

KANGAROO ISLAND

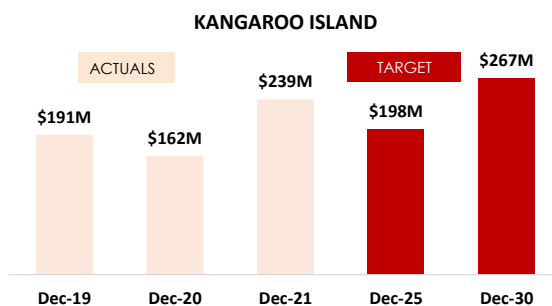
REGIONAL PROFILE



OVERVIEW

ALL DATA BASED ON THE YEAR END DECEMBER 2021

- Currently Kangaroo Island contributes \$239 million to the year end March 2021 South Australian expenditure of \$6.2 billion.
- The Kangaroo Island has achieved their 2025 target of \$198 million and 90 per cent of their 2030 target of \$267 million.



ANNUAL VISITOR SUMMARY YEAR END DECEMBER 2021

| ORIGIN | Intrastate | | Interstate | | Total Domestic | | International | | Total | |
|-------------------------------|---------------|-----|--------------|-----|----------------|------|---------------|----|---------------|------|
| | Count | % | Count | % | Count | % | Count | % | Count | % |
| Overnight Visits | 144,000 | 76% | 45,000 | 24% | 189,000 | 100% | - | 0% | 189,000 | 100% |
| Share of Regional SA | 3% | | 3% | | 3% | | 0% | | 3% | |
| % Across Regional SA | 76% | | 23% | | 100% | | 0% | | 100% | |
| Nights | 631,000 | 76% | 198,000 | 24% | 829,000 | 100% | - | 0% | 829,000 | 100% |
| Share of Regional SA | 5% | | 2% | | 4% | | 0% | | 4% | |
| % Across Regional SA | 60% | | 38% | | 98% | | 2% | | 100% | |
| Average Length of Stay | 4.4 | | 4.4 | | 4.4 | | - | | 4.4 | |
| ALOS Regional SA | 3.0 | | 6.2 | | 3.7 | | - | | 3.8 | |
| Total Expenditure | | | | | | | | | \$239,000,000 | |
| Overnight Expenditure | \$180,000,000 | | \$51,000,000 | | \$231,000,000 | | \$0 | | \$231,000,000 | |
| Day Trip Expenditure | | | | | | | | | \$8,000,000 | |
| Domestic Day Trips | | | | | | | | | 97,000 | |

Note - 100 per cent of day trips were taken by people who live in the region.

- Kangaroo Island saw 189,000 domestic overnight visitors for the year end December 2021.
- 76 per cent of overnight visitors were from intrastate and 24 per cent from interstate.
- The 144,000 intrastate overnight visitors stayed 631,000 nights with an average length of stay of 4.4 nights.
- There were 45,000 interstate overnight visitors who stayed 198,000 nights with an average length of stay of 4.4 nights.
- There have been no international arrivals with the borders closed.
- 97,000 day trips were taken to Kangaroo Island for the year with spend of \$8 million.
- The majority of these day trips were taken within the region.

KANGAROO ISLAND

REGIONAL PROFILE

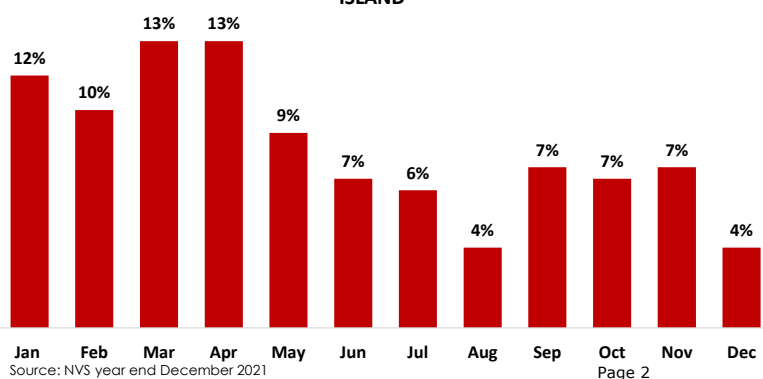


| PURPOSE | | | | | |
|----------------------------------|---------------|--------------|--------------|-------------|----------------------|
| | Holiday | VFR | Business | Other | Total |
| Overnight Visits | 146,000 | 17,000 | 23,000 | 2,000 | 189,000 |
| % | 77% | 9% | 12% | 1% | 100% |
| <i>Share of Regional SA</i> | 5% | 1% | 2% | 0% | 3% |
| <hr/> | | | | | |
| <i>% Across all regions</i> | 49% | 28% | 18% | 8% | 100% |
| <hr/> | | | | | |
| Nights | 668,000 | 80,000 | 57,000 | 25,000 | 829,000 |
| % | 81% | 10% | 7% | 3% | 100% |
| <i>Share of Regional SA</i> | 6% | 1% | 1% | 1% | 4% |
| <hr/> | | | | | |
| <i>% Across all regions</i> | 50% | 26% | 17% | 8% | 100% |
| <hr/> | | | | | |
| Average Length of Stay | 4.6 | 4.7 | 2.5 | 12.5 | 4.4 |
| <hr/> | | | | | |
| Expenditure | | | | | |
| Annual Expenditure | \$192,000,000 | \$14,000,000 | \$22,000,000 | \$3,000,000 | \$231,000,000 |
| Expenditure 2019 | \$147,000,000 | \$13,000,000 | \$9,000,000 | \$5,000,000 | \$174,000,000 |
| Av spend per night | \$287 | \$175 | \$386 | \$120 | \$279 |
| Av spend per night Reg SA | \$154 | \$58 | \$84 | \$80 | \$112 |
| Share of Regional SA | 6% | 1% | 3% | 0% | 4% |

- 86 per cent of overnight visitors to the Kangaroo Island are leisure visitors (Holiday + VFR).
- Overnight holiday visitors on average spend \$287 per night compared to VFR visitors who spend \$175 per night.
- Holiday visitors spent \$192 million for the year and Leisure Visitors \$14 million, making up 89 per cent of total overnight expenditure.

SEASONALITY

SEASONALITY OF DOMESTIC OVERNIGHT VISITORS TO KANGAROO ISLAND

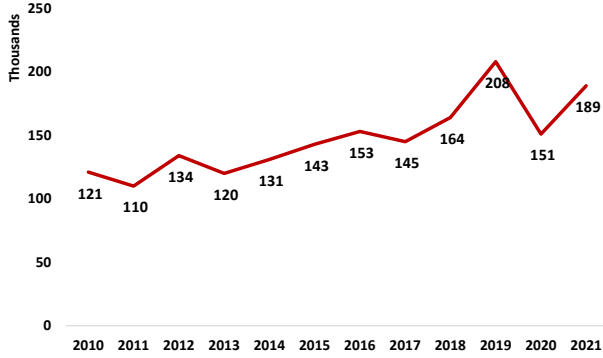


- National Visitor Survey data shows us that January, March and April are the most popular months of the year.
- January is busy with the school/summer holidays.
- March is busy with the Long weekend and April with Easter and the School holidays.

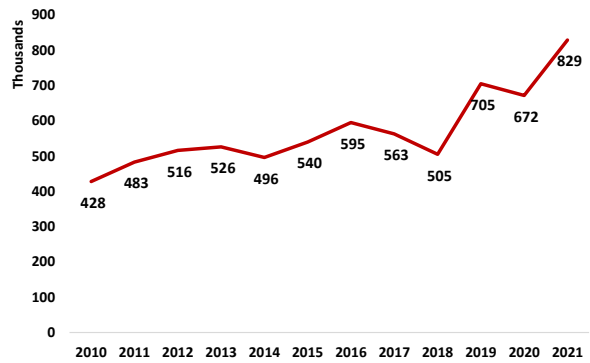


TOTAL OVERNIGHT VISITATION 2010 - 2021

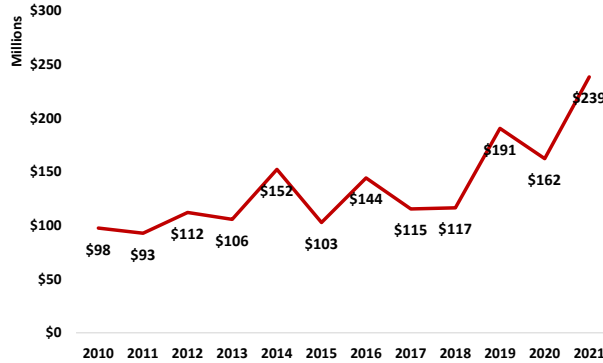
VISITORS KANGAROO ISLAND 2010 - 2021 - INTERNATIONAL AND DOMESTIC



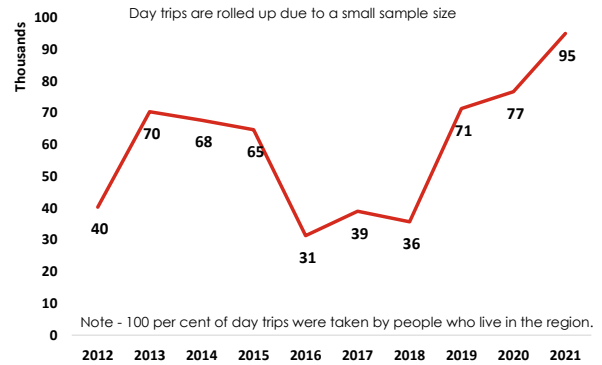
NIGHTS KANGAROO ISLAND 2010 - 2021 - INTERNATIONAL AND DOMESTIC



TOTAL EXPENDITURE KANGAROO ISLAND 2010 - 2021 - INTERNATIONAL AND DOMESTIC



DAY TRIPS KANGAROO ISLAND 2010 - 2021 - DOMESTIC - 3 year annual average



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-21 | Change on Dec-19 | Dec-21 | Change on Dec-19 |
| Adelaide | 1,982,000 | -49% | 2,549,700,000 | -44% |
| Adelaide Hills | 184,000 | -18% | 204,500,000 | -1% |
| Barossa | 230,000 | -28% | 291,600,000 | 29% |
| Clare Valley | 282,000 | 38% | 171,700,000 | 46% |
| Eyre Peninsula | 482,000 | -17% | 488,400,000 | -11% |
| Fleurieu Peninsula | 894,000 | -1% | 662,900,000 | 19% |
| Flinders Ranges and Outback | 638,000 | -31% | 359,700,000 | -30% |
| Kangaroo Island | 189,000 | -9% | 238,500,000 | 25% |
| Limestone Coast | 610,000 | -21% | 438,600,000 | 4% |
| Murray River, Lakes and Coorong | 391,000 | -13% | 211,200,000 | -25% |
| Riverland | 345,000 | -20% | 231,600,000 | 19% |
| Yorke Peninsula | 620,000 | 4% | 279,500,000 | 16% |
| Regional SA | 4,424,000 | -14% | 3,601,600,000 | 1% |
| South Australia | 6,077,000 | -29% | 6,151,275,792 | -24% |

KANGAROO ISLAND

REGIONAL PROFILE



KANGAROO ISLAND TOURISM LISTINGS

| Category | # Listings |
|-------------------------|------------|
| Accommodation | 117 |
| Attraction | 96 |
| Food and Drink | 35 |
| Tour | 34 |
| Destination Information | 7 |
| General Services | 6 |
| Hire | 6 |
| Event | 3 |
| Journey | 3 |
| Transport | 3 |
| Information Services | 2 |
| Grand Total | 312 |

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
126,000
YEAR END DECEMBER 2021

ACCOMMODATION
LEADS
 71,000
 57%

FOOD & DRINK
LEADS
 18,000
 14%

TOUR
LEADS
 19,000
 15%

***OTHER**
LEADS
 17,000
 14%

TOP 5

- SEA DRAGON LODGE VILLAS
- HAMILTON DUNE
- STOWAWAY KANGAROO ISLAND
- OCEANVIEW ECO VILLAS
- ONE KI

TOP 5

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

TOP 5

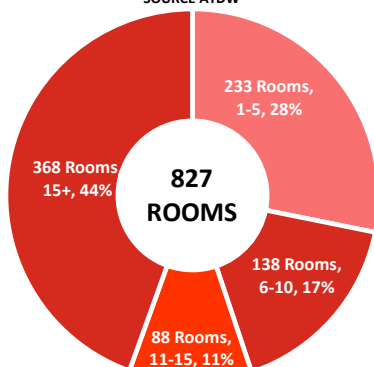
- KANGAROO ISLAND SEALINK
- KANGAROO ISLAND MARINE ADVENTURES
- KANGAROO ISLAND OUTDOOR ACTION
- LITTLE SAHARA ADVENTURE CENTRE
- PENNESHAW PENGUIN CENTRE

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

ROOMS IN REGIONS - AUSTRALIAN TOURISM DATA WAREHOUSE

ROOMS ON KANGAROO ISLAND

SOURCE ATDW



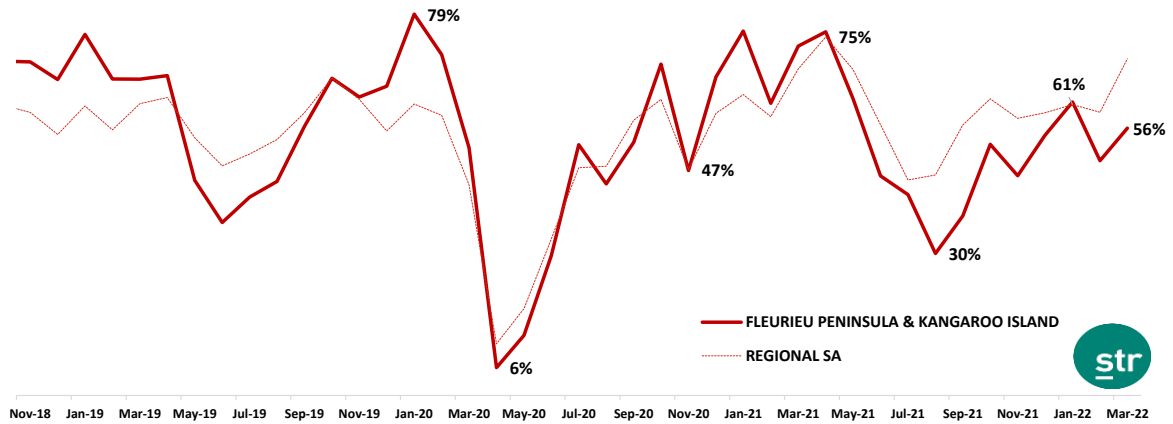
Rooms refer to rooms per establishment

- Currently there are 117 establishments on Kangaroo Island that accommodate guests.
- These 117 establishments account for 827 rooms across the region.
- 44 per cent of rooms fall into establishment with 15 or more rooms.
- 28 per cent of rooms fall into the 1-5 room establishments.



ACCOMMODATION STR

ACCOMMODATION OCCUPANCY FLEURIEU PENINSULA & KANGAROO ISLAND

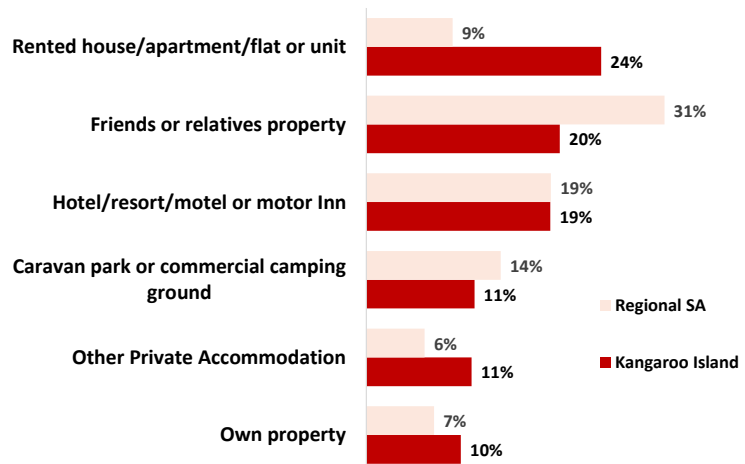


- Fleurieu Peninsula and Kangaroo Island accommodation data is not provided for each specific region.
- In 2019 prior to COVID average occupancy for these combined regions was 57 per cent, this fell to 48 per cent in 2020, rose to 54 per cent in 2021 and for the first 3 months of 2022 the average is 55 per cent.

VISITOR USE OF ACCOMMODATION

- 20 per cent of domestic visitor nights are spent with friends or relatives compared to the regional average of 31 per cent.
- 24 per cent of people rent and house or apartment on the island, above the regional average of 9 per cent.
- Pre COVID, 11 per cent of visitor nights were spent caravan or camping. This is 3 per cent below the regional average of 14 per cent.

ACCOMMODATION USED IN KANGAROO ISLAND FOR DOMESTIC VISITORS



TRANSPORT

TRANSPORT KANGAROO ISLAND DECEMBER 2021



- The main method of transport used for Kangaroo Island was a self drive vehicle.
- 59 per cent of visitors used this type of transport.
- 35 per cent used other - this was primarily by boat.
- 6 per cent of people used air transport.

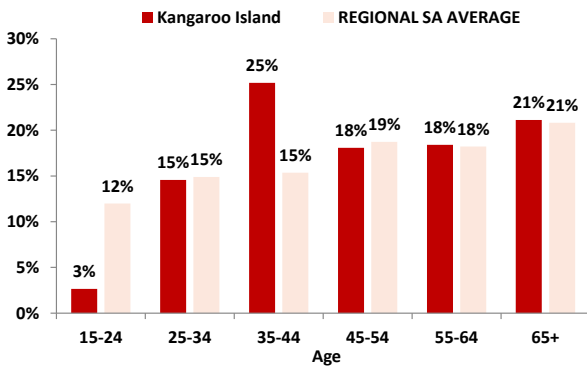
KANGAROO ISLAND

REGIONAL PROFILE



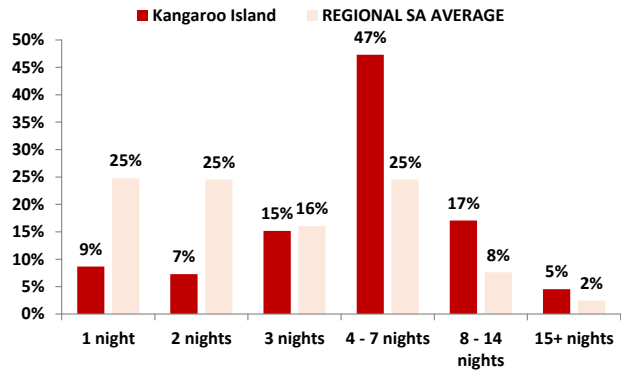
VISITOR PROFILE

AGE OF VISITORS TO KANGAROO ISLAND



- The 35-44 age group over indexed for the Kangaroo Island when compared to the average across all regions.
- 3 per cent of visitors are in the 15-24 age group, below the regional average of 12 per cent.

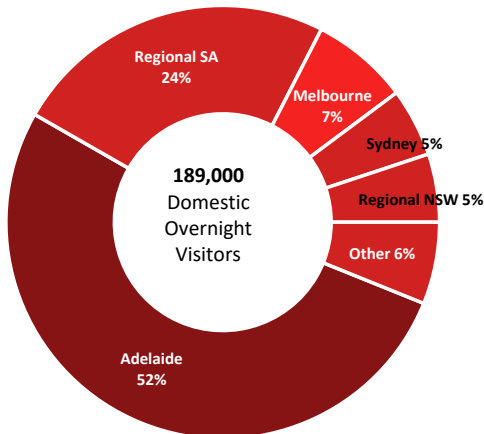
LENGTH OF VISIT TO KANGAROO ISLAND



- 47 per cent of domestic visitors like to stay 4 to 7 nights.
- 17 per cent of visitors stayed 8 nights compared to the regional average of 8 per cent.

VISITOR ORIGIN

ORIGIN OF DOMESTIC OVERNIGHT VISITORS TO KANGAROO ISLAND

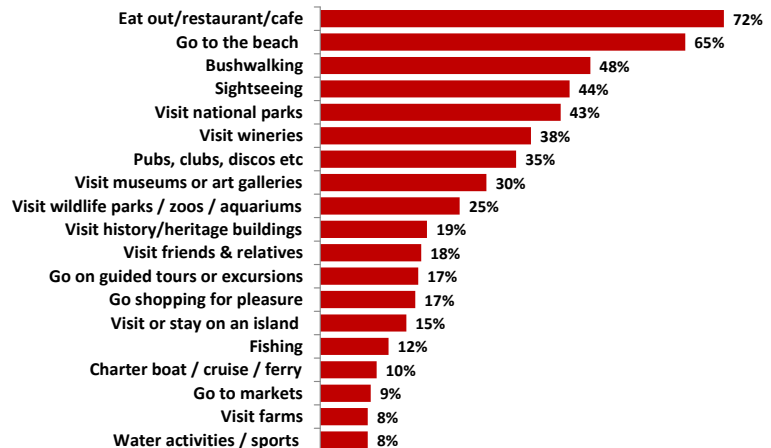


- Victoria at 11 per cent and New South Wales at 10 per cent are Kangaroo Island's biggest interstate overnight domestic markets.
- Regional South Australia contributes 24 per cent of visitors to the Kangaroo Island.
- 52 per cent of visitors come from Adelaide.

VISITOR ACTIVITIES

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

DOMESTIC OVERNIGHT VISITOR ACTIVITIES IN KANGAROO ISLAND





REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

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

Employment

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

Gross Value Added (GVA)

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

Gross Regional Product (GRP)

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

Tourism Consumption

| 2019–20 | |
|---------------------------------------------|------------------------------------------|
| <i>Tourism products</i> - directly consumed | |
| • 17% | Long distance passenger transportation |
| • 13% | Takeaway and restaurant meals |
| • 11% | Shopping (including gifts and souvenirs) |
| • 10% | Accommodation services |
| • 9% | Travel agency and tour operator services |
| • 8% | Education services |
| • 8% | Fuel (petrol, diesel) |
| • 6% | Food products |

Tourism Employment

| 2019–20 | |
|-----------------------------------------------------|-----------------------------------------------|
| <i>Tourism Industries</i> - 1,100 directly employed | |
| • 33% - 358 | Air, water and other transport |
| • 15% - 160 | Travel agency and tour operator services |
| • 12% - 129 | Cafes, restaurants and takeaway food services |
| • 10% - 105 | Accommodation |
| • 9% - 100 | Retail trade |
| • 8% - 84 | Education and training |

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

REGIONAL INSIGHTS

Interstate

- Highly appealing; the destination itself is described as spectacular.
- Interactive nature experiences and pristine beaches along with fine produce and being not crowded generate very high appeal.

Intrastate

- Very high appeal.
- Australian wildlife icons in abundance and living in their natural environment, including the beach.
- Local produce also endorsed.
- Expense of getting there is a known barrier.

International

- Kangaroo Island has one of the strongest appeals with Island wildlife dominating the appeal elements of Kangaroo Island.
- Local produce and rock formations in the top five appealing elements.

Regional Visitor Strategy Priorities

- As an established and thriving visitor region, the focus for Kangaroo Island is to exceed visitor expectations, deliver on the Island’s brand proposition, grow visitor yield, dispersal and manage the sustainable development of tourism on the island.
- With highly seasonal visitation, growing visits during the quieter months of May-August continues to be important.

Prepared by the South Australian Tourism Commission, December 2021

Sources Unless otherwise stated, all data in this report is from the International Visitor and National Visitor Surveys (IVS and NVS) conducted by Tourism Research Australia. These Sources are based on sample surveys and as with all sample surveys, are subject to sampling errors. Caution is required in interpreting some estimates, in particular, regional estimates can be affected by small sample sizes and can be subject to a high level of sampling error. Regional data should accordingly be used with a high level of caution and treated as being for indicative purposes only. Data refers to visitors 15 years and over. Unless otherwise stated, all data refers to the year end December 2021.

Consumer Demand Product Testing Phase 1 - BDA Marketing - Appeal data is from the consumer surveying conducted for the SATC by BDA Marketing Planning. Sample of 800 interstate travellers and 400 interstate travellers, followed by eight focus groups in Adelaide, Sydney and Melbourne. Comments relating to international appeal are sourced from the ConsumerDemand Project run by Tourism Australia in 11 priority markets, with a sample of 1,600 per market.

Notes and Abbreviations Totals may not add to 100% due to rounding. VFR: Visiting Friends and Relatives. np: Not Published due to small sample size. ALOS: Average Length of Stay
 ABS: Survey of Tourism Accommodation. Hotels, Motels, Guest houses and Serviced Apartments with 15 or more rooms. Cat. No. 865455001
 Consumer Demand Product Testing Phase 1 - BDA Marketing