, but these are not significant.

**Figure 50: Visitors who were extremely satisfied\*\* with their overall experience on Kangaroo Island by season**



Q22 Taking into account all aspects of your visit to Kangaroo Island, how would you rate your overall satisfaction?

Base: Visitors responding, (23/24 n=3382)

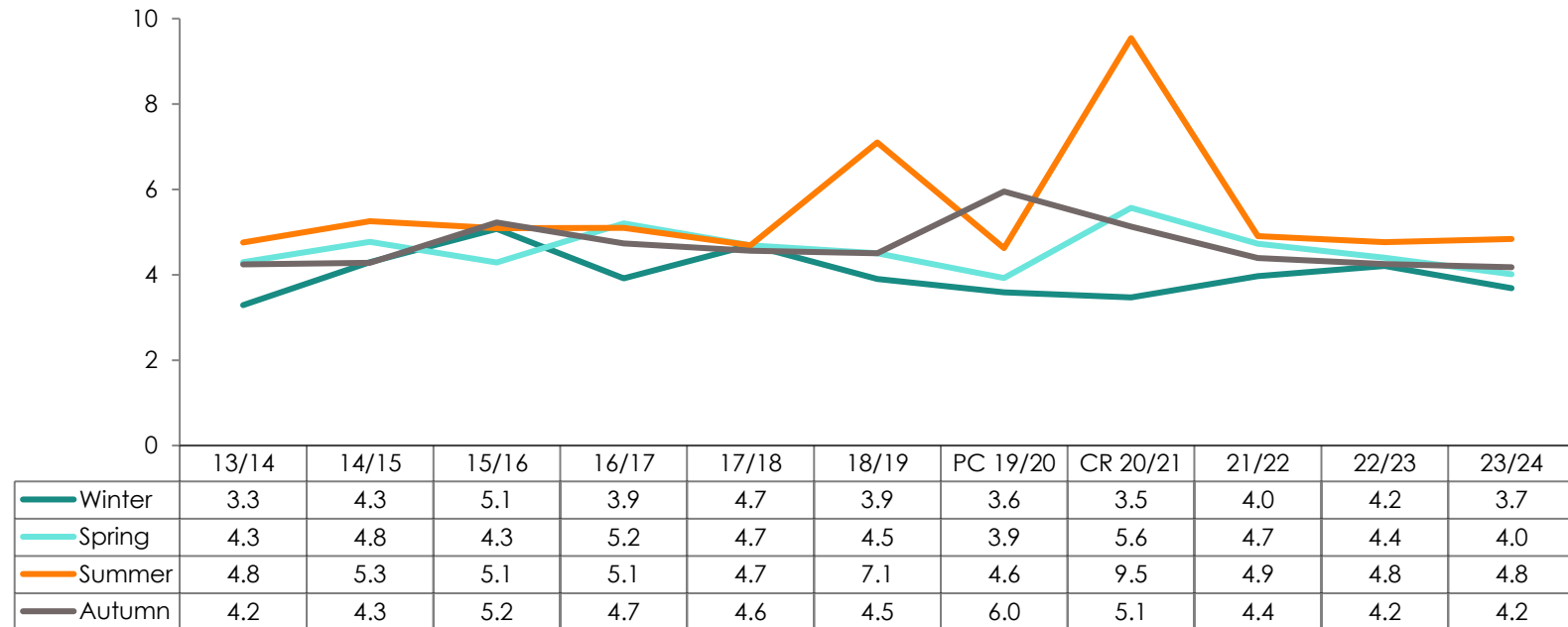
Note: Missing cases excluded.

\*\* Rated 8-10 on an eleven-point scale, where 0 means extremely dissatisfied and 10 means extremely satisfied.

## Average number of nights stayed by season

The average number of nights stayed in 2023/24 has decreased since the previous wave during winter (4.2 to 3.7 nights) and spring (4.4 to 4.0)- however these are not significant and summer (4.8) and autumn (4.2) have remained the same.

**Figure 51: Average number of nights stayed by season**



Q6 Did you stay one or more nights or was it a day trip?

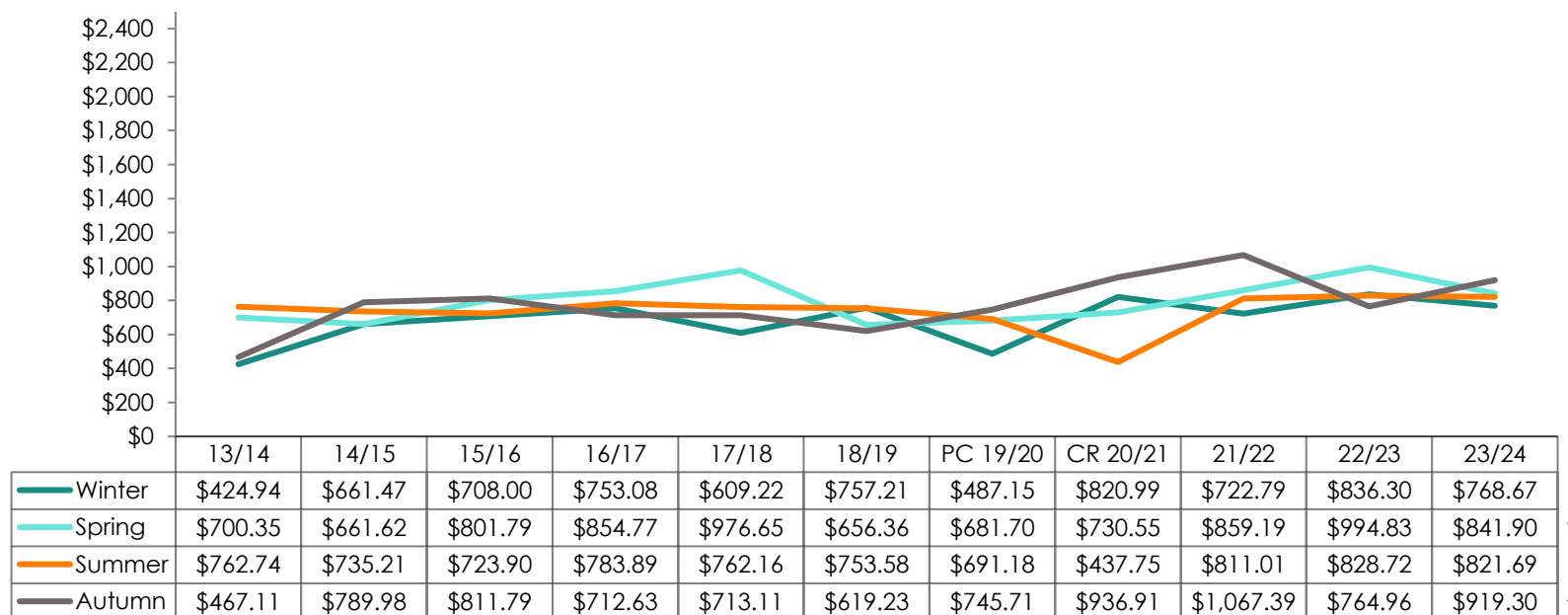
Base: Visitors responding, (23/24 n=2828)

Note: Arrows indicate significant change in score from previous year

## Average expenditure per visit by season

Since the previous wave, autumn expenditure has significantly increased (\$765.00 to \$984.17) and spring expenditure has significantly decreased (\$994.80 to \$841.90).

**Figure 52: Average total expenditure per person per visit by season**



- Q6 Did you stay one or more nights or was it a way trip?
- Q8 What was the cost of the total package?
- Q11 What is your best guess of the total Kangaroo Island component of the package?
- Q13 What additional money did you spend on top of the package whilst on the Island?
- Q14 Please indicate how much you spent on your trip to Kangaroo Island?

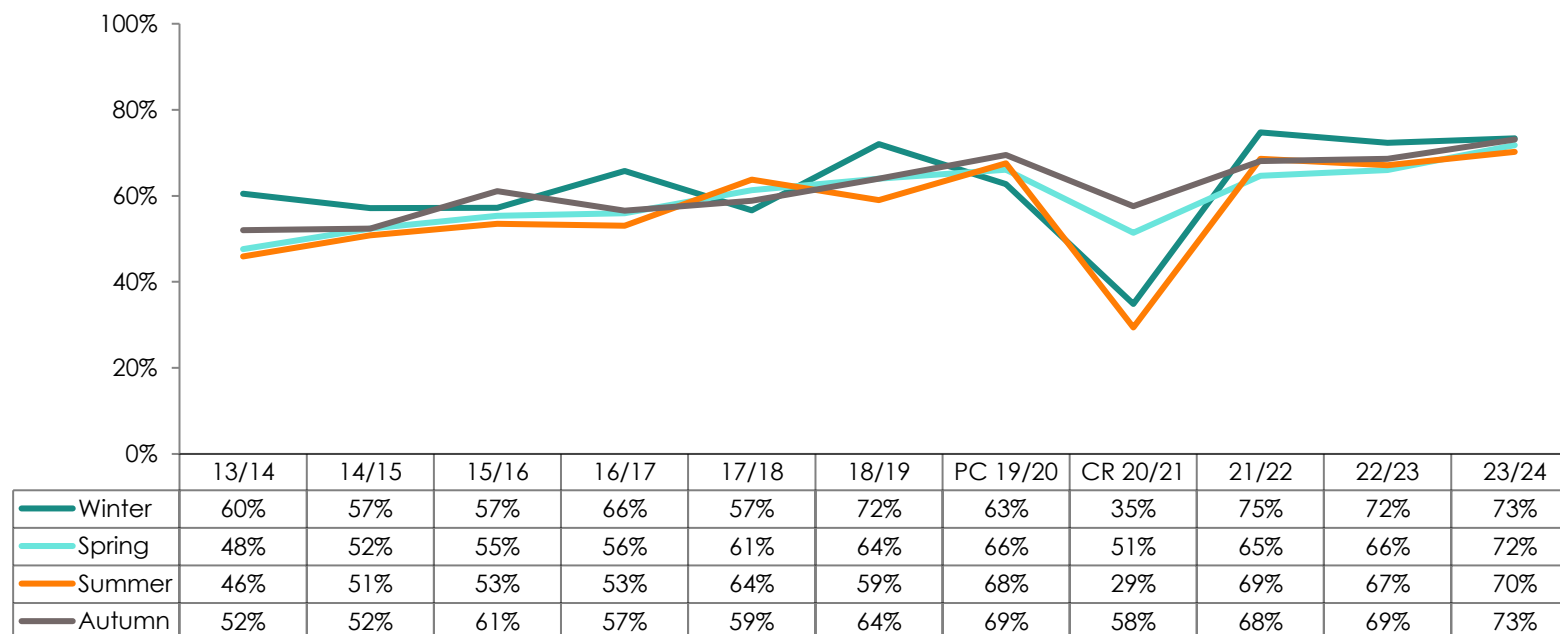
- Q15 How many people did these costs cover?
- Base: Visitors responding, (23/24 n=3324)
- Note: Missing cases excluded.
- Note: Visitors who indicated that their trip was part of a package yet did not specify the KI component of the package have been excluded from all expenditure calculations in this report



## Satisfaction with customer service received by season

Following the decrease in satisfaction with the customer service across all seasons in the COVID recovery period, satisfaction has continued to increase across all seasons, though none of these differences are significant.

**Figure 53: Visitors who were very satisfied with customer service received by season**



Q19.7 Please indicate how satisfied you were with the level of customer service you received.

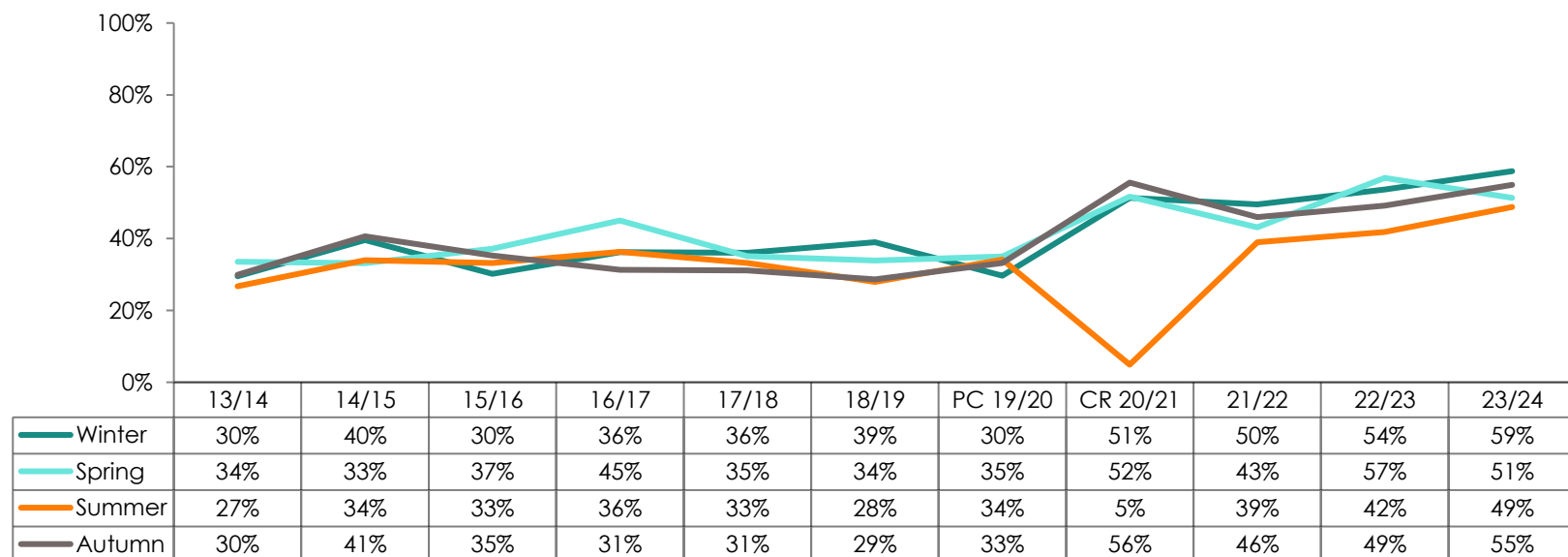
Base: Visitors who experienced it, (23/24 n=3330)

Note: Don't know, didn't experience and missing cases excluded

## Average spend per night over \$200 by season

The proportion of visitors who reported an average spend of over \$200 per night has reached its highest level this wave for winter (59%) and summer (49%). Additionally, since the last wave there have been significant increases in summer (42% to 49%) and autumn (49% to 55%).

**Figure 54: Visitors who spent \$200+ per night by season**



- Q6 Did you stay one or more nights or was it a day trip?
- Q8 What was the cost of the total package?
- Q11 What is your best guess of the total Kangaroo Island component of the package?
- Q13 What additional money did you spend on top of the package whilst on the Island?
- Q14 Please indicate how much you spent on your trip to Kangaroo Island?
- Q15 How many people did these costs cover?

Base: Visitors responding, (23/24 n=2765)

Note: Day trippers excluded.

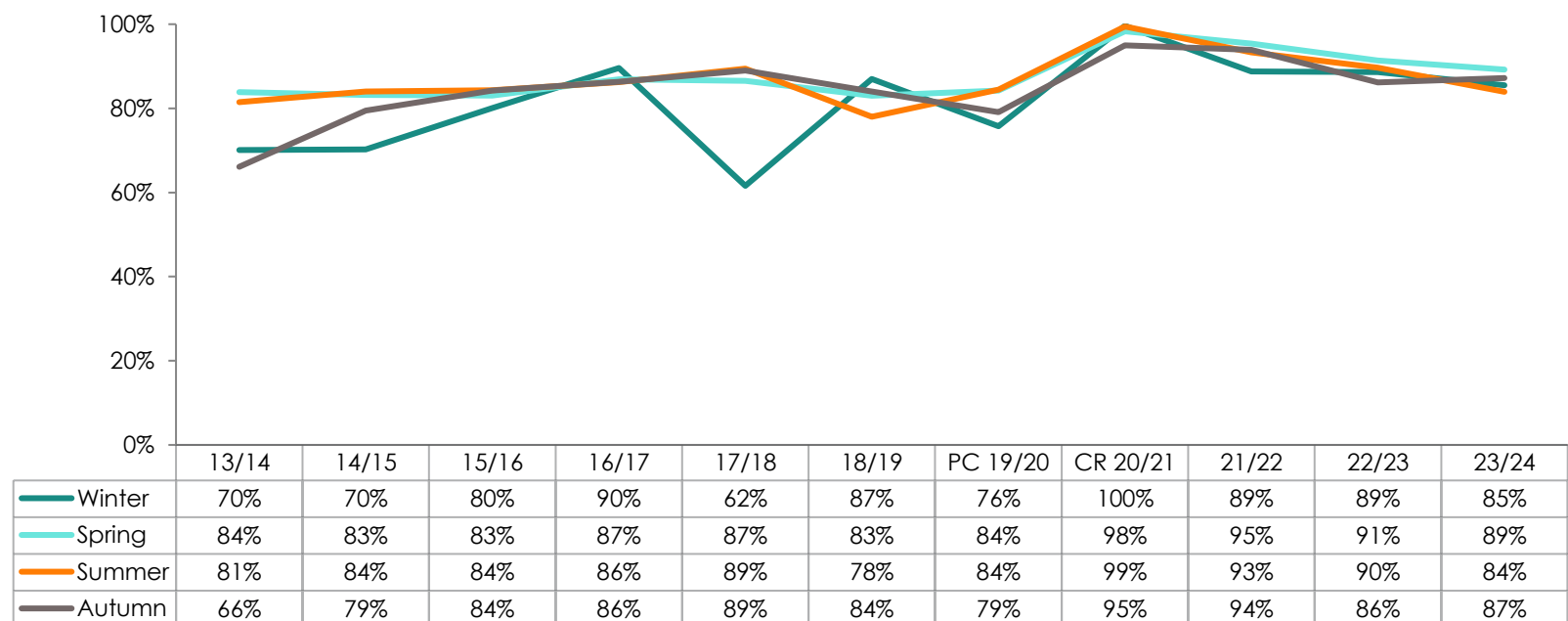
Note: Missing cases excluded.

Note: Visitors who indicated that their trip was part of a package yet did not specify the KI component of the package have been excluded from all expenditure calculations in this report

## Experienced local Kangaroo Island produce by season

The proportion of visitors who experienced local Kangaroo Island produce has continued to drop following the COVID-19 recovery period for all seasons except for autumn; this decrease was statistically significant for summer visitors (from 90% to 84%).

**Figure 55: Visitors that experienced local Kangaroo Island produce by season**



Q18.8 For each of the following please indicate whether you experienced this while on Kangaroo Island?

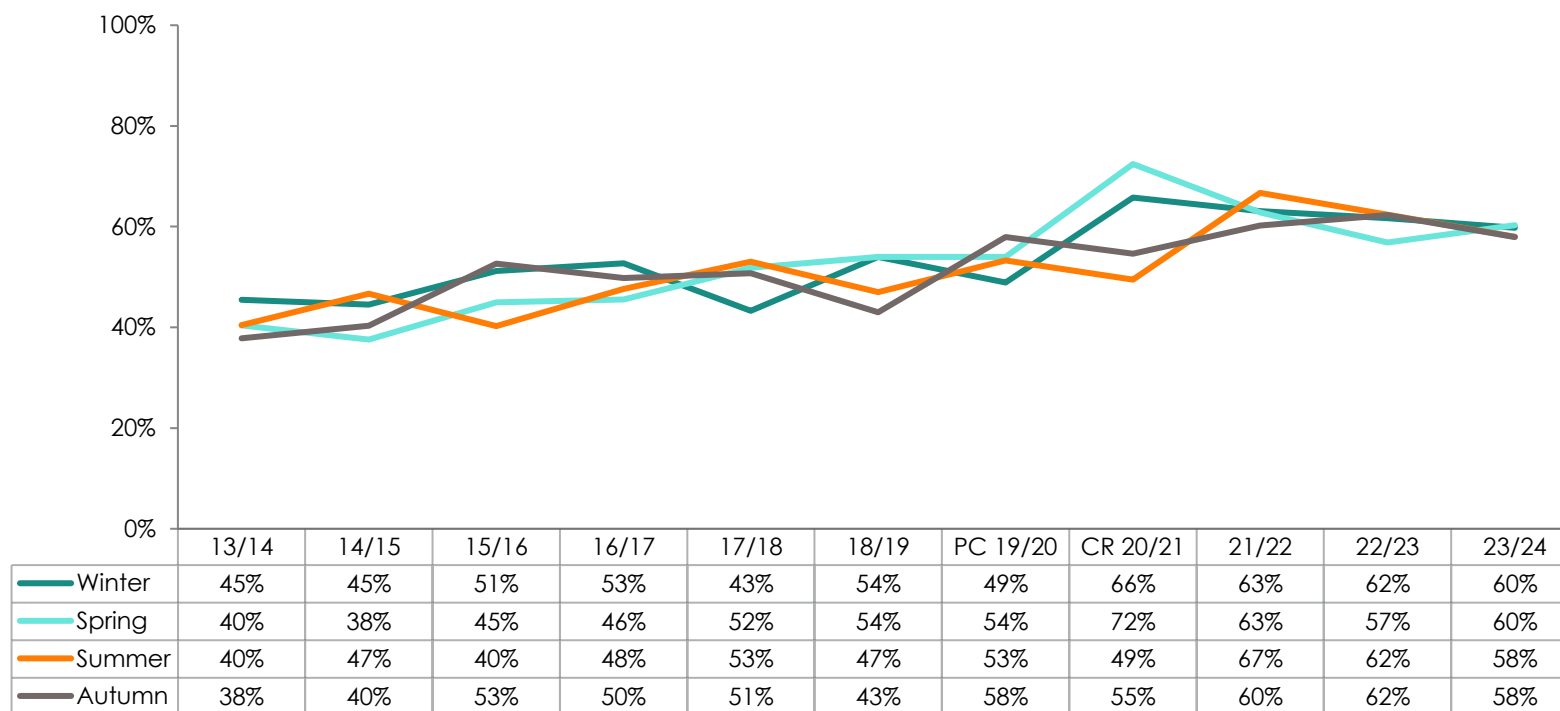
Base: Visitors responding, (23/24 n=3322)

Note: Missing cases excluded

## Range, quality and availability of Kangaroo Island produce by season

The proportion of visitors very satisfied with the range of local Kangaroo Island produce has slightly decreased in all seasons except spring since last wave though none are significant.

**Figure 56: Visitors very satisfied with the range of local Kangaroo Island produce by season**



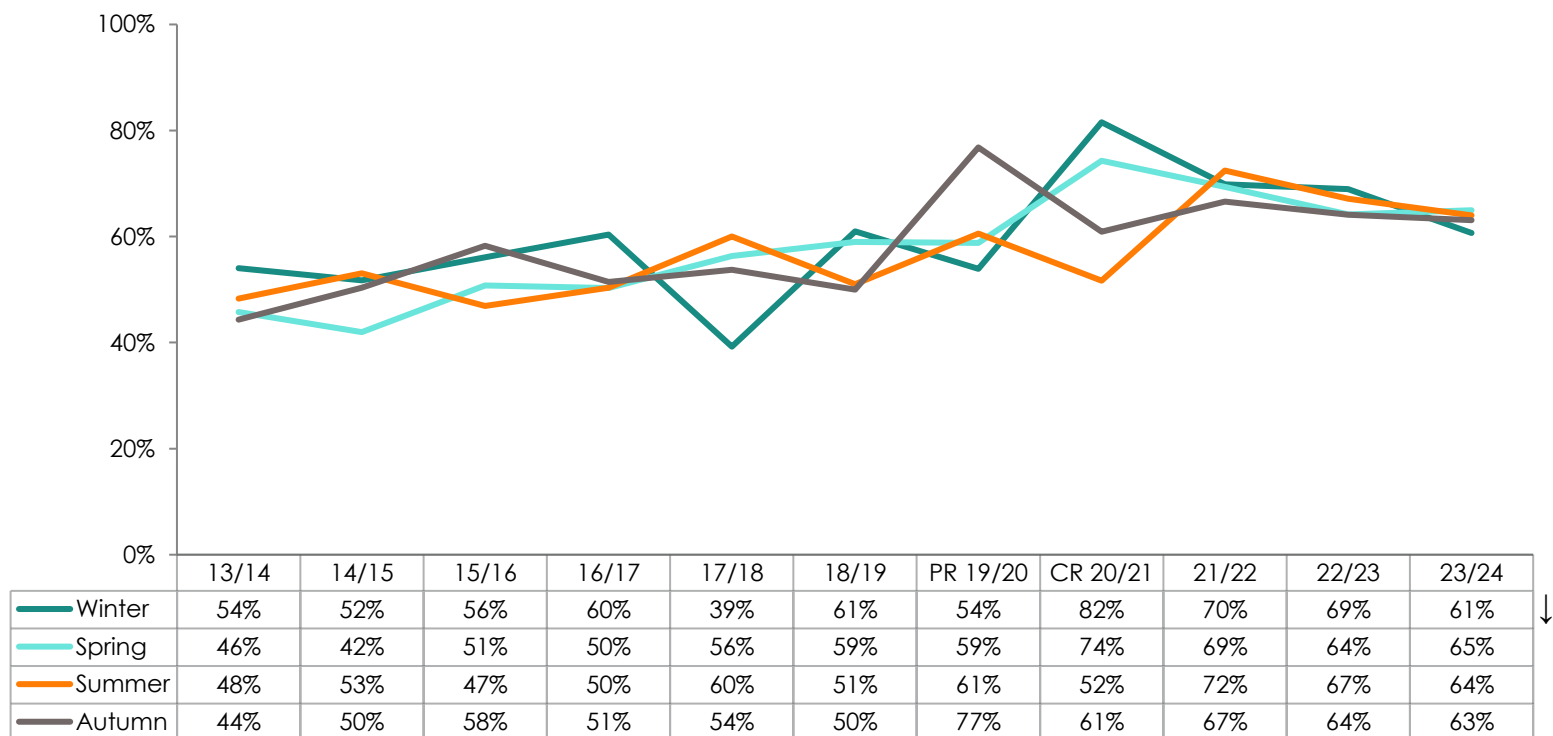
Q19.4 Please indicate how satisfied you were with....

Base: Visitors who experienced it, (23/24 n=3003)

Note: Don't know, didn't experience and missing cases excluded

Levels of satisfaction with the quality of local produce have significantly decreased for winter visitors since the previous wave (from 69% to 61%).

**Figure 57: Visitors very satisfied with the quality of local Kangaroo Island produce by season**



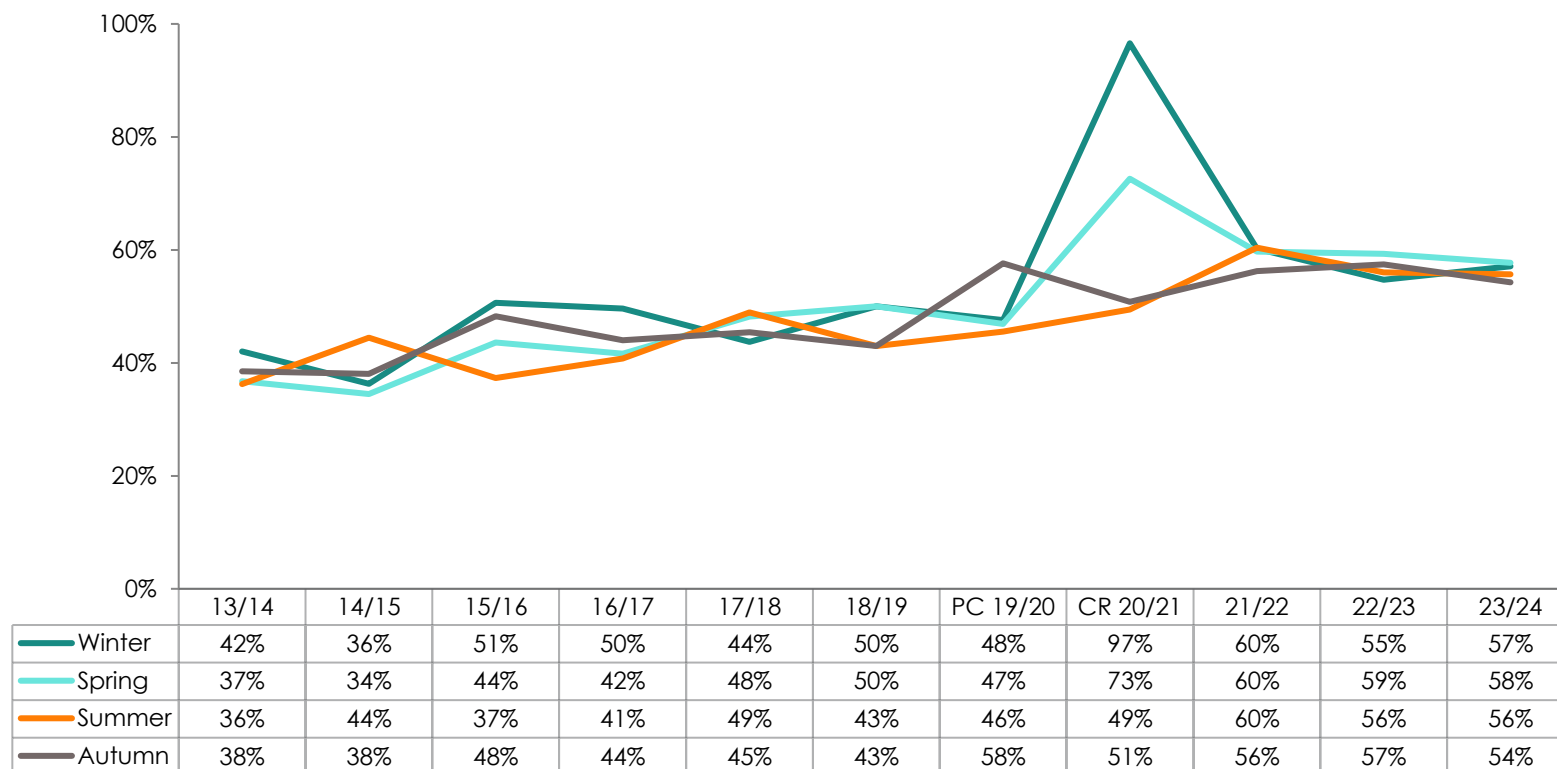
Q19.5 Please indicate how satisfied you were with....

Base: Visitors who experienced it, (23/24 n=3018)

Note: Don't know, didn't experience and missing cases excluded

Since the previous wave, the proportions of visitors very satisfied with the availability of local Kangaroo Island produce has slightly decreased for autumn and increased in winter- though these differences are not statistically significant.

**Figure 58: Visitors very satisfied with the availability of local Kangaroo Island produce by season**



Q19.6 Please indicate how satisfied you were with....

Base: Visitors who experienced it, (23/24 n=3011)

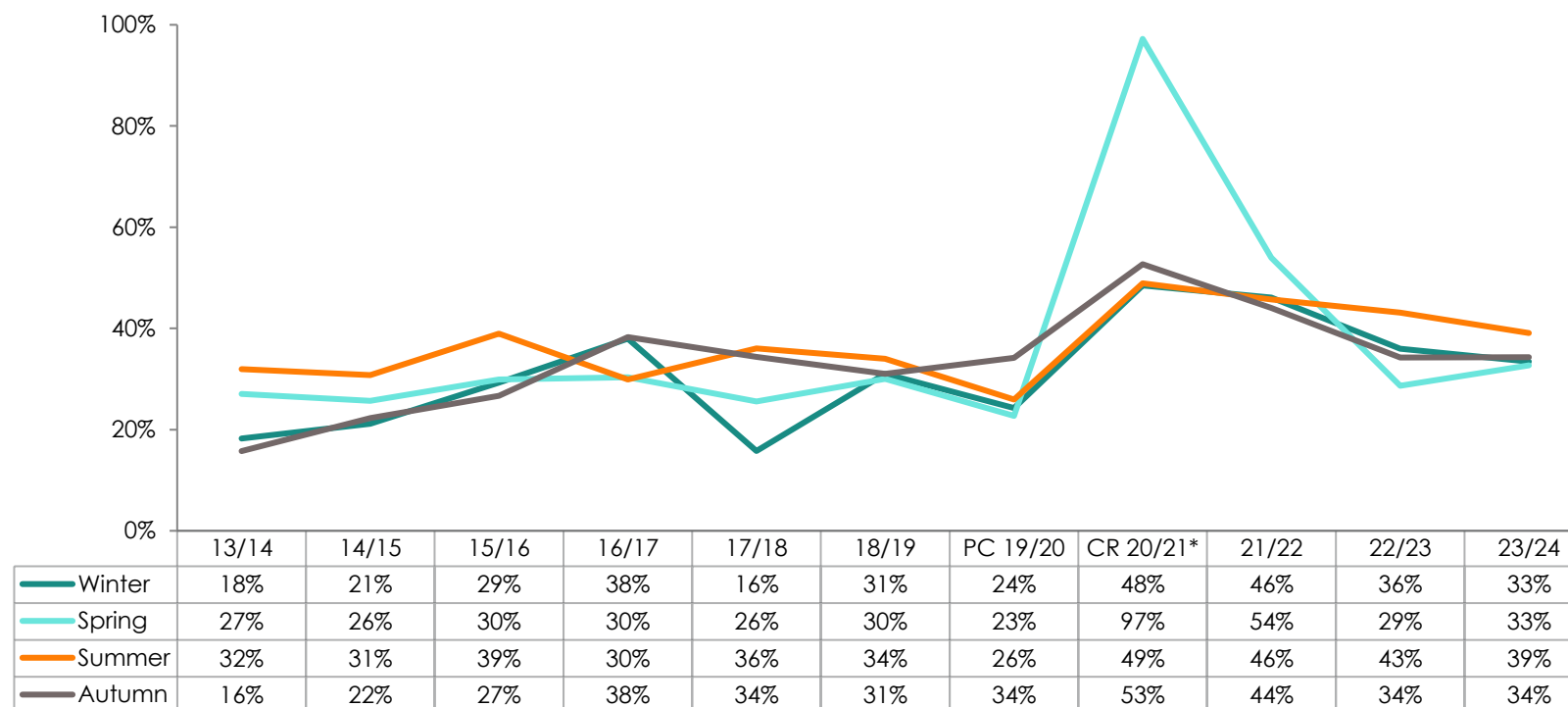
Note: Don't know, didn't experience and missing cases excluded

\* Interpret figures with caution given the low sample sizes achieved for this period

## Incidence of repeat visitation by season

The proportion of repeat visitors to Kangaroo Island has not changed significantly since the previous wave.

**Figure 59: Repeat visitors by season**



Q3 Have you ever visited Kangaroo Island before this trip?

Base: Visitors responding (23/24 n=3398)

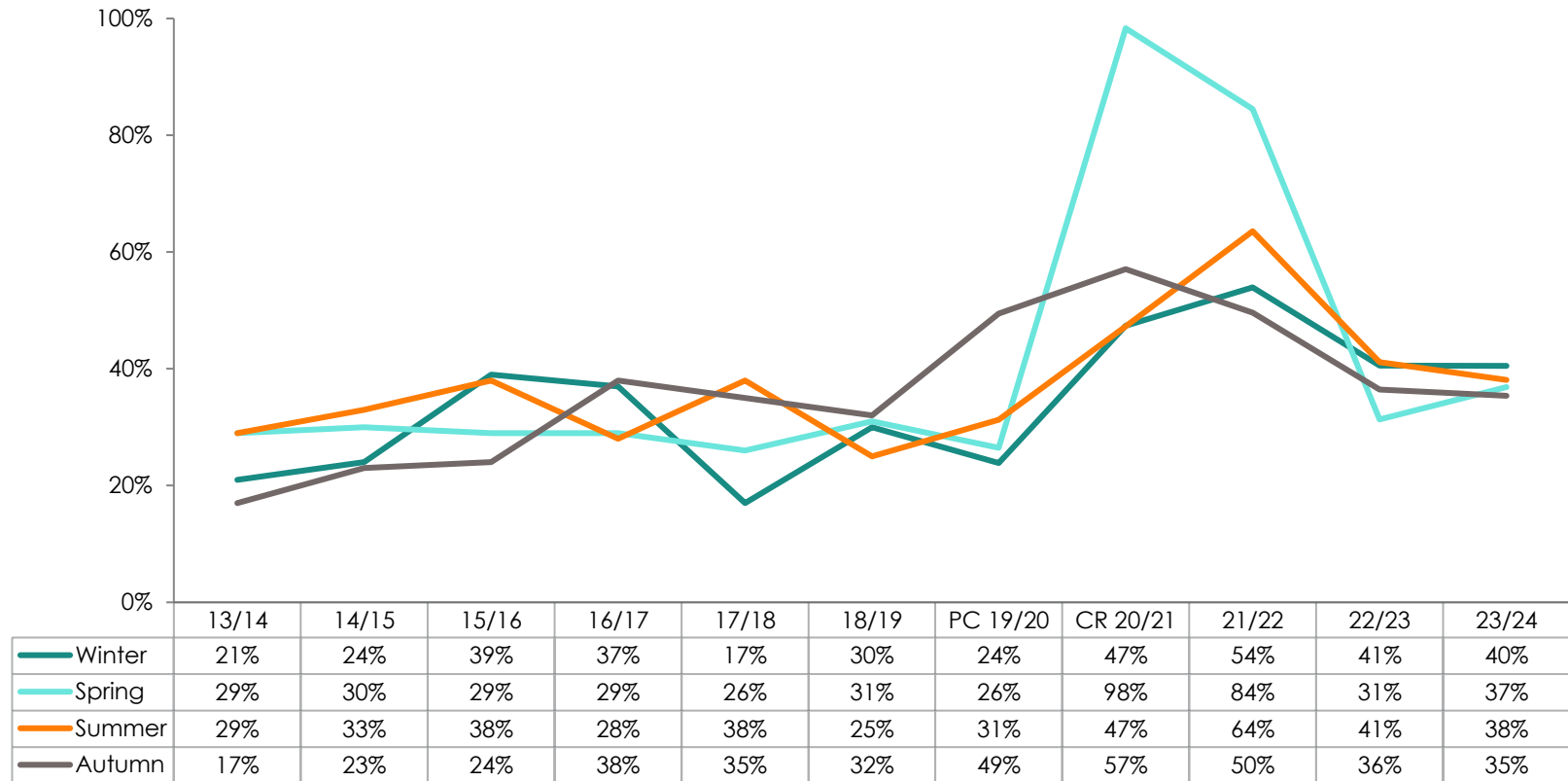
Note: Don't know and missing cases excluded

\* Interpret figures with caution given the low sample sizes achieved for this period

## Visitor origin by season

Since the previous wave, international visitation has increased significantly across all seasons except spring, but intrastate and interstate visitation has no significant differences.

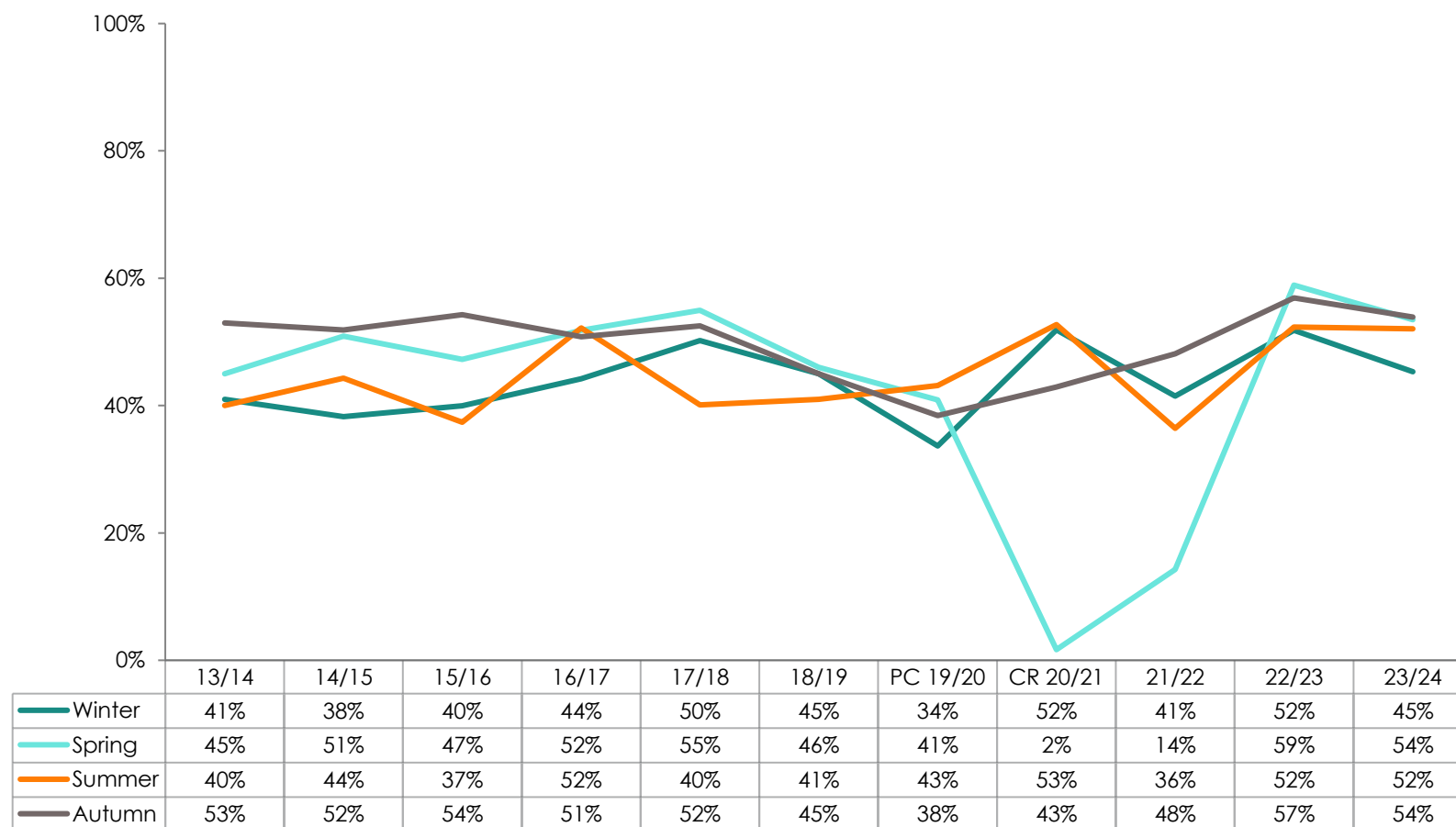
**Figure 60: Intrastate visitors by season**



Q4 Where do you live?  
 Note: Missing cases excluded

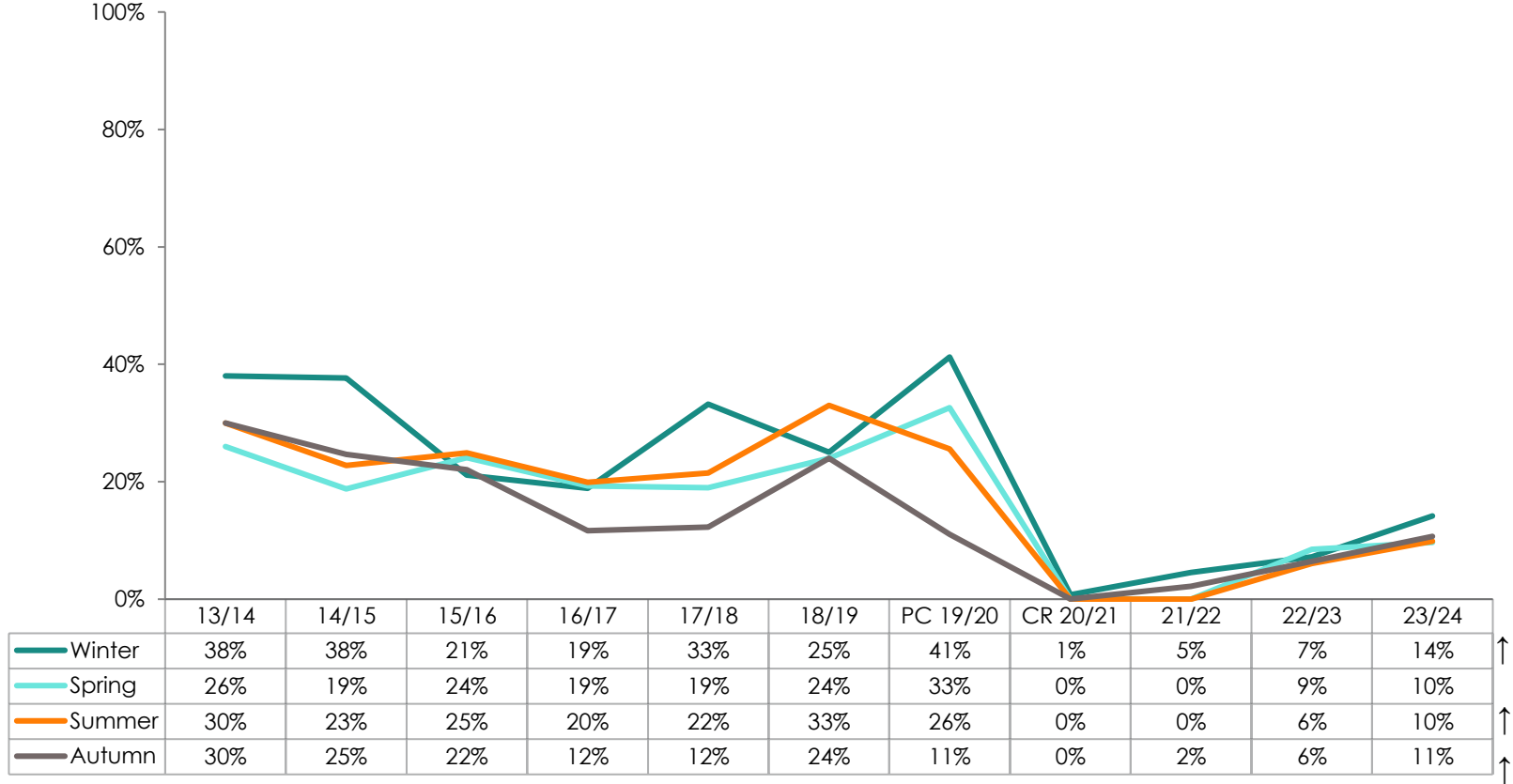


**Figure 61: Interstate visitors by season**



Q4 Where do you live?  
 Note: Missing cases excluded

Figure 62: International visitors by season



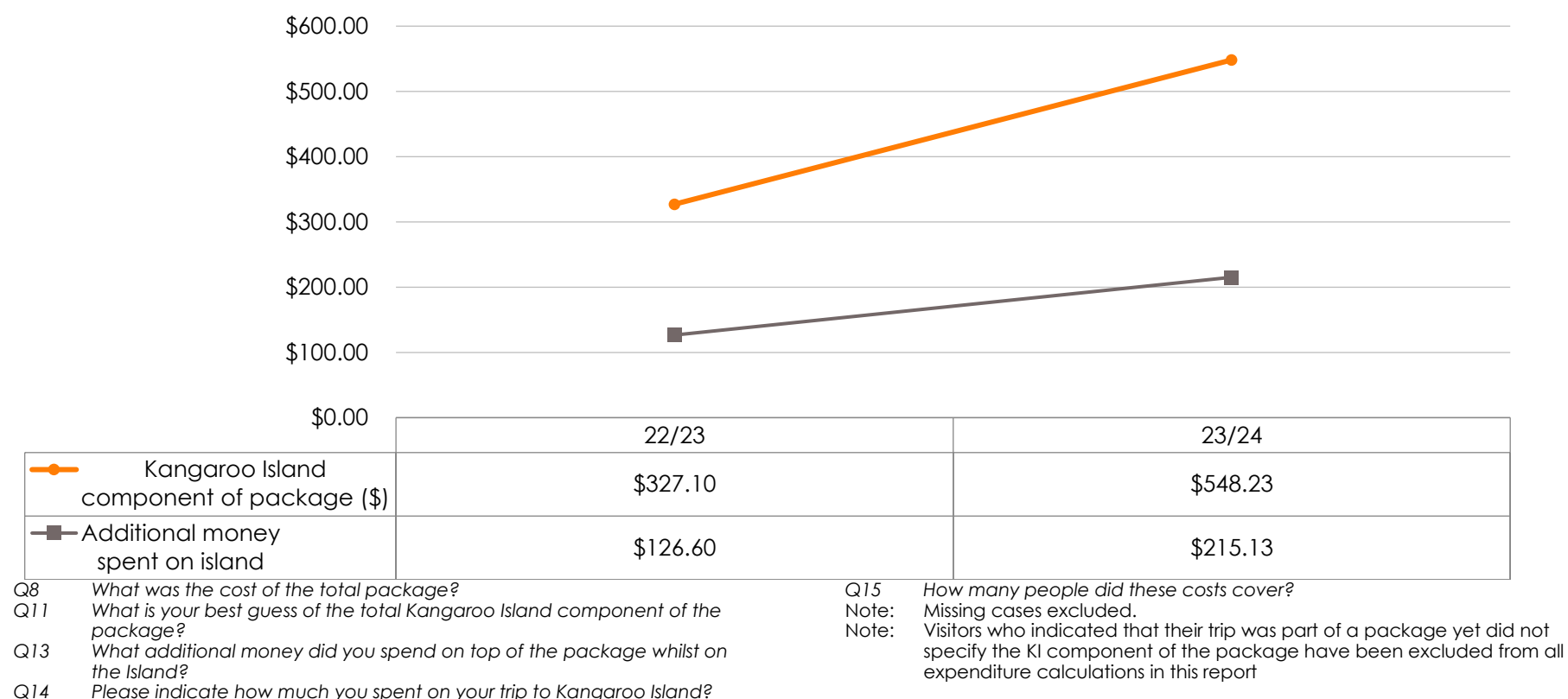
Q4 Where do you live?  
Note: Missing cases excluded

# Cruise ship arrivals

Findings from 2023/24 for cruise ship arrivals reflect a slight change in methodology. A QR code was provided to cruise ship arrivals to specifically track this cohort. Additionally, the survey that this QR code directs to excludes several questions from the general survey (e.g., means of arriving on the island, length of stay). The current findings are based on respondents who have completed the survey through this channel. Data was captured via other collection channels where respondents indicated cruise ship arrival, however some of these indicated they stayed overnight on the island. To avoid conflating respondents who may have mistaken the ferry for a cruise ship in their responses and given the challenge of verifying whether they were 'true' cruise ship arrivals, any cases that are not specifically from the cruise ship QR code have been omitted from this analysis to ensure a true representation.

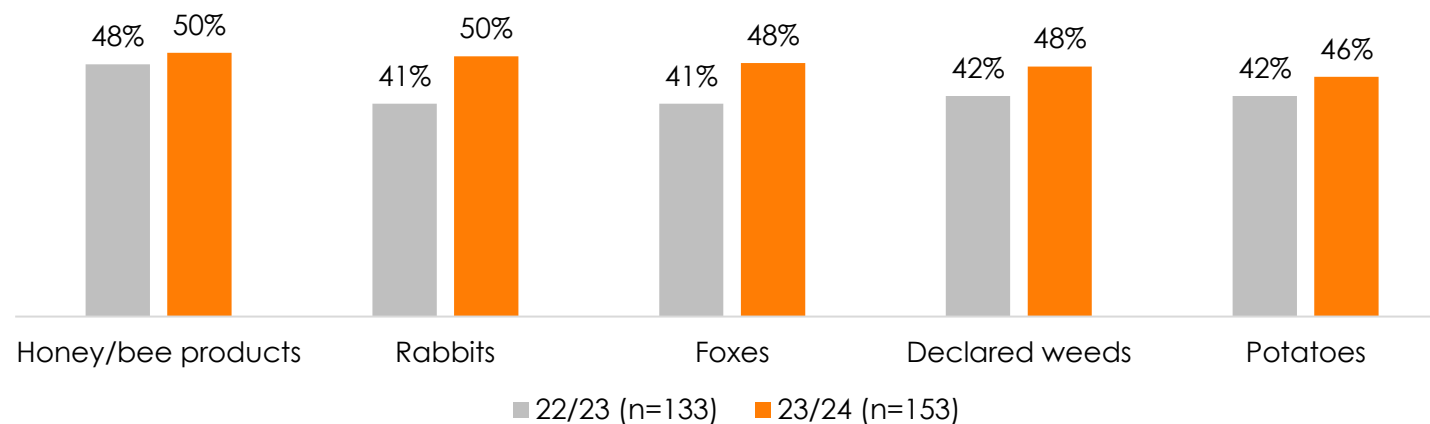
The average total expenditure for cruise ship arrivals was lower than that of non-cruise ship arrivals (\$403.10 vs. \$868.02). This is not surprising given all cruise ship arrivals stay only for a day trip.

**Figure 63: Average annual total expenditure per person per visit**



Non cruise ship arrivals were more aware of quarantine regulations prior to visiting when compared with cruise ship arrivals. Additionally, despite small shifts in awareness of quarantine regulations prior to visitation, no statistically significant differences were noted.

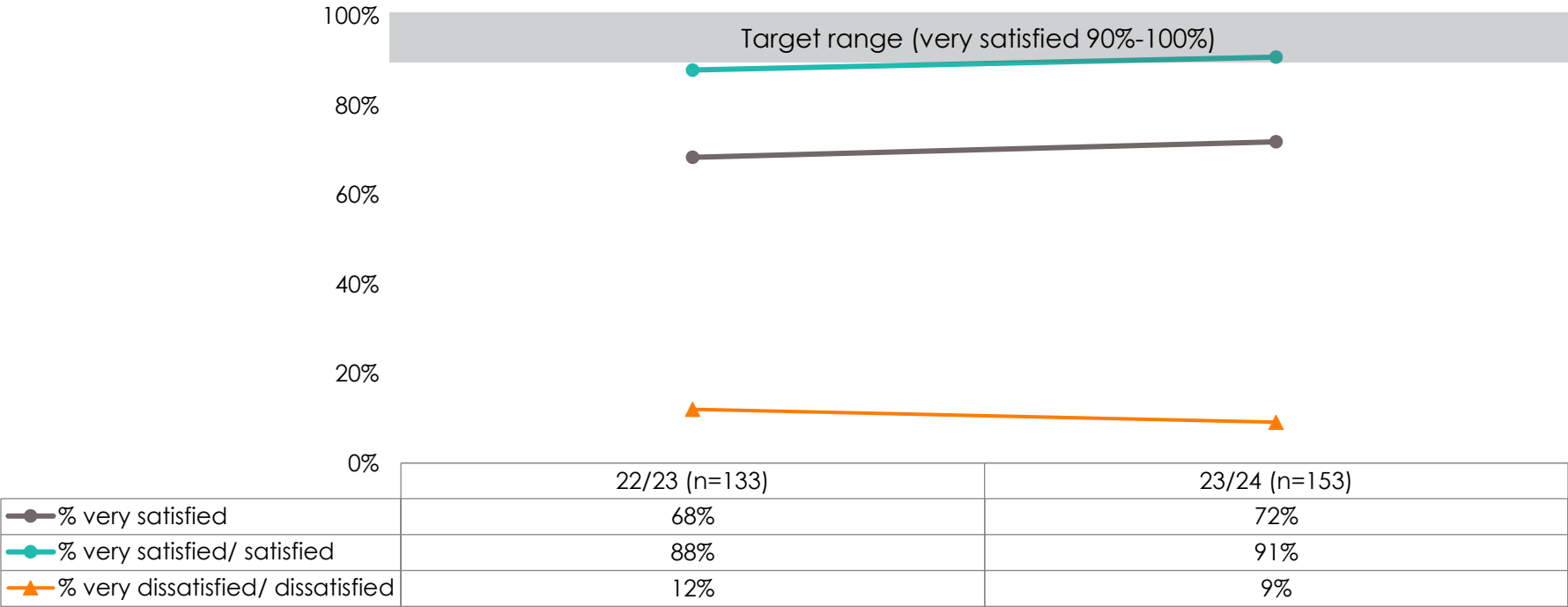
**Figure 64: Awareness of quarantine regulations prior to visitation**



Q16a Were you aware of all Kangaroo Island's quarantine regulations  
Q16b If yes, when did you find out this information

Those who did not arrive to the island by cruise ship were more likely to be very satisfied/satisfied and very satisfied with their overall experience of Kangaroo Island compared with those arriving by cruise ship- though this is not statistically significant.

**Figure 65: Visitors who were very satisfied\*\* with their overall experience on Kangaroo Island**

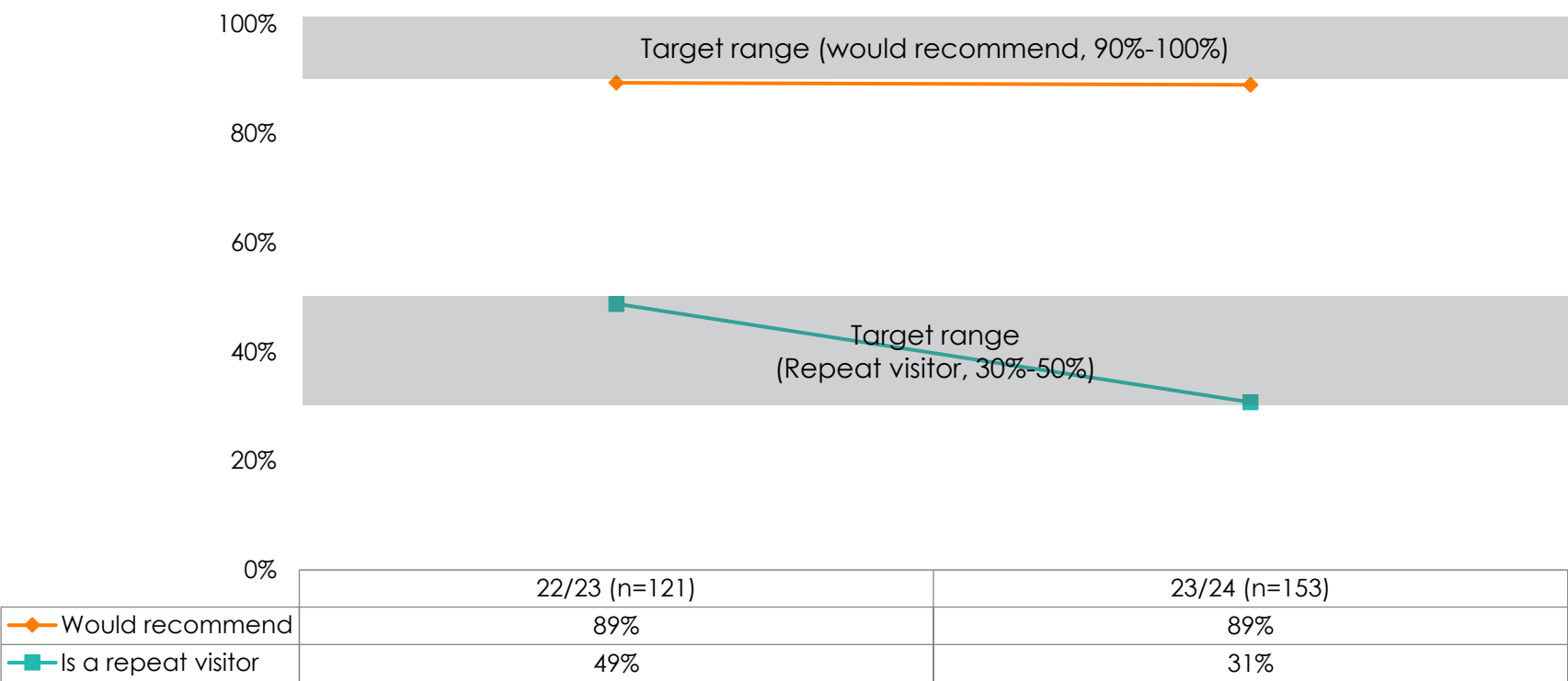


Q22    Taking into account all aspects of your visit to Kangaroo Island, how would you rate your overall satisfaction?  
Note:    Missing cases excluded.

\*\*    Rated 8-10 on an eleven-point scale, where 0 means extremely dissatisfied and 10 means extremely satisfied.

Positively, both cruise ship and non-cruise ship arrivals fell in the acceptable range for willingness to recommend (93% and 96% respectively).

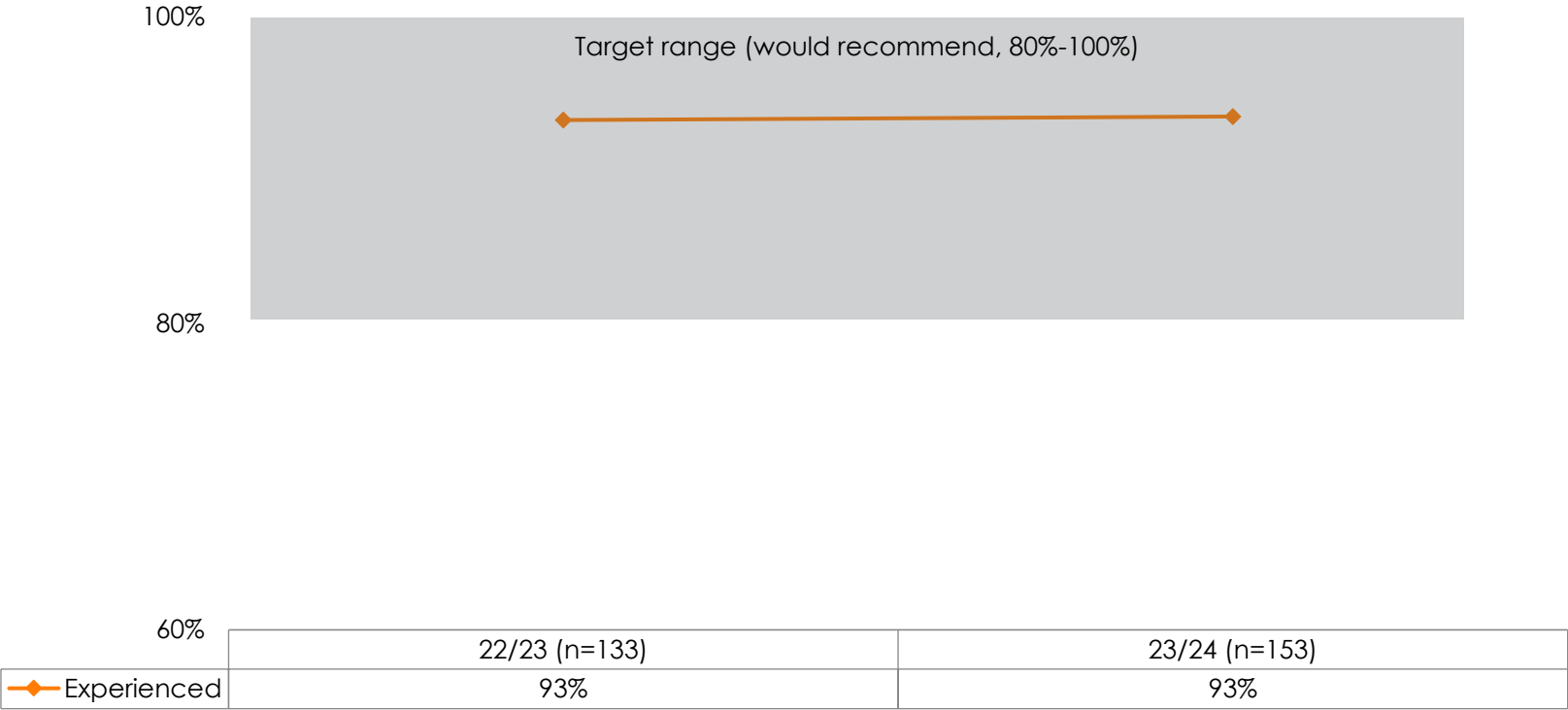
Figure 66: Willingness to recommend



Q23 Would you recommend Kangaroo Island as a holiday destination to others based on this trip?  
Note: Missing cases excluded.

The proportion of travellers who experienced a friendly local community on Kangaroo Island between those who arrived by cruise ship or other means of transport is the same and in the acceptable range.

**Figure 67: Visitors that experienced a friendly local community on Kangaroo Island**

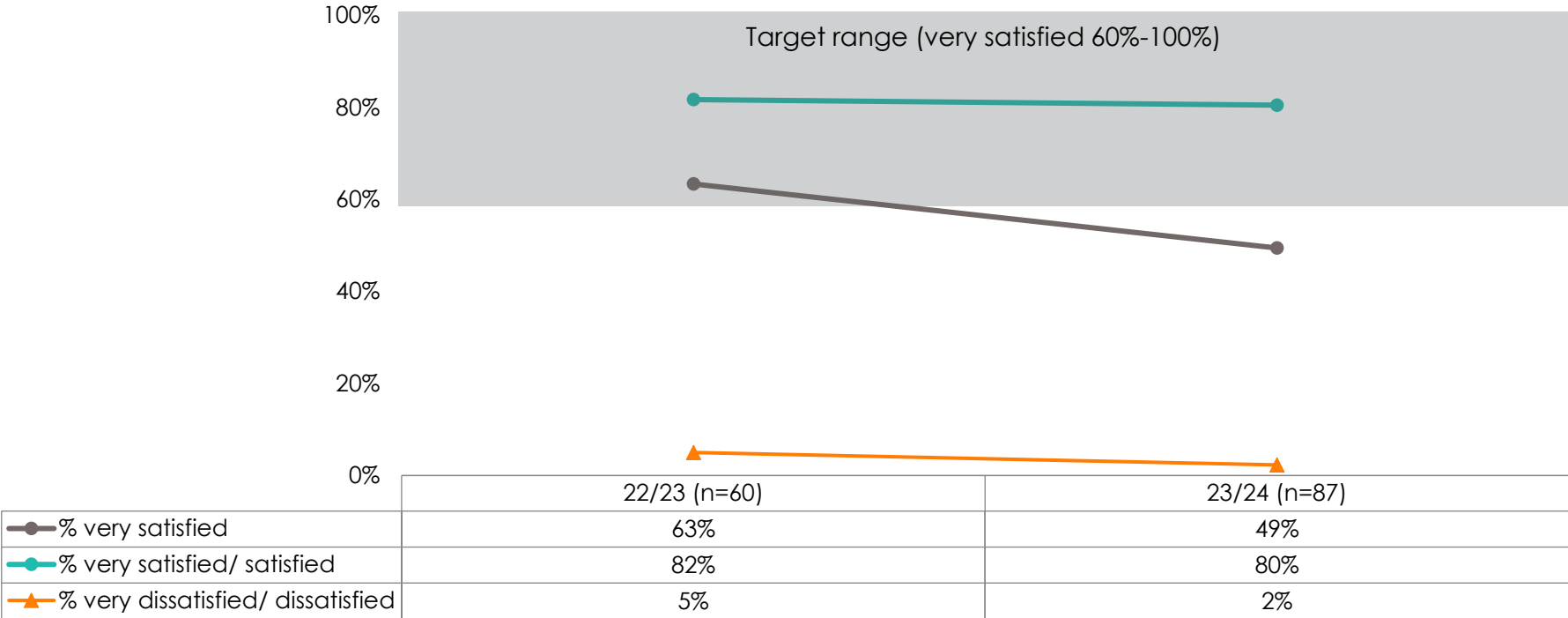


Q18.10 For each of the following please indicate whether you experienced this while on Kangaroo Island?  
Note: Missing cases excluded.

\* Figure reflects response to the question "please indicate whether you believe that Kangaroo Island provides you this while on Kangaroo Island."

Cruise ship arrivals were more likely to be very satisfied with the quality of interpretive and educational signage compared to other modes of transport- though this was not significant. While both cohorts fell into the target range for overall satisfaction, the proportion of those **very** satisfied sits outside the target range.

**Figure 68: Satisfaction with the quality of interpretive & educational signage**

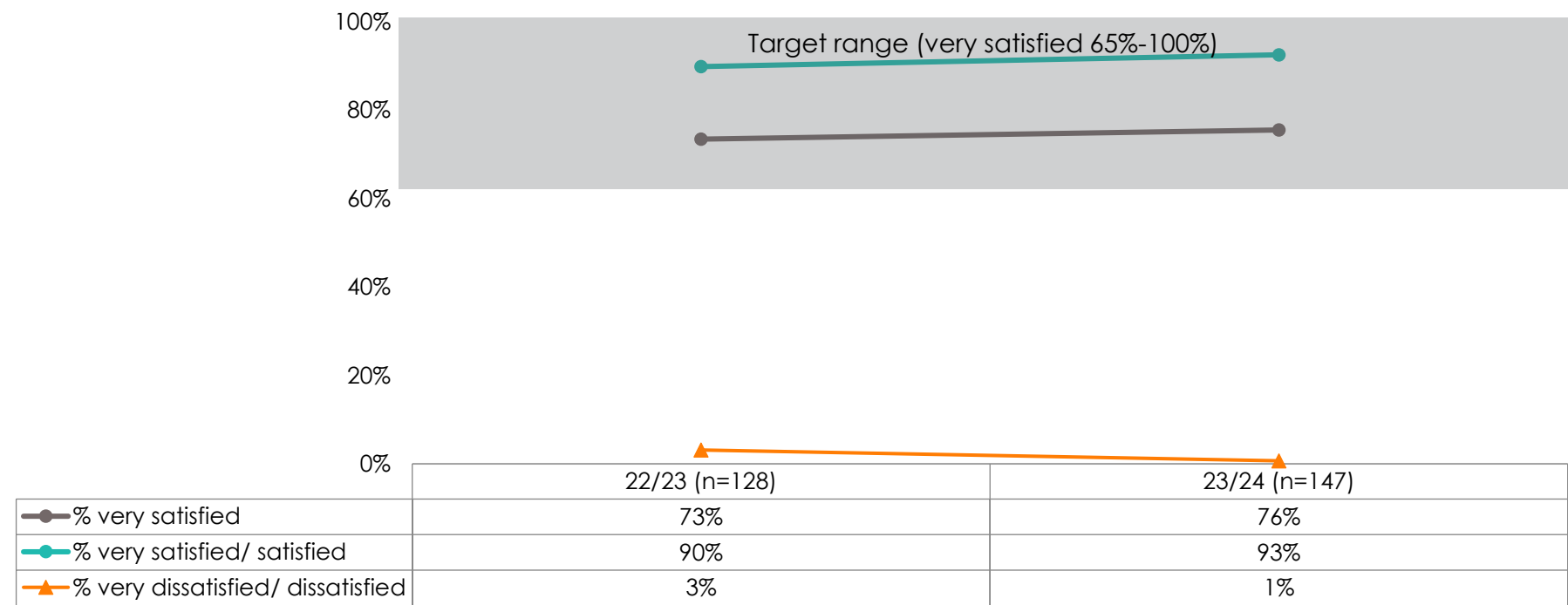


Q19.17 Please indicate how satisfied you were with....  
Note: Don't know, didn't experience and missing cases excluded.



Both cruise ship arrivals and other modes of transport fell into the acceptable ranges for satisfaction of customer service received. While cruise ship visitors had higher satisfaction than non-cruise ship arrivals, the difference was not statistically significant. Nonetheless, a good news story illustrating the high quality of service the island provides to all visitors.

Figure 69: Satisfaction with customer service received



Q19.7 Please indicate how satisfied you were with the level of customer service you received.  
Note: Don't know, didn't experience and missing cases excluded.

\*\* In 2008/2009 satisfaction was measured with a score out of 3  
Note: This measure is also used for indicator EX2g with an acceptable range of 80% - 100%.

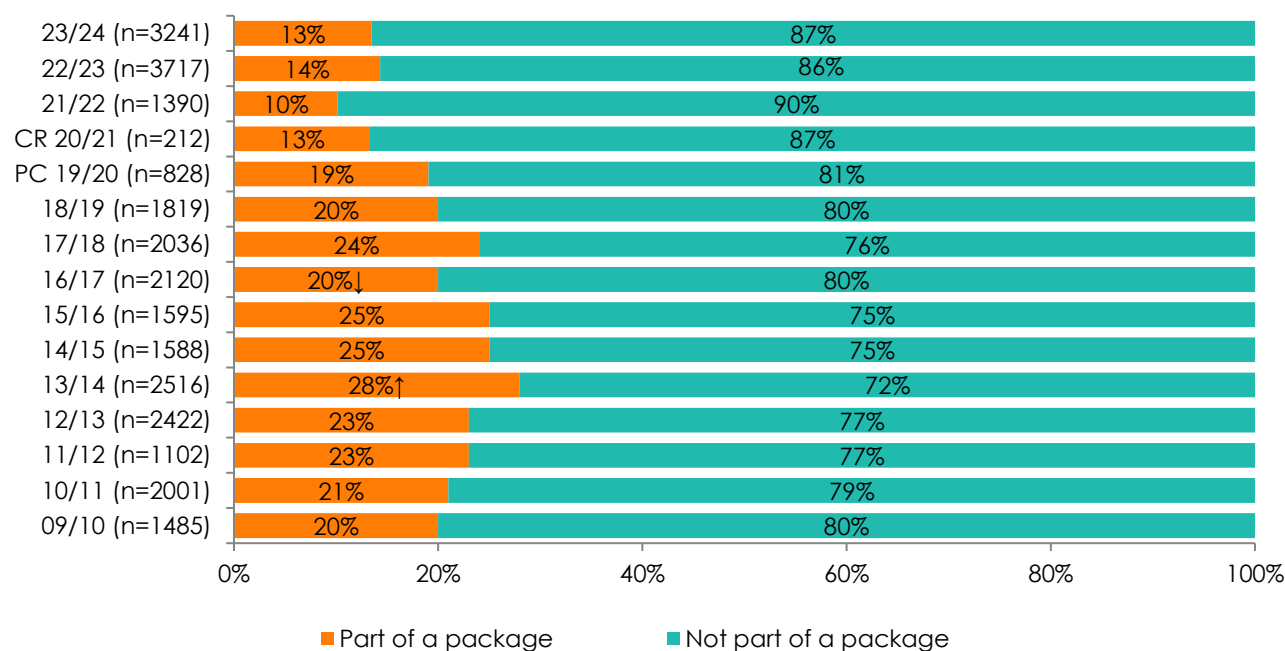
# Appendix A: Visitor expenditure

One key limitation of data about visitor expenditure is the dependence of the figures on the perceptions and opinions of visitors. In some cases, reporting may be inaccurate due to lack of information about expenditure (i.e., when purchasing a package) or the impact of recall on data quality. While figures have been calculated as best as possible with the available data, the data in this Appendix must be considered with caution.

## Incidence of Package Bookings

In 2023/24, the proportion of visitors whose trip to Kangaroo Island formed part of a travel package has remained relatively stable since last wave.

**Figure 70: Trip to Kangaroo Island part of travel package**



Q8 Was your trip to Kangaroo Island paid for as part of a travel package?  
 Base: Visitors responding  
 Note: Missing cases excluded.

## Type of booking by visitor origin

The proportion of visitors booking their trip as part of a package significantly decreased for intrastate visitors since last wave (9% to 6%). Whereas interstate and international visitors remained relatively consistent with the previous wave.

**Table 22: Booking Type by Visitor Origin**

Intrastate Visitors	11/12 (n=278)	12/13 (n=526)	13/14 (n=471)	14/15 (n=324)	15/16 (n=351)	16/17 (n=470)	17/18 (n=533)	18/19 (n=516)	PC 19/20 (n=201)	CR 20/21 (n=85)	21/22 (n=813)	22/23 (n=1366)	23/24 (n=1197)
Trip part of a package	19%	22%	19%	20%	24%	15%	15%	11%	11%	14%	8%	9%	6%↓
Not part of a package	81%	78%	81%	80%	76%	85%	85%	89%	89%	86%	92%	91%	94%↑

Interstate Visitors	11/12 (n=464)	12/13 (n=1077)	13/14 (n=1109)	14/15 (n=690)	15/16 (n=651)	16/17 (n=943)	17/18 (n=1027)	18/19 (n=825)	PC 19/20 (n=340)	CR 20/21 (n=124)	21/22 (n=552)	22/23 (n=2050)	23/24 (n=1654)
Trip part of a package	20%	19%	27%	19%	20%	18%	23%	19%	11%	12%	13%	15%	14%
Not part of a package	80%	81%	73%	81%	80%	82%	77%	81%	89%	88%	87%	85%	86%

International Visitors	11/12 (n=360)	12/13 (n=818)	13/14 (n=933)	14/15 (n=574)	15/16 (n=593)	16/17 (n=707)	17/18 (n=476)	18/19 (n=469)	PC 19/20 (n=284)	CR 20/21 (n=3)	21/22 (n=87)	22/23 (n=285)	23/24 (n=385)
Trip part of a package	33%	31%	36%	40%	34%	36%	40%	33%	36%	67%	24%	39%	39%
Not part of a package	67%	69%	64%	60%	66%	64%	60%	67%	64%	33%	76%	61%	61%

Q8 Was your trip to Kangaroo Island paid for as part of a travel package?

Base: Visitors responding.

Note: Missing cases excluded.

## Expenditure per visitor

The reported average expenditure per visitor has increased across all visitor types since the previous wave; however, none of these differences are statistically significant.

**Table 21: Average expenditure per visitor**

Total Visitors	12/13 (n=2179)	13/14 (n=2197)	14/15 (n=1414)	15/16 (n=1,412)	16/17 (n=1,826)	17/18 (n=1,633)	18/19 (n=1,742)	PC 19/20 (n=801)	CR 20/21 (n=202)	21/22 (n=1372)	22/23 (n=3655)	23/24 (n=3325)
Average	\$609.52	\$601.92	\$726.90	\$770.06	\$779.59	\$722.70	\$679.29	\$638.15	\$897.18	\$873.31	\$828.66	\$845.67
SD*	\$651.28	\$1,509.09	\$841.00	\$856.32	\$747.31	\$618.87	\$1,003.54	\$951.82	\$645.62	\$1573.24	\$925.83	\$1,067.95
Median^	\$487.50	\$400.00	\$500.00	\$550.00	\$600.00	\$575.00	\$500.00	\$500.00	\$769.00	\$700.00	\$650.00	\$625.0
Mode#	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500	\$1,000.00	\$1000.00	\$500.00	\$1,000.00
Min.	\$0.00	\$1.00	\$0.00	\$10.00	\$0.00	\$2.50	\$0.50	\$0.00	\$0.05	\$0.00	\$0.00	\$0.00
Max	\$24,000	\$50,000	\$16,400	\$42,500	\$18,000	\$7,000	\$25,000	\$20,150	\$4,500	\$50,654.5	\$25,000.0	\$30,000

Intrastate Visitors	12/13 (n=491)	13/14 (n=443)	14/15 (n=310)	15/16 (n=338)	16/17 (n=434)	17/18 (n=445)	18/19 (n=504)	PC 19/20 (n=197)	CR 20/21 (n=82)	21/22 (n=807)	22/23 (n=1362)	23/24 (n=1210)
Average	\$478.95	\$493.64	\$642.38	\$658.82	\$643.23	\$650.79	\$606.25	\$576.48	\$894.22	\$773.83	\$751.05	\$777.8
SD*	\$398.06	\$395.30	\$521.39	\$563.21	\$433.69	\$537.12	\$969.87	\$426.64	\$713.92	\$539.11	\$994.56	\$1,081.70
Median^	\$400.00	\$400.00	\$500.00	\$550.00	\$550.00	\$500.00	\$500.00	\$500.00	\$800.00	\$666.7	\$600.00	\$600.00
Mode#	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$1,000.00	\$1,000.00	\$500.00	\$1,000.00
Min.	\$15.00	\$3.50	\$15.00	\$33.33	\$10.00	\$11.00	\$0.85	\$0.00	\$71.11	\$0.00	\$0.00	\$0.00
Max	\$4,000	\$5,000	\$4,000	\$6,250	\$9,000	\$5,667	\$20,000	\$3,000.00	\$3,700.00	\$5,000.00	\$25000.0	\$25,000

Interstate Visitors	12/13 (n=1015)	13/14 (n=1014)	14/15 (n=642)	15/16 (n=606)	16/17 (n=857)	17/18 (n=873)	18/19 (n=793)	PC 19/20 (n=333)	CR 20/21 (n=119)	21/22 (n=542)	22/23 (n=2024)	23/24 (n=1754)
Average	\$691.97	\$665.17	\$819.43	\$923.88	\$894.75	\$813.58	\$834.00	\$717.09	\$900.70	\$1,047.97	\$892.15	\$889.62
SD*	\$622.53	\$866.26	\$795.47	\$861.79	\$853.15	\$630.35	\$1,166.78	\$622.81	\$544.46	\$2,488.08	\$856.34	\$774.43
Median^	\$500.00	\$500.00	\$650.00	\$650.00	\$712.00	\$685.00	\$600.00	\$500.00	\$750.00	\$750.00	\$718.00	\$712.50
Mode#	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$1,000.00	\$500.00	\$500.00	\$750.00	\$500.00	\$500.00	\$1,000.00
Min.	\$0.00	\$2.00	\$10.00	\$12.50	\$0.00	\$2.50	\$0.50	\$0.00	\$0.05	\$0.00	\$0.00	\$0.00
Max	\$6,000	\$12,500	\$10,500	\$12,500	\$18,000	\$7,500	\$25,000	\$5,000.00	\$4,500.00	\$50,654.5	\$15,000.0	\$10,000.25

International Visitors	12/13 (n=673)	13/14 (n=738)	14/15 (n=462)	15/16 (n=468)	16/17 (n=535)	17/18 (n=315)	18/19 (n=437)	PC 19/20 (n=268)	CR 20/21 (n=1)	21/22 (n=20)	22/23 (n=254)	23/24 (n=356)
Average	\$603.88	\$593.37	\$642.51	\$617.48	\$687.29	\$585.65	\$495.76	\$596.03	Omitted due to small base size	\$692.06	\$689.43	\$868.77
Standard Deviation*	\$890.51	2,599.39	\$1,180.87	\$1,128.53	\$843.74	\$685.15	\$627.55	\$1,504.94		\$610.36	\$859.93	\$1,964.74
Median^	\$400.00	\$328.00	\$350.00	\$450.00	\$490.00	\$400.00	\$350.00	\$350.00		\$387.5	\$450.00	\$450.00
Mode≠	\$500.00	\$250.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00		\$285.7	\$300.00	\$500.00
Min.	\$0.00	\$1.00	\$0.00	\$10.00	\$0.00	\$7.50	\$0.50	\$0.00		\$186.50	\$0.00	\$3.33
Max	\$24,000	\$50,000	\$16,400	\$42,500	\$10,150	\$6250	\$9,120	\$20,150		\$2,666.67	\$8,600.00	\$30,000.00

\* Standard Deviation provides an indication of the accuracy of the average.

^ Median is the point at which half the respondents spent more, and half spent less.

≠ Mode is the value that occurs the most frequently in a data set.

Q6 Did you stay one or more nights or was it a way trip?

Q9 What was the cost of the total package?

Q11 What is your best guess of the total Kangaroo Island component of the package?

Q13 What additional money did you spend on top of the package whilst on the Island?

Q14 Please indicate how much you spent on your trip to Kangaroo Island?

Q15 How many people did these costs cover?

Base: Visitors responding.

Note: Missing cases excluded.

Note: Visitors who indicated that their trip was part of a package yet did not specify the KI component of the package have been excluded from all expenditure calculations in this report

Since the previous wave, the reported average expenditure per visitor (per day) has increased significantly for the total number of visitors (from \$188.54 to \$209.95) and interstate visitors from \$207.75 to \$228.00.

**Table 22: Average daily expenditure per visitor**

Total Visitors	12/13 (n=2179)	13/14 (n=2197)	14/15 (n=1249)	15/16 (n=1393)	16/17 (n=1826)	17/18 (n=1,626)	18/19 (n=1742)	PC 19/20 (n=746)	CR 20/21 (n=192)	21/22 (n=1319)	22/23 (n=3226)	23/24 (n=2766)
Average	\$126.22	\$276.81	\$157.58	\$178.14	\$170.80	\$175.03	\$166.81	\$157.32	\$186.36	\$176.31	\$188.54	\$209.95↑
Standard Deviation*	\$142.18	\$650.05	\$209.36	\$266.72	\$168.60	\$154.44	\$250.24	\$307.68	\$120.13	\$144.56	\$170.35	\$341.72
Median^	\$100.00	\$175.00	\$125.00	\$131.70	\$133.30	\$130.00	\$125.00	\$125.00	\$178.60	\$150.00	\$150.00	\$166.67
Mode#	\$125.00	\$250.00	\$125.00	\$125.00	\$125.00	\$125.00	\$125.00	\$125.00	\$200.00	\$250.00	\$250.00	\$250.00
Min.	\$0.00	\$1.25	\$0.00	\$7.14	\$0.00	\$0.36	\$0.02	\$0.00	\$0.44	\$0.00	\$0.00	\$0.00
Max	\$4,800	\$45,000	\$5,216	\$9500	\$3,500	\$2000	\$6,000	\$6,716.67	\$750.00	\$2,583.33	\$5,000.00	\$15,000.00

Intrastate Visitors	12/13 (n=470)	13/14 (n=408)	14/15 (n=280)	15/16 (n=331)	16/17 (n=434)	17/18 (n=441)	18/19 (n=504)	PC 19/20 (n=181)	CR 20/21 (n=78)	21/22 (n=786)	22/23 (n=1235)	23/24 (n=1106)
Average	\$93.28	\$189.39	\$124.02	\$132.52	\$136.25	\$130.92	\$126.57	\$126.16	\$173.67	\$159.36	\$156.21	\$165.79
Standard Deviation*	\$75.30	\$180.01	\$87.87	\$109.27	\$115.98	\$109.21	\$135.45	\$104.92	\$110.01	\$107.16	\$111.58	\$158.18
Median^	\$74.80	\$125.00	\$100.00	\$111.10	\$114.70	\$107.10	\$104.20	\$111.10	\$150.00	\$140.60	\$131.30	\$135.00
Mode#	125.00	\$100.00	\$166.67	\$125.00	\$125.00	\$125.00	\$125.00	\$120.00	\$200.00	\$250.00	\$250.00	\$250.00
Min.	\$4.17	\$6.32	\$15.00	\$7.14	\$2.00	\$4.35	\$0.08	\$0.00	\$4.44	\$0.00	\$0.05	\$0.00
Max	\$917	\$2,500	\$1,000	\$917	\$3,000	\$1,200	\$3,500	\$1,100.00	\$500.00	\$666.67	\$1,062.50	\$2,857.14

Interstate Visitors	12/13 (n=983)	13/14 (n=818)	14/15 (n=588)	15/16 (n=600)	16/17 (n=857)	17/18 (n=871)	18/19 (n=793)	PC 19/20 (n=321)	CR 20/21 (n=113)	21/22 (n=512)	22/23 (n=1779)	23/24 (n=1408)
Average	\$129.55	\$263.73	\$159.49	\$199.86↑	\$178.43	\$191.83	\$187.92	\$145.19	\$203.17	\$203.91	\$207.75	\$228.00↑
Standard Deviation*	\$112.47	\$315.82	\$123.94	\$314.08	\$153.56	\$158.08	\$316.75	\$121.32	\$131.23	\$188.46	\$193.24	\$190.06
Median^	\$100.00	\$178.60	\$133.30	\$140.00	\$150.00	\$150.00	\$125.00	\$125.00	\$187.50	\$166.7	\$166.70	\$187.50
Mode#	\$125.00	\$250.00	\$125.00	\$125.00	\$125.00	\$250.00	\$125.00	\$125.00	\$125.00	\$250.0	\$250.00	\$250.00
Min.	\$0.00	\$1.25	\$10.00	\$12.50	\$0.00	\$0.36	\$0.02	\$0.00	\$0.44	\$0.07	\$0.00	\$0.00
Max	\$1,333	\$3,750	\$2,500	\$5,125.00	\$3,500.00	\$1875.00	\$6000.00	\$1,333.33	\$750.00	\$2,583.33	\$5,000.00	\$2,500.06

International Visitors	12/13 (n=631)	13/14 (n=574)	14/15 (n=381)	15/16 (n=462)	16/17 (n=535)	17/18 (n=313)	18/19 (n=437)	PC 19/20 (n=244)	CR 20/21 (n=1)	21/22 (n=18)	22/23 (n=199)	23/24 (n=247)
Average	\$160.54	\$415.89	\$210.13	\$202.36	\$222.09	\$210.27	\$179.24	\$208.76	Omitted due to small base size	\$211.28	\$226.00	\$329.65
Standard Deviation*	\$226.81	\$1,213.54	\$422.75	\$315.63	\$271.33	\$196.01	\$220.23	\$550.79		\$183.99	\$223.27	\$1,043.08
Median^	\$123.50	\$270.00	\$125.00	\$150.00	\$150.00	\$166.70	\$133.30	\$125.00		\$158.30	\$166.70	\$200.00
Mode#	\$150.00	\$250.00	\$125.00	\$150.00	\$125.00	\$125.00	\$100.00	\$83.30		\$650.00	\$250.00	\$250.00
Min.	\$0.83	\$3.33	\$0.00	\$8.33	\$0.00	\$6.67	\$0.17	\$125.00		\$8.24	\$0.00	\$0.83
Max	\$4,800.00	\$45,000.00	\$5,216.67	\$9,500.00	\$3,383.33	\$2,000.00	\$3040.00	\$6,716.67		\$650.00	\$2,150.00	\$15,000.00

\* Standard Deviation provides an indication of the accuracy of the average.

^ Median is the point at which half the respondents spent more, and half spent less.

# Mode is the value that occurs the most frequently in a data set.

Q6 Did you stay one or more nights or was it a way trip?

Q9 What was the cost of the total package?

Q11 What is your best guess of the total Kangaroo Island component of the package?

Q13 *What additional money did you spend on top of the package whilst on the Island?*

Q14 *Please indicate how much you spent on your trip to Kangaroo Island?*

Q15 *How many people did these costs cover?*

Base: Visitors responding.

Note: Missing cases excluded.

Note: Visitors who indicated that their trip was part of a package yet did not specify the KI component of the package have been excluded from all expenditure calculations in this report

# Appendix B: VES 23/24 questionnaire

**Please Help!**  
Your views are  
important...

## Kangaroo Island Visitor Survey

**WIN!!!**  
**KANGAROO ISLAND**  
**LOCAL PRODUCE TO**  
**THE VALUE OF \$500**  
**DELIVERED.**

Dear Visitor,

The few minutes you spend completing this questionnaire will help the Kangaroo Island community to improve the quality of the Kangaroo Island experience for future visitors.

We are asking that one visitor aged 15 years or older from each travel group fill in a survey at the end of their visit to Kangaroo Island, even if you've visited previously or are a frequent visitor.

Please answer all questions and place this questionnaire in the collection box provided,  
or mail freepost to: Kantar  
Reply Paid 84922  
Adelaide SA 5000



Alternatively you can complete the survey online at:  
[www.kisurvey.com](http://www.kisurvey.com)  
or by scanning the QR code to the right

**Q1: On which date are you leaving Kangaroo Island (this trip)?**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Day		Month	Year

**Q2: On this trip, who did you travel with?**  
(circle one number only)

- Travelling alone..... 1
- Travelling with a partner..... 2
- Travelling with family and/or friends..... 3
- Travelling with a special interest/tour group..... 4
- Travelling with business associate (with or without spouse)..... 5

**Q3: Have you ever visited Kangaroo Island before this trip?** (circle as many 'Yes' options as apply or 'No' or 'Unsure')

- Yes, on a cruise ship visit..... 1
- Yes, on a coach/tour day trip..... 2
- Yes, via another method..... 3
- No..... 4
- Unsure..... 5

**Q4: Where do you live?**

State:

Or country (if not in Australia):

.....

**Q5: How will/ did you... (circle one number only):**

- a. Arrive on the Island?.....  
Air.....1 Ferry.....2 Cruise ship..... 3
- b. Leave the Island?  
Air.....1 Ferry.....2 Cruise ship..... 3

**Q6: Did you stay one or more nights or was it a day trip?** (circle one number only)

- Day trip..... 1 (please go to Q8)
- Stayed one or more nights..... 2
- Total nights stayed:

**Q7: In which type of accommodation did you stay while on Kangaroo Island?** (circle all that apply)

- Camping, caravan or motor-home..... 1
- Cabin..... 2
- Hosted bed & breakfast or farm stay..... 3
- Self contained bed & breakfast or farm stay..... 4
- Holiday home..... 5
- Rented apartment or flat or unit..... 6
- Hotel / motel..... 7
- Backpacker hostel..... 8
- Friends / relatives..... 9
- Own property..... 10
- Luxury lodge / Retreat..... 11
- Other (please circle and specify below)..... 12



vibrant community, sound economy,  
healthy environment, satisfied visitors,  
better decisions....

**KANTAR PUBLIC**



**Q8:** Was your trip to Kangaroo Island paid for as part of a travel package?

Yes ..... 1 (please go to Q9)

No ..... 2 (please go to Q14)

**Q9:** What was the cost of the total package? (indicate in whole dollars using Australian currency)

\$   ,    .00

**Q10:** Was Kangaroo Island the only destination included in the package?

Yes ..... 1 (please go to Q12)

No ..... 2

**Q11:** What is your best guess of the total Kangaroo Island component of the package? (indicate in whole dollars using Australian currency)

\$   ,    .00

**Q12:** Which specific costs are covered in the package? (circle all that apply)

Transport to and from the Island ..... 1

Transport around the Island ..... 2

Accommodation ..... 3

Food etc. .... 4

Tours ..... 5

**Q13:** What additional money did you spend on top of the package whilst on the Island? (e.g. souvenirs, additional food and beverages. Indicate in whole dollars using Australian currency)

\$   ,    .00 (please go to Q15)

**Q14:** Please estimate how much you spent on your trip to Kangaroo Island?

(Please include what you spent on air and/or ferry fares from Adelaide to the Island, travel and accommodation on the Island, any food or other expenses, and any tours or tourist attractions. Please indicate in whole dollars using Australian currency)

\$   ,    .00

**Q15:** How many people did these costs cover?

**Q16a:** Were you aware of Kangaroo Island's quarantine regulations, prohibiting the import of...

(circle one answer for each item)

	Yes	No	Unsure
Potatoes	1	2	3
Honey/ bee products	1	2	3
Foxes	1	2	3
Rabbits	1	2	3
Declared weeds	1	2	3

**Q16b:** If yes, when did you find out this information?

(circle one number only)

Before my visit ..... 1

During my visit ..... 2

I didn't know ..... 3

Comment: .....

**Q17:** Which of these locations did you visit while on Kangaroo Island this time

(circle the number for each of the places you visited):

Admirals Arch ..... 1

American River township ..... 2

Antechamber Bay (Chapman River) ..... 3

Baudin Conservation Park ..... 4

Browns Beach ..... 5

Cape Borda Light Station ..... 6

Cape Willoughby Light Station ..... 7

Emu Bay ..... 8

Hanson Bay ..... 9

Flinders Chase Visitor Centre ..... 10

Island Beach ..... 11

Kelly Hill Caves ..... 12

Kingscote Silos ..... 28

Kingscote township ..... 13

Latham Conservation Park ..... 14

Little Sahara ..... 15

Murray Lagoon ..... 16

Pamdana township ..... 17

Penneshaw township ..... 18

Pennington Bay ..... 19

Remarkable Rocks ..... 20

Seal Bay ..... 21

Snelling Beach ..... 22

Stokes Bay ..... 23

Vivonne Bay ..... 24

Western River Cove ..... 25

Prospect Hill ..... 26

Other (please circle and specify below): ..... 27

.....

.....

18: For each of the following, please indicate whether: (circle one number for each item)

A) You believe that Kangaroo Island provides this...

B) You experienced this while on Kangaroo Island...

		Q18A: Does Kangaroo Island provide this?			Q18B: Did you experience this?	
		Yes	No	Unsure	Yes	No
18.1	Viewing Australia's wildlife in natural surroundings	1	2	3	1	2
18.2	Scenic variety without crowds of people	1	2	3	1	2
18.3	The cultural heritage and history of settlement	1	2	3	1	2
18.4	Spectacular scenery and coastal beauty	1	2	3	1	2
18.5	Areas of untouched natural beauty	1	2	3	1	2
18.6	Farming and rural landscapes	1	2	3	1	2
18.7	Island produce (food & wine)	1	2	3	1	2
18.8	One of Australia's top three nature and wildlife experiences	1	2	3	1	2
18.9	A friendly local community	1	2	3	1	2

Q19: Please indicate how satisfied you were with... (circle one number for each item)

		Very dissatisfied					Don't know	Didn't experience
		1	2	3	4	5		
19.1	Seeing wildlife in the natural environment	1	2	3	4	5	99	98
19.2	Your opportunity to learn more about the Island's natural environment	1	2	3	4	5	99	98
19.3	The quality of accommodation	1	2	3	4	5	99	98
19.4	The range of Island produce (food & wine)	1	2	3	4	5	99	98
19.5	The quality of Island produce (food & wine)	1	2	3	4	5	99	98
19.6	The availability of Island produce (food & wine)	1	2	3	4	5	99	98
19.7	The level of customer service you received	1	2	3	4	5	99	98
19.8	Your opportunity to learn more about the Island's history	1	2	3	4	5	99	98
19.9	The range of activities available	1	2	3	4	5	99	98
19.10	The quality of activities available	1	2	3	4	5	99	98
19.11	The availability of activities	1	2	3	4	5	99	98
19.12	The professionalism of tourism businesses	1	2	3	4	5	99	98
19.13	The quality of public toilets	1	2	3	4	5	99	98
19.14	The quality of roads	1	2	3	4	5	99	98
19.15	The quality of campgrounds	1	2	3	4	5	99	98
19.16	The quality of road signage	1	2	3	4	5	99	98
19.17	The quality of interpretive/ educational signage	1	2	3	4	5	99	98
19.18	The quality of picnic/ day use areas	1	2	3	4	5	99	98

Q20: For any item you were dissatisfied with, please provide further comment: .....

.....

.....

Q21: Do you believe that Kangaroo Island's marketing material matched the experience you had while visiting Kangaroo Island? (circle one number only)

Better than expected ..... 1

Met expectations ..... 2

Worse than expected ..... 3

If worse: Why? .....

.....

.....

Q22: Taking into account all aspects of your visit to Kangaroo Island, how would you rate your overall satisfaction? (circle one number only)

Extremely dissatisfied 0 1 2 3 4 5 6 7 8 9 10 Extremely satisfied

Q23: Would you recommend Kangaroo Island as a holiday destination to others based on this trip? (circle one number only)

Yes ..... 1

No ..... 2

Don't know ..... 3

Q24: Kangaroo Island is a wild and welcoming destination, that will surprise and amaze you, relax your mind, refresh your spirit and make you feel totally alive.

To what extent do you agree or disagree with this statement? (circle one number only)

Strongly disagree 0 1 2 3 4 5 6 7 8 9 10 Strongly agree

Q25: Are there any individuals or businesses you would like to draw our attention to for...

Q25: Are there any individuals or businesses you would like to draw our attention to for...

a) compliments: .....

.....

.....

.....

b) improvement: .....

.....

.....

.....

Q26: What suggestions do you have for improving your Kangaroo Island travel experience?

.....

.....

.....

.....

.....

.....

Q27: Please record the number of people you are travelling with in each of the following categories... (please include your own age and gender and then the number of travellers in each)

	Yourself		Travellers	
	Male	Female	Male	Female
Under 15 years	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15-24 years	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25-44 years	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
45-64 years	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
65 plus years	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

This is an initiative of the Kangaroo Island Tourism Optimisation Management Model (TOMM).  
TOMM is a long-term process for monitoring and managing the health of Kangaroo Island as a sustainable tourism destination.  
Please visit [www.tourkangarooisland.com.au](http://www.tourkangarooisland.com.au)

Many thanks for taking the time to complete this survey. If you would like to go into the draw to win a prize of Kangaroo Island Local Produce to the value of \$500 delivered, please provide your contact details. *Your details will be used for the draw only and for no other purpose.*

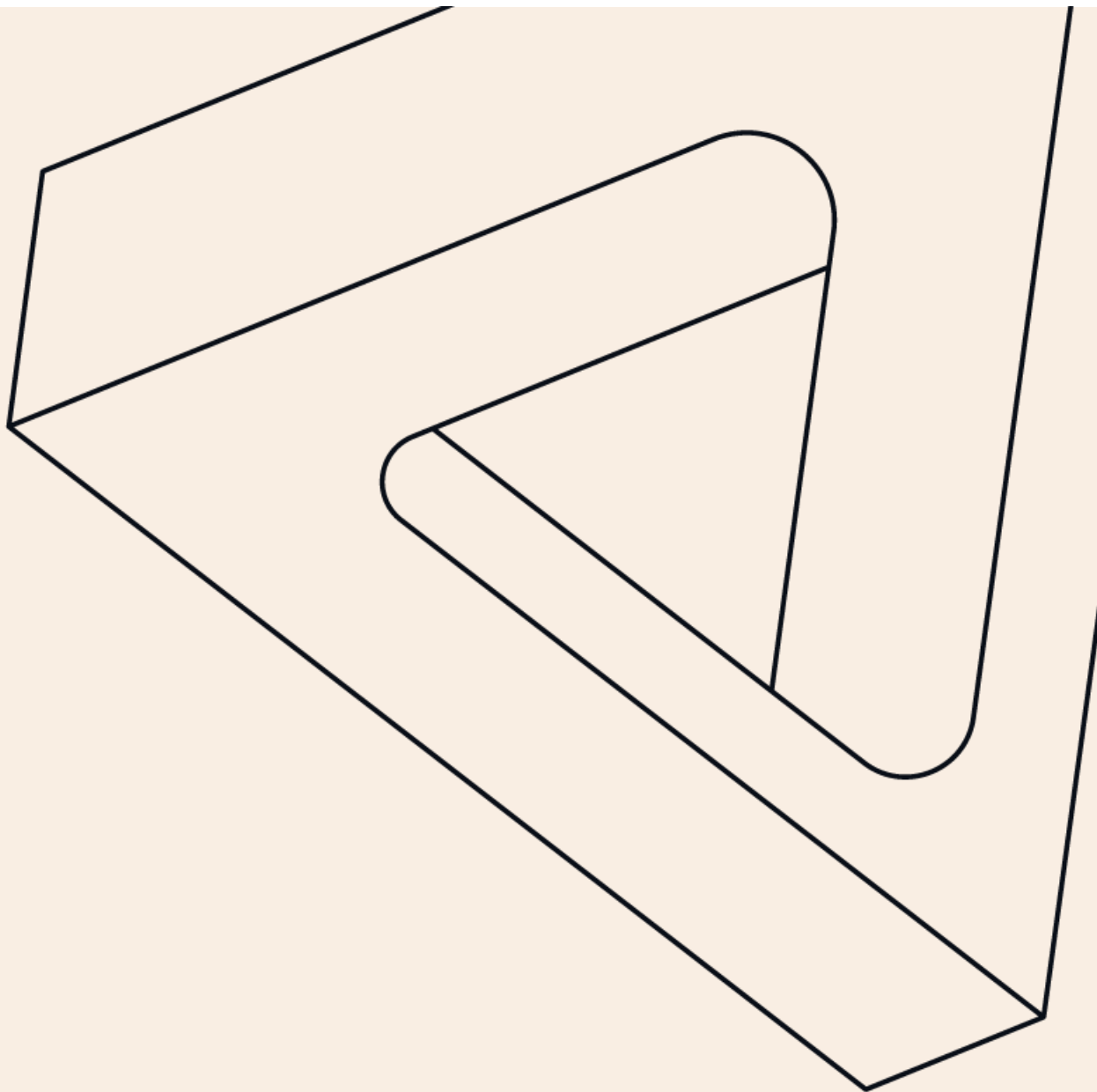
Full name: ..... Phone number: .....

Address: ..... Country: .....

For last year's survey results and further information about TOMM, please visit [www.tourkangarooisland.com.au](http://www.tourkangarooisland.com.au)



Powering decisions  
that shape the world.



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