

KANGAROO ISLAND

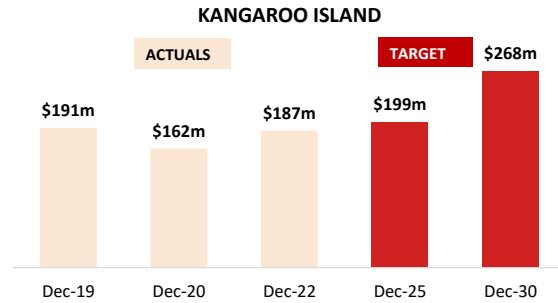
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2022

- Currently Kangaroo Island contributes \$187 million to the year end December 2022 South Australian expenditure of \$8.3 billion.
- Kangaroo Island has achieved 94 per cent of their 2025 target of \$199 million and 70 per cent of their 2030 target of \$268 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2022

ORIGIN						
	Intrastate	Interstate	Total Domestic	International	Total	
Overnight Visits	108,000	50,000	158,000	13,000	171,000	
%	68%	32%	92%	8%	100%	
<i>Share of Regional SA</i>	3%	5%	3%	25%	4%	
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% Across Regional SA	76%	22%	99%	1%	100%	
<small>% Across Regional SA: percentage of visits across total regional SA that are intrastate, interstate or international</small>						
Nights	419,000	181,000	600,000	47,000	647,000	
%	70%	30%	93%	7%	100%	
<i>Share of Regional SA</i>	4%	3%	4%	6%	4%	
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% Across Regional SA	63%	32%	95%	5%	100%	
<small>% Across Regional SA: percentage of nights across total regional SA that are intrastate, interstate or international</small>						
Average Length of Stay	3.9	3.6	3.8	3.6	3.8	
ALOS Regional SA	3.0	5.1	3.5	16.1	3.7	
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Total Expenditure						\$187,000,000
Overnight Expenditure	\$107,000,000	\$56,000,000	\$163,000,000	\$22,000,000	\$185,000,000	
Day Trip Expenditure						\$2,000,000
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Domestic Day Trips						26,000

- Kangaroo Island saw 158,000 domestic overnight visitors for the year end December 2022.
- 68 per cent of overnight visitors were from intrastate and 32 per cent from interstate.
- The 108,000 intrastate overnight visitors stayed 419,000 nights with an average length of stay of 3.9 nights.
- There were 50,000 interstate overnight visitors who stayed 181,000 nights with an average length of stay of 3.6 nights.
- The region saw 13,000 international visitors with an average length of stay of 3.6 nights and spend of \$22 million.
- 26,000 day trips were taken to Kangaroo Island for the year with spend of \$2 million.

KANGAROO ISLAND

REGIONAL PROFILE



PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	123,000	14,000	33,000	1,000	171,000
%	72%	8%	19%	1%	100%
<i>Share of Regional SA</i>	5%	1%	4%	0%	4%
<i>% Across all regions</i>	53%	25%	19%	3%	100%

Nights	426,000	67,000	140,000	14,000	647,000
%	66%	10%	22%	2%	100%
<i>Share of Regional SA</i>	5%	2%	4%	2%	4%
<i>% Across all regions</i>	54%	21%	20%	4%	100%

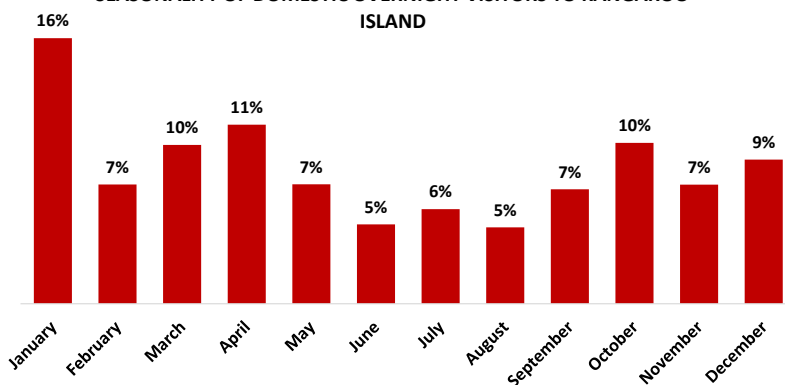
Average Length of Stay	3.5	4.8	4.2	14.0	3.8
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Expenditure					
Annual Expenditure	\$144,000,000	\$10,000,000	\$20,000,000	\$11,000,000	\$185,000,000
Expenditure 2019	\$147,000,000	\$13,000,000	\$9,000,000	\$5,000,000	\$174,000,000
Av spend per night	\$338	\$149	\$143	\$786	\$286
Av spend per night Reg SA	\$204	\$112	\$142	\$279	\$175
Share of Regional SA	3%	4%	0%	2%	3%

- 79 per cent of overnight visitors to Kangaroo Island are overnight leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$338 per night compared to VFR visitors who spend \$149 per night.
- Leisure overnight visitors spent \$154 million for the year, making up 83 per cent of all overnight expenditure.
- There are 33,000 business visitors who stay 140,000 nights with spend of \$20 million.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO KANGAROO ISLAND



- National Visitor Survey data shows us that in 2022 January, April 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.

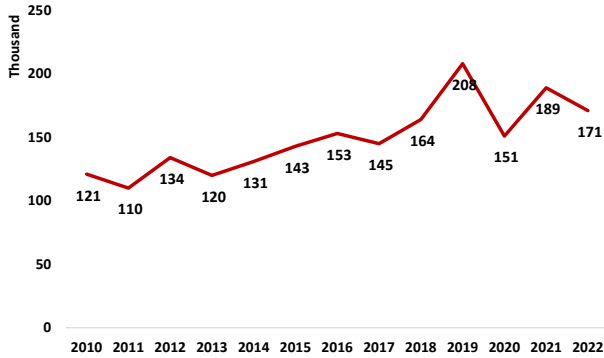
KANGAROO ISLAND

REGIONAL PROFILE

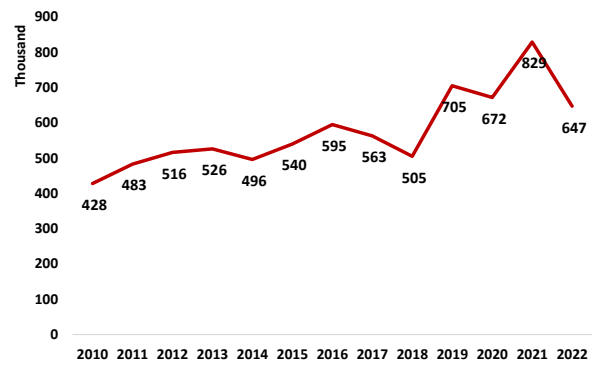


TOTAL OVERNIGHT VISITATION 2010 - 2022

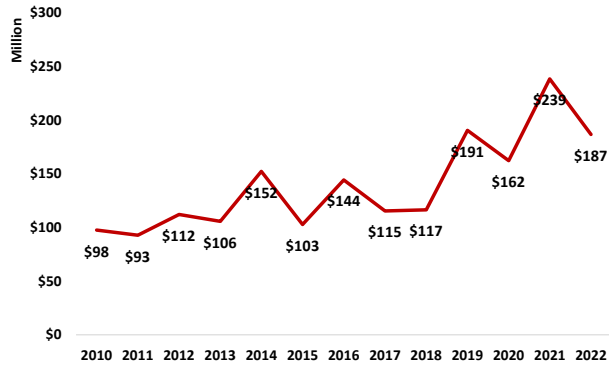
VISITORS KANGAROO ISLAND 2010 - 2022 - International and Domestic



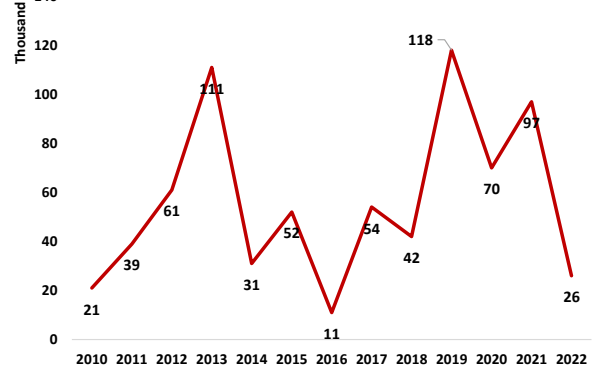
NIGHTS KANGAROO ISLAND 2010 - 2022 - International and Domestic



TOTAL EXPENDITURE KANGAROO ISLAND 2010 - 2022 - International and Domestic



DAY TRIPS KANGAROO ISLAND 2010 - 2022 - Domestic
Data for Day Trips highly variable due to low sample



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-22	Change on Dec-19	Dec-22	Change on Dec-19
Adelaide	3,084,000	-21%	\$4,400,000,000	-3%
Adelaide Hills	155,000	-31%	\$225,000,000	9%
Barossa	319,000	1%	\$326,000,000	45%
Clare Valley	196,000	-4%	\$152,000,000	29%
Eyre Peninsula	500,000	-14%	\$503,000,000	-8%
Fleurieu Peninsula	783,000	-13%	\$665,000,000	19%
Flinders Ranges and Outback	835,000	-10%	\$576,000,000	12%
Kangaroo Island	171,000	-18%	\$187,000,000	-2%
Limestone Coast	622,000	-20%	\$441,000,000	5%
Murray River, Lakes and Coorong	381,000	-16%	\$201,000,000	-28%
Riverland	412,000	-4%	\$240,000,000	23%
Yorke Peninsula	602,000	1%	\$354,000,000	47%
Regional SA	4,568,000	-12%	\$3,980,000,000	12%
South Australia	7,291,000	-15%	\$8,340,000,000	3%



KANGAROO ISLAND TOURISM LISTINGS

Category	# Listings
ACCOMM	113
ATTRACTION	98
TOUR	38
RESTAURANT	36
EVENT	11
HIRE	8
JOURNEY	7
GENSERVICE	5
DESTINFO	5
TRANSPORT	3
INFO	2
Grand Total	326

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)

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

**KANGAROO ISLAND
AUSTRALIAN TOURISM DATA WAREHOUSE
LEADS
109,000
YEAR END DECEMBER 2022**



TOP 5

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

TOP 5

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

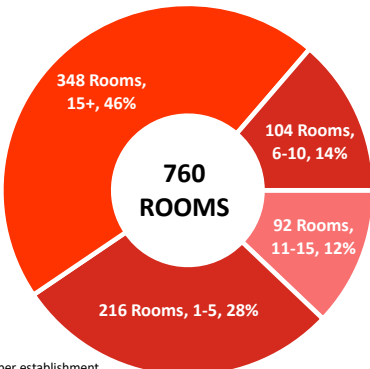
TOP 5

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

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

ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS IN THE KANGAROO ISLAND - SOURCE ATDW



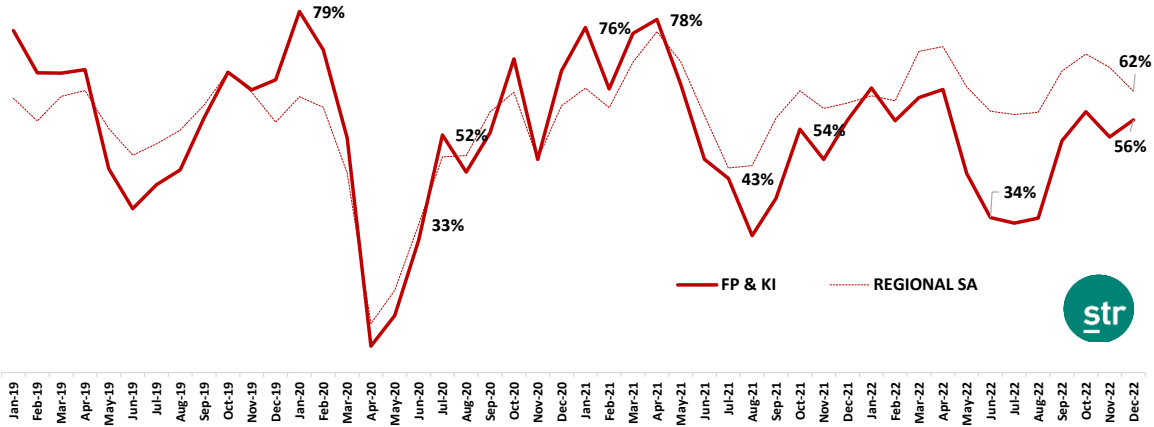
- Currently there are 113 establishments on Kangaroo Island that accommodate guests.
- These 113 establishments account for 760 rooms across the region.
- 46 per cent of rooms fall into establishment with 15 or more rooms.
- 28 per cent of rooms fall into the 1-5 room establishments.

Rooms refers to rooms per establishment



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY FP & KI

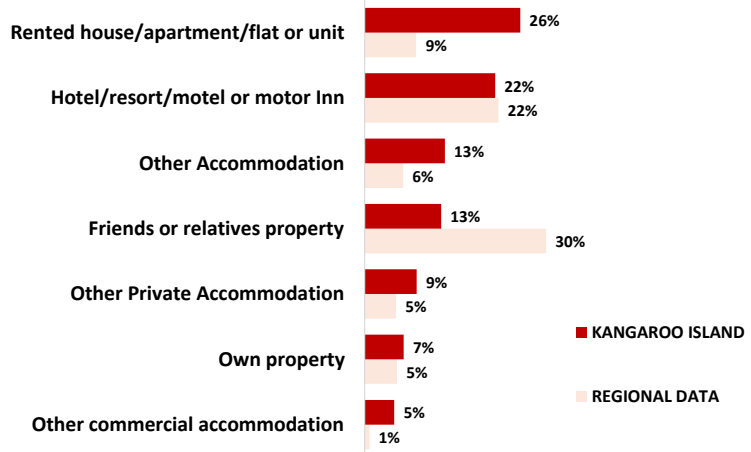


- The FP & KI regions include accommodation data for the Fleurieu Peninsula and Kangaroo Island. Data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for the FP & KI regions was 57 per cent, this fell to 48 per cent in 2020, rose to 56 per cent in 2021 and fell in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

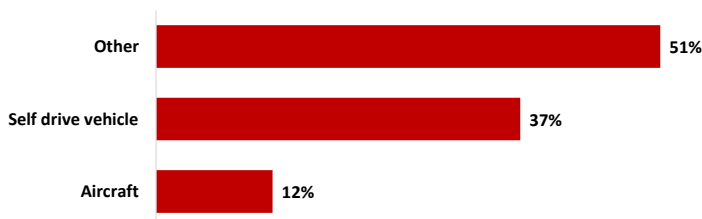
VISITOR USE OF ACCOMMODATION

ACCOMMODATION USED IN KANGAROO ISLAND FOR DOMESTIC VISITORS

- 26 per cent of domestic overnight visitor nights to Kangaroo Island are spent in a rented house/apartment/ flat or unit to the SA regional average of 9 per cent.
- 22 per cent stayed in a Hotel/resort/motel or motor inn. This compares to the regional average of 22 per cent.
- 13 per cent stay with friends or relatives compared to the regional average of 30 per cent.



TRANSPORT

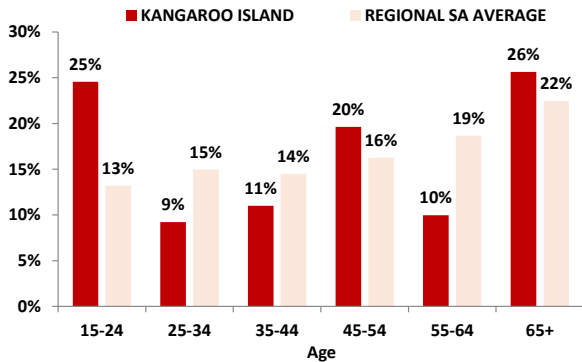


- The main method of transport used on trips to Kangaroo Island was 'Other'.
- The 51% for 'Other' relates to the Ferry across to the island.
- 37% of visitors used self drive as their type of transport.
- 12% of people used an aircraft.

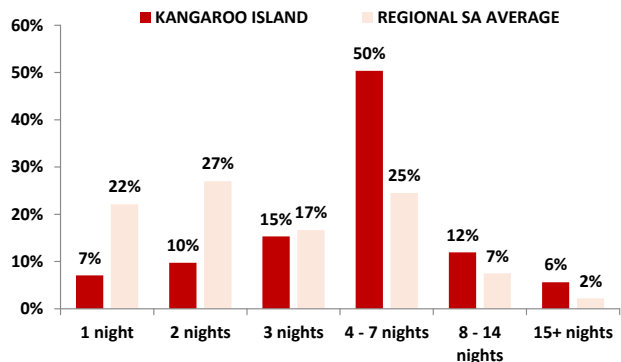


VISITOR PROFILE

AGE OF VISITORS TO KANGAROO ISLAND



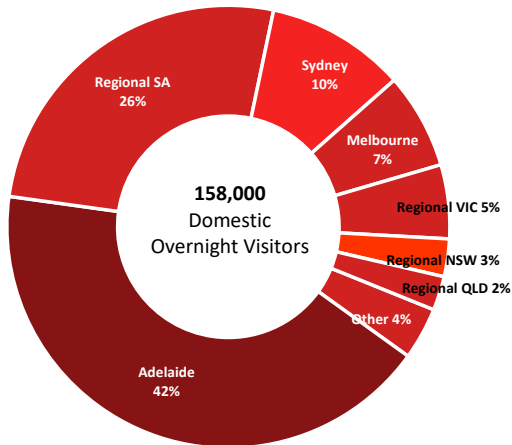
LENGTH OF VISIT TO KANGAROO ISLAND



- Overnight domestically there is a peak in the 65+ age group of 26 per cent compared to the regional average of 22 per cent.
- The 15-24 age group at 25 per cent was well above the regional average of 13 per cent.
- 50 per cent of domestic overnight visitors like to stay 4-7 nights above the regional average of 25 per cent.
- 18 per cent like to stay 8+ nights, above the regional average of 9 per cent.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO KANGAROO ISLAND

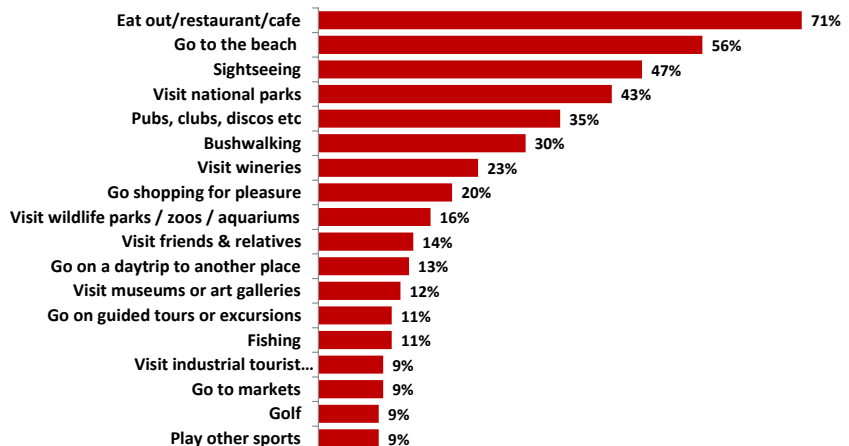


- Victoria at 12 per cent and New South Wales at 13 per cent are Kangaroo Island's biggest interstate overnight domestic markets.
- Regional South Australia contributes 26 per cent of visitors to Kangaroo Island.
- 42 per cent of visitors come from Adelaide.

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. Going to the beach, Sightseeing, Visiting national parks, Bushwalking, Visiting wineries, Visit friends and relatives and going to museums and art galleries.





REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2020-21, the tourism industry contributed an estimated \$196 million to Kangaroo Island regional economy and directly employed approximately 1,200 people.

Employment

- 1,200 jobs for people employed directly by the tourism industry, 300 indirect jobs and a total employment impact of 1,600 people.

Gross Value Added (GVA)

- \$62 million and \$38 million in direct and indirect tourism GVA, and \$99 million in total tourism GVA.

Gross Regional Product (GRP)

- \$69 million and \$47 million in direct and indirect tourism GRP and \$117 million in total tourism GRP.

Tourism Consumption

2020-21 <i>Tourism products</i> - directly consumed
• Takeaway and restaurant meals 18%
• Shopping (including gifts and souvenirs) 13%
• Travel agency and tour operator services 13%
• Accommodation services 11%
• Fuel (petrol, diesel) 10%
• Food products 8%
• Long distance passenger transportation 8%
• Alcoholic beverages and other beverages 7%

Tourism Employment

2020-21 <i>Tourism Industries</i> - 1,200 directly employed
• Air, water and other transport 30%
• Travel agency and tour operator services 19%
• Retail trade 13%
• Cafes, restaurants and takeaway food services 12%
• Accommodation 10%
• Road transport and transport equipment rental 6%
• Cultural services 4%
• All other industries 3%

The regional tourism data is the latest available data at the time of publication. Data for the year end June 2021

REGIONAL PERCEPTIONS REPORTING

- Kangaroo Island is on almost every travellers bucket list. Promotions in recent years and availability of direct flights from interstate have 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...	<ul style="list-style-type: none"> – Relaxation seekers – Nature lovers – Beach seekers

Prepared by the South Australian Tourism Commission, December 2022

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 2022.

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 Intra-state 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 intra-state).

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