

KANGAROO ISLAND

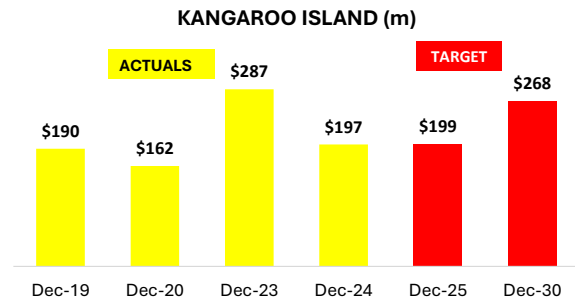
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2024

- Currently, Kangaroo Island contributes \$197 million to the year end December 2024 South Australian expenditure of \$9.8 billion.
- Kangaroo Island has achieved 99 per cent of their 2025 target of \$199 million and 74 per cent of their 2030 target of \$268 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2024

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total
Overnight Visits	87,000	65,000	152,000	30,000	182,000
% of visits	48%	36%	84%	16%	100%
Share of Regional SA	3%	6%	3%	23%	4%
% Across Regional SA	73%	24%	97%	3%	100%
% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international					
Nights	321,000	229,000	550,000	89,000	639,000
% of nights	50%	36%	86%	14%	100%
Share of Regional SA	3%	5%	4%	3%	4%
% Across Regional SA	57%	28%	85%	15%	100%
% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international					
Average Length of Stay	3.7	3.5	3.6	3.0	3.5
ALOS Regional SA	2.9	4.2	3.2	19.8	3.7
Total Expenditure					\$197,000,000
Overnight Expenditure	\$52,000,000	\$74,000,000	\$126,000,000	\$54,000,000	\$180,000,000
Day Trip Expenditure					\$17,000,000
Domestic Day Trips					92,000

- Kangaroo Island saw 182,000 overnight visitors for the year end December 2024.
- 48 per cent of overnight visitors were from intrastate, 36 per cent from interstate and 16 per cent from overseas.
- The 87,000 intrastate overnight visitors stayed 321,000 nights with an average length of stay of 3.7 nights.
- There were 65,000 interstate overnight visitors who stayed 229,000 nights with an average length of stay of 3.5 nights
- The region saw 30,000 international visitors with an average length of stay of 3.0 nights and spend of \$54 million.
- 92,000 day trips were taken to and on Kangaroo Island for the year with spend of \$17 million.

ALOS = Average Length of Stay

KANGAROO ISLAND

REGIONAL PROFILE



PURPOSE

	Holiday	VFR	Business	Other	Total
Overnight Visits	121,000	43,000	18,000	-	182,000
% of visits	66%	24%	10%	0%	100%
Share of Regional SA	5%	4%	2%	0%	4%
% Across all regions	53%	24%	19%	7%	100%

Nights	451,000	125,000	60,000	2,000	639,000
% of nights	71%	20%	9%	0%	100%
Share of Regional SA	5%	3%	2%	0%	4%
% Across all regions	49%	25%	17%	9%	100%

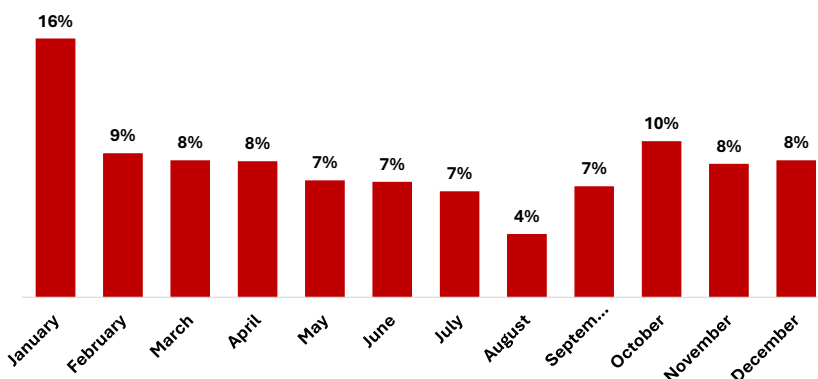
Average Length of Stay	3.7	2.9	3.3	-	3.5
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Expenditure					
Annual Overnight Exp	\$159,000,000	\$10,000,000	\$10,000,000	\$2,000,000	\$180,000,000
Expenditure 2019	\$147,000,000	\$13,000,000	\$9,000,000	\$5,000,000	\$174,000,000
Av spend per night	\$353	\$80	\$167	\$1,000	\$282
Av spend per night Reg SA	\$190	\$103	\$176	\$218	\$169
Share of Regional SA	3%	5%	1.3%	2%	3%

- 90 per cent of overnight visitors to Kangaroo Island are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$353 per night compared to VFR visitors who spend \$80 per night.
- Leisure overnight visitors spent \$169 million for the year, making up 94 per cent of all overnight expenditure.
- 6 per cent of spend is allocated to business visitation.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO KANGAROO ISLAND



- National Visitor Survey data shows us that in 2024 January and October are the strongest months for visitation on Kangaroo Island.
- January is the busiest month for the year with the summer school holidays.
- April and October also strong with school holidays, Easter and the October long weekend.

Source: NVS year end December 2024

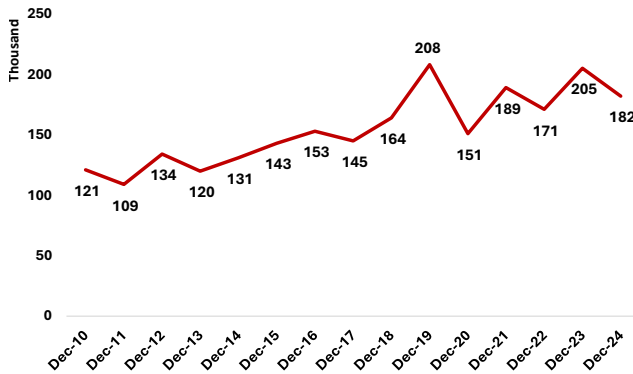
KANGAROO ISLAND

REGIONAL PROFILE



TOTAL OVERNIGHT VISITATION 2010 - 2024

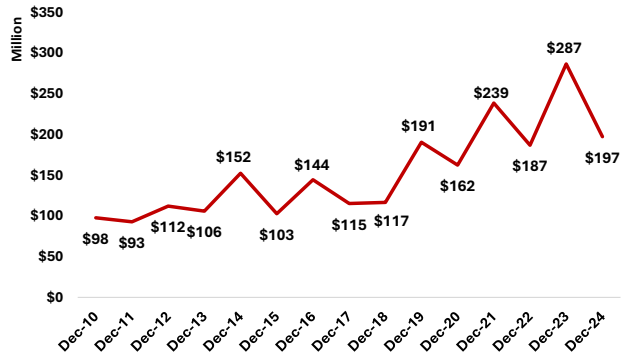
VISITORS KANGAROO ISLAND 2010 - 2024 - INTERNATIONAL AND DOMESTIC



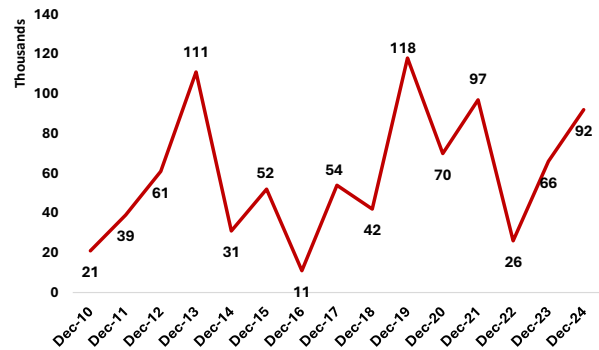
NIGHTS KANGAROO ISLAND 2010 - 2024 - INTERNATIONAL AND DOMESTIC



TOTAL EXPENDITURE KANGAROO ISLAND 2010 - 2024 - INTERNATIONAL AND DOMESTIC



DAY TRIPS KANGAROO ISLAND 2010 - 2024 - DOMESTIC



Note: Fluctuations can occur in visitation data due to small sample sizes. Prior regional profiles used data averaged over three years to smooth these fluctuations.

Regions	Visits		Expenditure	
	Dec-24	Change on Dec-19	Dec-24	Change on Dec-19
Adelaide	3,933,000	0%	\$5,800,000,000	29%
Adelaide Hills	200,000	-12%	\$192,000,000	-7%
Barossa	244,000	-23%	\$287,000,000	27%
Clare Valley	222,000	9%	\$162,000,000	38%
Eyre Peninsula	455,000	-22%	\$455,000,000	-17%
Fleurieu Peninsula	727,000	-19%	\$519,000,000	-7%
Flinders Ranges and Outback	699,000	-25%	\$603,000,000	17%
Kangaroo Island	182,000	-12%	\$197,000,000	4%
Limestone Coast	807,000	4%	\$662,000,000	57%
Murray River, Lakes and Coorong	396,000	-12%	\$223,000,000	-20%
Riverland	464,000	8%	\$236,000,000	21%
Yorke Peninsula	620,000	4%	\$358,000,000	49%
Regional SA	4,615,000	-11%	\$3,950,000,000	11%
South Australia	8,034,000	-6%	\$9,800,000,000	21%



KANGAROO ISLAND TOURISM LISTINGS

Category	# Listings
ACCOMM	119
ATTRACTION	98
TOUR	41
RESTAURANT	34
EVENT	10
JOURNEY	7
GENSERVICE	6
DESTINFO	5
HIRE	5
TRANSPORT	3
INFO	2
Grand Total	330

Note: some listings have multiple categories of accommodation
Source: Australian Tourism Data Warehouse
Categories above defined at -
<https://tourism.sa.gov.au/support/atdw>

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

An **ATDW lead** is generated when a user performs one of the following actions when viewing an ATDW product page on southaustralia.com:

- Website click through (via visit website button or website URL)
- Book now button click
- Claim deal button click
- Clicking on contact email address to start writing email
- Clicking on a phone number to start a phone call (mobile only)

KANGAROO ISLAND AUSTRALIAN TOURISM DATA WAREHOUSE LEADS

203,000

YEAR END DECEMBER 2024

ACCOMMODATION LEADS

108,000
53%

FOOD & DRINK LEADS

31,000
15%

TOUR LEADS

35,000
17%

*OTHER LEADS

30,000
15%

TOP 5

- KANGAROO ISLAND SEAFRONT HOLIDAY PARK
- CLIFF HOUSE LIFETIME PRIVATE RETREATS
- ONE KI STOWAWAY KANGAROO ISLAND HAMILTON DUNE

TOP 5

- KANGAROO ISLAND SEALINK TOURS AND PACKAGES
- LITTLE SAHARA ADVENTURE CENTRE
- KANGAROO ISLAND MARINE ADVENTURES
- KANGAROO ISLAND OUTDOOR ACTION
- PENNESHAW PENGUIN CENTRE

TOP 5

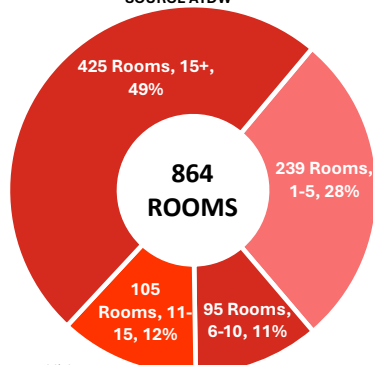
- GASTRONOMO THE ENCHANTED FIG TREE
- KANGAROO ISLAND SPIRITS
- CACTUS KANGAROO ISLAND
- SUNSET FOOD AND WINE
- PENNESHAW HOTEL

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

ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS ON KANGAROO ISLAND

SOURCE ATDW



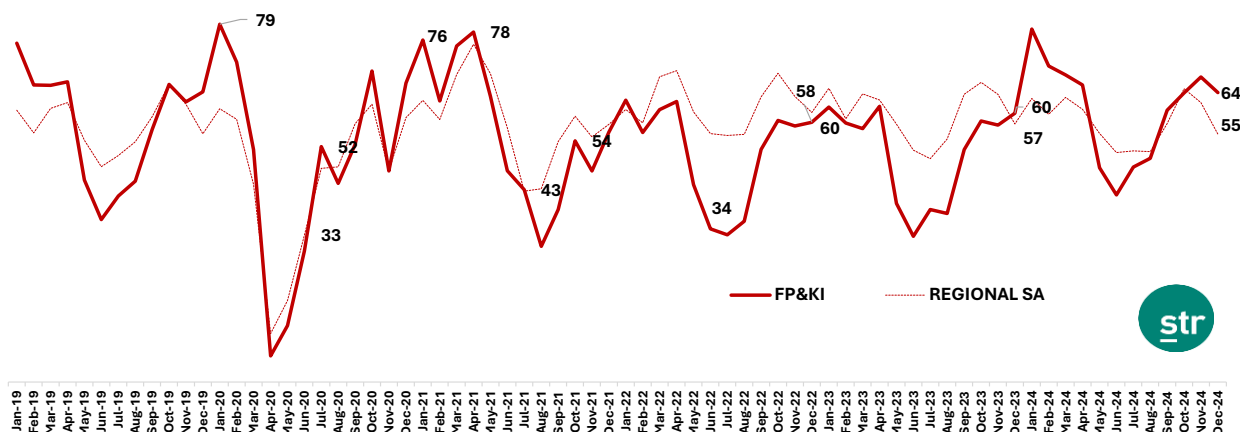
Rooms refers to rooms per establishment

- Currently there are 120 establishments on Kangaroo Island that accommodate guests.
- These 120 establishments account for 864 rooms across the region.
- 49 per cent of rooms fall into establishment with 15 or more rooms.
- 11 per cent of rooms fall into the 6-10 & 12 per cent into the 11-15 room establishments.



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY FLEURIEU PENINSULA AND KANGAROO ISLAND

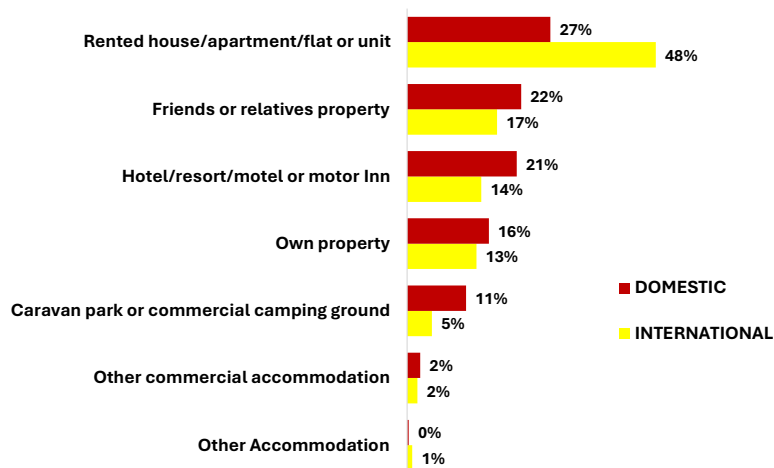


- The FP & KI regions include accommodation data for the Fleurieu Peninsula and Kangaroo Island. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the FP & KI regions was 57 per cent, this fell to 48 per cent in 2020, rose to 56 per cent in 2021, fell in 2022 to 50 per cent, grew to 52 per cent in 2023 and now sits at 55 per cent.

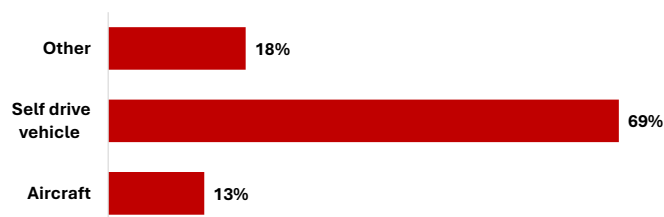
VISITOR USE OF ACCOMMODATION

- 27 per cent of domestic visitors and 48 per cent of international visitors to Kangaroo Island stay in a rented house, apartment or flat,
- 22 per cent of domestic overnight visitor nights on Kangaroo Island are spent with Friends or Relatives compared to the international average of 17 per cent.
- 21 per cent of domestic and 14 per cent of international visitors stayed in a Hotel/resort/motel or motor inn.

ACCOMMODATION USED IN KANGAROO ISLAND FOR DOMESTIC VISITORS



TRANSPORT - DOMESTIC OVERNIGHT

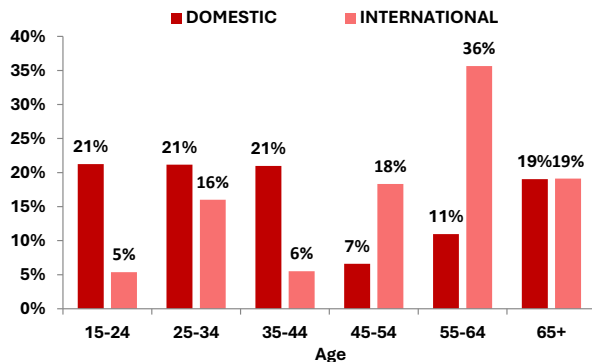


- The main method of transport used on trips to Kangaroo Island was a self drive vehicle.
- 69 per cent of visitors used this type of transport.
- 13 per cent of people used an aircraft to get to the region.
- The 18 per cent for 'Other' relates to the Ferry across to the island.



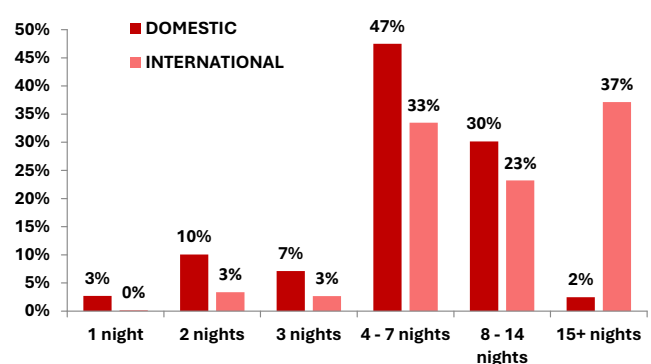
VISITOR PROFILE

AGE OF VISITORS TO KANGAROO ISLAND



- In the domestic market the 25-44 age group account for 63% of all visitors to the island.
- The International market is strongest for the 55+ age group with 55% of all visits.

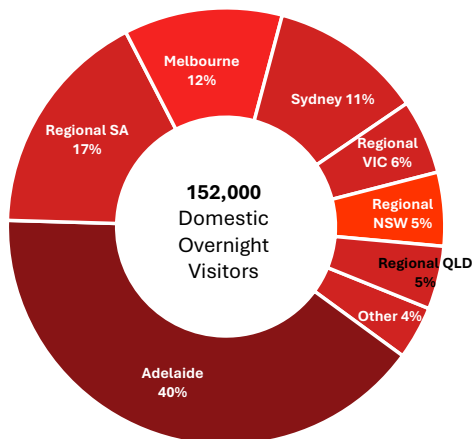
LENGTH OF VISIT TO KANGAROO ISLAND



- 47 per cent of domestic overnight visitors like to stay 4 to 7 nights.
- 93 per cent of international visitors stay greater than 4 night, with 37 staying greater than 15 nights.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO KANGAROO ISLAND

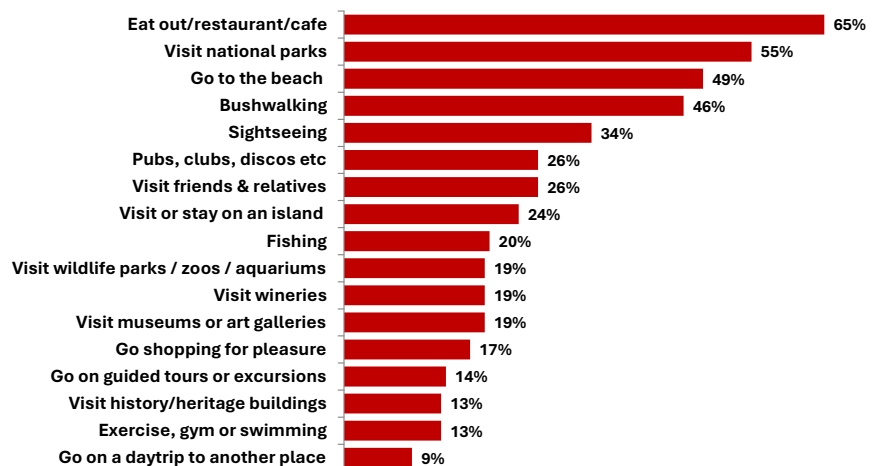


- Victoria at 18 per cent and NSW at 16 per cent are Kangaroo Islands biggest interstate overnight domestic.
- Regional South Australia contributes 17 per cent of visitors to Kangaroo Island.
- 40 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN KANGAROO ISLAND

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





KANGAROO ISLAND

REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2023-24, the tourism industry contributed an estimated \$277 million to the Kangaroo Island regional economy and directly employed approximately 1,000 people.

Employment

1,000 jobs for people employed directly by the tourism industry, 400 indirect jobs and a total employment impact of 1,400 people.

Gross Value Added (GVA)

\$83 million and \$57 million in direct and indirect tourism GVA, and \$140 million in total tourism GVA.

Gross Regional Product (GRP)

\$98 million and \$70 million in direct and indirect tourism GRP and \$168 million in total tourism GRP.

Tourism Consumption

2023-24

Tourism products - directly consumed

- Long distance passenger transportation 20%
- Takeaway and restaurant meals 17%
- Accommodation services 13%
- Fuel (petrol, diesel) 11%
- Shopping (including gifts and souvenirs) 7%
- Food products 7%
- Alcoholic beverages and other beverages 6%
- Travel agency and tour operator services 6%

Tourism Employment

2023-24

Tourism Industries -1,000 directly employed

- Air, water and other transport 31%
- Cafes, restaurants and takeaway food services 19%
- Accommodation 17%
- Retail trade 11%
- Travel agency and tour operator services 6%
- Road transport and transport equipment rental 5%
- Clubs, pubs, taverns and bars 4%
- Education and training 4%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2024

REGIONAL PERCEPTIONS REPORTING

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

Make sure everyone knows that KI is open again

Recent bushfires on Kangaroo Island have impacted consideration of travelling to this region. Travellers, particularly interstate travellers, tend to feel as though the Island is still rebuilding, and that there is still damage and the region may not be ready for tourists. It's important to ensure that travellers know that KI is ready and open for business, and reassure travellers that the number, variety and location of attractions are consistent with the experience pre-fires.

Price getting to KI is a major barrier

Price came up across the board as one of the major barriers to visiting Kangaroo Island. Although some accommodation was cheaper than anticipated, the cost to get there was the major impact. For locals, this is the cost to take the car over on the ferry, and for interstate travellers it was more about the cost to get there. Offering packages, particularly in shoulder and off seasons may help shift perceptions of price.

No events captured the interest of travellers. New events may motivate winter visitation

Although there is a great deal of interest in Kangaroo Island, and in the experiences that can be had on the Island (food, drink, wildlife, nature etc.), there was extremely low awareness of events that take place on Kangaroo Island, and low interest in attending the events currently on offer. Unique, winter style event may appeal to adult travellers provided positioned as a luxury, rare event that showcases the unique attributes of Kangaroo Island – creating a sense of urgency.

Region appeals to...

- Relaxation seekers
- Nature lovers
- Beach seekers



Kangaroo Island Tourism Optimisation Model

The Tourism Optimisation Management Model (TOMM) is a community-based initiative responsible for monitoring and managing the long-term sustainability of tourism on the Island. At the core of TOMM is a set of indicators that measure changes in the economic, environmental, socio-cultural, and experiential environments. TOMM provides a wide range of data specific to this region and is available through [Tools and Resources](#) • [Kangaroo Island, South Australia](#). This section includes a small sample of what is available.

SATISFACTION



LOCATIONS VISITED IN 2023/24

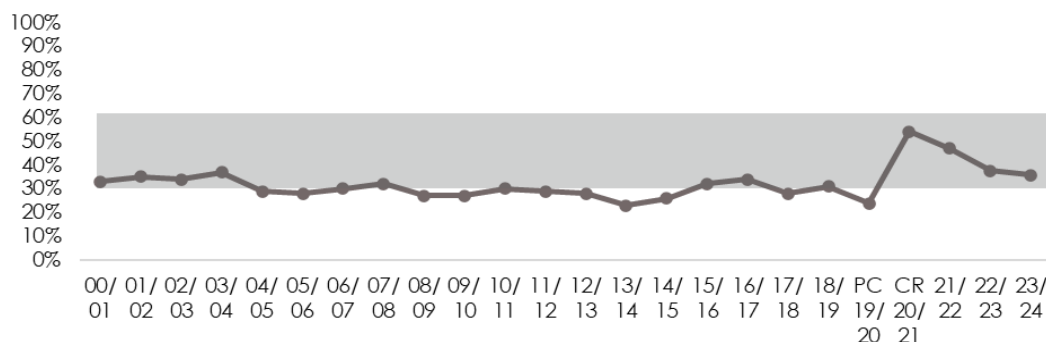


AWARENESS OF QUARANTINE PRIOR TO VISITATION

- 74% aware prior to arrival
- More intrastate (82%) and interstate (71%) visitors were aware compared with internationals(55%)
- More repeat visitors were aware (84%) than first time visitors (67%)
- More cruise ship arrivals were aware after arriving (46%) compared to non-cruise ship arrivals (26%)
- More visitors that stayed one or more nights (77%) were aware compared to those that stayed for only a day trip (52%)
- Visitors in autumn (78%) were more likely to be aware than winter (69%) and summer (70%) visitors

REPEAT VISITATION

- 36% of visitors are repeat visitors
- More intrastate visitors were repeat visitors (69%) compared to interstate (17%) and international visitors (10%)
- More of those that had stayed one or more nights on the island were repeat visitors compared to day-trippers (37% vs 25%)
- More sea arrivals were repeat visitors than air arrivals (37% vs 21%)
- More summer visitors were repeat visitors (39%) compared to spring visitors (33%)



Prepared by the South Australian Tourism Commission, December 2024

Sources Unless otherwise stated, all data in this report is from the International Visitor and National Visitor Surveys (IVS and NVS) conducted by Tourism Research Australia. These Sources are based on sample surveys and as with all sample surveys, are subject to sampling errors. Caution is required in interpreting some estimates, in particular, regional estimates can be affected by small sample sizes and can be subject to a high level of sampling error. Regional data should accordingly be used with a high level of caution and treated as being for indicative purposes only. Data refers to visitors 15 years and over. Unless otherwise stated, all data refers to the year end December 2024.

Regional Perceptions Testing - June 2022 - 3-day, online bulletin board (OBB) Approx. 40 mins of content per person, per day.

Participants were recruited as follows: – 22 Intrastate participants (70% metro, 30% regional), – 20 interstate participants (Melbourne, Regional VIC and Sydney)

A mix of age (18-44 and 45-69) and gender was achieved across participants. Participants were willing travellers, non-rejectors of travelling to/within SA, and did not live in the region they were recruited to explore (for intrastate).

Notes and Abbreviations Totals may not add to 100% due to rounding. VFR: Visiting Friends and Relatives. np: Not Published due to small sample size. ALOS: Average Length of Stay