



TOMM Kangaroo Island Committee Visitor Exit Survey 2022/23

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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 2022/23 Visitor Exit Survey (VES).

Summary of TOMM Indicators






Summary of Economic Indicators

Optimal Conditions	Ref	Indicators	Acceptable Range	Wave 21 (22/23)	
Tourism optimises economic benefits for Kangaroo Island	EC1d	Annual average number of nights stayed	4-7 nights	4.5 nights	✓
	EC1e	Proportion of visitors that would recommend Kangaroo Island to others as a holiday destination	90% - 100%	97%	✓
	EC1f	Average annual total expenditure per visit	5% - 10%↑	\$828.66 [5.1% decrease]	✗
	EC1g	Annual number of visitors to Kangaroo Island	0% - 20%*↑	+22.8%	✓
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%	68%	✓
	EC2d	Proportion of customers that are highly satisfied with the professionalism of tourism operators	65% - 100%	66%	✓
	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%	48%	✓



Summary of Experiential Indicators

Optimal Conditions	Ref	Indicators	Acceptable Range	Wave 21 (22/23)	
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%	97%	✓
	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%	88%	✗

Optimal Conditions	Ref	Indicators	Acceptable Range	Wave 21 (22/23)
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	EX1h	Proportion of visitors that experienced local Kangaroo Island produce	80% - 100%	89% ✓
	EX1i	Proportion of visitors that believe Kangaroo Island offers one of Australia's top three nature & wildlife experiences	70% - 100%	76% ✓
	EX1j	Proportion of visitors that believe Kangaroo Island has a friendly local community	80% - 100%	95% ✓
	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%	91% ✓
	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%	86% ✗

Optimal Conditions	Ref	Indicators	Acceptable Range	Wave 21 (22/23)
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%	72% 
	EX2b	Proportion of visitors who were very satisfied with their opportunity to learn more about the Island's natural environment	70% - 100%	58% 
	EX2c	Proportion of visitors who were very satisfied with their opportunity to learn more about the Island's history	70% - 100%	47% 
	EX2d	Proportion of visitors who were very satisfied with the range, quality and availability of activities available	70% - 100%	56% - 60% 
	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%	57% - 62% 
	EX2g	Proportion of visitors that are very satisfied with the level of customer service they receive	80% - 100%	68% 
	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%	28% - 55% 
	EX2i	Proportion of visitors that would recommend Kangaroo Island as a holiday destination to others as a result of their experience	90% - 100%	97% 
	EX2j	Proportion of repeat visitation	30% - 50%	38% 

Summary of Environmental Indicators

Optimal Conditions	Ref	Indicators	Acceptable Range	Wave 21 (22/23)
Visitor activity has minimal negative impacts on the natural environment	EN2b	Proportion of visitations to natural areas occurring on managed sites	70% - 100%	72% 
	EN2e	Proportion of visitors aware of quarantine regulations prior to arriving on Kangaroo Island	70% - 100%	69% 

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, 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 2022/23 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 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 2022 to June 2023. 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 the second half of the 22/23 data collection period cruise ship visitation to Kangaroo Island recommenced. The cruise ship season traditionally runs from October to March each year, however based the delayed start to the season only a small number of surveys were collected (n=133). Findings from this group have been noted throughout the report. The aim is to collect a higher number of responses from cruise ship visitors in the 23/24 period to provide greater opportunity for analysis.

The response to the 22/23 wave of the VES was the strongest across the waves, with n=3722 surveys completed. This reflects the 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=3222, 87%), which highlights the growing 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, Kantar 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 22/23 that have been included in analysis is n=3722.

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 Kantar. 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 Kantar with the resulting weights. The population figures are not provided to Kantar 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 the 2017/18 questionnaire, though in 2019 'sea' options to arrive/depart the island were further distinguished with 'ferry' and 'cruise ships'. Results have been split in the 22/23 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 22/23 sample of n=3722 can be reported within a +/-1.6% 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 48.4% and 51.6%. 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
3700	±1.6%
2000	±2.2%
1500	±2.5%
1000	±3.1%
500	±4.4%
200	±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 2022/23 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

2022/23 in a nutshell

The results of Wave 21 of the VES are largely consistent with the 2021/22 survey and continue to show positive outcomes across a range of areas.

Economic indicators: Almost all indicators, except the average annual total expenditure, were found to be within the acceptable range. Notably, for EC1g, the number of visitors to Kangaroo Island increased by 22.8%, once again exceeding the acceptable range of 0% to 20%.

The annual average number of nights stayed on the island remained stable at 4.5, as did the proportion of visitors who would recommend Kangaroo Island to others as a holiday destination (97%). There was a drop in the average annual expenditure (5.1%, from \$873.31 to \$828.66).

Economic indicators relating to whether tourism operators excel in their business professionalism (68%) and the proportion of visitors who were very satisfied with the professionalism of tourism operators (66%) also remained stable. As did the level of positive comments and negative comments.

Positively, the proportion of visitors whose average spend per night exceeds \$200 increased from 44% in 21/22 to 48% in the 22/23 wave.

Experiential indicators: Similar to last wave, the indicators under '**Kangaroo Island delivers authentic and credible experiences consistent with its positioning**' are almost entirely within the acceptable range, except for EX1m '**Proportion of visitors very satisfied with their overall experience on Kangaroo Island**' (86%) and '**Proportion of visitors that experienced farming and rural landscapes**' (88%). While not in the acceptable range, the results are consistent with previous years. Repeat visitation has decreased again (47% to 38%) but remains within the acceptable range and continues to be higher than all prior years (e.g. 2018/19 was 31%).

Regarding indicators under '**the majority of visitors leave the island highly satisfied with their experience**', many are outside of the acceptable range. However, the improvements made in 21/22 continue to be observed across these measures in the 22/23 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 2022/23 results relating to the first economic condition '***Tourism optimises economic benefits for Kangaroo Island***' continued to show the positive outcomes observed in the 2021/22 wave.

While overnight visitation decreased to 88% (from 96%) the average number of nights stayed remained stable at 4.5 (within the acceptable range). The proportion of visitors recommending Kangaroo Island as a holiday destination also remained high, at 97%, well within the acceptable range. Unsurprisingly, there was a decrease in average annual spend per visit and a continued increase in the annual number of visitors (22.8%).

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 unchanged at 95%. While the number of negative comments increased, it was ever so slightly (43% to 44%).

Finally, the third economic condition '***Kangaroo Island attracts its high yield target markets***' increased slightly from 44% to 48% of surveyed visitors spending more than \$200 per night.

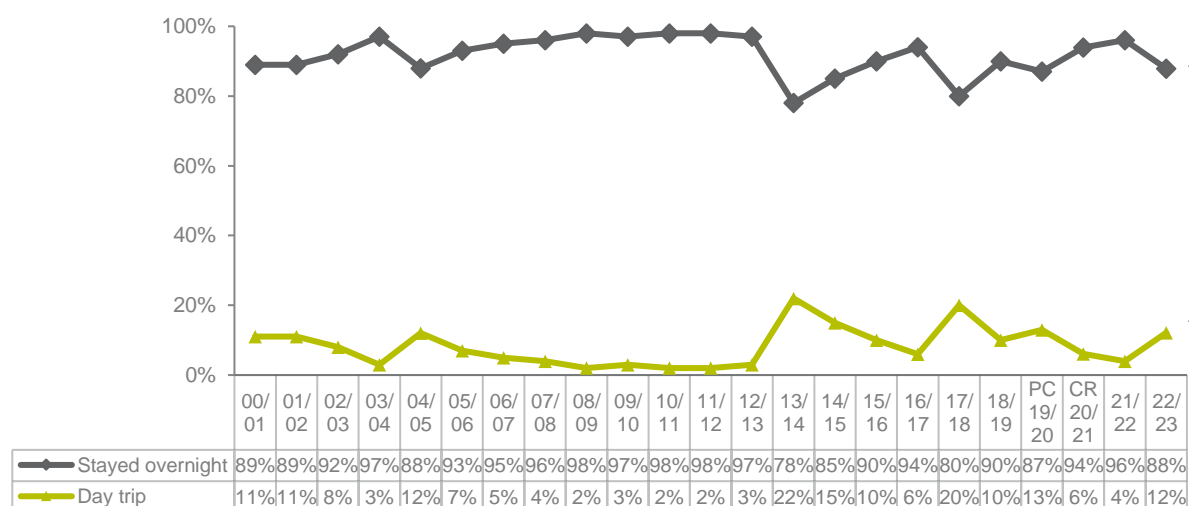
Annual average number of nights stayed (EC1d)

Optimal Conditions	Indicator	Acceptable Range	22/23 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

Most visitors to KI were overnight visitors (staying at least one night on the island), which has dropped significantly since 21/22 (88% vs 96%). The number of day trippers has increased significantly from 21/22 (12% vs 4%).

Figure 1: Length of stay over time



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

Base: Visitors responding (22/23 n= 3721)

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

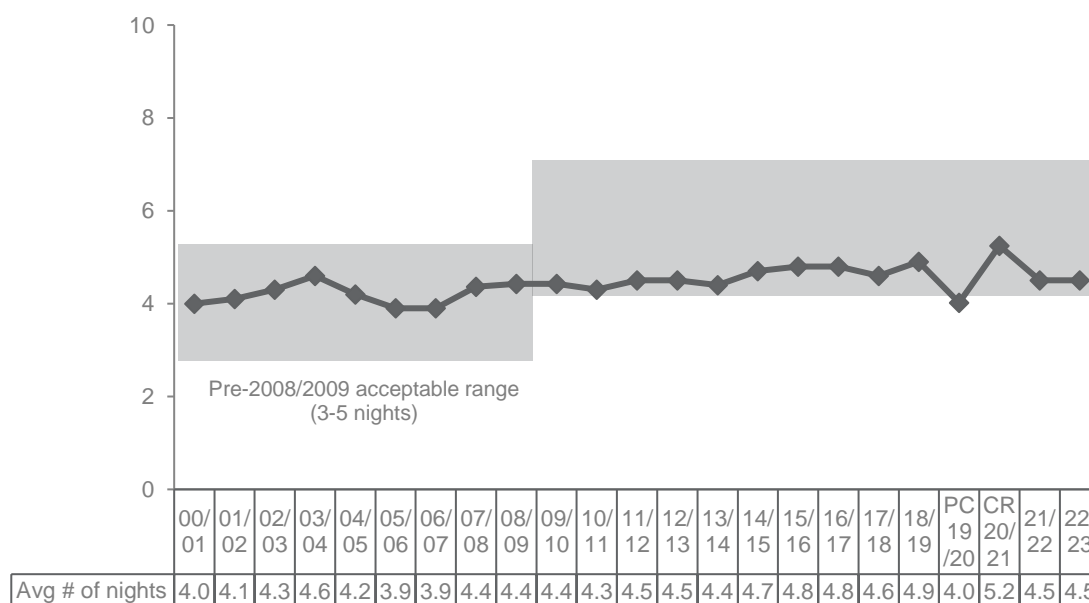
Significant and notable differences between subgroups:

- Consistencies with observations from the previous wave:
 - ▶ More intrastate (91%) and interstate (87%) visitors stayed one or more nights than international visitors (76%); whereas more international (24%) and interstate (13%) visitors only stayed for a day trip compared to intrastate (9%); and
 - ▶ More air arrivals (97%) stayed one or more nights than sea arrivals (88%).
- New in 22/23
 - ▶ Those who visited in autumn (82%) were less likely to stay one or more nights than those who visited in other seasons (winter 90%, spring 93%, summer 90%); and
 - ▶ Repeat visitors were more likely to stay one or more nights compared to first-time visitors (90% vs 87%).

Length of stay

The average number of nights stayed on Kangaroo Island has remained consistent since the last wave at 4.5 nights. 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 (22/23 n=3288)

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:

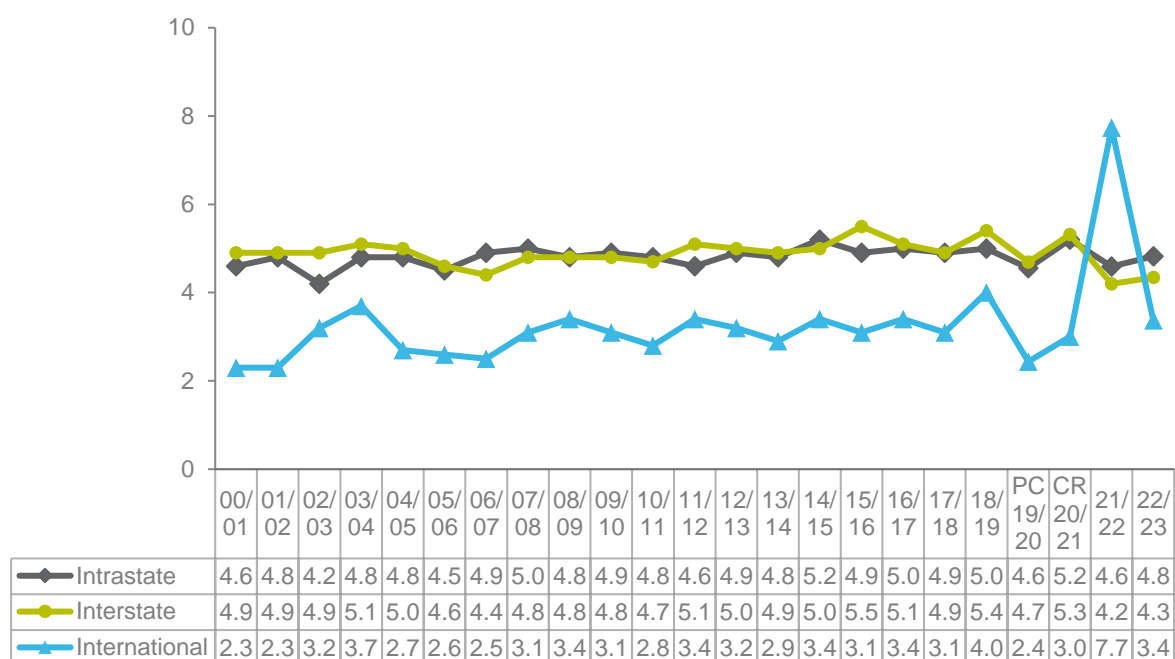
- Consistent with observations from the previous wave:
 - ▶ Visitors who spent up to \$200 a night stayed significantly longer (avg. 5.6 nights) than those who spent more than \$200 a night (3.3); and
 - ▶ Repeat visitors stayed longer (5.3 nights) than first time visitors (3.9).
- New in 22/23:
 - ▶ Intrastate (4.8) and interstate visitors (4.3) stayed significantly longer compared to international visitors (3.4).

Average number of nights by visitor origin

The length of stay decreased markedly for international visitors from 7.7 nights in 2021/22 to 3.4 nights in the 2022/23 period (though this was not statistically significant). This decrease more so reflects the fewer number of international responses in 21/22.

NOTE: International visitors have a small sample size, please take caution when interpreting results: 2021/22 period (n=19)

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



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

Base: Visitors responding, 22/23 Intrastate n=1239, Interstate n=1807, International n=228

Note: Missing cases excluded.

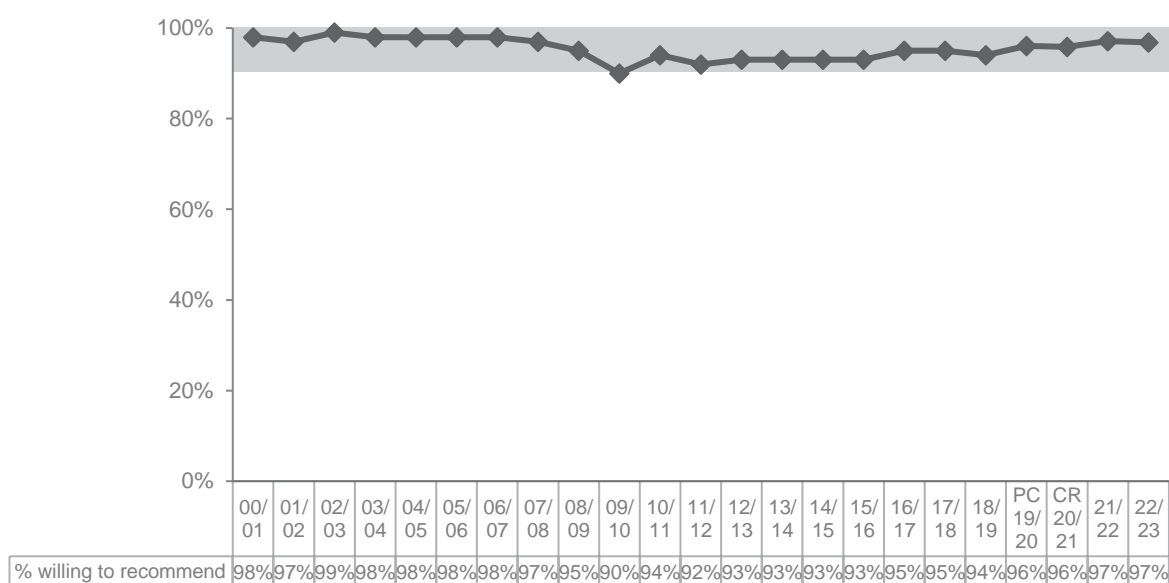
Note: Arrows indicate significant change in score from previous year. The change for international was not significant, as the 2021/22 period had only 19 international visitors – a base size too small for a meaningful comparison.

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

Optimal Conditions	Indicator	Acceptable Range	22/23 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 consistent since the last wave (97%); this result sits at the upper end of the acceptable range of 90-100%.

Figure 4: Willingness to recommend



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

Base: Visitors responding, (22/23 n= 3711)

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 (97%) would recommend Kangaroo Island to others than those that came for a day trip (93%).

New in 2022/23:

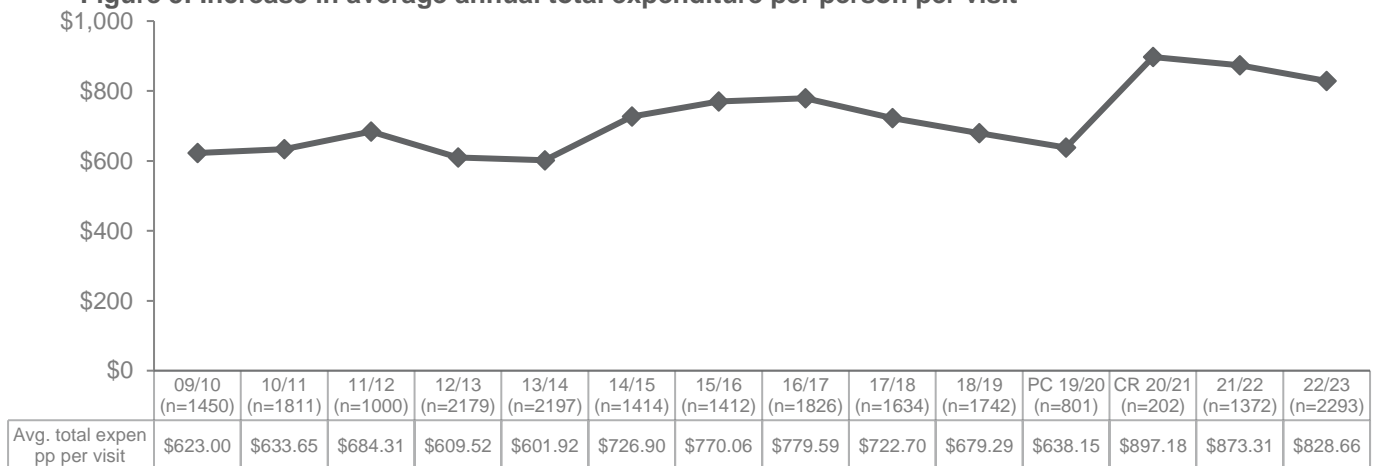
- ▶ More intrastate (98%) and interstate visitors (97%) would recommend Kangaroo Island to others than international visitors (92%);
- ▶ More people that visited in the summer (98%) would recommend Kangaroo Island compared to those who visited in other seasons (winter 97%, spring 97%, autumn 96%);
- ▶ More people who spent \$200 or less (98%) were likely to recommend Kangaroo Island to others compared to those who spent more than \$200; and
- ▶ Those who were cruise ship arrivals were more likely to not recommend (5%) the Island than non-cruise ship arrivals (1%), however the majority were still likely to recommend (89%).

Average expenditure per visit (EC1f)

Optimal Conditions	Indicator	Acceptable Range	22/23 Result
Tourism optimises economic benefits for Kangaroo Island	Average annual total expenditure per visit	5% - 10% increase	✗

The average spend in the 2022/23 period (\$828.66) decreased by 5.11% compared to the last wave (\$873.31), 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, (22/23 n=3655)

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:

- Air arrivals (\$1,483.24) spent significantly more than sea arrivals (\$805.68);
- First time visitors (\$858.84) spent significantly more than repeat visitors (\$780.25); and
- Visitors that spent more than \$200 per night (\$1229.6) spent significantly more than visitors that spent only up to \$200 (\$602.2).

New in 2022/23:

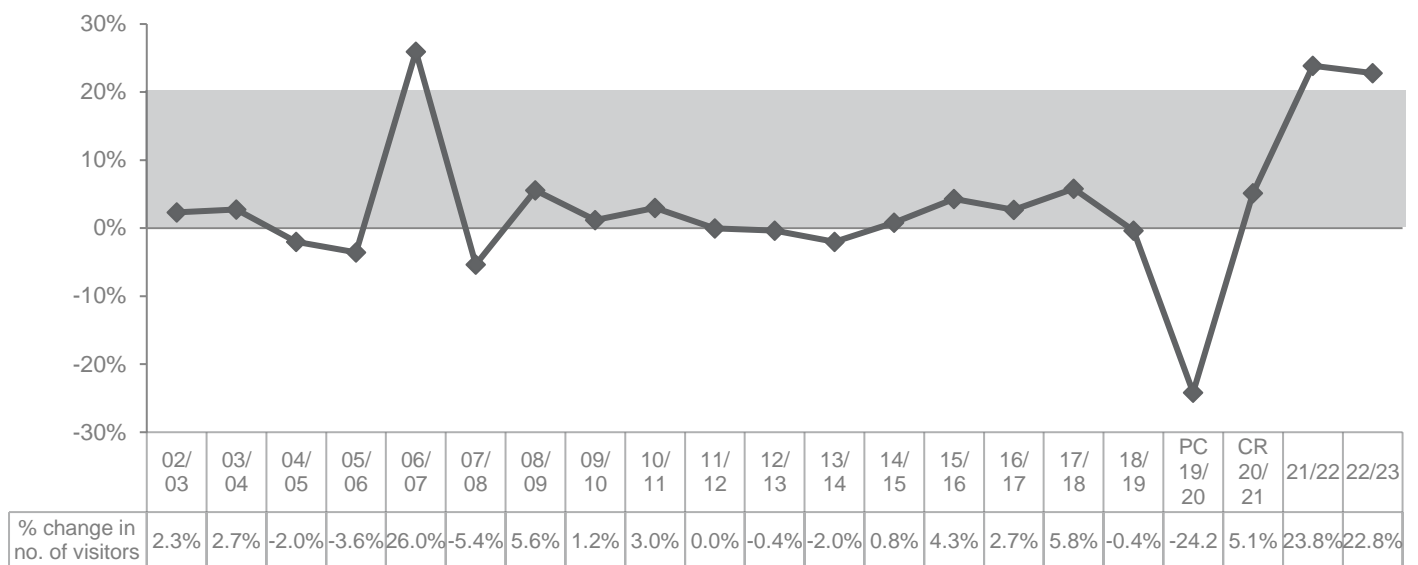
- Spring visitors (\$994.83) spent significantly more than summer (\$828.72) and autumn (\$764.96) visitors;
- Interstate visitors (\$892.15) spent significantly more per visit compared to intrastate (\$751.05) and international visitors (\$689.43); and
- Those who did not arrive by cruise ship (\$850.57) spent significantly more per visit than the cruise ship arrivals (\$277.54).

Annual number of visitors (EC1g)

Optimal Conditions	Indicator	Acceptable Range	21/22 Result
Tourism optimises economic benefits for Kangaroo Island	Annual number of visitors to Kangaroo Island	0% - 20% increase	✓

In 22/23 the proportional increase of visitors once again exceeded the upper range of the target, the second time since 06/07.

Figure 6: Increase in annual number of visitors



Note: Data provided by TOMM Committee.

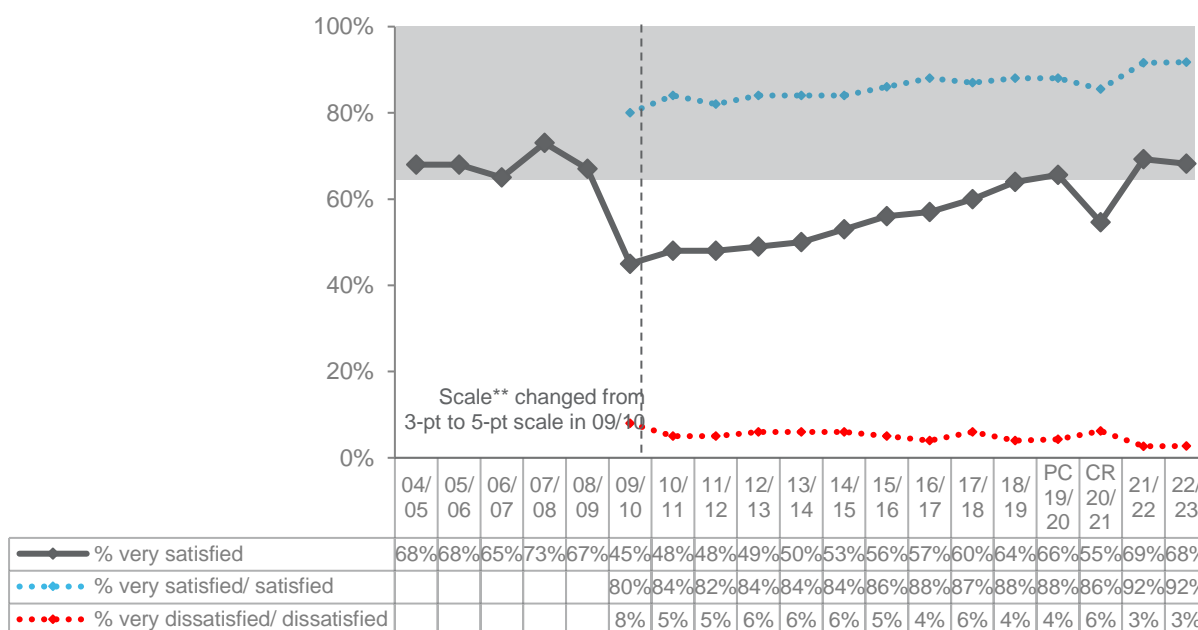
Satisfaction with customer service received (EC2c)

Optimal Conditions	Indicator	Acceptable Range	22/23 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 2022/23 period (92%) were satisfied/ very satisfied with the level of customer service they received which has remained consistent since the last wave. The percentage of visitors who reported being very satisfied with the customer service they received (68%) has also remained consistent since the last wave and is therefore still in the acceptable range.

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

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, (22/23 n=3666)

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%.

Significant and notable differences between subgroups:

📌 New in 2022/23:

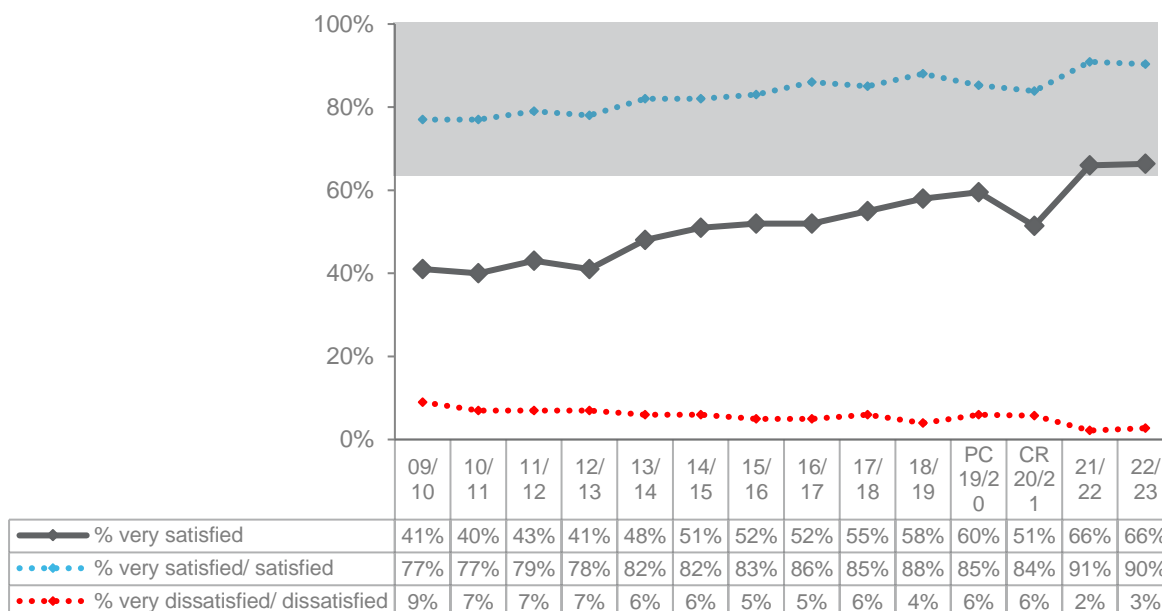
- ▶ Intrastate and interstate visitors (both 92%) were significantly more likely to be satisfied with the customer service they received compared to international visitors (85%); additionally, interstate visitors were more likely to be very satisfied compared to intrastate visitors (70% vs 66%); and
- ▶ 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 (73% vs 68%).

Satisfaction with professionalism of tourism operators (EC2d)

Optimal Conditions	Indicator	Acceptable Range	22/23 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 2022/23 period (90%) 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 2022/23 period (66%) 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, (22/23 n=3302)

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

Significant and notable differences between subgroups:

📌 New in 2022/23:

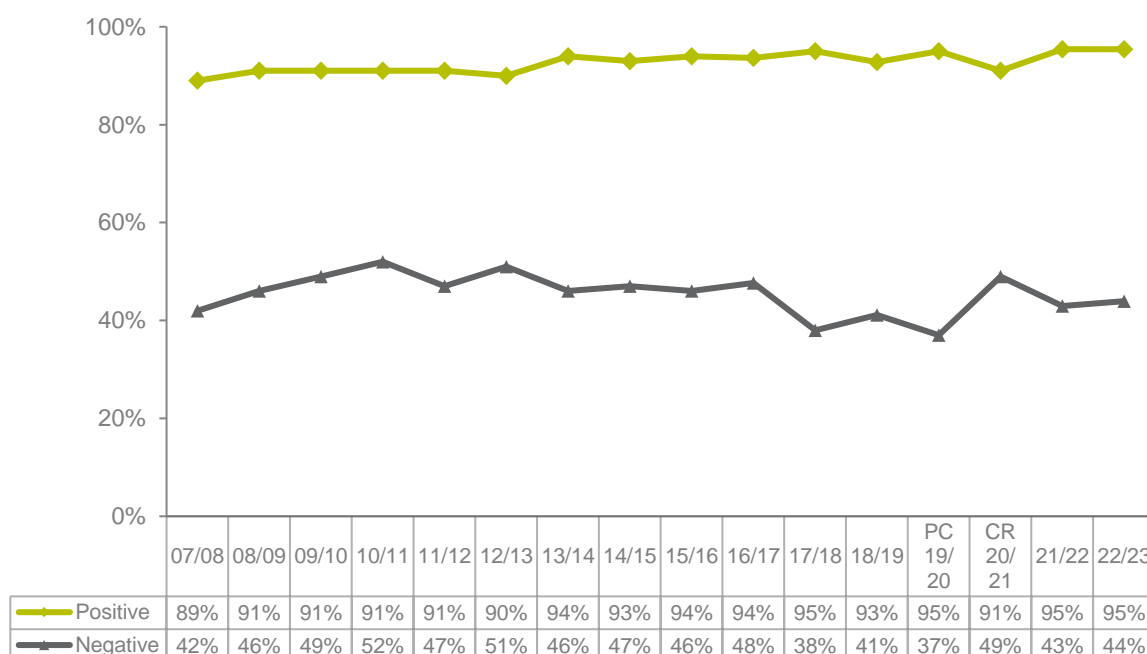
- ▶ Intrastate and interstate visitors (both 91%) were more likely to be satisfied than international visitors (81%); and
- ▶ Those who spent more than \$200 per night were more likely to report being very satisfied compared to those who spent up to \$200 (68% vs 64%).

Compliments and complaints (EC2e)

Optimal Conditions	Indicator	Acceptable Range	22/23 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 comments in 2022/23 remained consistent with the previous wave (95%) and the number of negative comments increased slightly since the previous wave from 43% to 44% (though this is not statistically significant); therefore, these 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, (22/23 n=2520)

Note: Don't know and missing cases excluded.

Significant and notable differences between subgroups:

📌 New in 2022/23:

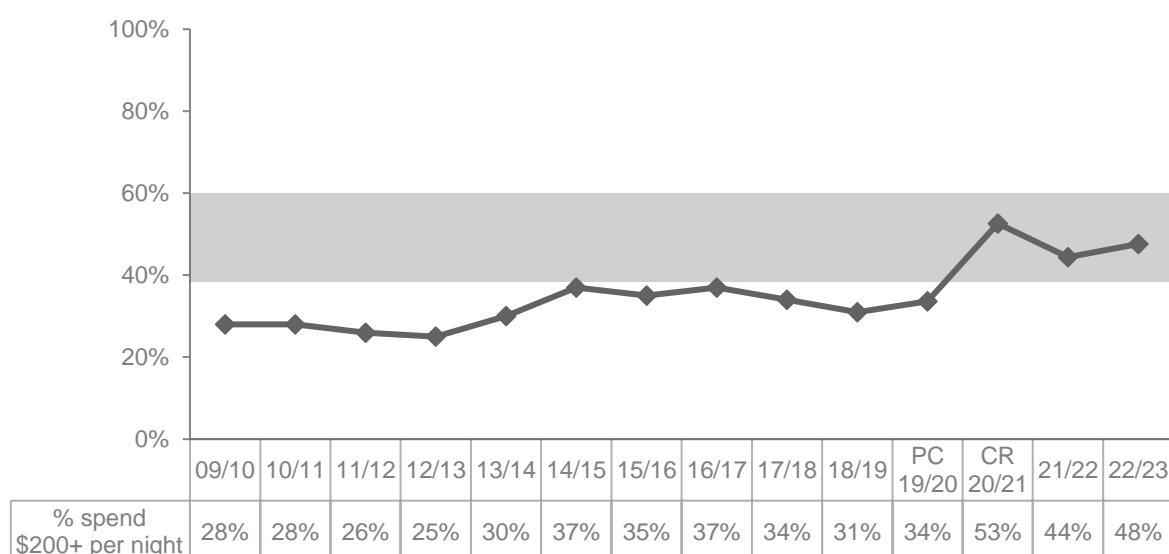
- ▶ Visitors who stayed one or more nights were more likely to leave positive comments compared to day trippers (96% vs 93%);
- ▶ International visitors (54%) were more likely to leave negative comments compared to intrastate (45%) and interstate visitors (42%); and
- ▶ Visitors not arriving by cruise ship (96%) were more likely to leave positive comments than the cruise ship arrivals (89%).

Average spend per night over \$200 (EC3c)

Optimal Conditions	Indicator	Acceptable Range	22/23 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 2022/23 who reported an average spend of over \$200 per night was 48% therefore meeting the 40-60% goal for the third 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?

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, (22/23 n=3226)

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

Significant and notable differences between subgroups:

- Consistent with observations from the previous wave:
 - ▶ Those arriving by air (75%) were more likely to spend over \$200 per night than those arriving by sea (47%); and
 - ▶ First time visitors (56%) were more likely to spend over \$200 per night than repeat visitors (35%).
- New in 2022/23:
 - ▶ More interstate (53%) and international visitors (56%) spent over \$200 per night compared to intrastate visitors (39%); and
 - ▶ More spring (57%), winter (54%) and autumn visitors (49%) spent over \$200 compared to summer visitors (42%).

Summary of sub-group scores for economic indicators (22/23)

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"> Intrastate and interstate visitors All seasons Sea and air arrivals Repeat visitors Those who spent up to \$200 a night 	<ul style="list-style-type: none"> Intrastate visitors Repeat visitors Those who spent up to \$200 a night
EC1e	Proportion of visitors that would recommend Kangaroo Island to others as a holiday destination (90-100%)	<ul style="list-style-type: none"> All subgroups except cruise ship arrivals 	<ul style="list-style-type: none"> Intrastate visitors Summer visitors Those who spent up to \$200 a night Stayed one or more nights Non-cruise ship arrivals
EC1f	Average annual total expenditure per visit (5-10% increase)	<ul style="list-style-type: none"> Winter and spring visitors Stayed one or more nights 	<ul style="list-style-type: none"> Interstate visitors Spring visitors First-time visitors Air arrivals More than \$200 spent per night Stayed one or more nights
EC2c	Proportion of visitors that are very satisfied with the level of customer service they receive (65-100%)	<ul style="list-style-type: none"> All subgroups except international visitors 	<ul style="list-style-type: none"> Interstate visitors Day trippers
EC2d	Proportion of customers that are highly satisfied with the professionalism of tourism operators (65-100%)	<ul style="list-style-type: none"> All subgroups except those spending up to \$200 per night 	<ul style="list-style-type: none"> Those spending more than \$200 per night
EC2e	The number of compliments and complaints received from visitors	<ul style="list-style-type: none"> There are no statistically significant differences for increases to compliments or decreases to complaints amongst any subgroups from the previous year. 	<ul style="list-style-type: none"> Those staying one or more nights (compliments) Non-cruise ship arrivals (compliments) International visitors (complaints)
EC3c	Proportion of visitors whose average spend per night exceeds \$200 (40-60%)	<ul style="list-style-type: none"> Interstate and international visitors All seasons First-time visitors Air and sea arrivals 	<ul style="list-style-type: none"> International visitors Spring visitors First-time visitors Air arrivals

Experiential Indicators

Overview

Almost all of the **'Kangaroo Island delivers authentic and credible experiences consistent with its positioning'** indicators fell within their respective acceptable ranges in the 2022/23 period.

The indicators which did not fall within the acceptable range were the proportion of visitors that 'experienced farming and rural landscapes', which fell just short of the target (88%) and the proportion of visitors 'very satisfied with their overall experience on Kangaroo Island' (86%).

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.

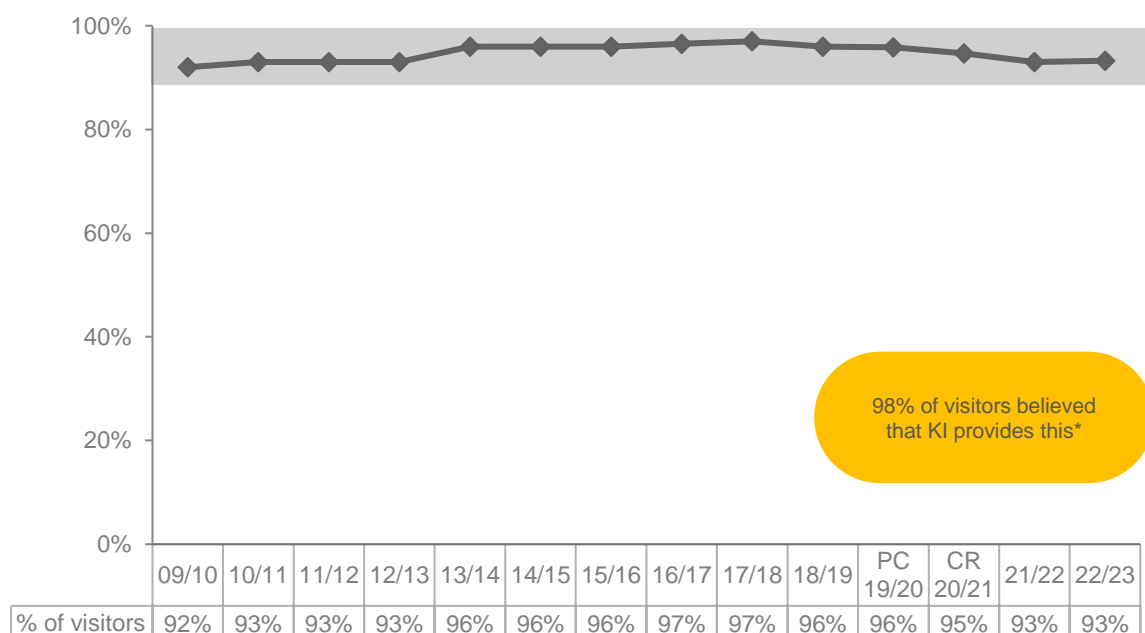
The proportion of visitors that would recommend Kangaroo Island as a holiday destination (97%) and the proportion of repeat visitation (38%) both remained within the acceptable range, despite the level of repeat visitation decreasing.

Viewed wildlife in natural environment (EX1b)

Optimal Conditions	Indicator	Acceptable Range	22/23 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 2022/23 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



Q18.2 For each of the following please indicate whether experienced this while on Kangaroo Island?

Base: Visitors responding, (22/23 n=3656)

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 saw wildlife in natural surroundings than day trippers (95% vs 79%).

New in 2022/23:

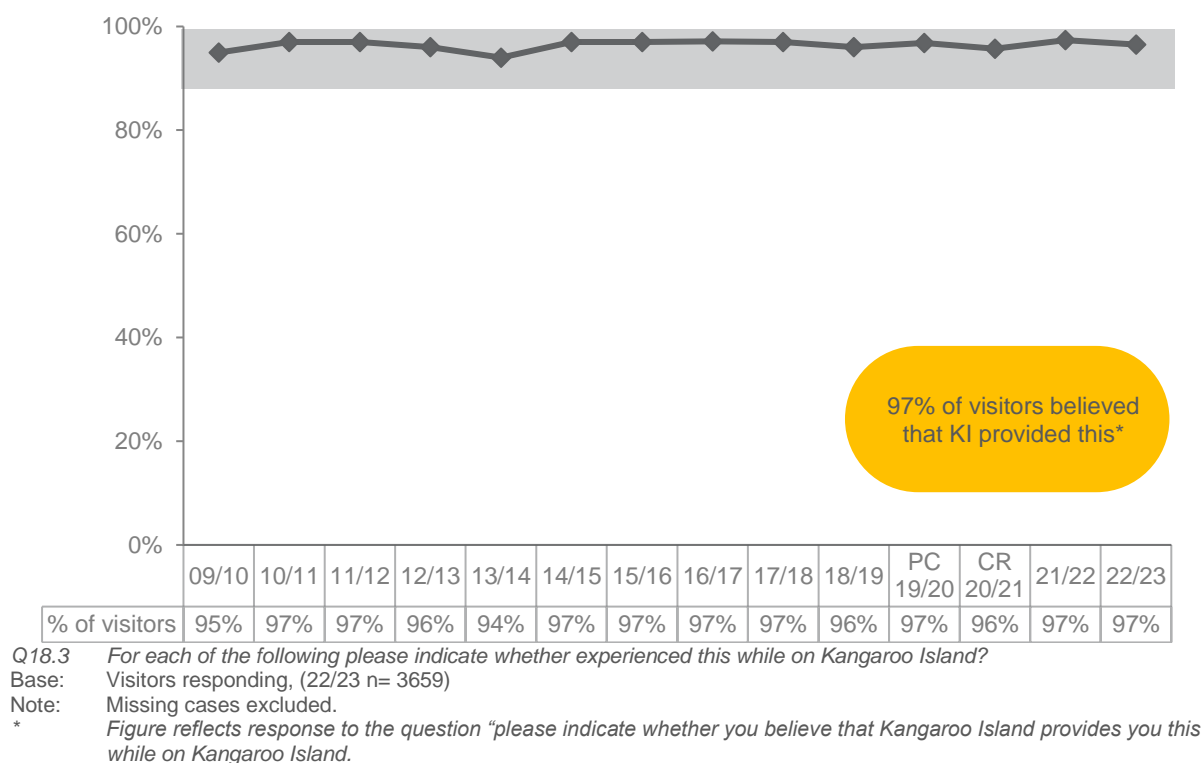
- ▶ More interstate (94%) and international visitors (96%) saw wildlife in natural surroundings than intrastate visitors (91%);
- ▶ More first time visitors saw wildlife in natural surroundings than repeat visitors (94% vs 91%); and
- ▶ More non-cruise ship arrivals saw wildlife in natural surroundings than cruise ship arrivals (94% vs 63%).

Experienced scenic variety without crowds (EX1c)

Optimal Conditions	Indicator	Acceptable Range	22/23 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 (97%) of the visitors surveyed during 22/23 experienced scenic variety without crowds; this continues to fall within the acceptable range of 90%-100% and is consistent with previous waves.

Figure 12: Visitors that experienced scenic variety without crowds



Significant and notable differences between subgroups:

➡ New in 2022/23:

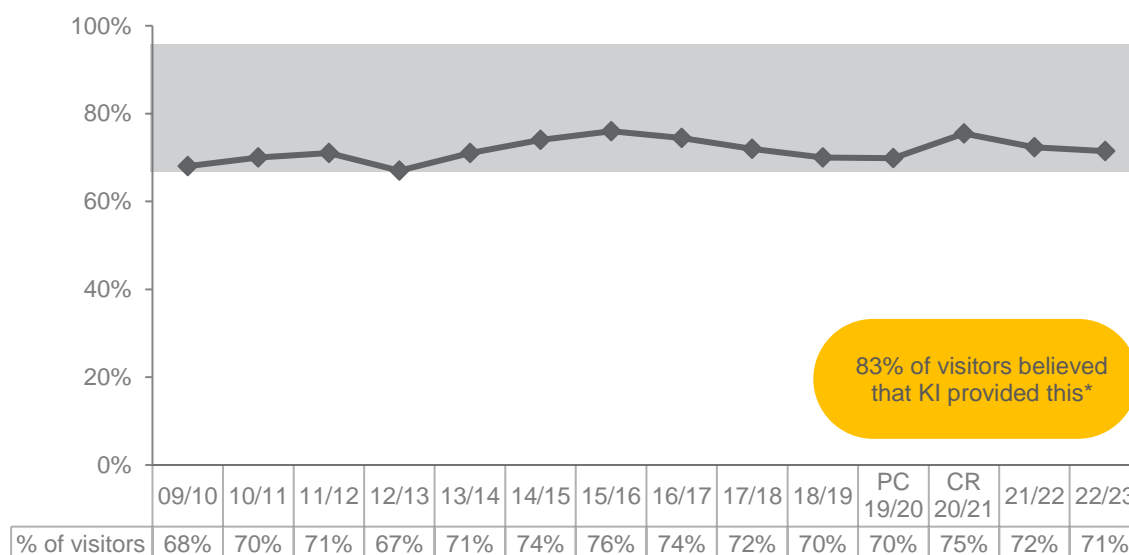
- ▶ Those who stayed one or more nights were more likely to experience scenic variety without crowds compared to day trippers (98% vs 89%); expectedly, more of those that stayed one or more nights believed Kangaroo Island provides this compared to day trippers (98% vs 94%); and
- ▶ Those who did not arrive by cruise ship were more likely to experience scenic variety without crowds compared to the cruise ship arrivals (97% vs 81%).

Experienced cultural heritage and history of settlement (EX1d)

Optimal Conditions	Indicator	Acceptable Range	22/23 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 2022/23 period indicated they experienced the cultural heritage and history of the settlement. This has decreased by one percent since the previous wave from 72% to 71% (not statistically significant); however, this result remains within the acceptable range of 70-100%.

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, (22/23 n=3636)

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:

➡ New in 2022/23:

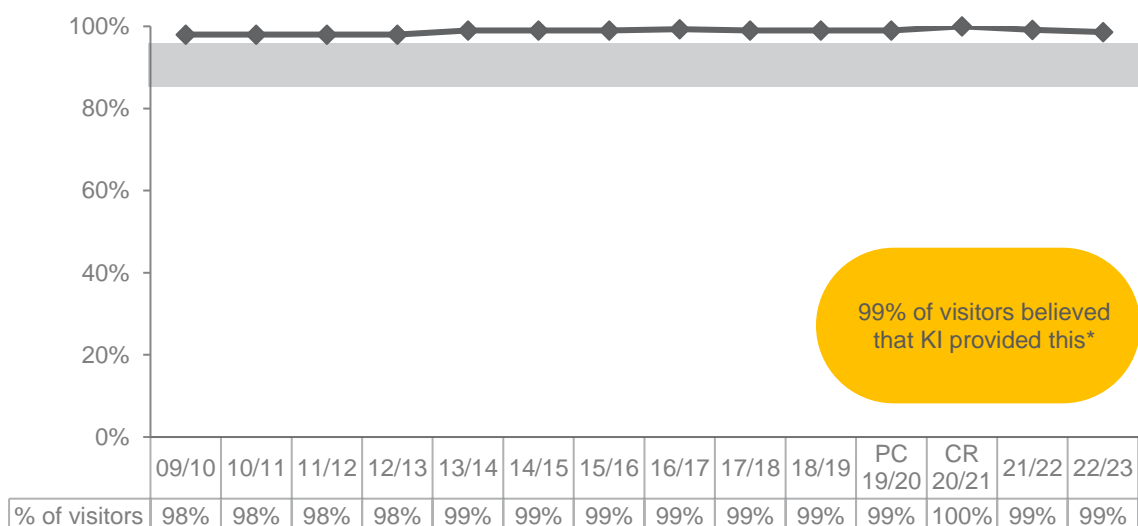
- ▶ More interstate visitors (74%) experienced Kangaroo Island's cultural heritage and history of settlement compared to intrastate (69%) and international visitors (64%);
- ▶ More spring visitors (78%) experienced Kangaroo Island's cultural heritage and history of settlement compared to winter (72%) and summer visitors (68%); additionally, more autumn visitors experienced Kangaroo Island's cultural heritage and history of settlement compared to summer visitors (73% vs 68%);
- ▶ First time visitors experienced more of Kangaroo Island's cultural heritage and history of settlement compared to repeat visitors (73% vs 68%); and
- ▶ More of those that stayed one or more nights experienced Kangaroo Island's cultural heritage and history of settlement compared to day trippers (72% vs 66%).
- ▶ More non-cruise ship arrivals experienced Kangaroo Island's cultural heritage and history of settlement compared to those who did (72% vs 61%).

Experienced spectacular scenery and coastal landscapes (EX1e)

Optimal Conditions	Indicator	Acceptable Range	22/23 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors that experienced spectacular scenery and coastal landscapes	90% - 100%	✓

Almost all 2022/23 visitors surveyed (99%) experienced spectacular scenery and coastal landscapes and believe Kangaroo Island provides this; this has remained consistent since the previous wave and continues to fall within 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, (22/23 n= 3654)

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:

➡ New in 2022/23:

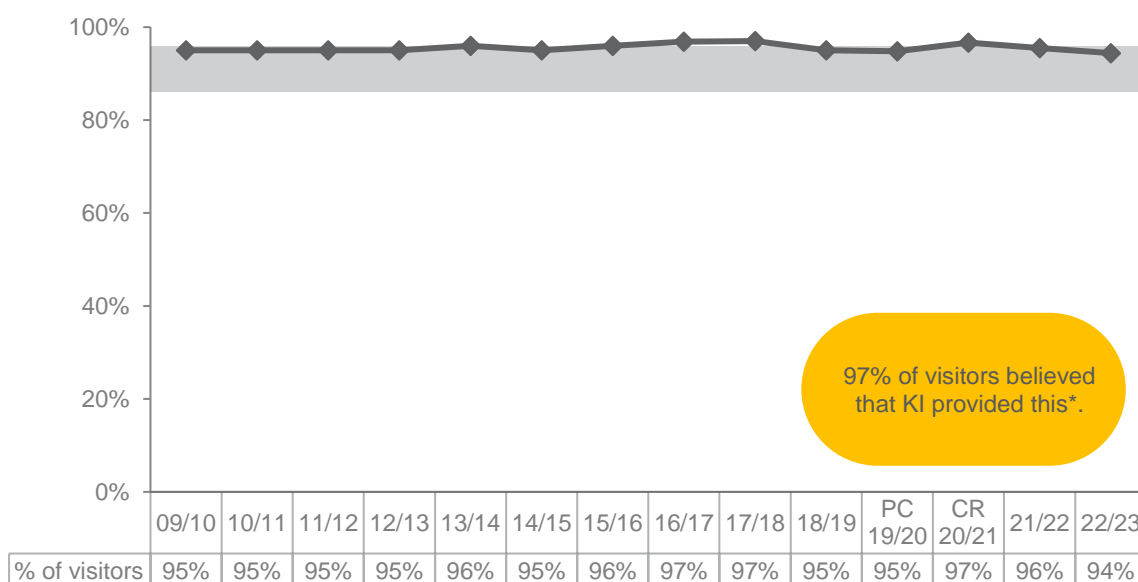
- ▶ More first-time visitors experienced spectacular scenery and coastal landscapes compared to repeat visitors (99% vs 98%); and
- ▶ More of those that stayed one or more nights experienced spectacular scenery and coastal landscapes compared to day trippers (99% vs 95%); expectedly, more of those that stayed one or more nights believed Kangaroo Island provides this than day trippers (99% vs 98%).
- ▶ Non-cruise ship arrivals (99%) were less likely to experience spectacular scenery and coastal landscapes than non-cruise ship arrivals (91%).

Experienced areas of untouched natural beauty (EX1f)

Optimal Conditions	Indicator	Acceptable Range	22/23 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 2022/23 has slightly decreased since the last wave from 96% to 94% - though this is not statistically significant. However, this result continues to be within the acceptable range of 90-100%.

Figure 15: Visitors that experienced areas of untouched natural beauty



Q18.6 For each of the following please indicate whether you experienced this while on Kangaroo Island?

Base: Visitors responding, (22/23 n=3646)

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:

- Visitors who stayed one or more nights (96%) were more likely to experience areas of untouched natural beauty compared to day trippers (86%); additionally, more of those that stayed one or more nights believed Kangaroo Island provides this than day trippers (98% vs 95%).

New in 2022/23:

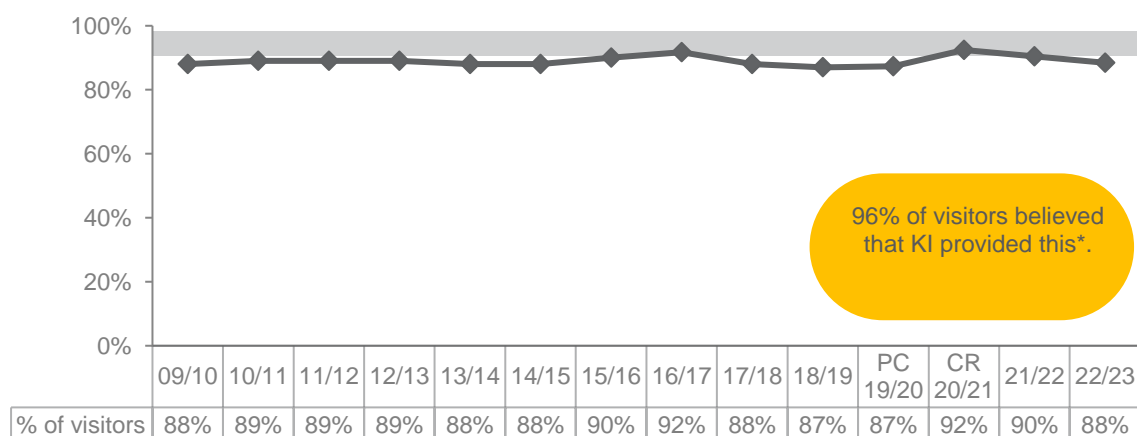
- More spring visitors (97%) experienced areas of untouched natural beauty than summer (94%) and autumn visitors (93%); additionally, more winter visitors experienced areas of untouched natural beauty than autumn visitors (96% vs 93%);
- More first-time visitors experienced areas of untouched natural beauty than repeat visitors (95% vs 93%); and
- More non-cruise ship arrivals (95%) experienced areas of untouched natural beauty than cruise ship arrivals (74%).

Experienced farming and rural landscapes (EX1g)

Optimal Conditions	Indicator	Acceptable Range	22/23 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors that experienced farming and rural landscapes	90% - 100%	X

The proportion of visitors who experienced farming and rural landscapes no longer remains within the acceptable range of 90-100%, having dropped slightly from 90% in 2021/22 to 88% in the 2022/23 period - though this difference is not statistically significant. Additionally, those that believe Kangaroo Island provides this has remained high but decreased by 1% (96% in 2022/23 vs 97% in 2021/22).

Figure 16: Visitors that experienced farming and rural landscapes



Q18.7 For each of the following please indicate whether you experienced this while on Kangaroo Island?

Base: Visitors responding, (22/23 n= 3642)

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:

- Air arrivals reported experiencing more farming and rural landscapes compared to sea arrivals (93% vs 88%).

New in 2022/23:

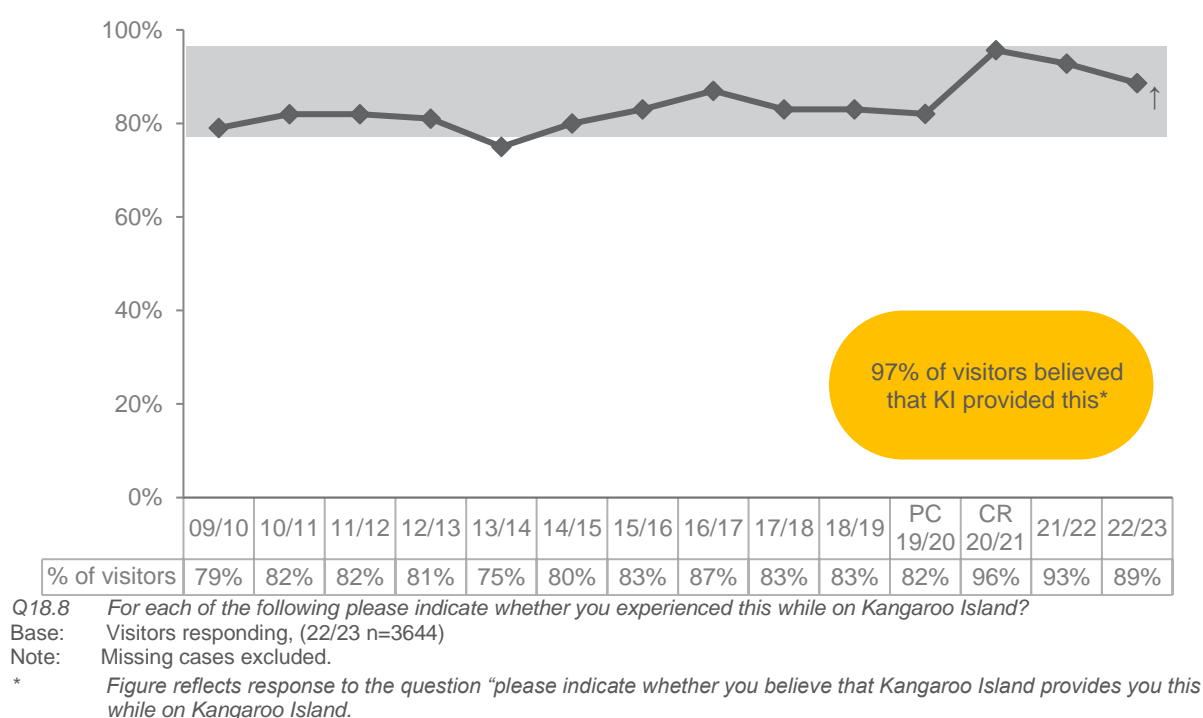
- More interstate visitors (91%) experienced farming and rural landscapes than intrastate (85%) and international visitors (84%). Furthermore, more intrastate (97%) and interstate visitors (96%) believed Kangaroo Island provides farming and rural landscapes than international visitors (91%);
- More winter and spring visitors (both 93%) experienced farming and rural landscapes than summer (88%) and autumn visitors (85%). Additionally, more winter visitors (98%) believed Kangaroo Island provides farming and rural landscapes compared to summer visitors (95%);
- More first-time visitors experienced farming and rural landscapes than repeat visitors (89% vs 87%). Interestingly, repeat visitors were more likely to believe Kangaroo Island provides this compared to first-time visitors (97% vs 95%);
- More of those who stayed one or more nights experienced farming and rural landscapes than day trippers (91% vs 71%) and they were also more likely to believe this is provided by Kangaroo Island compared to day trippers (97% vs 90%); and
- More cruise ship arrivals (90%) experienced farming and rural landscapes than non-cruise ship arrivals (51%).

Experienced local Kangaroo Island produce (EX1h)

Optimal Conditions	Indicator	Acceptable Range	22/23 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 93% to 89%.

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 (89%) experienced Kangaroo Island produce than international visitors (72%);
- ▶ More air arrivals experienced Kangaroo Island produce compared to sea arrivals (93% vs 88%); and
- ▶ More visitors who stayed one or more nights experienced Kangaroo Island produce (92% vs 64%) and believed that Kangaroo Island provides this (98% vs 90%) compared to day trippers.

New in 2022/23:

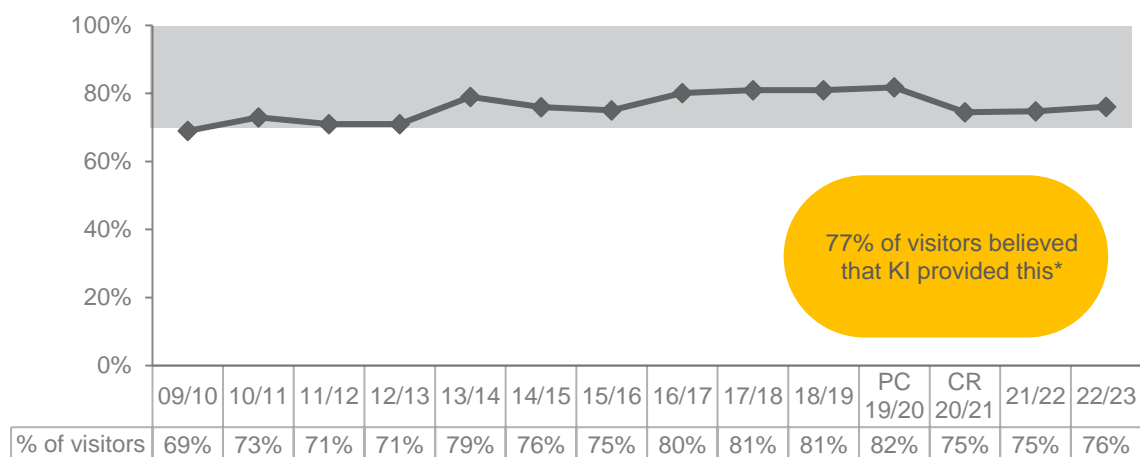
- ▶ More intrastate visitors experienced Kangaroo Island's produce than interstate visitors (91% vs 89%). Additionally, more intrastate (98%) and interstate visitors (96%) believed Kangaroo Island provides this than international visitors (92%);
- ▶ More spring (91%) and summer visitors (90%) experienced Kangaroo Island's produce than autumn visitors (86%);
- ▶ More repeat visitors experienced Kangaroo Island's produce than first-time visitors (91% vs 87%) and were more likely to believe Kangaroo Island provides this (98% vs 96%); and
- ▶ More non-cruise ship arrivals (90%) experienced Kangaroo Island's produce than cruise ship arrivals (62%).

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

Optimal Conditions	Indicator	Acceptable Range	22/23 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 increased by one percent since the previous wave (76% vs 75%) - 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, (22/23 n=3604)

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:

📌 New in 2022/23:

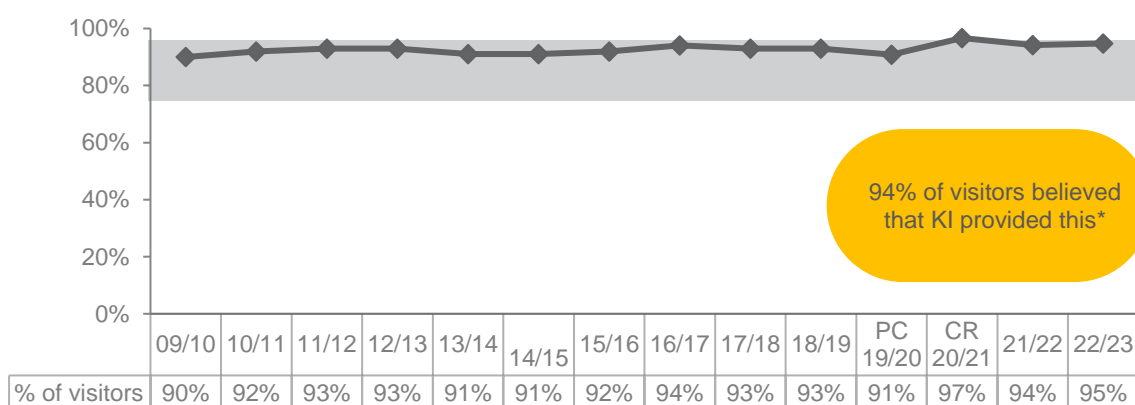
- ▶ More interstate (77%) and international visitors (83%) experienced Kangaroo Island as one of Australia's top three nature and wildlife experiences compared to intrastate visitors (73%). Surprisingly, more intrastate visitors (82%) believed Kangaroo Island provides this compared to interstate (73%) and international visitors (74%);
- ▶ More first-time visitors experienced Kangaroo Island as one of Australia's top three nature and wildlife experiences than repeat visitors (78% vs 73%). Interestingly, more repeat visitors believed Kangaroo Island provides this than first time visitors (81% vs 74%);
- ▶ Those that stayed one or more nights were more likely to experience Kangaroo Island as one of Australia's top three nature and wildlife experiences than day trippers (78% vs 63%);
- ▶ More of those who arrived by sea believed Kangaroo Island provides this compared to air arrivals (77% vs 71%); and
- ▶ More non-cruise ship arrivals (78%) experienced Kangaroo Island as one of Australia's top three nature and wildlife experiences than cruise ship arrivals (38%).

Kangaroo Island has a friendly local community (EX1j)

Optimal Conditions	Indicator	Acceptable Range	22/23 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 95% in 2022/23; this has increased by one percent since the last wave (94%) - 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



Q18.10 For each of the following please indicate whether you experienced this while on Kangaroo Island?

Base: Visitors responding, (22/23 n=3644)

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 who stayed one or more nights reported experiencing a friendly local community compared to day trippers (96% vs 87%).

New in 2022/23:

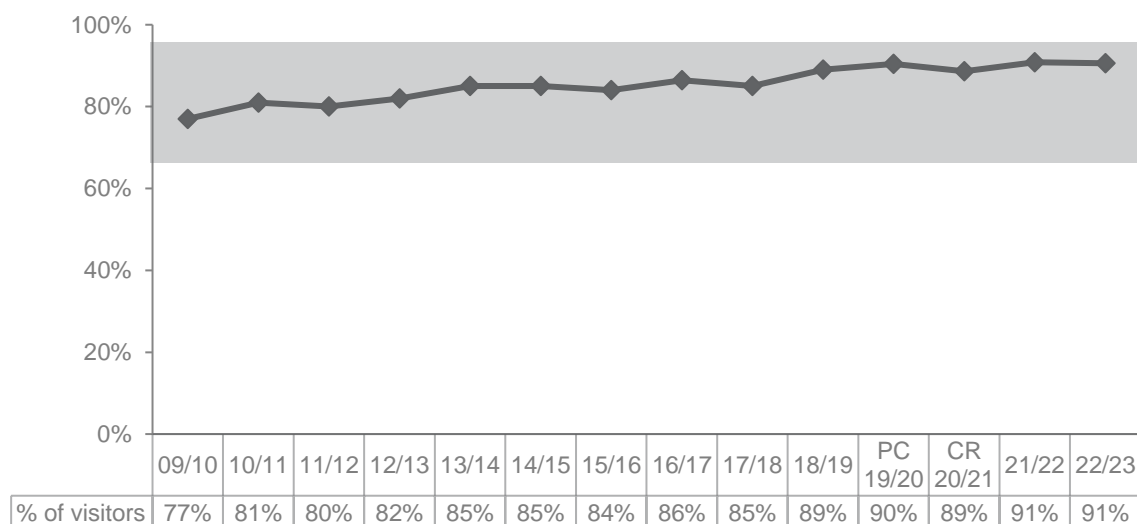
- ▶ More intrastate visitors (96%) reported experiencing a friendly local community compared to interstate (94%) international visitors (93%). Additionally, intrastate visitors (96%) were more likely to report believing that Kangaroo Island provides this compared to interstate (93%) and international visitors (89%). Furthermore, interstate visitors were more likely to report believing that Kangaroo Island provides this than international visitors (93% vs 89%);
- ▶ More spring visitors reported experiencing a friendly local community than autumn visitors (97% vs 93%);
- ▶ Repeat visitors were more likely to report experiencing a friendly local community than first-time visitors (96% vs 94%) and believing that Kangaroo Island provides this (96% vs 93%); and
- ▶ More visitors who stayed one or more nights reported believing Kangaroo Island provides a friendly local community compared to day trippers (95% vs 87%).

Agreement with positioning statement (EX1k)

Optimal Conditions	Indicator	Acceptable Range	22/23 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 (91%); this has remained consistent with the previous wave and safely falls within the acceptable range of 70%-100%.

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



Q24 To what extent do you agree or disagree with this statement?

Base: Visitors responding, (22/23 n=3709)

Note: Missing cases excluded

** Rated 7-10 on an eleven-point scale, where 0 means strongly disagree and 10 means strongly agree.

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 (86%).

New in 2022/23:

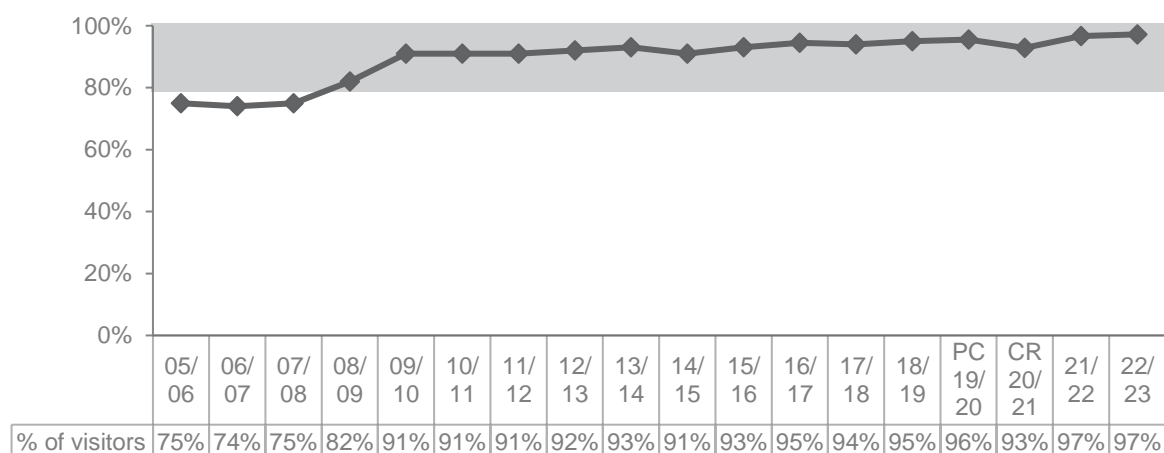
- Intrastate (92%) and interstate visitors (91%) were more likely to agree with the statement than international visitors (84%); and
- Those who spent up to \$200 per night were more likely to agree with the statement than those who spent more than \$200 per night (92% vs 90%).
- Non-cruise ship arrivals (91%) were more likely to agree with the statement than cruise ship arrivals (83%).

Matching expectation set by marketing materials (EX1I)

Optimal Conditions	Indicator	Acceptable Range	22/23 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



Q21 Do you believe that Kangaroo Island's marketing material matched the experience you had while visiting Kangaroo Island?

Base: Visitors responding, (22/23 n=3705)

Note: Missing cases excluded.

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 97%). Expectedly, more first-time visitors found their visit worse than expected than repeat visitors (3% vs 2%).

New in 2022/23:

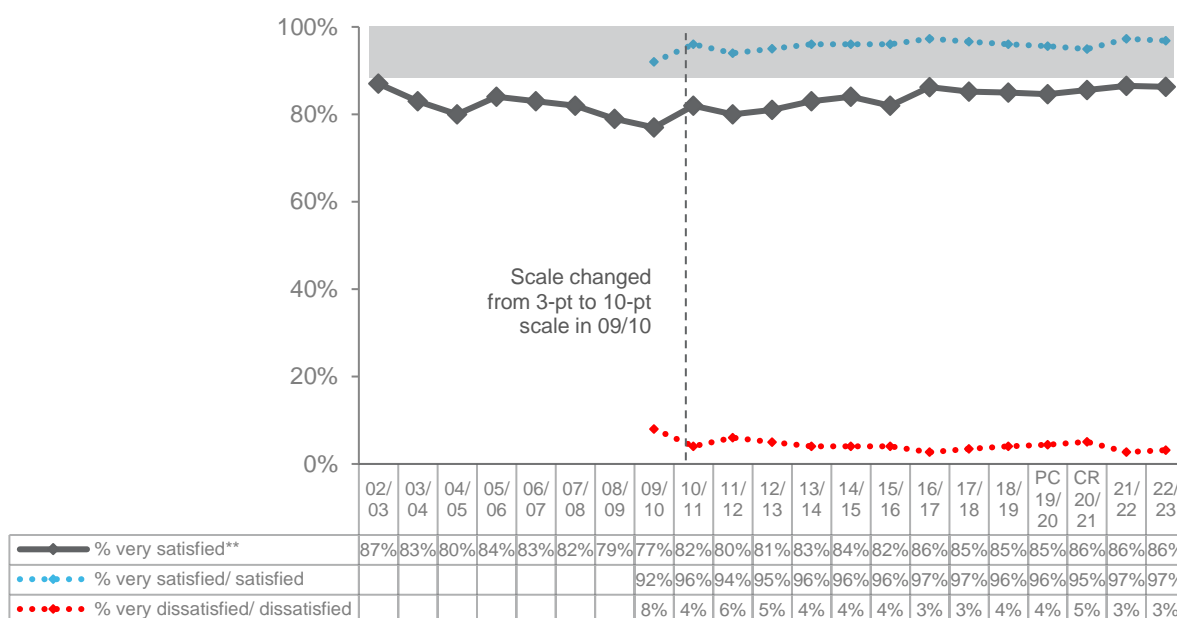
- ▶ More intrastate (99%) and interstate visitors (97%) reported their visit as meeting or exceeding expectations than international visitors (93%). Additionally, more intrastate visitors reported their visit as meeting or exceeding expectations than interstate visitors (99% vs 97%). In contrast, more interstate visitors reported their visit as exceeding expectations than intrastate visitors (34% vs 27%);
- ▶ More summer visitors reported their visit as meeting or exceeding expectations than autumn visitors (98% vs 96%). Additionally, more spring visitors reported their visit as exceeding expectations than autumn visitors (36% vs 28%);
- ▶ More sea arrivals reported their visit as meeting or exceeding expectations than air arrivals (97% vs 95%); and
- ▶ Those that stayed one or more nights were more likely to report their visit as meeting or exceeding expectations than day trippers (97% vs 95%).

Satisfaction with overall experience (EX1m)

Optimal Conditions	Indicator	Acceptable Range	22/23 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%	X

The proportion of surveyed visitors who stated they were very satisfied with their overall experience on Kangaroo Island in this wave (86%) stayed consistent with the COVID-19 recovery period and 2021/22, continuing to remain just below 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, (22/23 n=3707)

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:

➡ New in 2022/23:

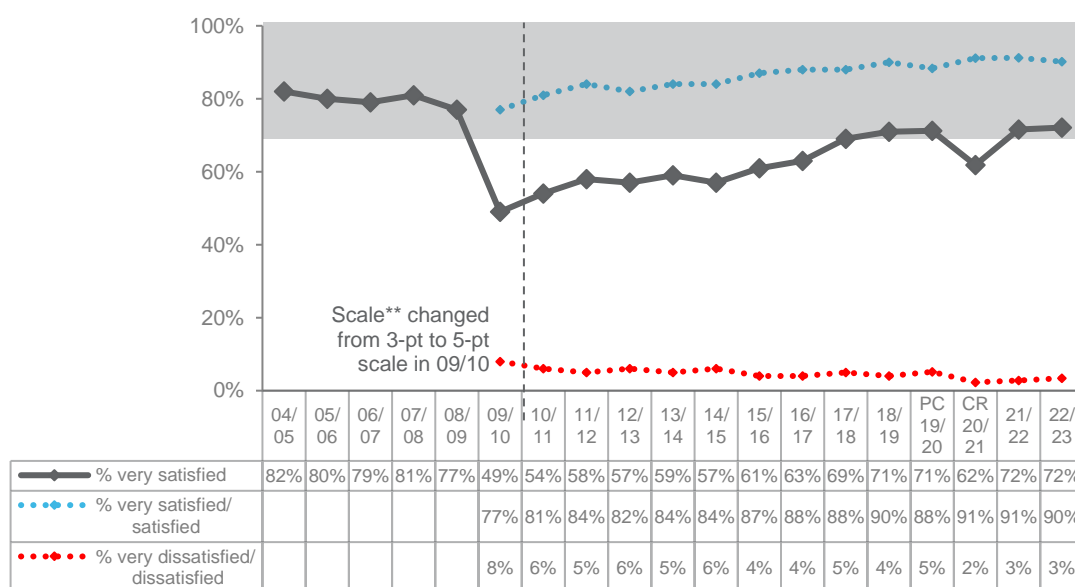
- ▶ More intrastate and interstate visitors were satisfied (respectively 98%, 97%) and very satisfied (respectively, 86%, 88%) with their overall experience compared to international visitors (satisfied 92%, very satisfied 77%);
- ▶ Those that stayed one or more nights were more likely to be satisfied (97%) and very satisfied (88%) with their overall experience compared to day trippers (92%, 77% respectively); and
- ▶ Those who arrived by cruise ship were more likely to be dissatisfied (12%) than the non-cruise ship arrivals (3%).

Seeing native wildlife in its natural environment (EX2a)

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 seeing native wildlife in its natural environment	70% - 100%	✓

Most visitors (72%) were very satisfied with seeing native wildlife in its natural environment; this has remained consistent since the previous wave and 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, (22/23 n=3567)

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

** 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 very satisfied with seeing native wildlife in its natural environment compared to day trippers (73% vs 66%)

New in 2022/23:

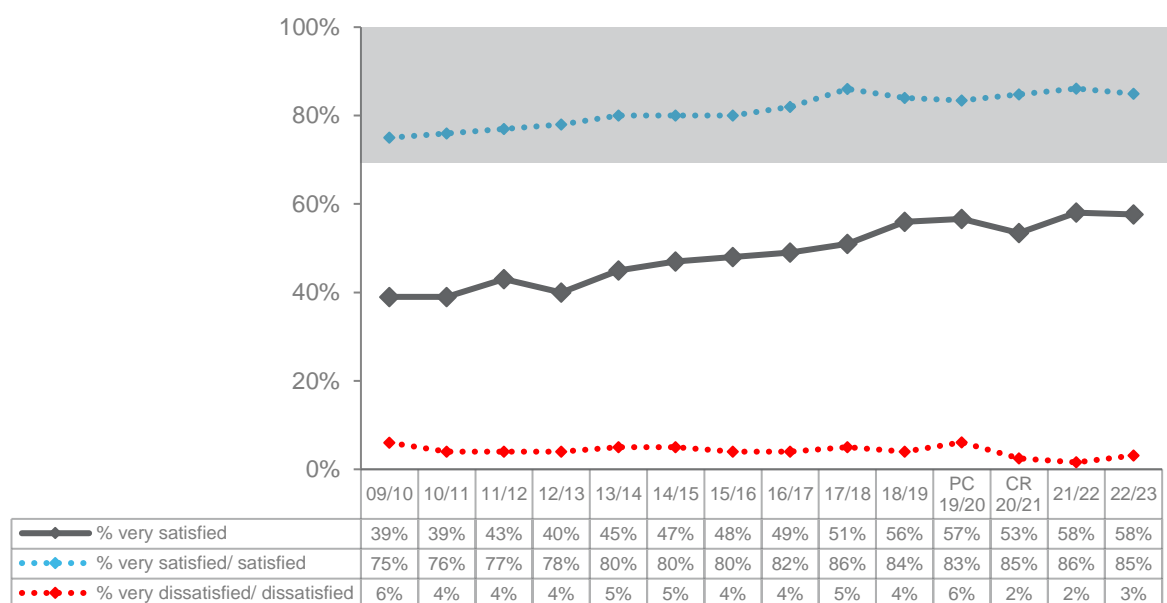
- ▶ More interstate visitors were satisfied/very satisfied compared to international visitors (91% vs 85%). Additionally, intrastate (72%) and interstate visitors (73%) are more likely to be very satisfied compared to international visitors (63%); and
- ▶ Autumn visitors were more likely to be satisfied/very satisfied with seeing native wildlife in its natural environment than spring visitors (92% vs 87%).
- ▶ Non-cruise ship arrivals were more likely to be satisfied/very satisfied with seeing native wildlife in its natural environment than cruise ship arrivals (90% vs 82%). Additionally, they were more likely to be very satisfied (72% vs 60%).

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

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 their opportunity to learn more about the Island's natural environment	70% - 100%	✗

Over half (58%) of visitors reported they were very satisfied with the opportunity to learn more about the Island's natural environment which has remained consistent 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, (22/23 n=3451)

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

Significant and notable differences between subgroups:

📌 New in 2022/23:

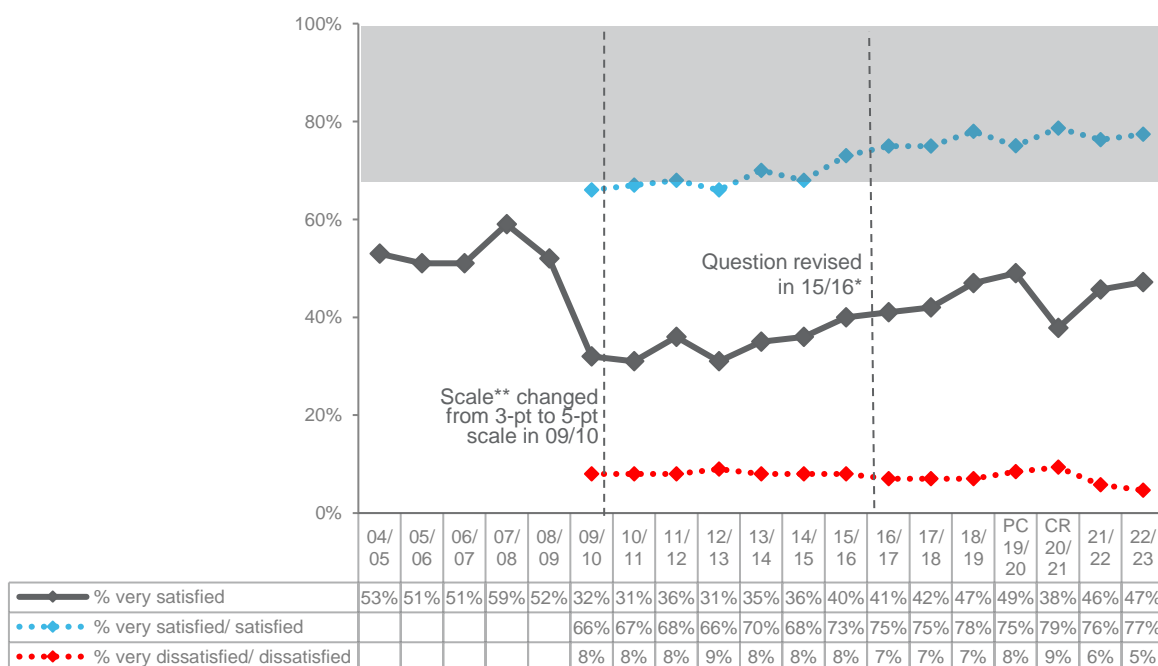
- ▶ More interstate visitors were satisfied/very satisfied than international visitors (86% vs 80%); and
- ▶ Those spending more than \$200 per night were more likely to be very satisfied than those spending up to \$200 per night (59% vs 55%).

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

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 their opportunity to learn more about the Island's history*	70% - 100%	✗

Nearly half (47%) of visitors surveyed this wave were very satisfied with their opportunity to learn more about the Island's history; this has continued to increase slightly following the COVID recovery period (38% in CR, 46% in 2021/22) - though this is not statistically significant and continues to remain outside the acceptable range of 70%-100%.

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



Q19.8 Please indicate how satisfied you were with....

Base: Visitors who experienced it, (22/23 n=3284)

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

* Prior to 2015/16 this was asked as satisfaction "To learn more about the Island's cultural history"

** Prior to 2009/2010 this was asked as satisfaction "To learn more about Kangaroo Island's culture and history", which was measured with a score out of 3.

Significant and notable differences between subgroups:

📌 New in 2022/23:

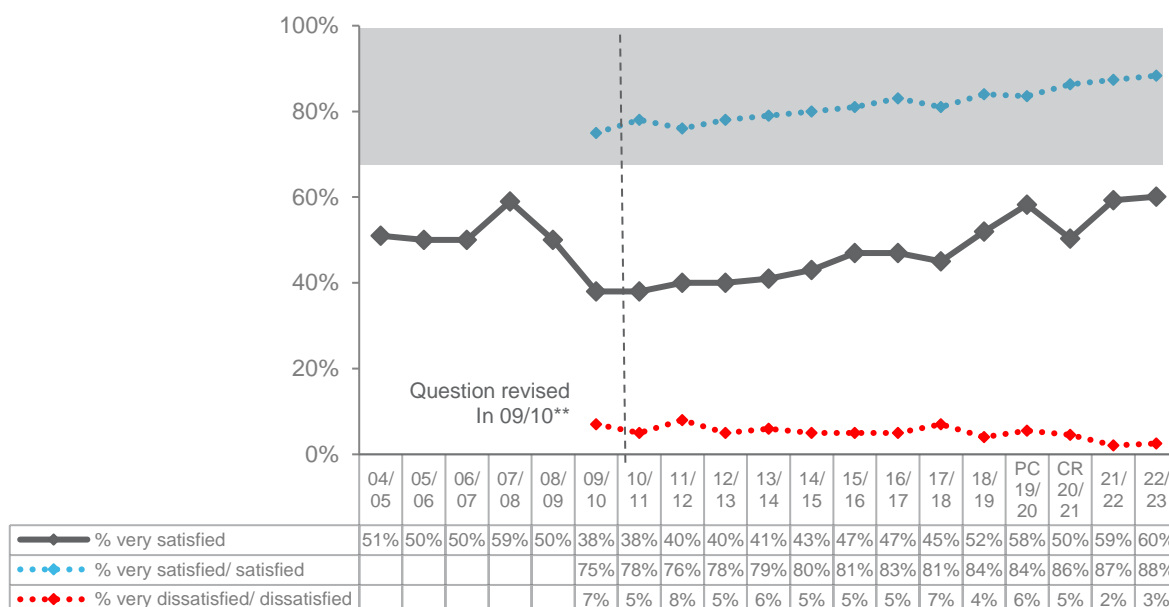
- ▶ More interstate visitors were satisfied/very satisfied than international visitors (86% vs 80%); and
- ▶ Autumn visitors were more likely to be satisfied/very satisfied than summer visitors (81% vs 75%)
- ▶ Those that spent more than \$200 per night (48%) were more likely to be very satisfied than those that spent up to \$200 per night (44%).

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 increased by one percent since the previous wave from 59% to 60%. Additionally, visitors who were very satisfied with the quality of activities has decreased by one percent (from 61% to 60%) - though these differences were not statistically significant. The availability of activities has remained consistent with the previous wave (both 56%). 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, (22/23 n=3453)

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:

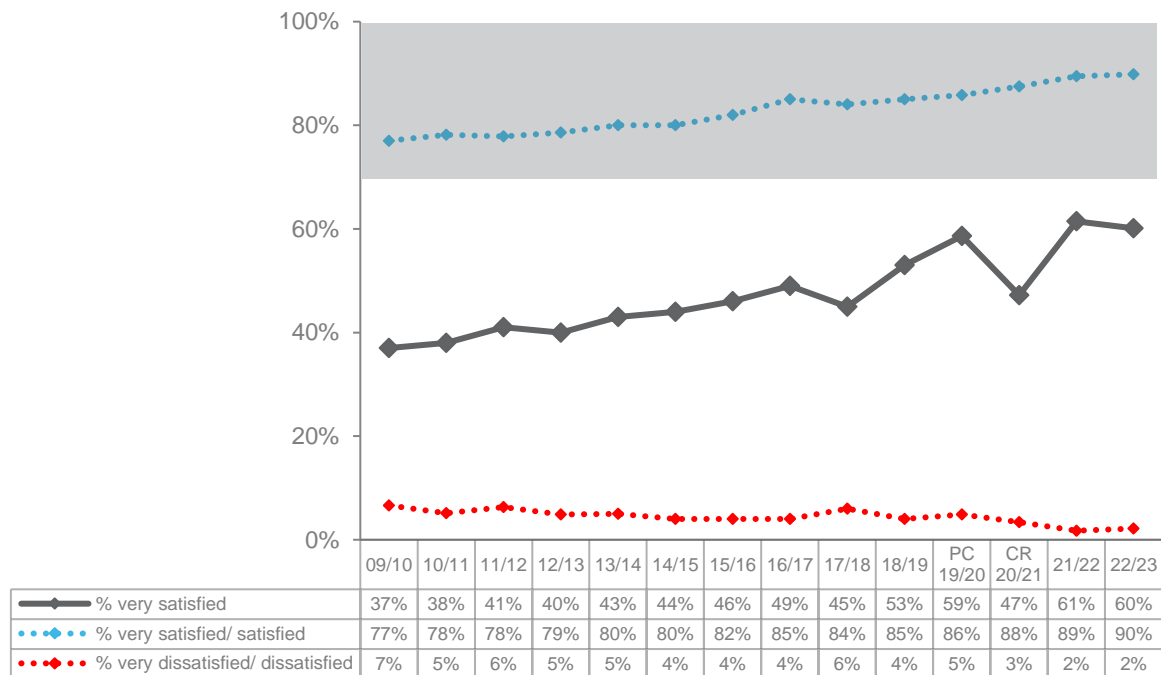
Consistent with the previous year:

- ▶ More intrastate visitors were very satisfied with the range of activities compared to international visitors (63% vs 54%).

New in 2022/23:

- ▶ More intrastate (90%) and interstate visitors (89%) were satisfied/very satisfied than international visitors (79%);
- ▶ More of those that stayed one or more nights were satisfied/very satisfied compared to day trippers (89% vs 82%); this was driven by a large proportion of those that stayed one or more nights who were very satisfied (61% vs 53%); and
- ▶ Those that arrived via cruise ship were less likely to be satisfied/very satisfied than those that arrived via other modes (76% vs 89%).

Figure 27: Satisfaction with the quality of activities



Q19.10 Please indicate how satisfied you were with....

Base: Visitors who experienced it, (22/23 n=3370)

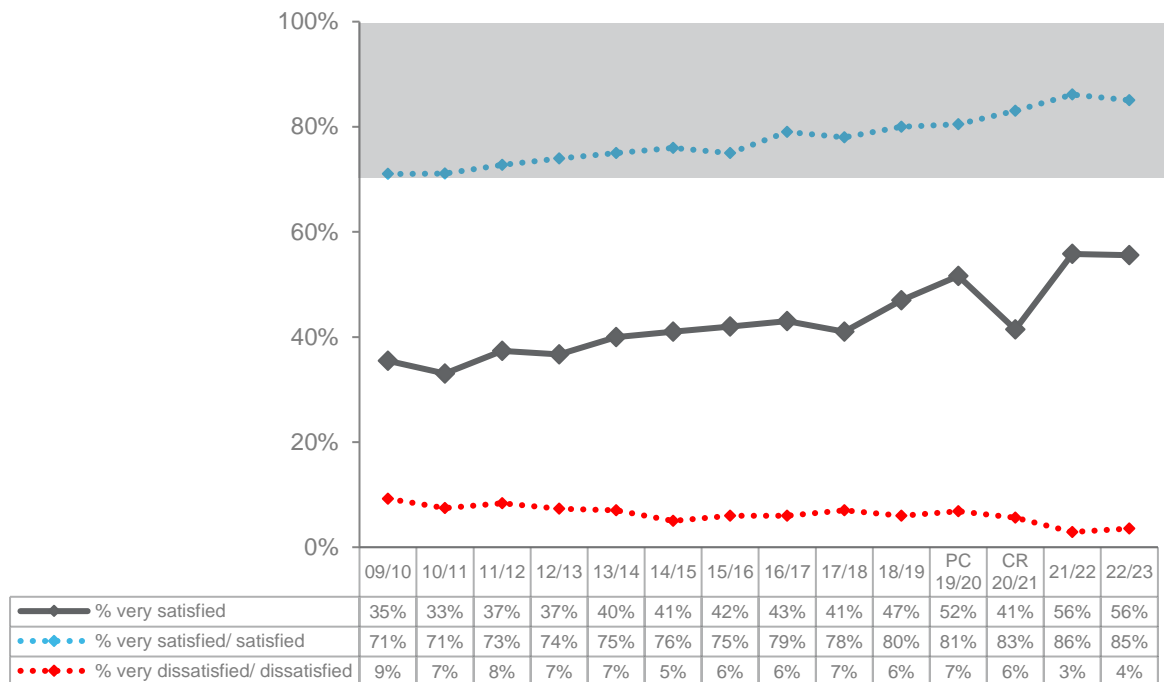
Note: Don't know, didn't experience and missing cases excluded.

Significant and notable differences between subgroups:

📌 New in 2022/23:

- ▶ More intrastate (91%) and interstate visitors (90%) were satisfied/very satisfied compared to international visitors (80%);
- ▶ Those that stayed one or more nights were more satisfied/very satisfied than day trippers (90% vs 86%); and
- ▶ Non-cruise ship arrivals were more satisfied/very satisfied than those that arrived via cruise ship (90% vs 80%).

Figure 28: Satisfaction with the availability of activities



Q19.11 Please indicate how satisfied you were with....

Base: Visitors who experienced it, (22/23 n=3353)

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

Significant and notable differences between subgroups:

🚩 New in 2022/23:

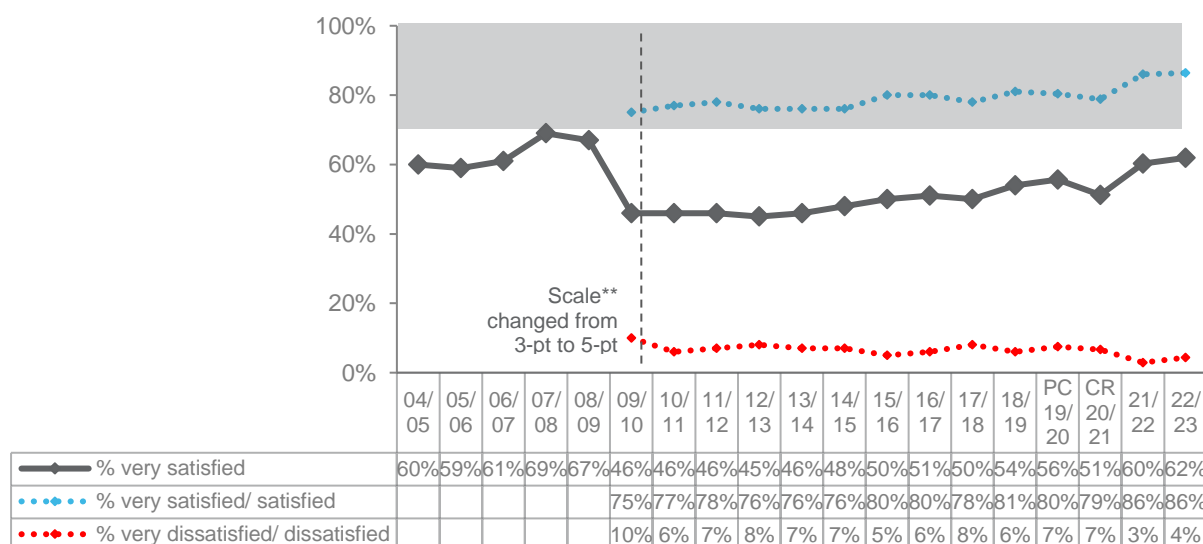
- ▶ Intrastate (86%) and interstate visitors (85%) were more satisfied/very satisfied compared to international visitors (75%);
- ▶ Those that stayed one or more nights were more satisfied/very satisfied compared to day trippers (86% vs 80%); and
- ▶ Those arriving via cruise ship were less satisfied than those arriving via other modes (73% vs 85%).

Quality of accommodation (EX2e)

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 quality of accommodation	70% - 100%	✗

The proportion of surveyed visitors that were very satisfied with the quality of accommodation in 2022/23 has slightly increased from the previous wave (from 60% to 62%)- though this is not statistically significant. 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, (22/23 n=3249)

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

Note: In 2005/2006 statement read 'To see native wildlife, nature and the natural environment.' Satisfaction was measured with a score out of 3.

Note: In 2004/2005 statement used was 'General interest in native wildlife, nature and the natural environment'. Satisfaction was measured with a score out of 3.

Significant and notable differences between subgroups

Consistent with the previous year:

- ▶ The group who were most satisfied (i.e., rated 'very satisfied') were the intrastate visitors (66% very satisfied), who were more satisfied than the interstate group (60% very satisfied), who themselves were also more satisfied than the international group (48%); and
- ▶ More repeat visitors were satisfied/very satisfied (89%) and very satisfied (68%) compared to first time visitors (respectively, 85%, 58%).

New in 2022/23:

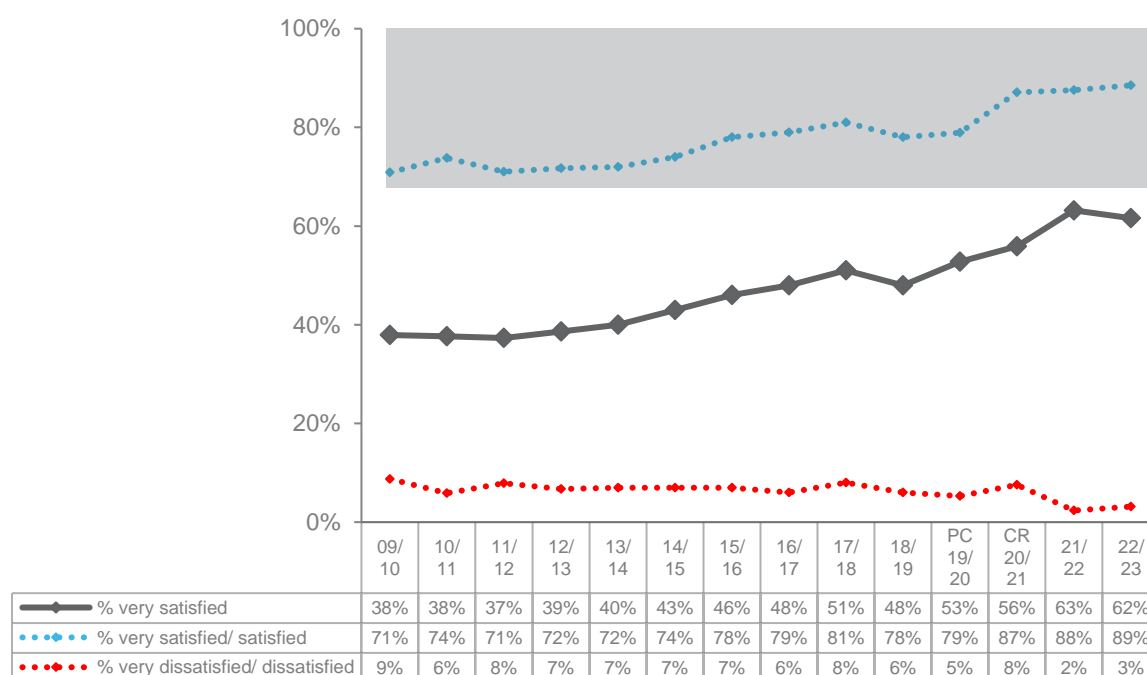
- ▶ More intrastate (87%) and interstate visitors (86%) were satisfied/very satisfied than international visitors (79%);
- ▶ More sea arrivals were satisfied/very satisfied (87%) and very satisfied (62%) compared to air arrivals (respectively, 82%, 54%); and
- ▶ More day trippers reported being very satisfied compared to those who stayed one or more nights (75% vs 62%).

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

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 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 63% to 62%), quality (from 70% to 66%) and availability (from 59% to 57%) of Kangaroo Island produce. Satisfaction with the *quality* of Kangaroo Island produce has fallen out the acceptable range (70%-100%). Levels of satisfaction with the *range* and *availability* of Kangaroo Island produce continue to remain outside of the acceptable range.

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, (22/23 n=3409)

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

Significant and notable differences between subgroups:

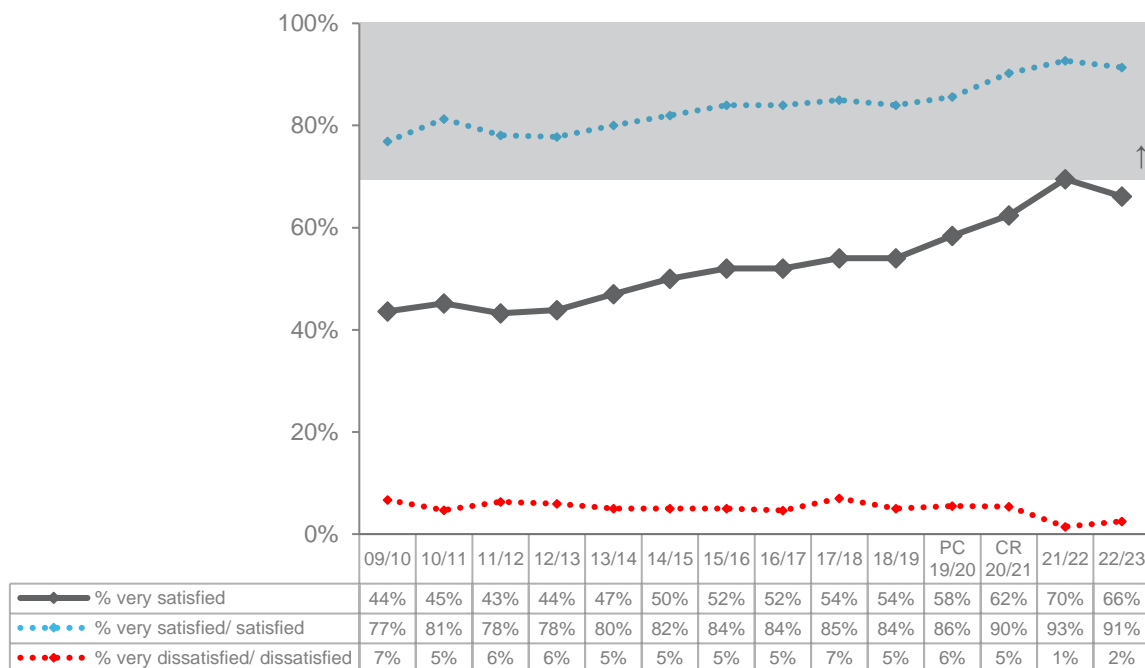
Consistent with the previous year:

- ▶ More intrastate visitors were satisfied/very satisfied (90%) and very satisfied (66%) with the Kangaroo Island produce range (e.g., food and wine) compared to interstate visitors (respectively 88%, 60%); and
- ▶ More repeat visitors were satisfied/very satisfied (90%) and very satisfied (67%) compared to first time visitors (respectively, 87%, 58%).

New in 2022/23:

- ▶ Satisfaction levels (satisfied/very satisfied, very satisfied) are highest for intrastate (90%, 66%) and interstate visitors (88%, 60%) compared to international visitors (79%, 45%).

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, (22/23 n=3405)

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

Significant and notable differences between subgroups:

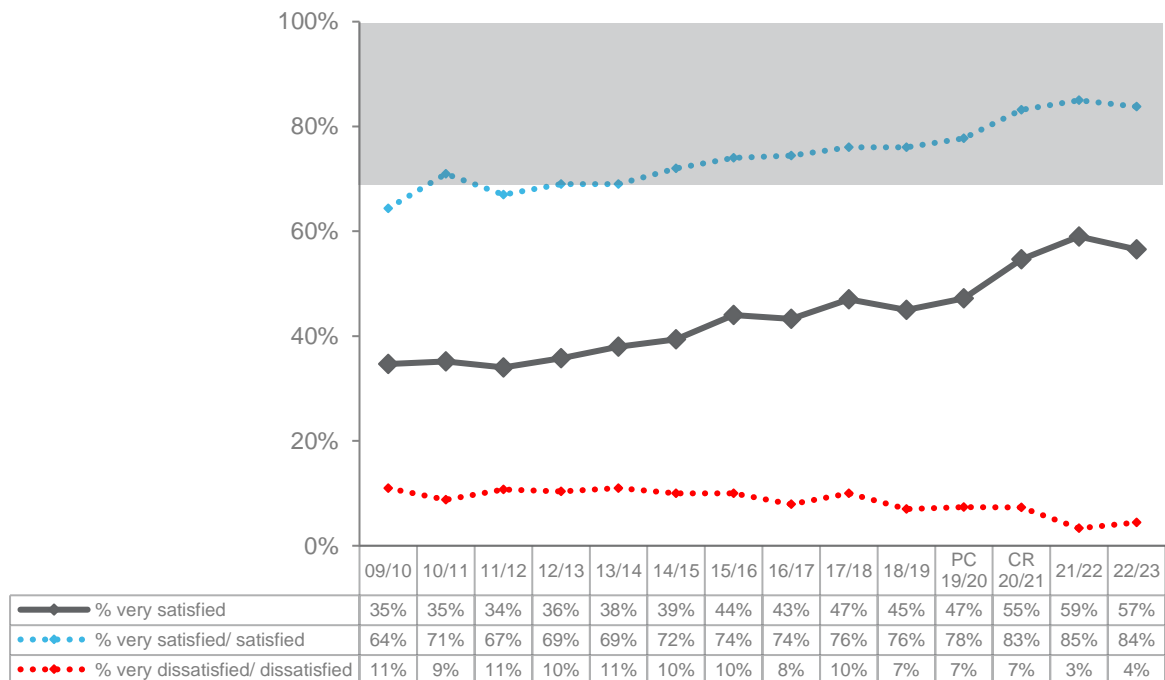
Consistent with the previous year:

- ▶ More intrastate visitors (71%) were very satisfied with the quality of Island produce compared to interstate visitors (64%); and
- ▶ More repeat visitors were satisfied/very satisfied (93%) and very satisfied (70%) compared to first time visitors (respectively, 91%, 64%).

New in 2022/23:

- ▶ Satisfaction levels (satisfied/very satisfied, very satisfied) are highest for intrastate (93%, 71%) and interstate visitors (91%, 64%) compared to international visitors (83%, 54%).

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, (22/23 n=3388)

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 overall (satisfied/very satisfied, 87%) than interstate (82%) and international (74%) visitors; this is driven by more intrastate visitors being very satisfied compared to interstate visitors (61% vs 54%); and
- ▶ More repeat visitors were satisfied/very satisfied (87%) and very satisfied (60%) compared to first time visitors (respectively, 81%, 54%).

New in 2022/23:

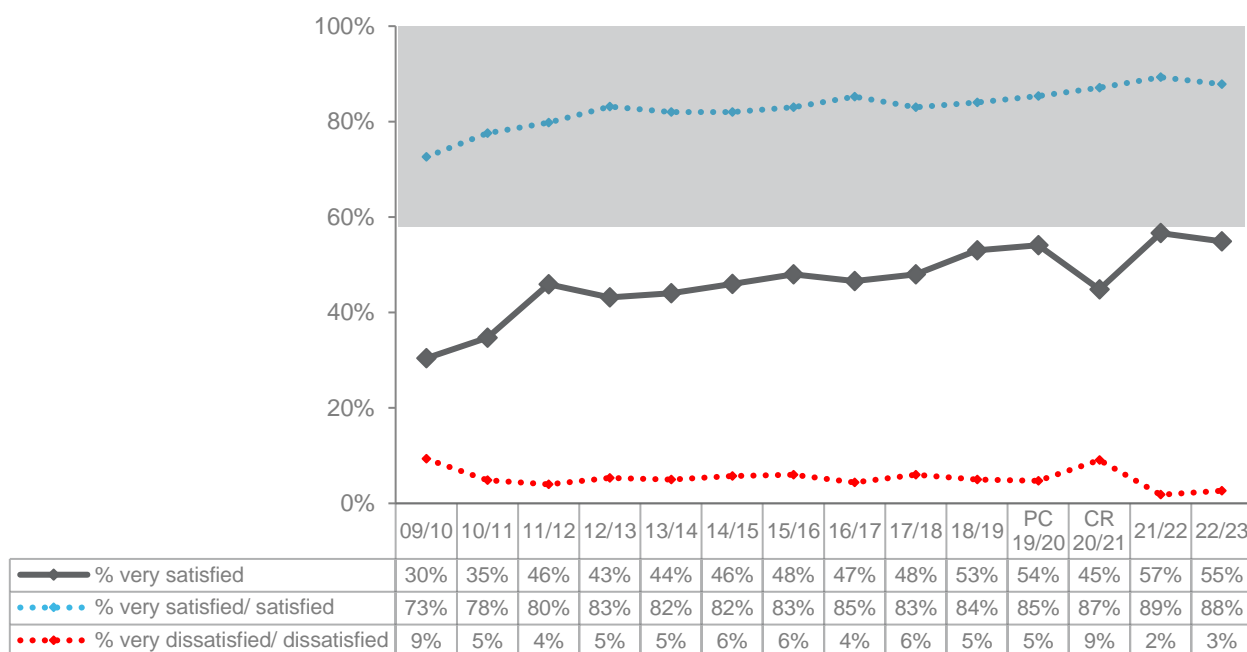
- ▶ Intrastate visitors were more satisfied/very satisfied than interstate visitors (87% vs 82%); and
- ▶ Spring visitors were more satisfied/very satisfied than winter visitors (87% vs 81%).

Quality of public tourism infrastructure (EX2h)

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 quality of public tourism infrastructure (toilets, roads, campgrounds, public parks, picnic and signage) provided on Kangaroo Island	60%-100%	X

The proportion of visitors who were very satisfied with the quality of various elements of Kangaroo Island's public tourism infrastructure has increased in 2022/23 from the previous wave for campgrounds (from 52% to 53%) and roads (from 25% to 28% - significant); additionally, satisfaction levels have remained consistent for interpretive and educational signage (both 45%) and decreased for picnic and day use areas (from 57% to 55%), public toilets (from 53% to 52%) and road signage (from 49% to 48%). However, only the quality of roads difference is statistically significant and 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, (22/23 n=2143)

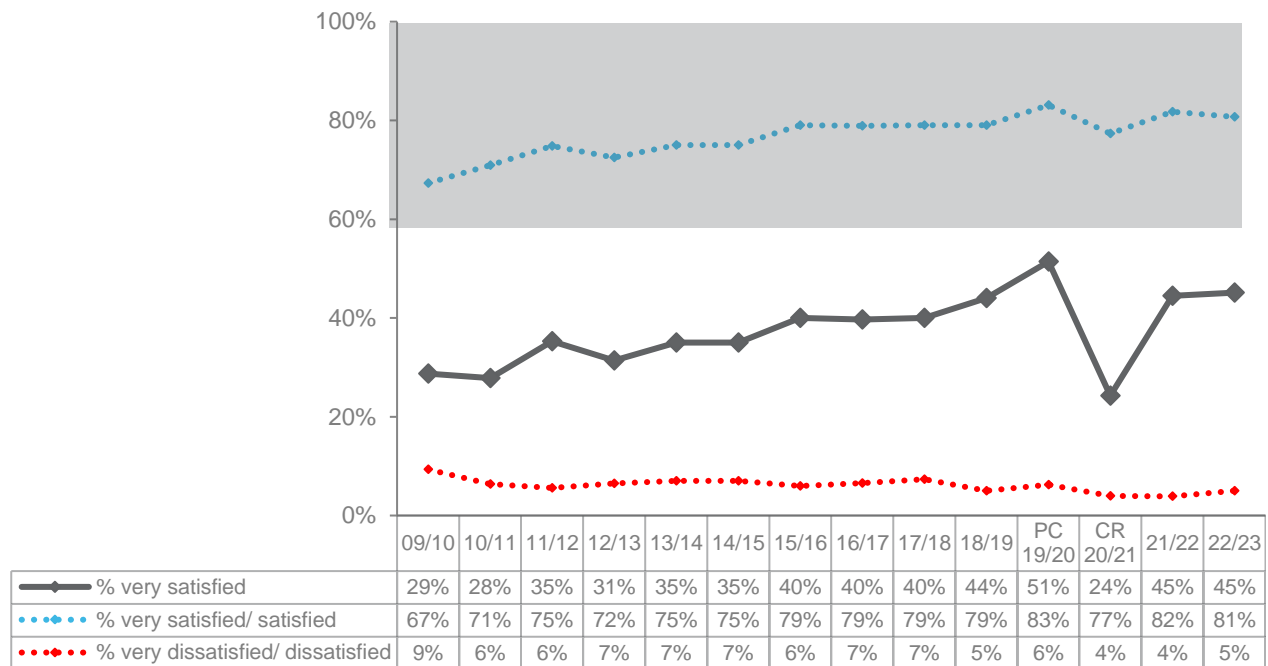
Note: Don't know, didn't experience and missing cases excluded.

Significant and notable differences between subgroups:

➡ New in 2022/23:

- ➡ More international visitors are dissatisfied/very dissatisfied than interstate visitors (6% vs 2%); this is driven by more international visitors (4%) being very dissatisfied compared to interstate (<1%) and intrastate visitors (1%); and
- ➡ Sea arrivals were more satisfied/very satisfied than air arrivals (88% vs 83%).

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



Q19.17 Please indicate how satisfied you were with....

Base: Visitors who experienced it, (22/23 n=2588)

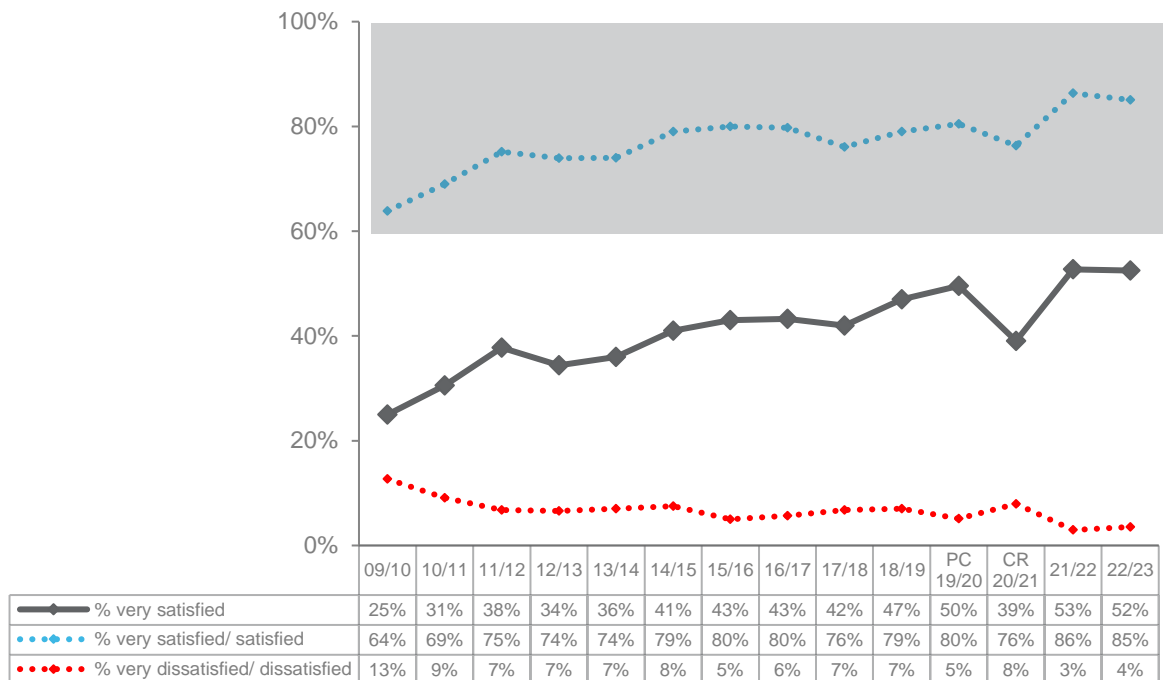
Note: Don't know, didn't experience and missing cases excluded.

Significant and notable differences between subgroups:

📌 New in 2022/23:

- ▶ More day trippers were very satisfied than those who stayed one or more nights (57% vs 44%); and
- ▶ Those arriving by cruise ship were more likely to be very satisfied than those arriving via other modes of transport (63% vs 45%).

Figure 35: Satisfaction with the quality of public toilets



Q19.13 Please indicate how satisfied you were with....

Base: Visitors who experienced it, (22/23 n=3354)

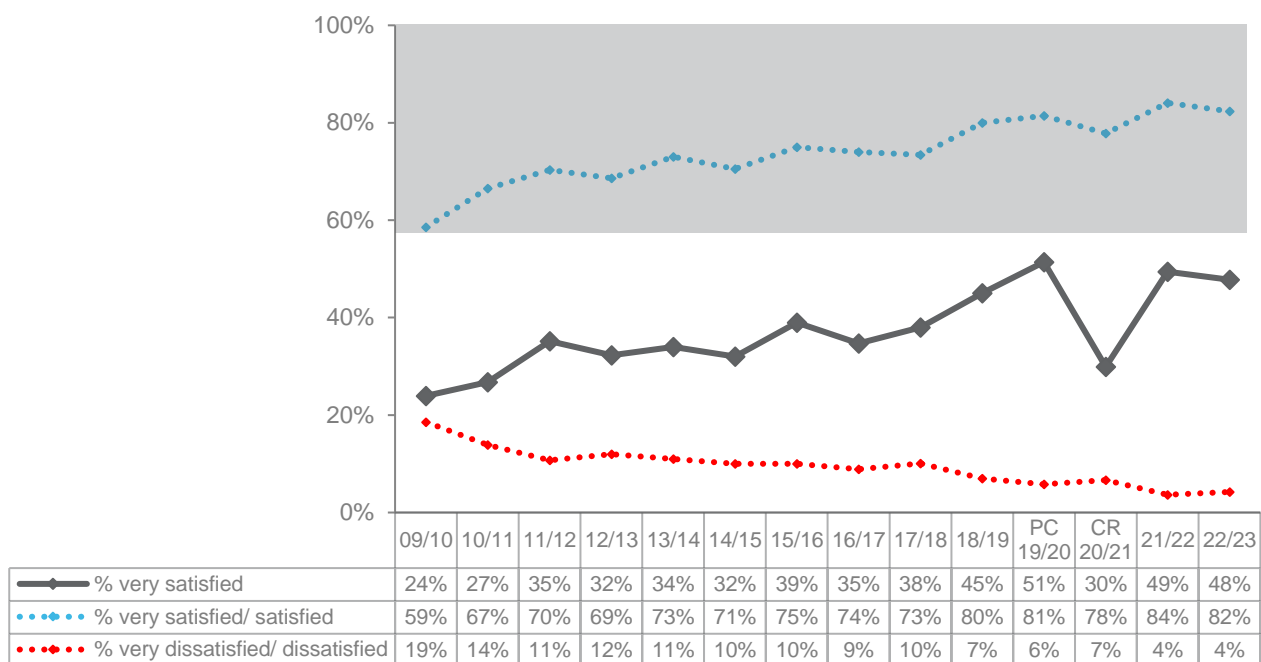
Note: Don't know, didn't experience and missing cases excluded.

Significant and notable differences between subgroups:

📌 New in 2022/23:

- ▶ More interstate visitors were satisfied/very satisfied (87%) and very satisfied (55%) compared to intrastate (82%, 48% respectively);
- ▶ International visitors were the most dissatisfied (i.e. rated 'very dissatisfied') (5% very dissatisfied), and were more dissatisfied than the intrastate group (2% very dissatisfied), who themselves are also more dissatisfied than the interstate group (1%);
- ▶ First-time visitors were more likely to be satisfied/very satisfied (87%) and very satisfied (55%) compared to repeat visitors (81%, 47%);
- ▶ More air arrivals were very satisfied than sea arrivals (62% vs 52%);
- ▶ Visitors who spent more than \$200 per night were more likely to be very satisfied than those who spent up to \$200 per night (55% vs 51%);
- ▶ More day trippers were dissatisfied/very dissatisfied (6%) and very dissatisfied (3%) compared to those who stayed one or more nights (3%, 1% respectively); and
- ▶ Those who arrived by cruise ship were more dissatisfied/very dissatisfied (10%) and very dissatisfied (6%) compared to those who arrived via other transportation (3%, 1% respectively).

Figure 36: Satisfaction with the quality of road signage



Q19.16 Please indicate how satisfied you were with....

Base: Visitors who experienced it, (22/23 n=3383)

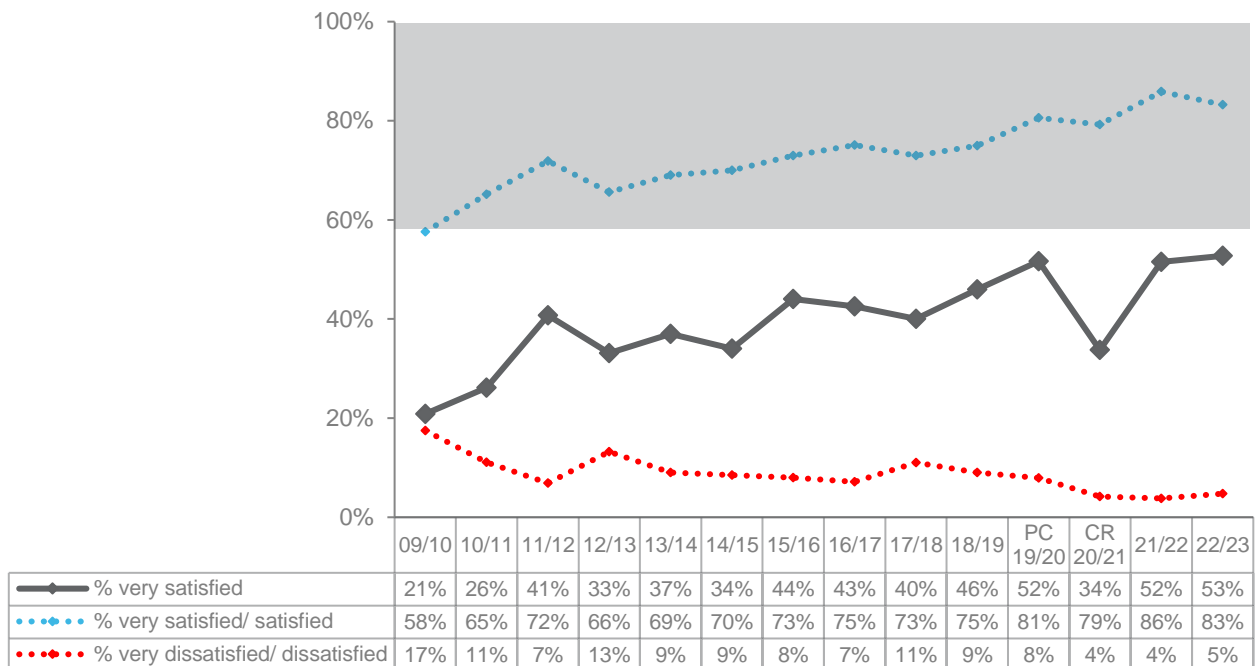
Note: Don't know, didn't experience and missing cases excluded.

Significant and notable differences between subgroups:

🚩 New in 2022/23:

- ▶ More winter (51%) and autumn visitors (49%) were very satisfied compared to spring visitors (41%);
- ▶ More air arrivals were dissatisfied/very dissatisfied than sea arrivals (8% vs 4%); and
- ▶ More day trippers were very satisfied than who that stayed one or more nights (55% vs 47%)

Figure 37: Satisfaction with the quality of campgrounds



Q19.15 Please indicate how satisfied you were with....

Base: Visitors who experienced it, (22/23 n=1010)

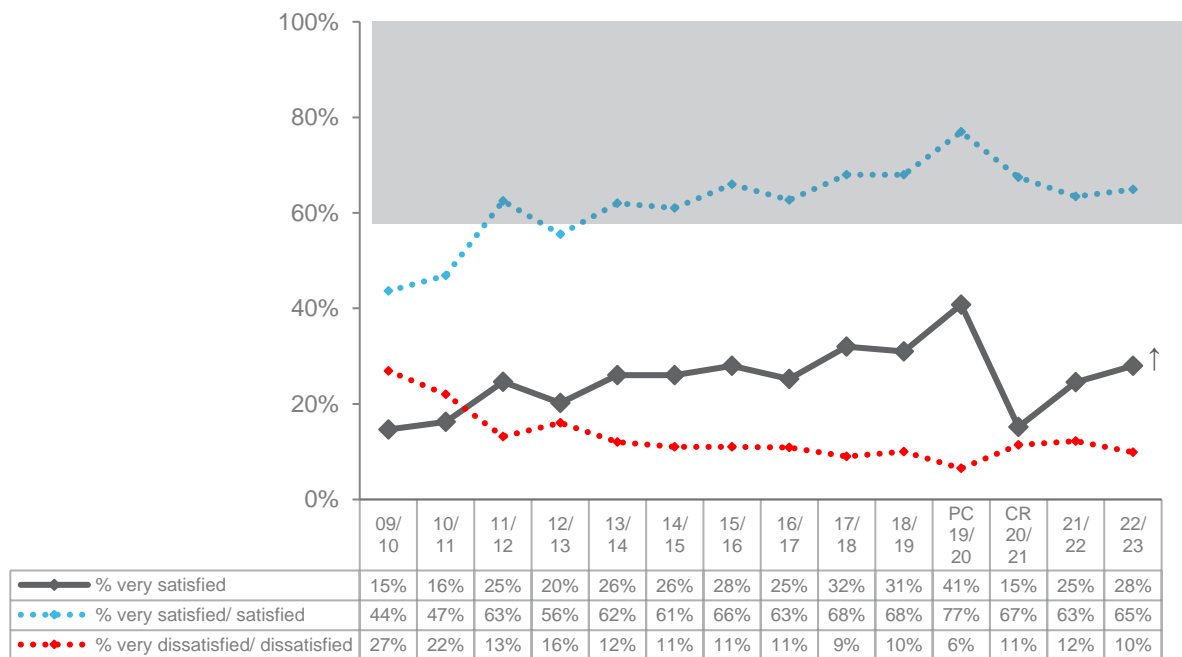
Note: Don't know, didn't experience and missing cases excluded.

Significant and notable differences between subgroups:

🚩 New in 2022/23:

- ▶ More international visitors (13%) were dissatisfied/very dissatisfied than intrastate (5%) and interstate visitors (4%); additionally, more international (8%) and intrastate visitors (3%) were very dissatisfied than interstate visitors (1%); and
- ▶ More winter visitors were very satisfied compared to the summer visitors (62% vs 49%).

Figure 38: Satisfaction with the quality of roads



Q19.14 Please indicate how satisfied you were with....

Base: Visitors who experienced it, (22/23 n=3630)

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 25%).

New in 2022/23:

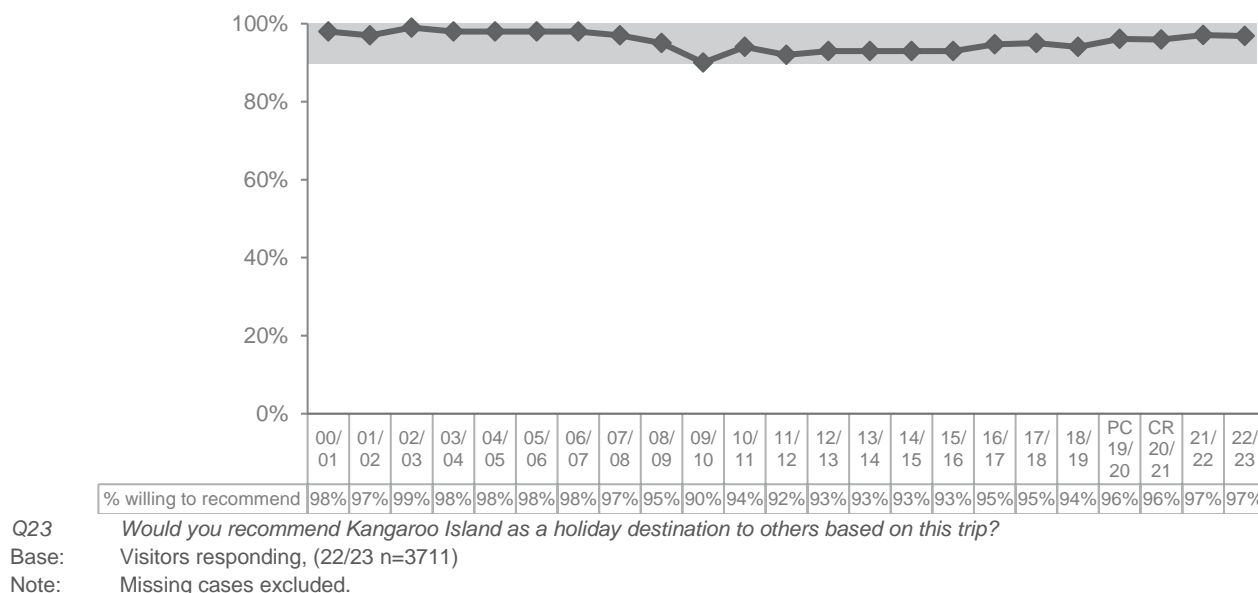
- ▶ More international (70%) and interstate visitors (68%) were satisfied/very satisfied than intrastate visitors (59%). Unexpectedly, more international visitors (6%) reported being very dissatisfied than intrastate (3%) and interstate visitors (2%);
- ▶ More first-time visitors were satisfied/very satisfied (68%) and very satisfied (31%) than repeat visitors (59%, 24% respectively); and
- ▶ Day trippers were more satisfied/very satisfied (73%) and very satisfied (38%) than those who stayed one or more nights (64%, 27% respectively).

Recommendation of Kangaroo Island as holiday destination (EX2i)

Optimal Conditions	Indicator	Acceptable Range	22/23 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 remained consistent since the last wave and continues to fall well within the acceptable range of 90%-100%.

Figure 39: Willingness to recommend



Significant and notable differences between subgroups:

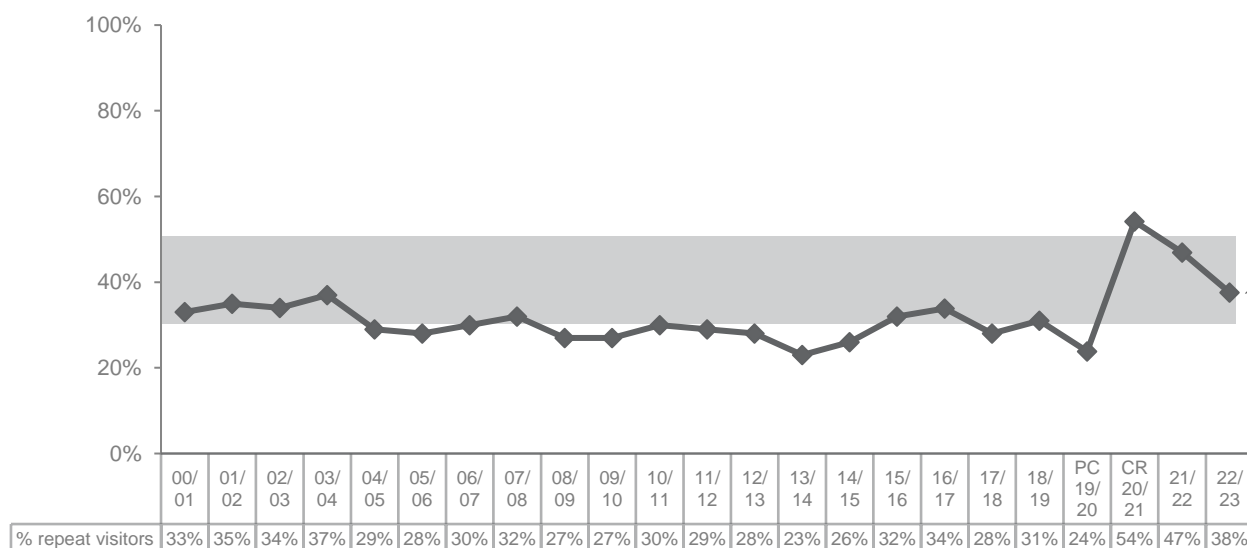
- Consistent with the previous year:
 - ▶ More visitors who stayed one or more nights would recommend than day trippers (97% vs 93%).
- New in 2022/23:
 - ▶ Those who visited in summer (98%) were more likely to recommend than those who visited in autumn (96%);
 - ▶ Those who spent up to \$200 per night (98%) were more likely to recommend than those who spent more than \$200 per night (97%).
 - ▶ Intrastate (98%) and interstate visitors (97%) were more likely to recommend Kangaroo Island as a holiday destination than international visitors (92%); however overall recommendation for all groups are still >90%; and
 - ▶ Those who arrived by cruise ship were less likely to recommend than those arriving via other transportation (89% vs 97%).

Repeat visitation (EX2j)

Optimal Conditions	Indicator	Acceptable Range	22/23 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 2022/23 has significantly decreased since the previous wave yet remains in the acceptable range (from 47% to 38%). *The acceptable range was formerly 30%-60% to cover the COVID recovery result but has returned to 30-50%.

Figure 40: Repeat visitation



Q3 Have you ever visited Kangaroo Island before this trip?

Base: Visitors responding, (22/23 n=3713)

Note: Don't know and missing cases excluded.

Significant and notable differences between subgroups:

Consistent with the previous year:

- ▶ More intrastate visitors were repeat visitors (72%) compared to interstate (16%) and international visitors (15%); and
- ▶ A greater proportion of those who spent up to \$200 per night were repeat visitors than those who spent more than \$200 per night (48% vs 29%).

New in 2022/23:

- ▶ More of those visiting in the summer (43%) were repeat visitors than the other seasons (winter 36%, spring 29%, autumn 34%); additionally, more of those visiting in winter (36%) and autumn (34%) had previously visited KI than those visiting in the spring (29%);
- ▶ More sea arrivals were repeat visitors than air arrivals (38% vs 23%);
- ▶ More of those that had stayed one or more nights on the island were repeat visitors compared to day-trippers (38% vs 32%); and
- ▶ More cruise ship arrivals were repeat visitors (50%) compared to non-cruise ship arrivals (37%). However, this more so reflects significant proportional differences arising from the small sample of cruise ship arrivals.

Summary of sub-groups scores for experiential condition 'Kangaroo Island delivers authentic and credible experiences consistent with its positioning' – (22/23)

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"> All sub-groups, except day trippers and cruise ship arrivals 	<ul style="list-style-type: none"> International visitors First-time visitors Stayed one or more nights Non-cruise ship arrivals
EX1c	Proportion of visitors that experienced scenic variety without crowds	<ul style="list-style-type: none"> All sub-groups, except day trippers and cruise ship arrivals 	<ul style="list-style-type: none"> Stayed one or more nights Non-cruise ship arrivals
EX1d	Proportion of visitors that experienced cultural heritage and history of settlement	<ul style="list-style-type: none"> Interstate visitors Winter, spring and autumn visitors First-time visitors Air and sea arrivals Those spending up to or more than \$200 per night Stayed one or more nights Non-cruise ship arrivals 	<ul style="list-style-type: none"> Interstate visitors Spring visitors First-time visitors Stayed one or more nights Non-cruise ship arrivals
EX1e	Proportion of visitors that experienced spectacular scenery and coastal landscapes	<ul style="list-style-type: none"> All sub-groups 	<ul style="list-style-type: none"> First-time visitors Stayed one or more nights Non-cruise ship arrivals
EX1f	Proportion of visitors that experienced areas of untouched natural beauty	<ul style="list-style-type: none"> All sub-groups except day trippers and cruise ship arrivals 	<ul style="list-style-type: none"> Spring visitors First-time visitors Stayed one or more nights Non-cruise ship arrivals
EX1g	Proportion of visitors that experienced farming and rural landscapes	<ul style="list-style-type: none"> Interstate visitors Winter and spring visitors Air arrivals Those spending up to or more than \$200 per night Stayed one or more nights Non-cruise ship arrivals 	<ul style="list-style-type: none"> Interstate visitors Winter and spring visitors First-time visitors Air arrivals Stayed one or more nights Non-cruise ship arrivals

Summary of sub-groups scores for experiential condition 'Kangaroo Island delivers authentic and credible experiences consistent with its positioning' (continued) – (22/23)

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"> All sub-groups except international visitors, day trippers and cruise ship arrivals 	<ul style="list-style-type: none"> Intrastate visitors Spring visitors Repeat visitors Air arrivals Stayed one or more nights Non-cruise ship arrivals
EX1i	Proportion of visitors that believe Kangaroo Island offers one of Australia's top three nature & wildlife experiences	<ul style="list-style-type: none"> All sub-groups except day trippers and cruise ship arrivals 	<ul style="list-style-type: none"> International visitors First-time visitors Stayed one or more nights Non-cruise ship arrivals
EX1j	Proportion of visitors that believe Kangaroo Island has a friendly local community	<ul style="list-style-type: none"> All sub-groups 	<ul style="list-style-type: none"> Intrastate visitors Spring visitors Repeat visitors Stayed one or more nights
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"> All sub-groups 	<ul style="list-style-type: none"> Intrastate visitors Spent up to \$200 per night Stayed one or more nights Non-cruise ship arrivals
EX1l	Proportion of visitors that state that their experience matched or exceeded expectation set by marketing materials	<ul style="list-style-type: none"> All sub-groups 	<ul style="list-style-type: none"> Intrastate visitors Summer visitors Repeat visitors Sea arrivals Stayed one or more nights
EX1m	Proportion of visitors very satisfied with their overall experience on Kangaroo Island	<ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> Interstate visitors Stayed one or more nights Non-cruise ship arrivals

Summary of sub-groups scores for experiential condition ‘The majority of visitors leave the Island highly satisfied with their experience’ – (22/23)

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"> All subgroups except international and spring visitors, day trippers and cruise ship arrivals 	<ul style="list-style-type: none"> Interstate visitors Stayed one or more nights Non-cruise ship arrivals
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"> None 	<ul style="list-style-type: none"> Spent more than \$200 per night
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"> None 	<ul style="list-style-type: none"> Spent more than \$200 per night Day trippers
EX2d	Proportion of visitors who were very satisfied with the range, quality and availability of activities available	<ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> Range: intrastate visitors, stayed one or more nights
EX2e	Proportion of visitors who were very satisfied with the quality of accommodation	<ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> Intrastate visitors Repeat visitors Sea arrivals
EX2f	Proportion of visitors who were very satisfied with the range, quality and availability of Kangaroo Island produce	<ul style="list-style-type: none"> Quality: intrastate and repeat visitors 	<ul style="list-style-type: none"> Range, quality and availability: intrastate and repeat visitors
EX2g	Proportion of visitors that are very satisfied with the level of customer service they receive	<ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> Interstate visitors Day trippers
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"> Picnic areas: day trippers Interpretive/educational signage: cruise ship arrivals Public toilets: air arrivals Campgrounds: winter visitors, air arrivals, day trippers 	<ul style="list-style-type: none"> Interpretative/educational signage: day trippers, cruise ship arrivals Public toilets: interstate and first time visitors, air arrivals and those who spent more than \$200 per night Road signage: winter visitors and day trippers Campgrounds: winter visitors Roads: interstate and first time visitors and day trippers.
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"> All subgroups except cruise ship arrivals 	<ul style="list-style-type: none"> Intrastate visitors Summer visitors Those who spent up to \$200 per night Stayed one or more nights Non-cruise ship arrivals

Summary of sub-groups scores for experiential condition ‘The majority of visitors leave the Island highly satisfied with their experience’ (continued) – (22/23)

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"> • All subgroups except interstate, international and spring visitors, air arrivals and those who spent more than \$200 per night • Note intrastate exceeded range 	<ul style="list-style-type: none"> • Intrastate visitors • Summer visitors • Sea arrivals • Those who spent up to \$200 per night • Stayed one or more nights • Cruise ship arrivals

Environmental Indicators

Overview

With respect to the condition 'Visitor activity has minimal negative impacts on the natural environment', the proportion of visitors in 2022/23 who were within the acceptable ranges for EN2b was met, however EN2e dropped just outside the target (from 70% to 69%).

The proportion of visitations to natural areas occurring on managed sites was 72%, while the proportion of visitors aware of quarantine regulations prior to arriving on Kangaroo Island was 69%.

In 22/23, the most commonly visited location was the Penneshaw township (80%) followed by the Kingscote township (73%), however this was significantly less than last year (78%), then Admirals Arch (65%). Other significant changes from last year's results include a decrease in visitation to Vivonne Bay (from 62% to 58%), American River Township (from 60% to 53%), Emu Bay (from 64% to 60%), Parndana Township (from 41% to 36%), Antechamber Bay (from 19% to 16%) and Island Beach (from 19% to 15%). Increases in visitation to Seal Bay (from 58% to 63%) and Kelly Hill Caves (from 2% to 4%) were observed.

Awareness amongst repeat visitors of the quarantine regulations decreased slightly from 96% to 95%, indicating still a strong overall awareness.

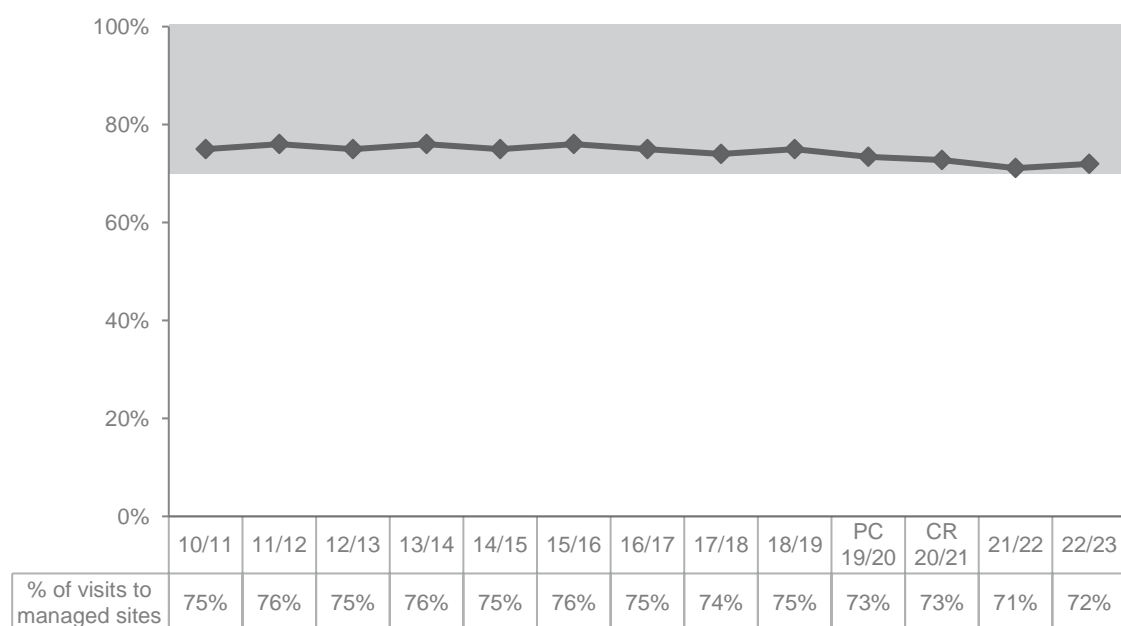
Awareness levels for specific prohibited items remained relatively consistent with no statistically significant differences noted.

Visits to natural areas occurring on managed sites (EN2b)

Optimal Conditions	Indicator	Acceptable Range	22/23
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 (72%) but has seen a gradual decrease since 15/16 where it was at 76%.

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 (22/23 n=3722)

Significant and notable differences between subgroups:

Consistent with previous wave

- ▶ More interstate visitors visited managed sites than intrastate visitors (73% vs 69%); and
- ▶ More day trippers visited managed sites than those visiting for one or more nights (82% vs 72%).

New in 2022/23:

- ▶ Proportionally more international visitors attended managed sites (75%) compared to intrastate visitors (69%). Similarly, fewer interstate visitors visited managed sites than international visitors (73% vs 75%);
- ▶ Compared to the spring (73%), managed sites were visited more in the autumn (74%) and less in the summer (70%);
- ▶ More first time visitors visited managed sites than repeat visitors (73% vs 70%);
- ▶ More air arrivals visited managed sites than sea arrivals (74% vs 72%); and
- ▶ More cruise ship arrivals visited managed sites than those arriving via other transportation (78% vs 72%).

Locations visited

Consistent with the previous wave, the most visited location was the Penneshaw township (80%), followed by the Kingscote township (73%) then Admirals Arch (65%). Significant changes from the previous wave include: a decrease to Kingscote township (from 78% to 73%), American River Township (from 60% to 53%), Emu Bay (from 64% to 60%), Parndana Township (from 41% to 36%), Antechamber Bay (from 19% to 16%) and Island Beach (from 19% to 15%) and an increase to Seal Bay (from 58% to 63%) and Kelly Hill Caves (from 2% to 4%). The table below shows visitation figures for each location.

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)
Kingscote Township	85%	88%	85%	88%	84%	85%	65%	74%	78%	78%	70%	73%	67%	87%	78%	73%↓
Flinders Chase National Park	76%	81%	80%	80%	79%	80%	82%	80%	82%	76%	81%	76%	72%	51%	55%	52%
Penneshaw Township	78%	85%	79%	81%	78%	79%	68%	74%	77%	77%	74%	73%	65%	81%	82%	80%
Admirals Arch	-	-	77%	80%	77%	79%	83%	82%	80%	78%	82%	80%	77%	72%	66%	65%
Remarkable Rocks	-	-	77%	79%	77%	78%	82%	80%	78%	77%	80%	76%	71%	65%	63%	64%
Seal Bay	73%	76%	69%	71%	68%	67%	77%	69%	70%	68%	71%	68%	72%	56%	58%	63%↑
Vivonne Bay	62%	66%	69%	66%	65%	67%	62%	63%	59%	57%	63%	58%	51%	53%	62%	58%↓
American River Township	49%	58%	55%	58%	57%	58%	44%	53%	58%	58%	50%	53%	49%	75%	60%	53%↓
Emu Bay	48%	48%	52%	52%	51%	57%	42%	44%	51%	47%	47%	51%	51%	68%	64%	60%↓
Parndana Township	47%	52%	51%	52%	53%	50%	39%	45%	49%	45%	42%	38%	36%	45%	41%	36%↓
Stokes Bay	43%	41%	47%	45%	44%	51%	39%	43%	46%	45%	43%	45%	36%	51%	49%	49%
Kelly Hill Caves	-	-	32%	30%	30%	22%	22%	21%	24%	26%	23%	27%	24%	1%	2%	4%↑
Cape Willoughby Light Station	31%	33%	31%	33%	33%	32%	25%	34%	37%	37%	28%	30%	31%	47%	37%	34%
Little Sahara	22%	25%	28%	24%	22%	22%	18%	18%	16%	17%	13%	19%	19%	15%	22%	20%
Hanson Bay	28%	32%	27%	27%	25%	30%	39%	35%	34%	33%	42%	37%	37%	12%	14%	16%
Pennington Bay	23%	27%	27%	29%	29%	28%	21%	24%	26%	26%	24%	27%	24%	33%	29%	30%
Cape Borda Light Station	20%	23%	25%	29%	26%	23%	24%	24%	26%	23%	26%	23%	21%	7%	21%	20%
Snelling Beach	19%	17%	20%	19%	16%	19%	13%	14%	17%	18%	18%	16%	11%	22%	17%	19%
Antechamber Bay	19%	22%	18%	23%	22%	20%	16%	18%	20%	16%	13%	13%	11%	22%	19%	16%↓
Brown's Beach	-	-	18%	20%	21%	21%	13%	17%	23%	17%	17%	18%	15%	23%	19%	18%
Island Beach	18%	18%	14%	18%	20%	18%	13%	14%	16%	14%	15%	16%	14%	19%	19%	15%↓
Western River Cove	14%	10%	14%	12%	11%	13%	10%	13%	12%	12%	10%	10%	8%	13%	11%	11%
Baudin Conservation Park	-	-	12%	17%	16%	17%	12%	16%	19%	18%	16%	16%	13%	13%	16%	14%
Murray Lagoon	-	-	12%	13%	12%	13%	4%	11%	11%	9%	10%	9%	8%	7%	7%	8%
Latham Conservation Park	-	-	8%	9%	8%	8%	8%	8%	9%	8%	8%	7%	7%	8%	7%	8%
Prospect Hill**	-	-	-	-	-	-	-	-	-	7%	7%	5%	25%	33%	30%	27%
Raptor Domain^^	-	-	-	-	-	-	-	3%	3%	2%	2%	1%	<1%	1%	2%	1%
Kingscote Silos#	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	34%

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

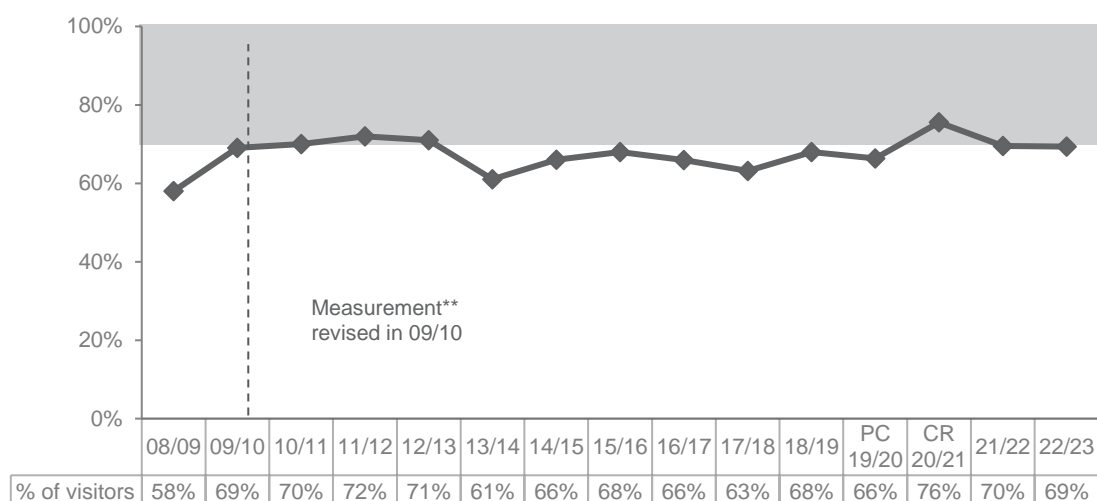
Base: Visitors responding, (22/23 n=3722) ^^New in 2014/15, **New in 2016/17, #New in 2022/23

Awareness of ALL quarantine regulations prior to arriving (EN2e)

Optimal Conditions	Indicator	Acceptable Range	22/23 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%	X

The proportion of visitors aware of quarantine regulations prior to arrival in this wave sits just outside the acceptable range (69%); this has continued to decrease since the COVID recovery period (2021/22 70%, CR 76%) - though this is not statistically significant. Concerningly, compared to non-cruise ship arrivals, those arriving by cruise ship were significantly less aware of all quarantine regulations (70% vs 50%).

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, (22/23 n=3722)

** 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:

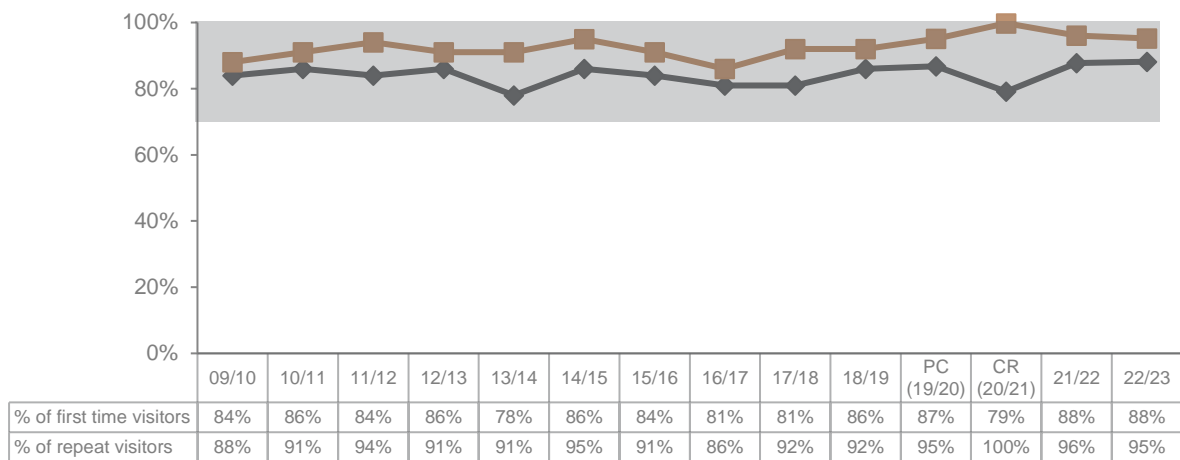
Consistent with the previous year:

- ▶ More repeat visitors were aware *prior* to their visit (77%) than first time visitors (65%);
- ▶ More intrastate visitors (76%) were aware before their visit to the island compared with interstate visitors (67% were aware prior);
- ▶ More visitors who spent *up to* \$200 were aware before their visit (78%) in contrast to those who spent more than \$200 (67%); and
- ▶ More visitors that stayed longer than a day trip (72%) were aware *before* their visit, compared to those that stayed for *only* a day trip (47%).

New in 2022/23

- ▶ More intrastate (76%) and interstate (67%) visitors were aware before their visit to the island compared with international visitors (54% were aware prior);
- ▶ More sea arrivals were aware prior to visiting than air arrivals (70% vs 57%); and
- ▶ Cruise ship arrivals were less aware prior to visiting than non-cruise ship arrivals (50% vs 70%).

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



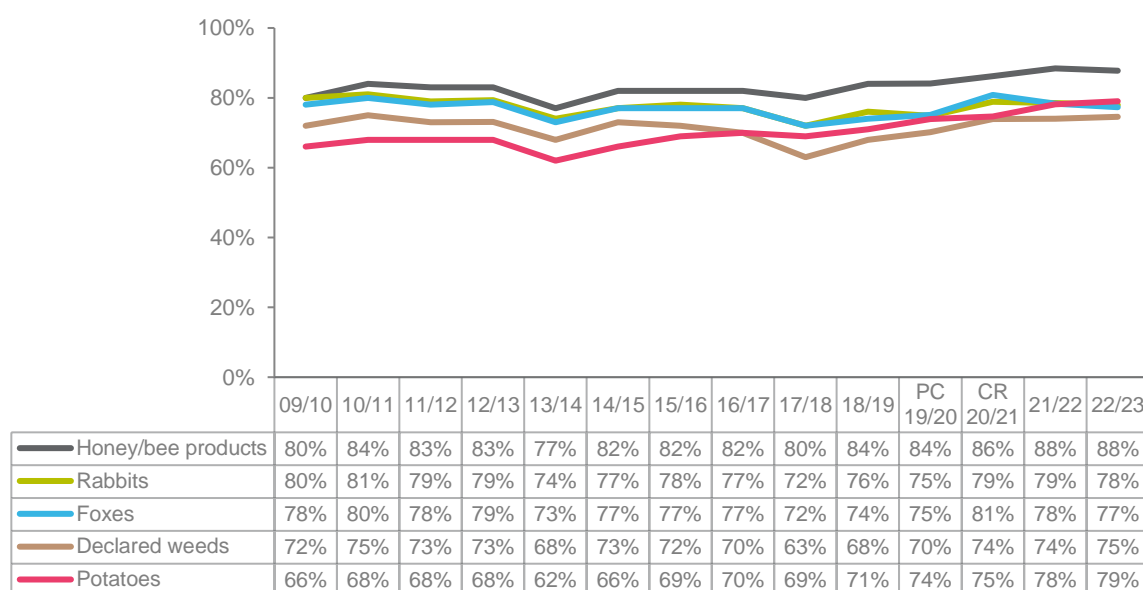
Q16a Were you aware of Kangaroo Island's quarantine regulations, prohibiting the import of....
 * The current awareness measurement used is the percentage of all respondents that were aware of any of the quarantine regulations.

Base: Repeat visitors responding, (22/23 n=1363), first time visitors responding, (22/23 n=2350).

Awareness of specific prohibited items

Awareness of each item in 2022/23 has remained consistent or increased/decreased slightly (though not to a statistically significant degree). Again, awareness of honey/bee products being prohibited is highest and has remained consistent with last wave (88%), whereas awareness has increased by one percent for potatoes (from 78% to 79%) and declared weeds (from 74% to 75%). Additionally, since the last wave, awareness has decreased by one percent for foxes (from 78% to 77%) and rabbits (from 79% to 78%).

Figure 44: Awareness of Prohibited Items



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

Base: Visitors responding, (22/23 n=3701)

Note: Missing cases excluded.

Significant and notable differences between subgroups:

Consistent with the previous year:

- Amongst the 22/23 visitors surveyed, more repeat visitors were aware of the regulations around all prohibited items. This marks an improvement from the COVID recovery period where awareness was only of honey/bee products and potatoes for repeat visitors.
- More ferry arrivals were aware (71%) than those arriving by air (57%) or cruise ship (50%) prior to arriving.
- More intrastate visitors were aware of quarantine regulations for honey/bee products than interstate and international visitors (91% vs 86% and 80%, respectively)
- For rabbits: More intrastate (82%) compared to interstate (76%) and international (71%) visitors, and
- For foxes: More intrastate (81%) compared to interstate (75%) and international (70%) visitors.
- For potatoes: More intrastate (81%) and interstate (79%) were aware compared to international (70%).
- More visitors who spent only up to \$200 were aware of regulations around rabbits (81%), declared weeds (78%) and potatoes (81%) compared to visitors who spent more than \$200.

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=2333	(b) Repeat visitors n=1360
Honey/bee products	85%	93%↑
Rabbits	75%	83%↑
Potatoes	77%	82%↑
Foxes	74%	82%↑
Declared weeds	73%	77%↑

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

Note: 22/23

Sources of information about quarantine regulations

Consistent with the previous wave, one in seven (14%) 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%).

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

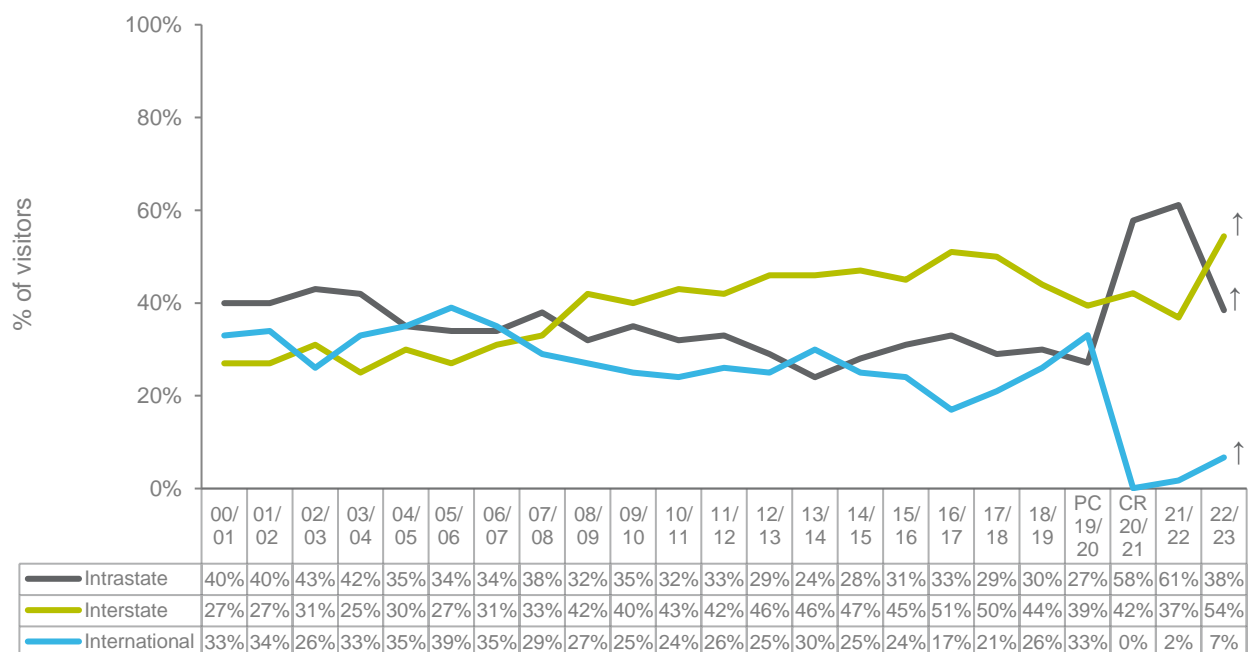
Indicator		Sub-groups who were within the Acceptable range for the indicator	Sub-groups who scored more highly for the indicator (compared to their comparative sub-group)
EN2b	Proportion of visitations to natural areas occurring on managed sites	<ul style="list-style-type: none"> All sub-groups, except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

Visitor Profile

Visitor Origin

In this wave, interstate visitation is at the highest of all historical waves following a period of continuous decline since 16/17- this is also statistically significant in comparison to the previous wave (from 37% to 54%); however, intrastate visitation has significantly declined from the previous wave (from 61% to 38%) and starting to return to pre-COVID-19 levels. Note that in March 2020 Australia's international borders commenced a complete closure, changing the visitor profile significantly - however, the 2022/23 profile of visitors echoes the impacts of the past three years, with international visitation still lower than pre-COVID-19 but significantly higher since the previous wave (from 2% to 7%).

Figure 45: Visitor Origin over time



Q4 Where do you live?

Base: Visitors responding, (22/23 n=3722)

*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.

**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 2022/23 period, results are largely consistent with previous years. Notably there is a larger proportion from VIC (from 30% to 35%) and a decrease from QLD (24% to 19%). Visitation from the ACT, TAS and NT also decreased down to 2%, 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)
VIC	39%	27%	36%	45%	36%	42%	43%	34%	39%	36%	41%	34%	34%	31%	37%	33%	36%	32%	28%	30%	35%
NSW	43%	52%	40%	36%	38%	35%	29%	36%	35%	35%	32%	39%	33%	34%	35%	38%	36%	37%	37%	32%	32%
QLD	11%	8%	13%	7%	10%	11%	15%	14%	12%	13%	13%	13%	17%	20%	14%	12%	15%	17%	11%	24%	19%
WA	3%	3%	6%	7%	7%	5%	8%	9%	8%	8%	9%	9%	10%	10%	7%	11%	8%	8%	5%	6%	8%
ACT	1%	4%	1%	4%	5%	3%	3%	4%	3%	4%	2%	2%	3%	3%	3%	2%	3%	3%	7%	3%	2%
TAS	2%	0%	2%	0%	2%	2%	1%	2%	2%	3%	1%	1%	2%	1%	2%	2%	2%	2%	5%	3%	2%
NT	1%	7%	2%	1%	2%	3%	<1%	1%	1%	1%	3%	1%	2%	1%	1%	1%	1%	1%	7%	3%	2%

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

International visitor origin

The number of international visitors has started returning to pre-COVID-19 levels (PC 2019/20 n=283, 2022/23 n=285) - this is markedly different from 2021/22 (n=22) and COVID-19 recovery 2020/21 (n=3) due to the relaxing of travel restrictions following increased vaccination rates to COVID-19. Most international visitors in this wave came from the UK (22%) and USA/Canada (21%).

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)
USA / Canada	29%	24%	24%	23%	19%	25%	23%	24%	22%	20%	14%	-	5%	21%
Other European countries	13%	14%	16%	15%	22%	16%	15%	22%	8%	19%	11%	-	9%	18%
United Kingdom	22%	22%	19%	18%	12%	21%	20%	16%	22%	12%	13%	-	14%	22%
Germany	12%	10%	10%	12%	15%	12%	14%	9%	15%	10%	13%	-	-	7%
Other Asia	5%	3%	6%	3%	8%	3%	4%	3%	2%	7%	6%	-	27%	7% [↑]
New Zealand	2%	2%	2%	2%	4%	3%	3%	3%	13%	2%	5%	100%	23%	5% [↑]
Other countries	0%	1%	1%	1%	2%	1%	1%	1%	3%	1%	3%	-	-	3%
France	8%	10%	8%	9%	5%	7%	6%	5%	5%	8%	12%	-	23%	5%
Italy	9%	11%	12%	15%	9%	7%	9%	14%	4%	12%	12%	-	-	9%
India	0%	1%	1%	1%	1%	1%	0%	<1%	4%	0%	2% [↑]	-	-	1%
China / Hong Kong	1%	1%	1%	2%	3%	4%	5%	3%	2%	8%	9%	-	-	2%
Japan	1%	0%	1%	0%	1%	1%	1%	1%	0%	0%	0%	-	-	-

Q4 *Where do you live?*

Base: International visitors responding.

Note: Missing cases excluded.

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

Age profile

Profile of respondents taking the survey

The 2022/23 age profile has changed since the previous wave— for total visitors, a significant increase in 65+-year-old visitors was recorded (from 16% to 21%) - likely driven by the significant increase in this age group for interstate visitors (from 19% to 24%).

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)
15 – 24 years	6%	4%	6%	6%	6%	4%	5%	4%	5%	6%	7%	1%	8%	6%
25 – 44 years	31%	29%	27%	31%	31%	25%	25%	21%	23%	28%	29%	15%	35%	32%
45 – 64 years	47%	47%	44%	44%	42%	44%	45%	45%	43%	40%	42%	47%	41%	41%
65+ years	16%	19%	23%	19%	21%	27%	26%	31%	29%	25%	19%	37%	16%	21%↑

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)
15 – 24 years	6%	4%	5%	7%	4%	3%	5%	5%	6%	7%	9%	2%	9%	9%
25 – 44 years	31%	31%	32%	32%	30%	27%	30%	19%	25%	30%	38%	11%	38%	34%
45 – 64 years	52%	49%	40%	43%	47%	50%	41%	47%	43%	40%	37%	53%	39%	40%
65+ years	12%	16%	22%	18%	18%	19%	24%	29%	26%	21%	14%	34%	13%	16%

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)
15 – 24 years	4%	3%	3%	4%	5%	2%	3%	2%	2%	3%	5%	0%	5%	4%
25 – 44 years	25%	21%	15%	23%	26%	18%	15%	17%	22%	18%	23%	20%	31%	30%
45 – 64 years	51%	51%	55%	51%	42%	46%	52%	45%	43%	46%	45%	38%	45%	41%
65+ years	20%	25%	27%	22%	27%	34%	30%	36%	33%	32%	23%	42%	19%	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)
15 – 24 years	10%	7%	13%	8%	9%	9%	8%	6%	10%	8%	8%	-	14%	9%
25 – 44 years	42%	43%	39%	43%	38%	34%	37%	35%	22%	42%	31%	-	27%	32%
45 – 64 years	34%	35%	33%	34%	37%	33%	35%	40%	44%	31%	43%	-	27%	41%
65+ years	14%	15%	16%	16%	15%	23%	19%	19%	24%	18%	17%	100%	32%	17%

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)
Total Female	55%	55%	53%	55%	52%	54%	51%	52%	52%	51%	50%
Under 15 years	5%	9%	7%	7%	7%	7%	10%	9%	3%	8%	9%
15 - 24 years	4%	6%	4%	2%	4%	3%	4%	6%	4%	9%	5%
25 - 44 years	14%	12%	9%	10%	8%	8%	11%	12%	3%	13%	11%
45 - 64 years	22%	17%	18%	15%	17%	17%	14%	16%	21%	13%	14%
65 plus years	11%	11%	15%	20%	16%	17%	12%	9%	21%	8%	10%
Total Male	45%	45%	47%	45%	48%	46%	49%	48%	48%	49%	50%
Under 15 years	4%	8%	7%	5%	7%	5%	8%	10%	1%	9%	9%
15 - 24 years	3%	3%	2%	3%	4%	2%	4%	5%	3%	5%	5%
25 - 44 years	11%	10%	9%	9%	8%	7%	11%	11%	7%	14%	12%↓
45 - 64 years	17%	14%	16%	15%	17%	16%	15%	14%	18%	13%	15%
65 plus years	10%	10%	13%	14%	16%	15%	11%	9%	20%	8%	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

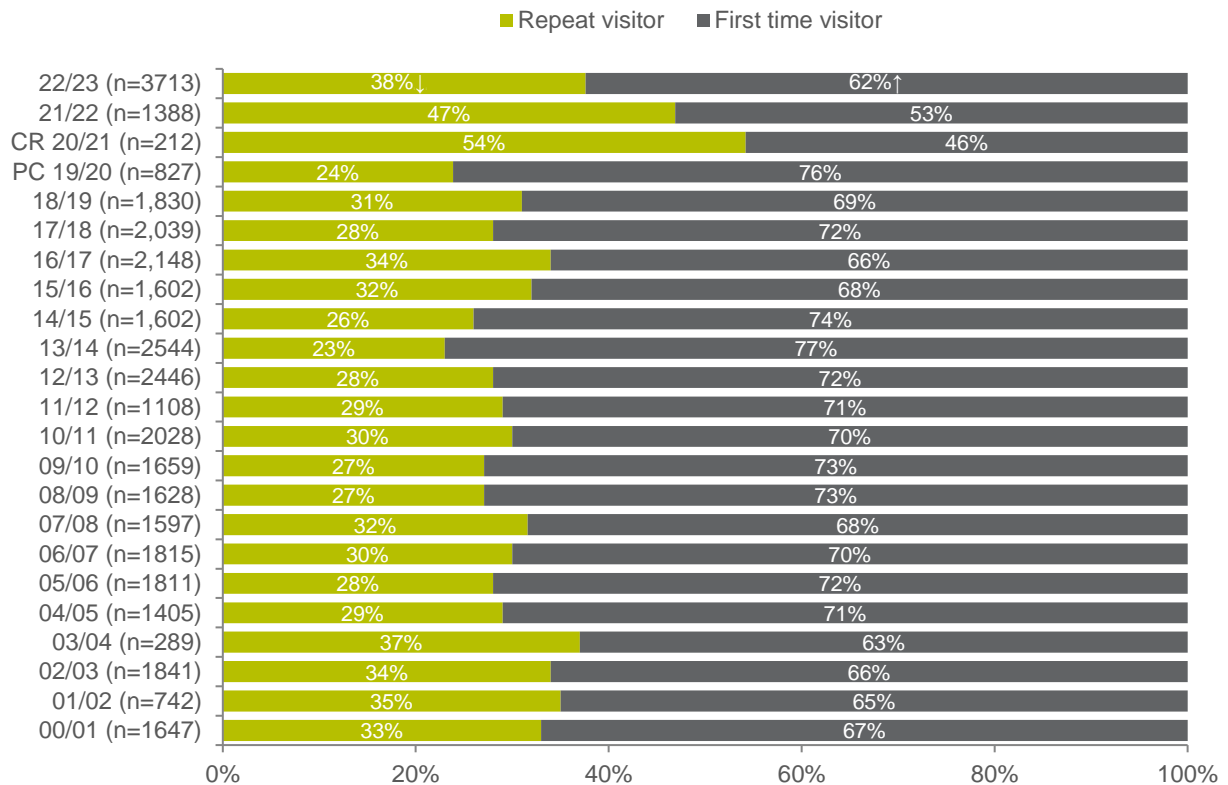
Note: Missing cases excluded.

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 significantly from 53% to 62%.

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 relatively consistent for interstate visitors since the previous wave (from 15% to 16%) and increased for intrastate visitors (from 67% to 72%) - though this is not significant. Visitation has also increased for international visitors since the previous wave from 5% to 15%; however, while this seems like a notable increase, the international sample in the previous wave was n=22, making this more susceptible to extreme fluctuations and non-significant.

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%

Q3 Have you ever visited Kangaroo Island before this trip?

Base: Visitors responding.

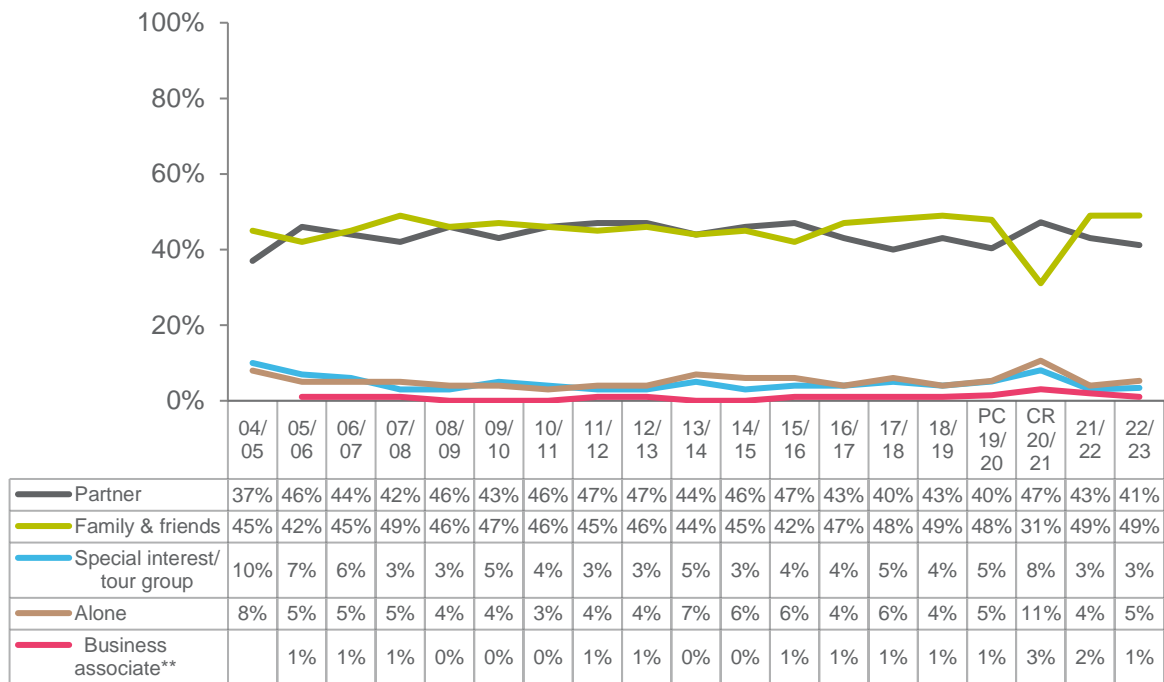
Note: Don't know and missing cases excluded.

*Interpret percentages with caution given small sample sizes. COVID recovery n=3 international visitors, while in Wave 20 there were n=22.

Travel party

In 2022/23, results are largely consistent with previous waves, indicating the composition of visitor groups has not been majorly affected by the 19/20 bushfires or COVID-19 restrictions. While in 2020/21 the composition of the travel group as family/friends decreased to 31%, in 2021/22 this returned to pre-COVID levels (49%) and continues to remain at 49% in the current wave.

Figure 48: Travel party over Time



Q2 On this trip, who did you travel with?

Base: Visitors responding, (22/23 n=3721)

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)
With family and friends	54%	56%	58%	65%	58%	61%	60%	55%	54%	63%	60%	54%	35%	55%	57%
With a partner	40%	36%	36%	30%	36%	30%	35%	38%	34%	27%	31%	31%	40%	36%	34%
With a special interest group	1%	3%	2%	1%	2%	3%	2%	3%	5%	3%	3%	4%	12%	2%	2%
Alone	4%	5%	3%	2%	3%	5%	3%	4%	5%	6%	4%	6%	7%	4%	5%
With business associate (with or without spouse)	<1%	<1%	1%	1%	1%	1%	1%	<1%	2%	1%	1%	5%	5%	2%	2%

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)
With family and friends	43%	46%	42%	35%	44%	40%	39%	37%	44%	42%	42%	49%	25%	37%	45%↑
With a partner	51%	48%	51%	57%	49%	49%	54%	51%	47%	45%	50%	43%	57%	54%	47%
With a special interest group	3%	3%	5%	2%	2%	5%	2%	4%	5%	6%	4%	4%	2%	6%	3%
Alone	3%	3%	2%	6%	4%	6%	5%	7%	4%	7%	3%	4%	15%	3%	4%
With business associate (with or without spouse)	<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)
With family and friends	42%	38%	38%	37%	36%	38%	38%	34%	43%	42%	45%	41%	67%	59%	37%
With a partner	46%	45%	51%	51%	54%	48%	43%	52%	49%	48%	44%	45%	33%	32%	38%
With a special interest group	6%	12%	4%	7%	4%	5%	6%	5%	4%	3%	4%	7%	-	-	10%
Alone	7%	5%	5%	5%	5%	9%	13%	7%	4%	6%	6%	6%	-	9%	15%
With business associate (with or without spouse)	<1%	<1%	<1%	1%	<1%	<1%	<1%	2%	<1%	1%	<1%	-	-	-	<1%

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

Types of Accommodation

In 2022/23, there has been no significant changes in the types of accommodation used since the previous wave. The most common types of accommodation were a holiday home (23%) or hotel/motel (22%).

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)
Hotel / motel	28%	29%	26%	32%	30%	25%	25%	23%	25%	22%	24%	25%	25%	25%	26%	24%	24%	28%	38%	24%	22%
Holiday home	28%	13%	19%	26%	27%	21%	21%	22%	21%	26%	23%	22%	22%	27%	25%	25%	24%	23%	20%	25%	23%
Apartment / unit	-	-	-	-	-	-	-	12%	10%	10%	9%	11%	9%	7%	10%	13%	13%	11%	14%	11%	11%
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%
Cabin / Cottage	18%	18%	17%	11%	12%	11%	10%	15%	11%	13%	13%	12%	12%	10%	12%	11%	11%	11%	7%	9%	8%
Luxury lodge / retreat^	-	-	-	-	-	-	-	9%	8%	8%	8%	8%	10%	7%	9%	8%	5%	8%	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%
Backpacker hostel	3%	5%	7%	4%	4%	3%	2%	6%	4%	5%	4%	5%	4%	4%	3%	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%
Own property	-	-	-	-	-	-	-	<1%	1%	<1%	1%	1%	1%	<1%	1%	1%	<1%	1%	<1%	2%	2%

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

Base: Visitors responding.

Note: Don't know and missing cases excluded.

^ 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 visitors. Amongst intrastate visitors, there was a significant decrease in hotel/motel use (from 21% to 15%) and for international visitors, there was a significant decrease in camping/caravan or motorhome use (from 37% to 12%).

	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)	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)	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)
Hotel / motel	16%	15%	16%	34%	21%	15%↓	27%	24%	27%	45%	29%	26%	35%	39%	42%	67%	26%	40%
Holiday home	34%	36%	31%	21%	30%	32%	23%	21%	24%	18%	17%	18%	11%	13%	12%	33%	5%	14%
Apartment / unit	16%	12%	15%	13%	11%	11%	11%	13%	8%	15%	11%	12%	11%	12%	11%	-	5%	8%
Camping, caravan or motorhome	13%	11%	7%	6%	9%	10%	22%	24%	18%	15%	18%	20%	10%	14%	9%	-	37%	12%↓
Cabin	10%	11%	9%	9%	8%	8%	12%	12%	13%	3%	10%	8%	11%	10%	10%	-	5%	8%
Luxury lodge/Retreat	5%	3%	4%	2%	5%	3%	9%	5%	6%	6%	3%	5%	9%	8%	13%	-	-	5%
Bed & breakfast or farm stay	9%	7%	11%	9%	12%	12%	9%	9%	10%	<1%	11%	11%	5%	5%	6%	-	16%	9%
Backpacker hostel	1%	1%	-	-	1%	-	1%	1%	1%	-	<1%		2%	2%	1%	-	-	-
Friends / relatives	10%	8%	6%	2%	8%	12%	3%	4%	5%	1%	3%	4%	4%	1%	1%	-	5%	5%
Own property	1%	1%	3%	-	2%	4%	1%	<1%	1%	<1%	1%	1%	0%	<1%	-	-	-	1%

Table 10: Accommodation Used by Visitor Origin

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 2022/23 has remained consistent with the previous wave (86%). The highest levels of satisfaction across the accommodation types during 21/22 were luxury lodges/retreats (95%) and friends/relatives (93%). In 2022/23, there has been a significant decrease in satisfaction for cabin accommodation since the previous wave (from 91% to 77%).

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)
Total Satisfaction	78%	76%	77%	80%	80%	80%	79%	78%	79%	75%	86%	86%
Hotel / motel	79%	66%	75%	71%	71%	73%	71%	77%	74%	82%	78%	83%
Holiday home	84%	91%	87%	87%	93%	85%	88%	88%	89%	73%	94%	91%
Rented apartment or flat or unit	82%	84%	81%	78%	93%	84%	86%	84%	77%	77%	83%	85%
Camping, caravan or motor home	67%	60%	59%	64%	70%	72%	66%	71%	76%	67%	80%	82%
Cabin	68%	67%	72%	63%	85%	77%	75%	80%	84%	51%	91%	77%↓
Luxury lodge/Retreat	80%	80%	87%	86%	84%	86%	87%	88%	81%	99%	96%	95%
Hosted bed & breakfast or farm stay	87%	89%	93%	92%	82%	84%	73%	82%	89%	99%	95%	85%
Self-contained bed & breakfast or farm stay	77%	93%	82%	96%	79%	95%	88%	83%	75%	100%	86%	91%
Backpacker hostel	63%	72%	56%	69%	52%	69%	80%	59%	100%	-	80%	-
Friends / relatives	78%	87%	94%	91%	89%	93%	95%	86%	80%	96%	95%	93%

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

	2022/23
A) Holiday home	91% ↑D, ↑F, ↑H, ↑I
B) Luxury Lodge / Retreat	95% ↑D, ↑F, ↑G, ↑H, ↑I
C) Friends / relatives	93% ↑D, ↑F, ↑H, ↑I
D) Rented apartment or flat or unit	85% ↑F
E) Self-contained bed & breakfast or farm stay	91% ↑F, ↑H, ↑I
F) Cabin	77%
G) Hosted bed & breakfast or farm stay	85%
H) Hotel / motel	83%
I) Camping, caravan or motorhome	82%

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 experienced the island's produce has decreased significantly (from 93% to 89%).

Table 13: Credible vs. experienced attributes and attractions

	Credible										Experienced									
	13/14 (min n=2401)	14/15 (min n=1534)	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)	13/14 (min n=1980)	14/15 (min n=1252)	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)
Spectacular scenery and coastal beauty	99%	99%	99%	99%	99%	99%	99%	100%	99%	99%	99%	99%	99%	99%	99%	99%	99%	100%	99%	99%
Areas of untouched natural beauty	97%	95%	96%	97%	97%	97%	96%	97%	97%	97%	96%	96%	96%	97%	97%	95%	95%	97%	96%	94%
Viewing Australia's wildlife in natural surroundings	98%	98%	97%	98%	98%	98%	99%	97%	97%	98%	96%	99%	96%	97%	97%	96%	96%	95%	93%	93%
Scenic variety without crowds of people	95%	97%	96%	96%	96%	95%	96%	98%	99%	97%	94%	97%	97%	97%	97%	96%	97%	96%	97%	97%
Farming and rural landscapes	92%	93%	94%	94%	94%	93%	93%	97%	97%	96%	88%	94%	90%	92%	88%	87%	87%	92%	90%	88%
Island produce (food & wine)	85%	89%	91%	94%	91%	93%	91%	99%	98%	97%	75%	91%	83%	87%	83%	83%	82%	96%	93%	89%↓
A friendly local community	87%	88%	90%	91%	92%	91%	91%	94%	94%	94%	91%	94%	92%	94%	93%	93%	91%	97%	94%	95%
The cultural heritage and history of settlement	77%	79%	80%	80%	80%	78%	78%	78%	81%	83%	71%	78%	76%	74%	72%	70%	70%	75%	72%	71%
One of Australia's top three nature and wildlife experiences	64%	63%	64%	66%	67%	72%	77%	65%	76%	77%	79%	78%	75%	80%	81%	81%	82%	75%	75%	76%

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 (0-3% changes). The highest satisfaction levels for the current wave include customer service received (92%) and the quality of Kangaroo Island produce (91%).

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

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. A total of 13% of the visitors surveyed in 2022/23 provided comments on their reasons for dissatisfaction. Visitors were most likely to express dissatisfaction towards KI's road infrastructure (29%), with a significant increase in dissatisfaction since the previous wave for the quality/availability of activities/tour guides (from 5% to 11%) and significantly less dissatisfaction noted for lack of restaurants, cafes and other eating places' (from 11% to 6%).

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

Q20 Base: For any item in question 19 above that you have expressed dissatisfaction with, please provide further comment.
 ^ 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 decrease in suggestions that the quality/number of stores, restaurants and takeaway shops needs to be improved (from 14% to 9%) and increases to statements around 'extend length of stay' (from 3% to 5%) and 'improve public transport, bus/ taxi / infrastructure' (from 1% to 4%).

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)
Improve road infrastructure	10%	9%	6%	10%	8%	5%	7%	7%	9%	18%	13%	13%
Improve road signage/ attraction signage/ improve map/ provide map^	—	6%	3%	6%	5%	3%	5%	4%	10%	10%	6%	7%
Improve quality/ number of stores, restaurants, takeaway shops	4%	4%	3%	4%	3%	4%	5%	3%	8%	14%	14%	9%↓
Lower the cost of travel	9%	8%	5%	7%	7%	3%	6%	4%	3%	2%	6%	8%
More/ accurate tourist information	8%	8%	5%	9%	9%	5%	6%	6%	11%	14%	10%	11%
Reduce expenses on the Island (activities, food, petrol etc.)	5%	4%	3%	3%	3%	2%	1%	1%	4%	2%	3%	3%
Extend length of stay	2%	2%	3%	3%	4%	2%	1%	2%	3%	-	3%	5%↑
Improve public transport, bus/ taxi / infrastructure	2%	1%	1%	1%	1%	1%	2%	1%	4%	2%	1%	4%↑
Extend trading hours (shops/ restaurants/ tours/ petrol stations)	2%	3%	3%	2%	4%	3%	3%	3%	6%	6%	4%	5%
Improve quality/ availability of accommodation	1%	1%	1%	3%	3%	1%	2%	1%	3%	4%	3%	5%
More activities / wildlife viewing opportunities	1%	2%	3%	4%	1%	2%	3%	3%	7%	<1%	4%	5%
Improve mobile phone/ Internet coverage	1%	1%	1%	1%	2%	2%	1%	2%	2%	2%	3%	3%
Improve public infrastructure (public toilets, rubbish bins, picnic areas etc.)	1%	3%	2%	1%	1%	1%	5%	4%	3%	14%	3%	4%
Reduce roadkill/ speed limits	1%	3%	2%	2%	2%	2%	1%	1%	3%	6%	1%	3%
More/ better local produce	2%	2%	1%	2%	3%	2%	1%	1%	3%	0%	2%	2%
Improve customer service/ friendliness of locals	1%	1%	2%	1%	2%	1%	1%	1%	2%	2%	2%	2%
Keep KI untouched/ limit development	3%	3%	1%	1%	2%	2%	2%	2%	4%	12%	2%	3%
Car rental - reduce costs/ availability/ provide more information	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%
No Comment / no suggestion	49%	47%	55%	41%	46%	60%	56%	62%	25%	17%	11%	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=115) of the total sample were dissatisfied overall in 2022/23, scoring a 5 or below out of 10 for Q22: Overall Satisfaction. Compared to the total sample, these visitors tended to be travelling with their partner (43%), family or friends (40%), in autumn (42%), had not visited KI previously (69%), coming from interstate (52%), arriving by sea (96%) or staying one or more nights (70%).

Table 17: Who was dissatisfied?

	22/23 respondents Min n=115
Travel party	
Travelling with family or friends	40%
Travelling with partner	43%
Travelling with special interest/tour group	5%
Travelling alone	12%
Travelling with business associates (with or without spouse)	-
Season visited	
Winter	11%
Spring	14%
Summer	33%
Autumn	42%
Previous visitation	
Yes	31%
No	69%
Visitor Origin	
Intrastate	30%
Interstate	52%
International	17%
Arrival transportation	
Air	4%
Sea	96%
Type of stay	
Day trip	30%
Overnight	70%

	22/23 respondents Min n=115
Trip as part of package	
Yes	14%
No	86%
Spend	
Up to \$200 per night	45%
More than \$200 per night	55%

In 2022/23, 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. The largest difference between the dissatisfied sub-group and the total sample was in relation to 'the quality of interpretive/ educational signage' (57% difference).

Table 18: What were they dissatisfied with?

	22/23 respondents Min n=33
	% Very satisfied / satisfied (Top 2 box out of 5)
The quality of accommodation	56%
The quality of picnic/ day use areas	54%
The quality of campgrounds	53%
Seeing wildlife in the natural environment	51%
The quality of Island produce (food & wine)	49%
The level of customer service you received	48%
Your opportunity to learn more about the Island's natural environment	48%
The quality of public toilets	48%
The professionalism of tourism businesses	44%
The quality of road signage	44%
Your opportunity to learn more about the Island's history	42%
The quality of interpretive/ educational signage	40%
The range of Island produce (food & wine)	39%
The availability of Island produce (food & wine)	39%
The availability of activities	38%
The range of activities available	37%
The quality of roads	34%
The quality of activities available	33%

Table 19: Reasons for dissatisfaction (Q20)

	22/23 respondents n=483
Road Infrastructure	29%
Better road signage (attractions/ airport/ ferry)^	16%
Quality of Accommodation / or lack of	11%
Quality/ availability of activities/ tour guides	11%
More / better tourist information	10%
Expenses at KI	9%
Bad quality / availability public toilets / bins / picnic areas	9%
Customer service and friendless/ or lack of	8%
Limited Trading Hours	7%
More local produce	6%
A lack of restaurants, cafes and other eating places	6%
Bad/ lack of food options in restaurants	4%
Habitat / Wildlife	3%
Too much roadkill	3%
Mobile phone coverage	1%
Other	6%
Everything fine / not dissatisfied	2%
No Comments / NA / Blank Cells	1%

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

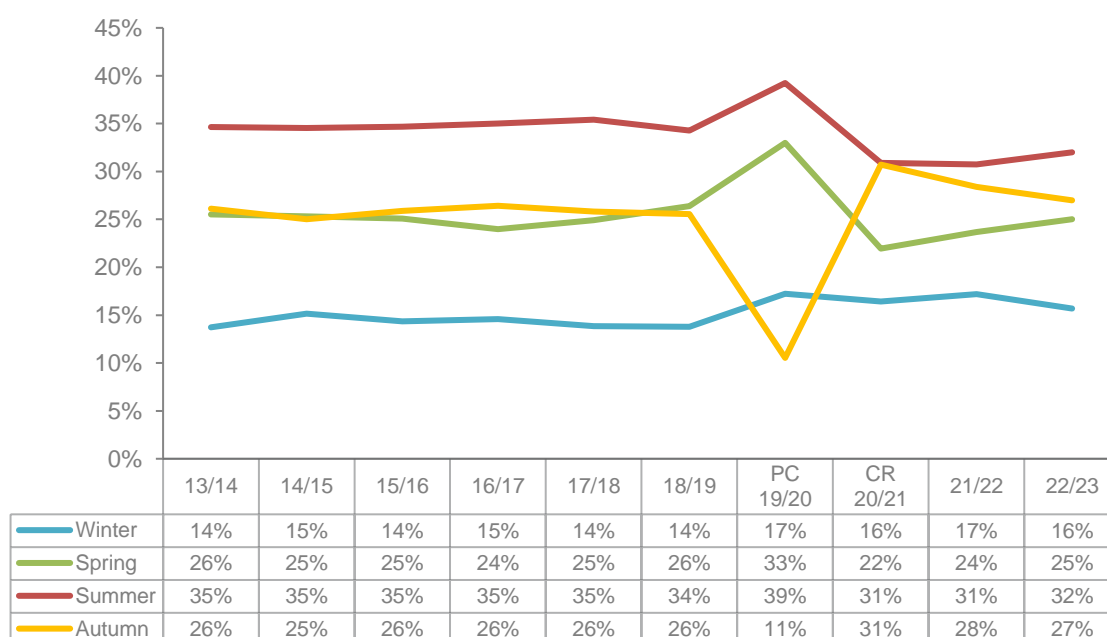
The distribution of visitors to Kangaroo Island who completed a survey across each season varies and should be considered when viewing the results throughout this section. Most surveys for the 2022/23 period were completed in summer, with similar levels of completion in autumn and the lowest number of completes in spring and winter.

Table 20: Base size by season

Season	22/23
Winter	585
Spring	442
Summer	1,543
Autumn	1,143
Total	3,713

Summer continues to be the most popular season to visit Kangaroo Island, accounting for 32% visitors in 2022/23. The seasonal proportions in visitation have remained relatively consistent across waves, besides the major disruptions in pre-COVID 19/20. Since the previous wave, visitation has changed slightly (by one percent) for all seasons- increased during summer (from 31% to 32%) and spring (from 24% to 25%) and decreased during autumn (from 28% to 27%) and winter (from 17% to 16%) - none of these differences are significant.

Figure 49: Proportion of visitors by season

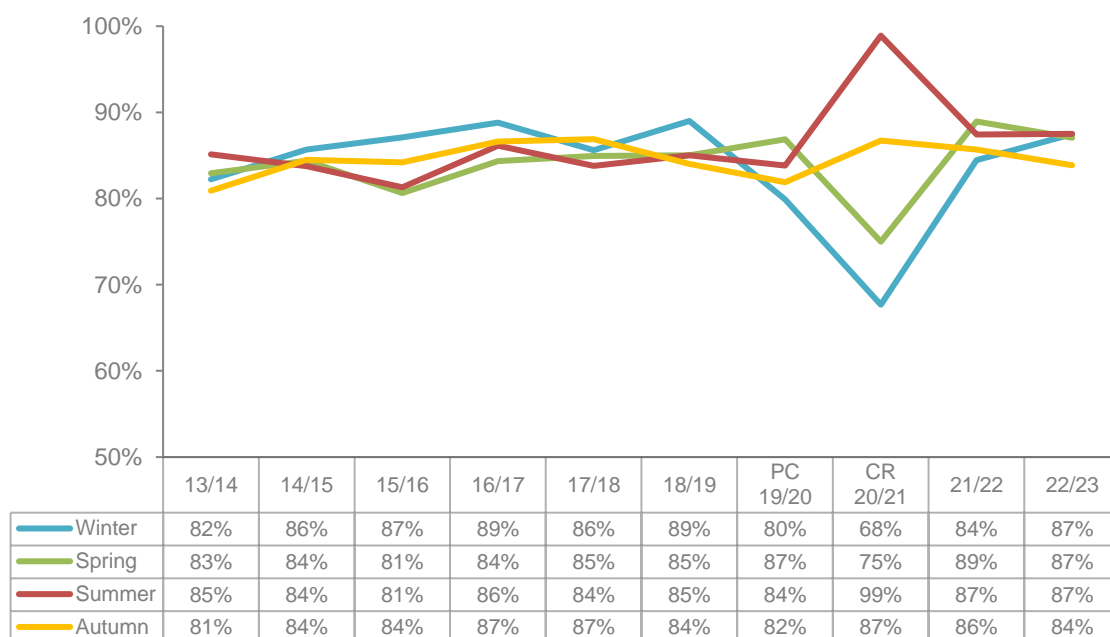


Note: These figures have been updated in accordance with data provided by the TOMM Committee.

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 the same for winter, spring and summer (all 87%) and slightly lower for autumn (84%). Satisfaction with overall experience has remained consistent with the previous wave for summer (87%), increased slightly in winter (from 84% to 87%) and decreased slightly in spring (from 89% to 87%) and autumn (from 86% to 84%) - though none of these differences are significant.

Figure 50: Visitors who were very 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, (22/23 n=3698)

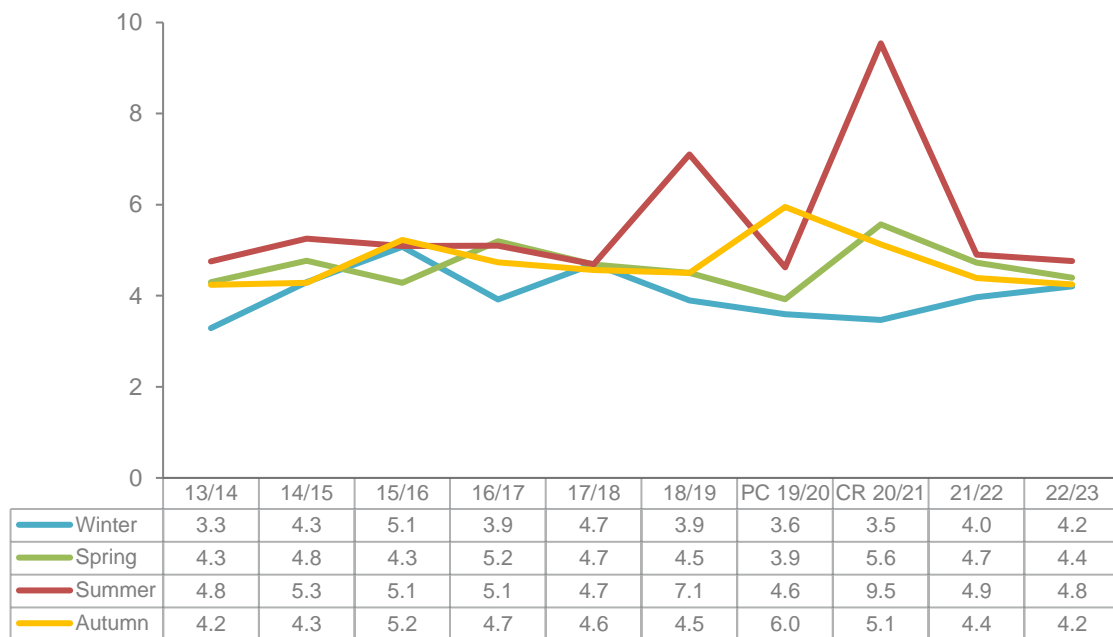
Note: Missing cases excluded.

** 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 2022/23 has decreased since the previous wave during spring (from 4.7 to 4.4), autumn (from 4.4 to 4.2) and summer (from 4.9 to 4.8); in contrast, winter visitors stayed slightly longer in 2022/23 than in the previous wave (from 4.0 to 4.2), this has been slowly increasing since COVID-19 recovery - however, none of these differences are statistically significant.

Figure 51: Average number of nights stayed by season

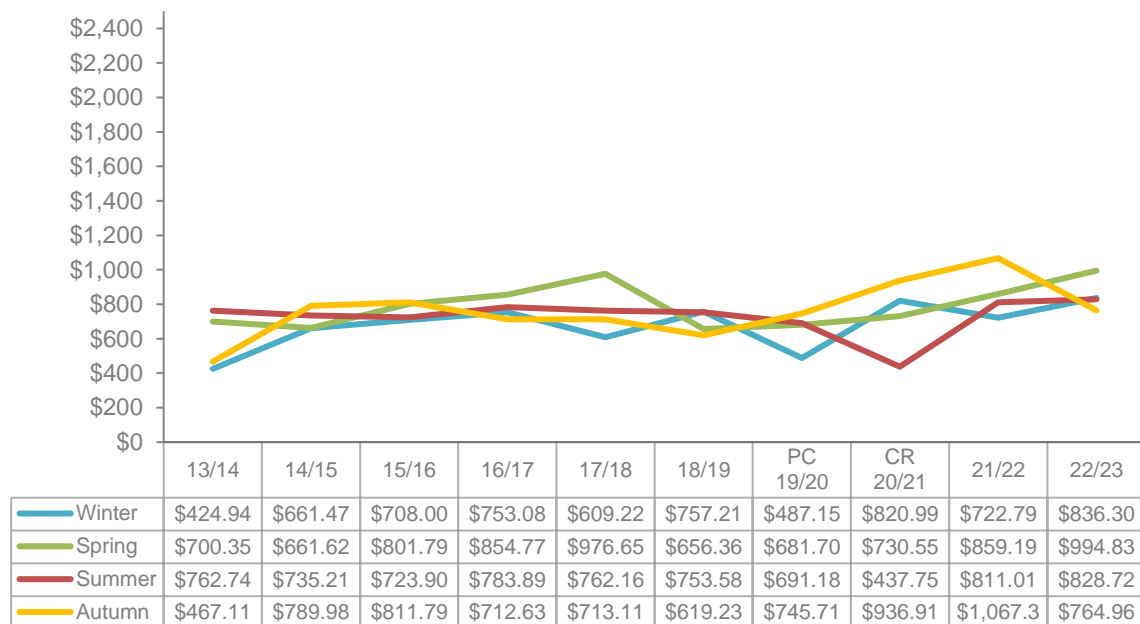


Q6 Did you stay one or more nights or was it a day trip?
 Base: Visitors responding, (22/23 n=3280)
 Note: Arrows indicate significant change in score from previous year

Average expenditure per visit by season

Average expenditure has increased in three of the four seasons for 2022/23 and the spring average expenditure is at its highest of all waves. Since the previous wave, average expenditure has increased during spring, winter and summer (an average increase of \$135.64, \$113.51, and \$17.71 respectively), while average expenditure in autumn notably decreased by -\$302.34.

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, (22/23 n=3647)

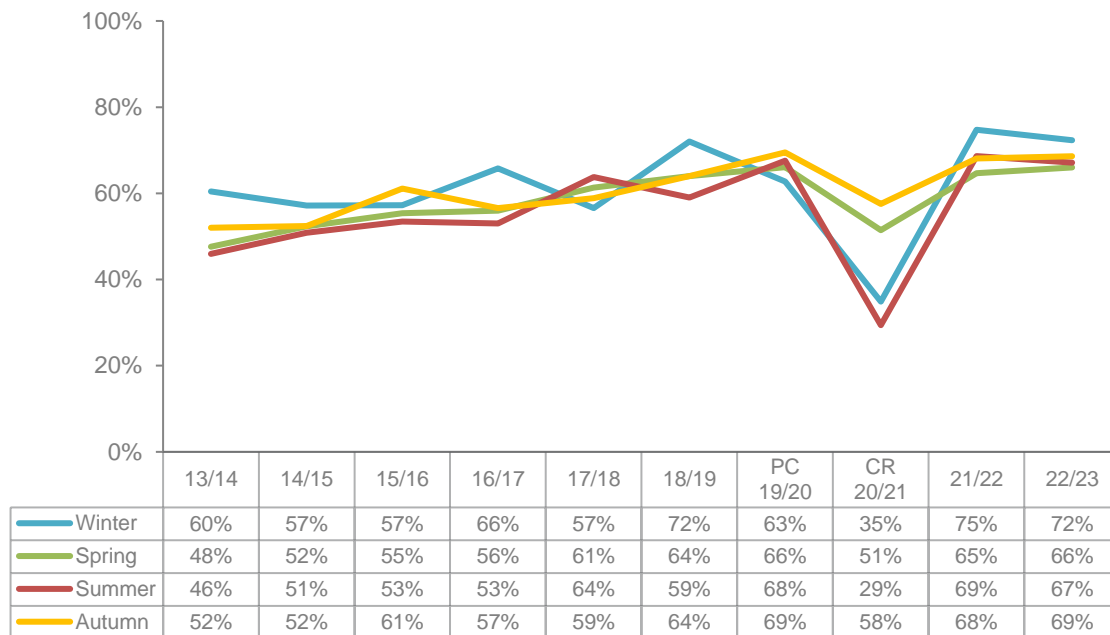
Note: Missing cases excluded.

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 bounced back in 2021/22 and has remained relatively consistent with these levels in the 2022/23 period with 1-3% changes.

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.

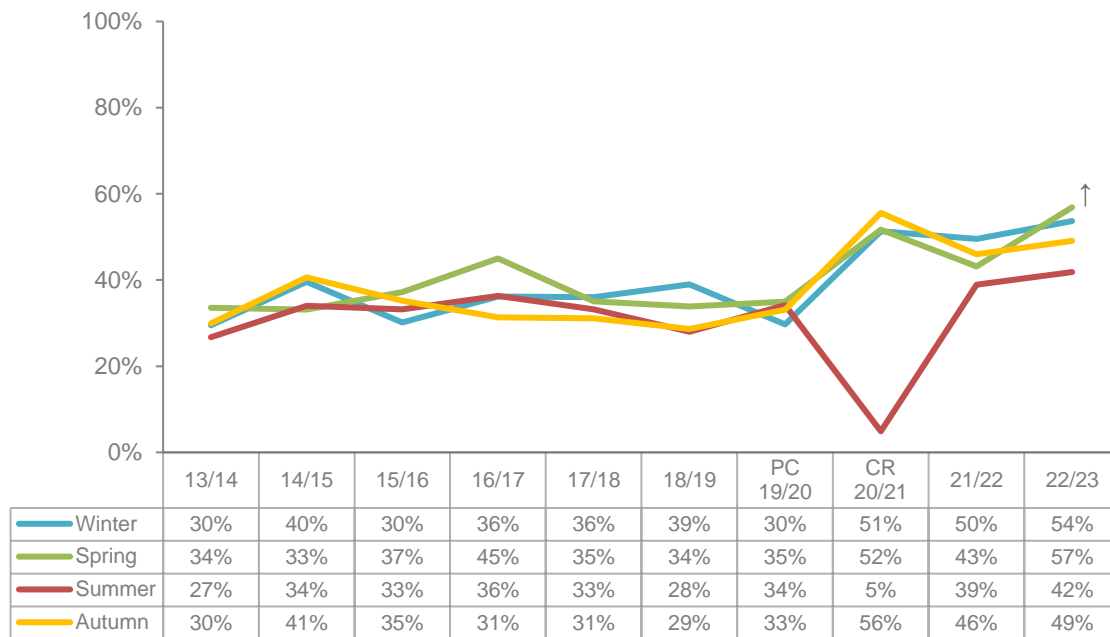
Base: Visitors who experienced it, (22/23 n=3657)

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 spring (57%), winter (54%) and summer (42%). Additionally, those reporting an average spend of over \$200 has significantly increased in spring since the previous wave (from 43% to 57%). Those reporting an average spend of \$200+ per night in the other seasons has also increased but these differences are not statistically significant.

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, (22/23 n=3219)

Note: Day trippers excluded.

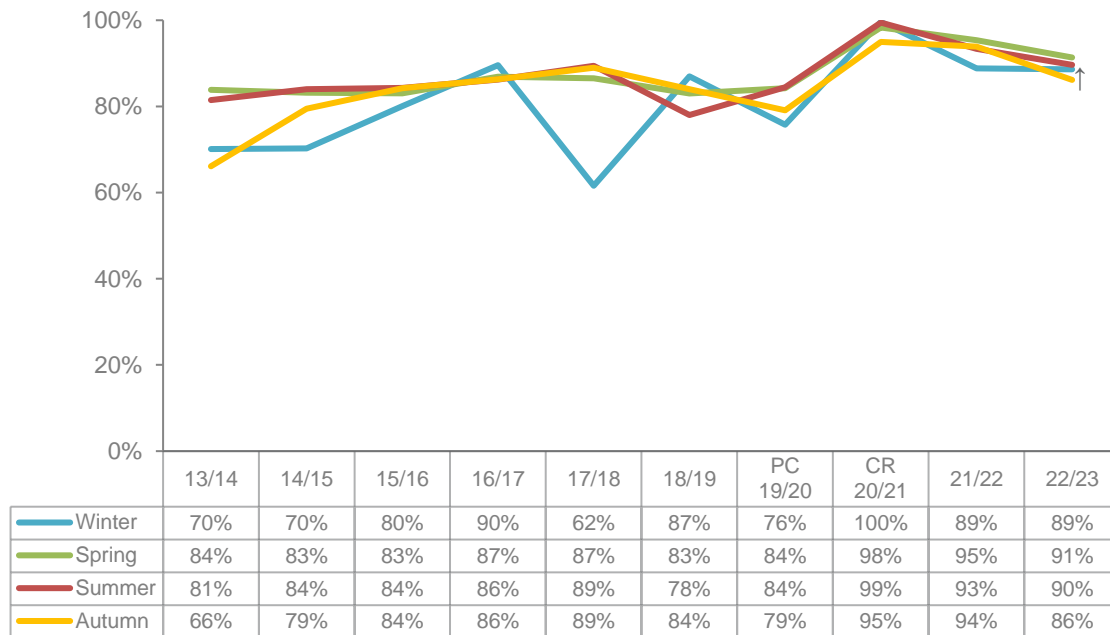
Note: Missing cases excluded.

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 winter, where it has remained consistent with the previous wave; this decrease was statistically significant for autumn visitors (from 94% to 86%) but non-significant for spring and summer visitors.

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?

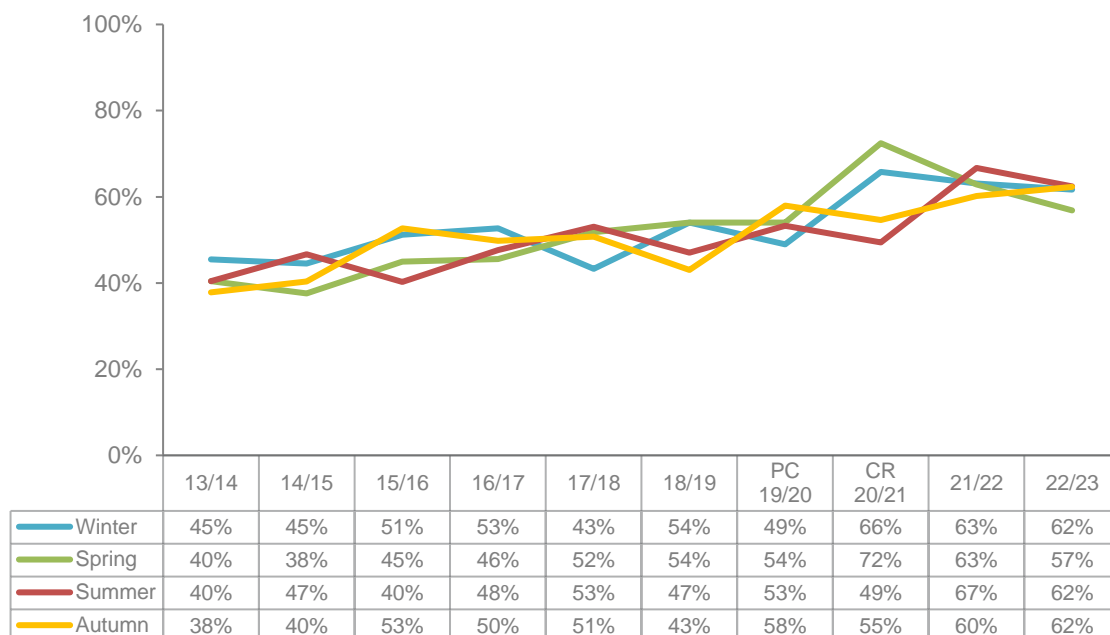
Base: Visitors responding, (22/23 n=3640)

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 increased since the previous wave for autumn visitors (from 60% to 62%) but decreased for spring (from 63% to 57%), summer (from 67% to 62%) and winter (from 63% to 62%) - though none of these differences were significant.

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



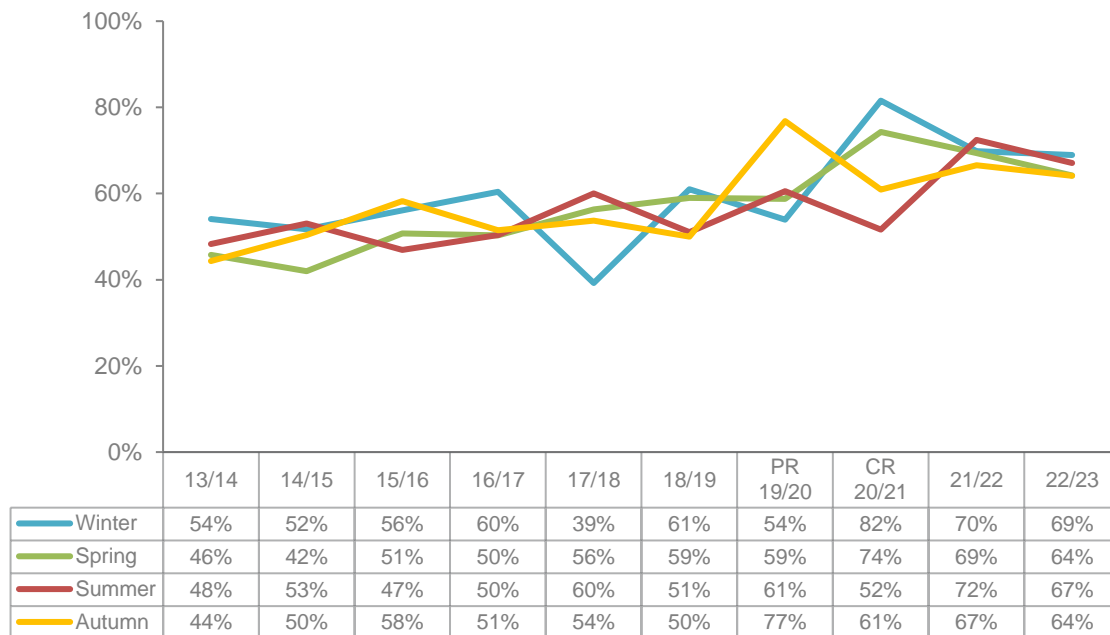
Q19.4 Please indicate how satisfied you were with....

Base: Visitors who experienced it, (22/23 n=3401)

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

Levels of satisfaction with the quality of local produce have decreased for all seasons since the previous wave, though none of these differences were significant - of all waves, the results from this wave and the previous wave have the least variation between seasons.

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



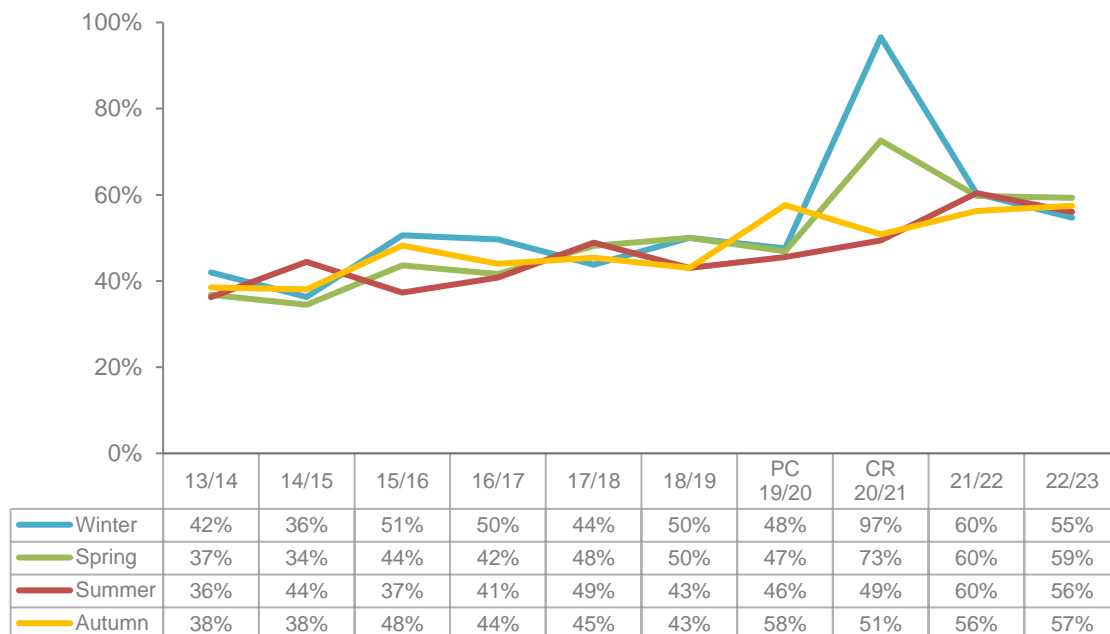
Q19.5 Please indicate how satisfied you were with....

Base: Visitors who experienced it, (22/23 n=3397)

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 remained relatively consistent for autumn and spring, and decreased slightly for winter (from 60% to 55%) and summer (from 60% to 56%) - 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, (22/23 n=3380)

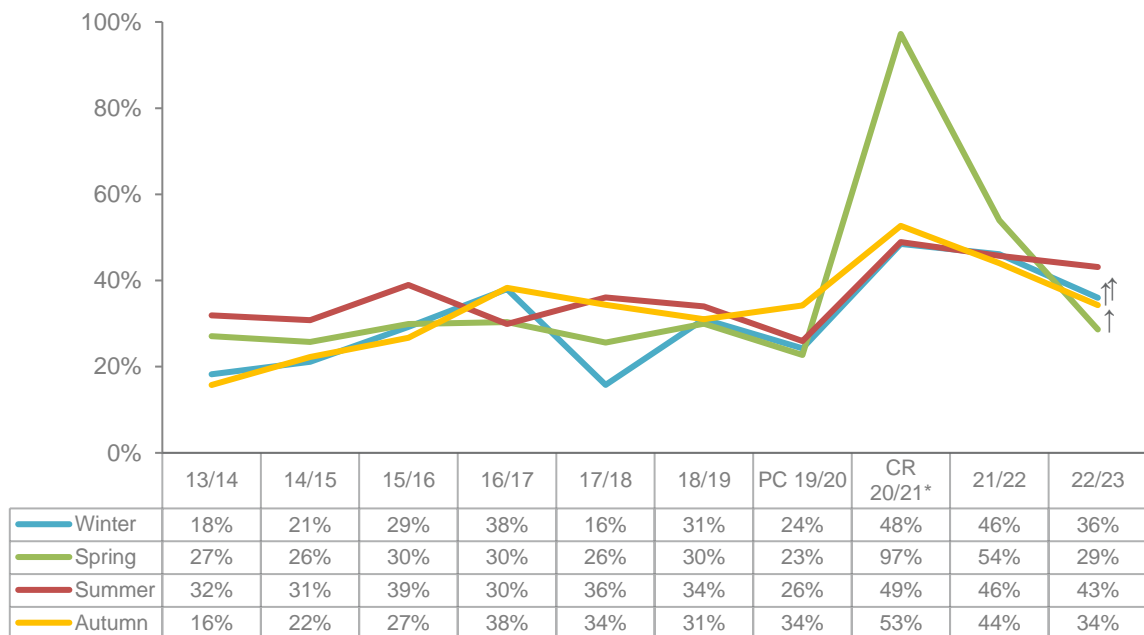
Note: Don't know, didn't experience and missing cases excluded

* 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 dropped across all seasons since the previous wave, this decrease was significant for spring (from 54% to 29%), autumn (from 44% to 36%) and winter visitors (from 46% to 36%).

Figure 59: Repeat visitors by season



Q3 Have you ever visited Kangaroo Island before this trip?

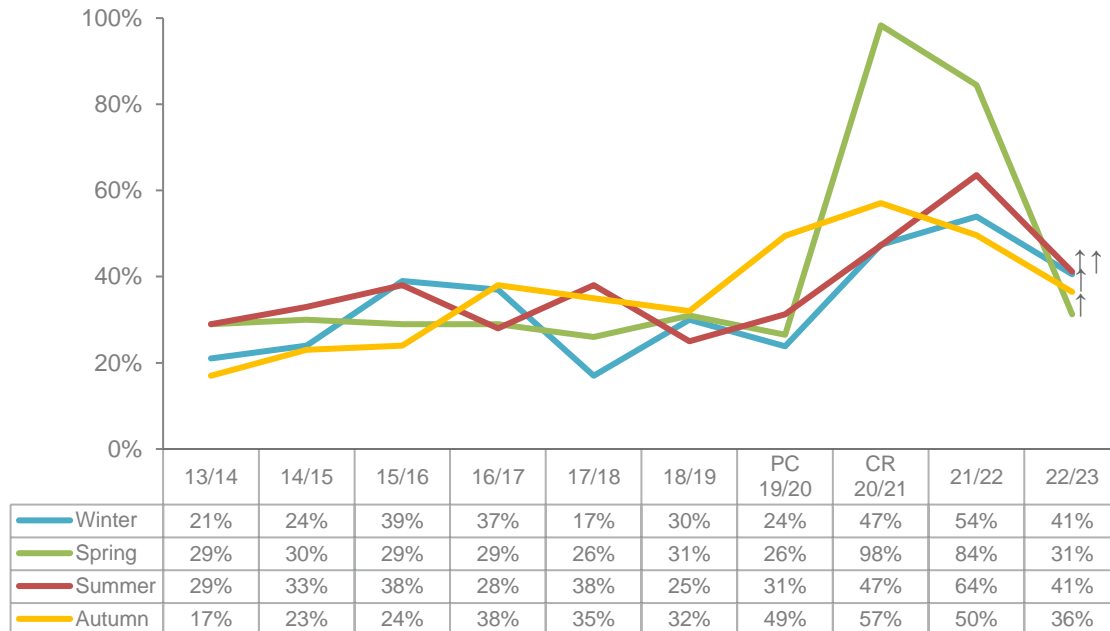
Base: Visitors responding (22/23 n=3705)

Note: Don't know and missing cases excluded

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

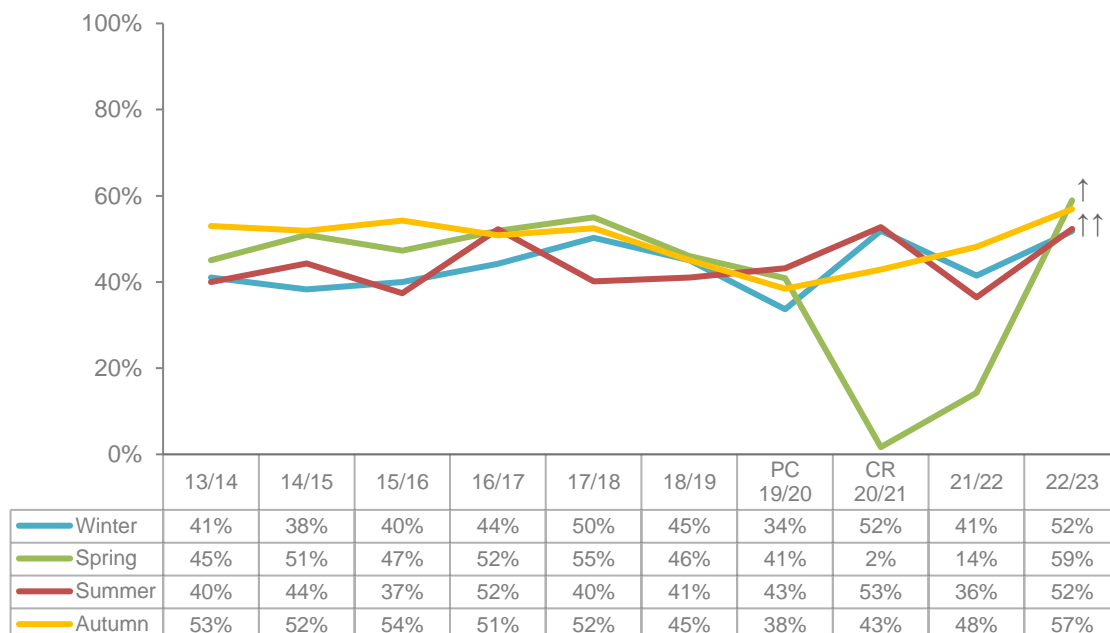
Visitor origin by season

Figure 60: Intrastate visitors by season



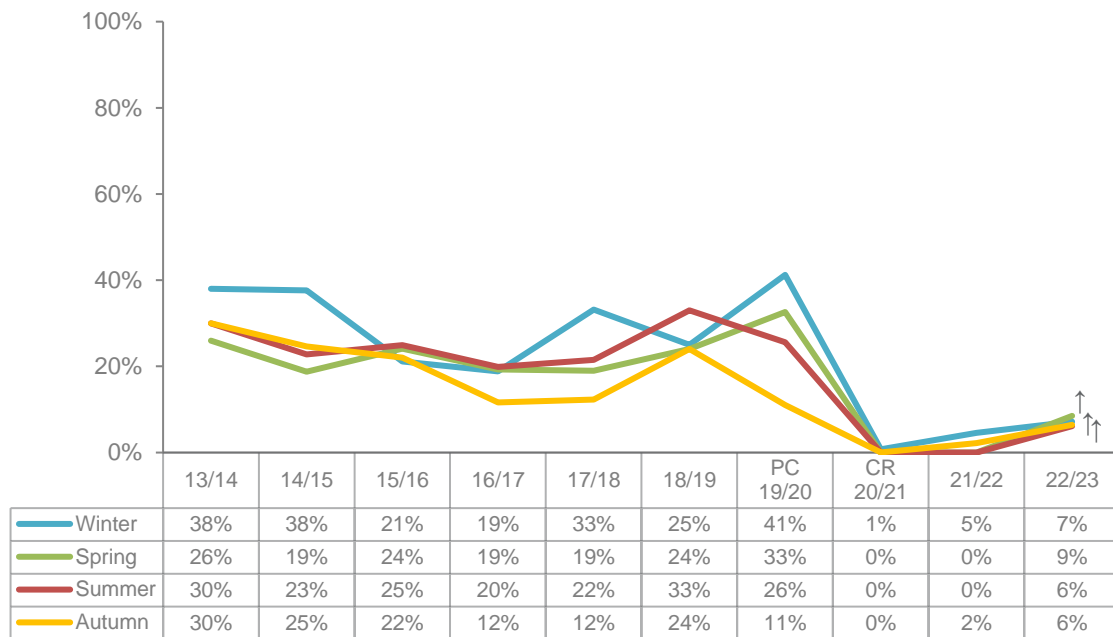
Q4 Where do you live?
Note: Missing cases excluded

Figure 61: Interstate visitors by season



Q4 Where do you live?
Note: Missing cases excluded

Figure 62: International visitors by season

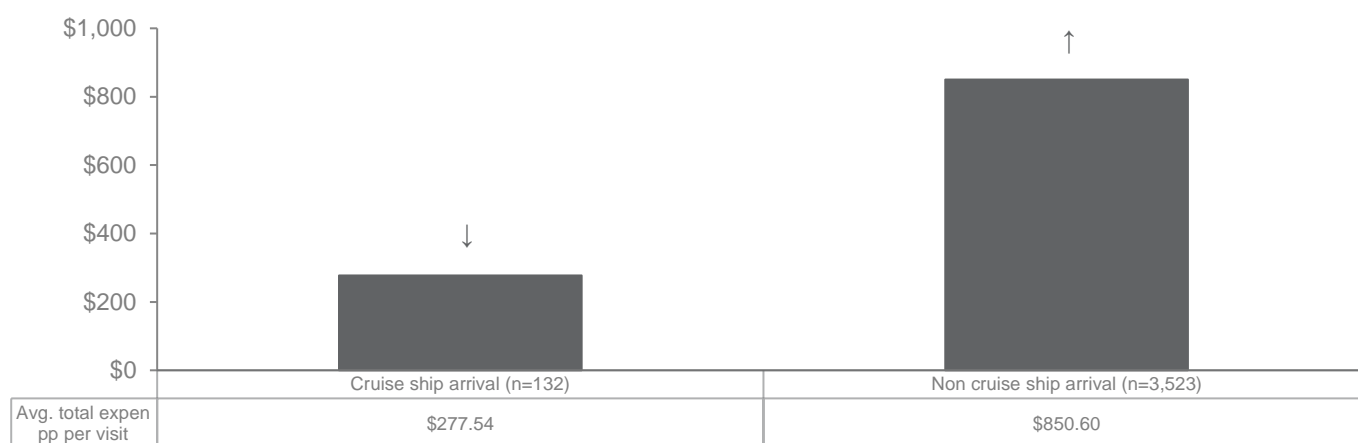


Q4 *Where do you live?*
 Note: Missing cases excluded

Cruise ship arrivals

The average total expenditure for cruise ship arrivals was significantly lower than that of non cruise ship arrivals (\$277.54 vs \$850.60). 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



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?

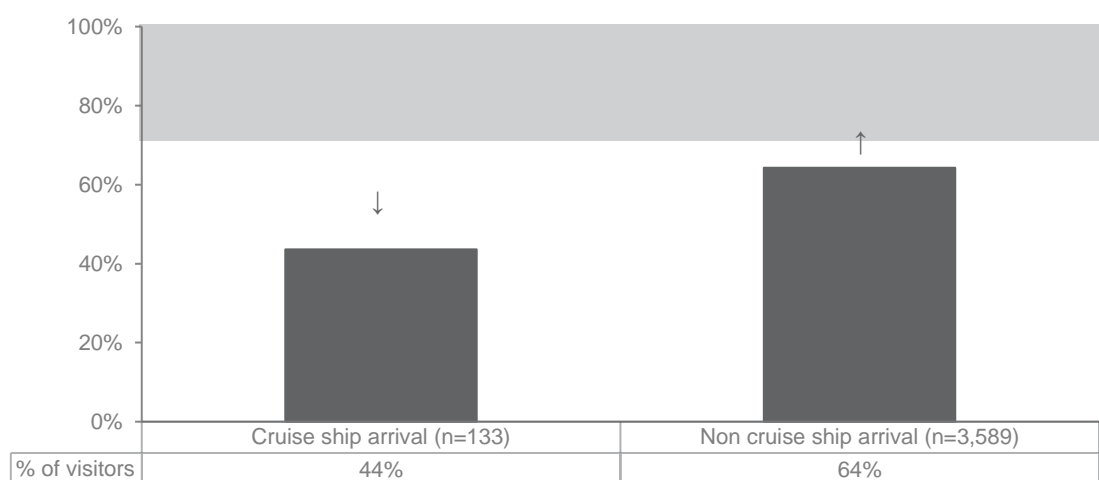
Base: Cruise ship visitors responding, (22/23 n=132)

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

Non cruise ship arrivals were significantly more likely to be aware of quarantine regulations prior to visiting when compared with cruise ship arrivals (64% vs 44%).

Figure 64: Awareness of quarantine regulations prior to visitation



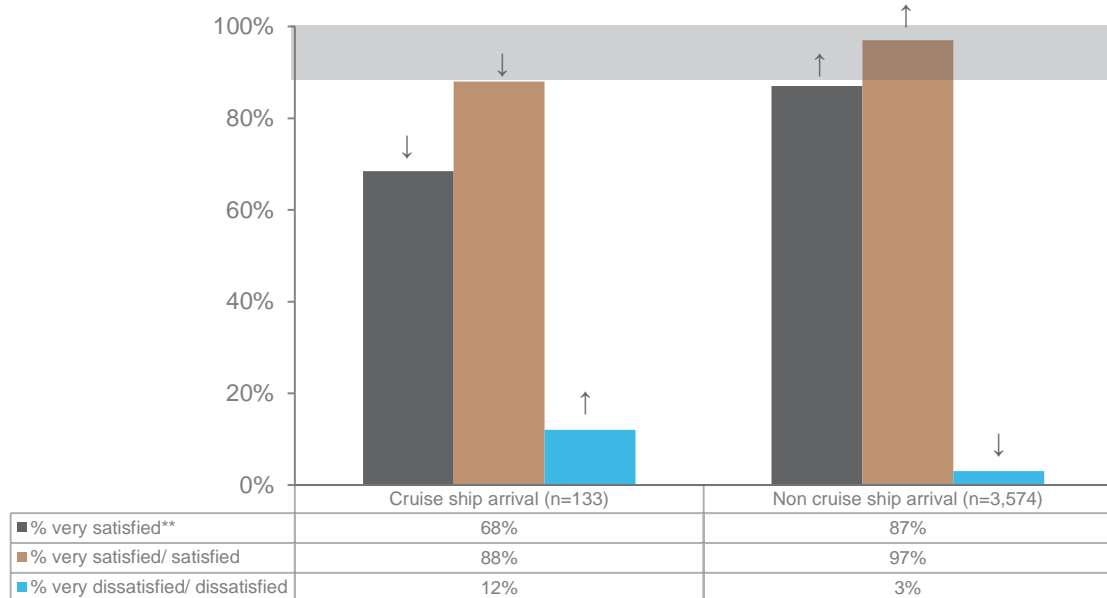
Q16a Were you aware of all Kangaroo Island's quarantine regulations

Q16b If yes, when did you find out this information

Base: Cruise ship visitors responding, (22/23 n=133)

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 (97% vs 88% and 87% vs 68%).

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?

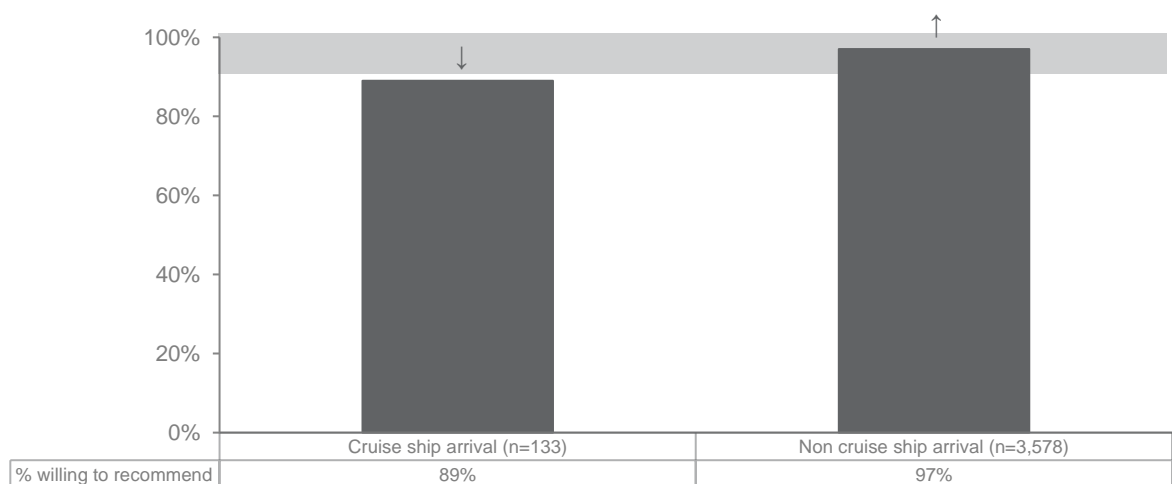
Base: Cruise ship visitors responding, (22/23 n=133)

Note: Missing cases excluded.

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

While non cruise ship arrivals fell in the acceptable range for willingness to recommend (97%), cruise ship arrivals were slightly below the acceptable range (89%).

Figure 66: Willingness to recommend



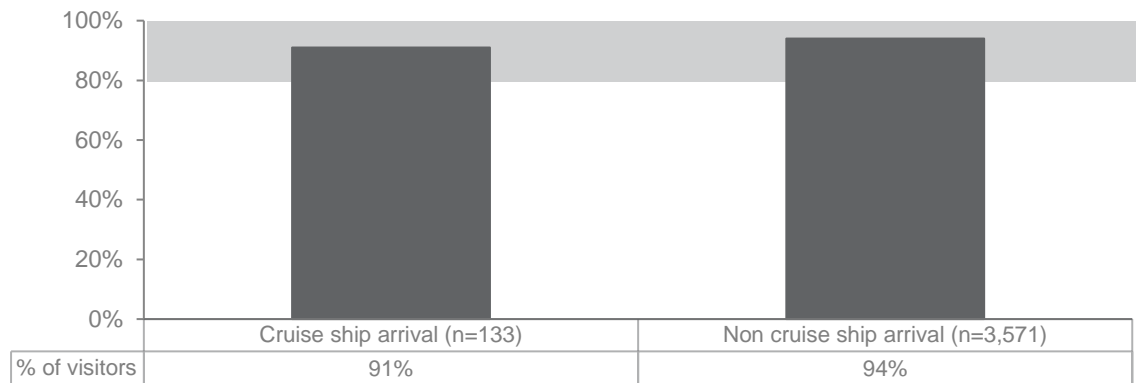
Q23 Would you recommend Kangaroo Island as a holiday destination to others based on this trip?

Base: Cruise ship visitors responding, (22/23 n=133)

Note: Missing cases excluded.

There were no significant differences present for 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 (91% vs 94%). Both groups were 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?

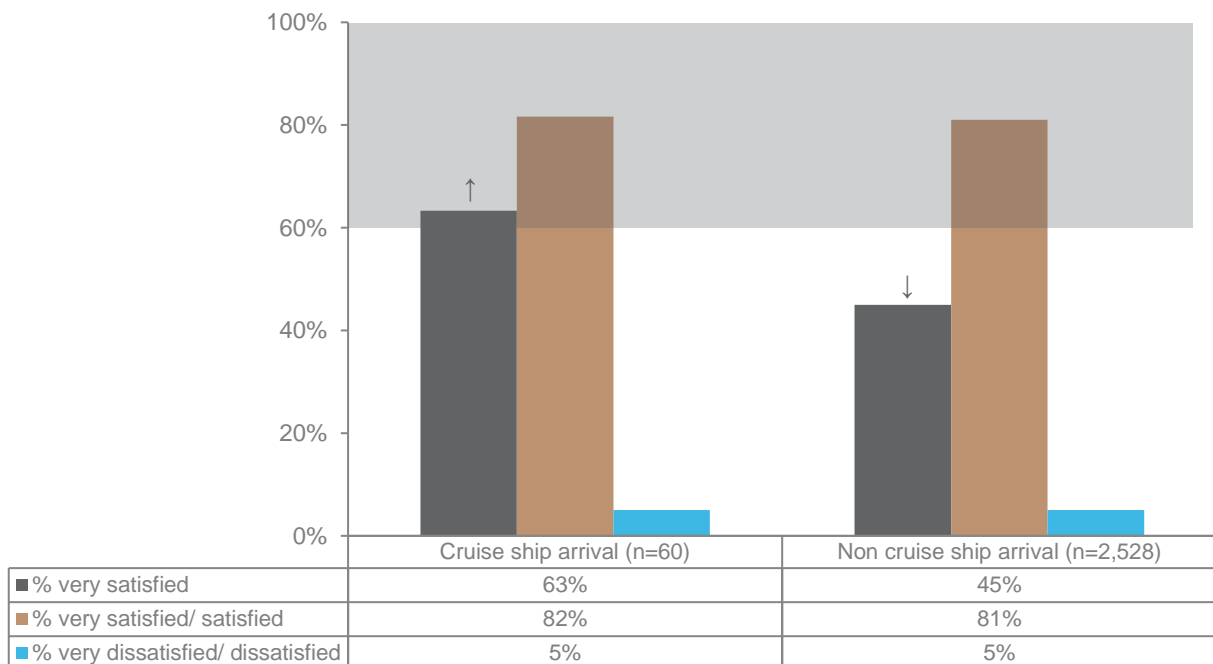
Base: Cruise ship visitors responding, (22/23 n=133)

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 significantly more likely to be very satisfied with the quality of interpretive and educational signage compared to other modes of transport (63% vs 45%). Furthermore, cruise ship arrivals fell into the acceptable range for satisfaction for this measure.

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



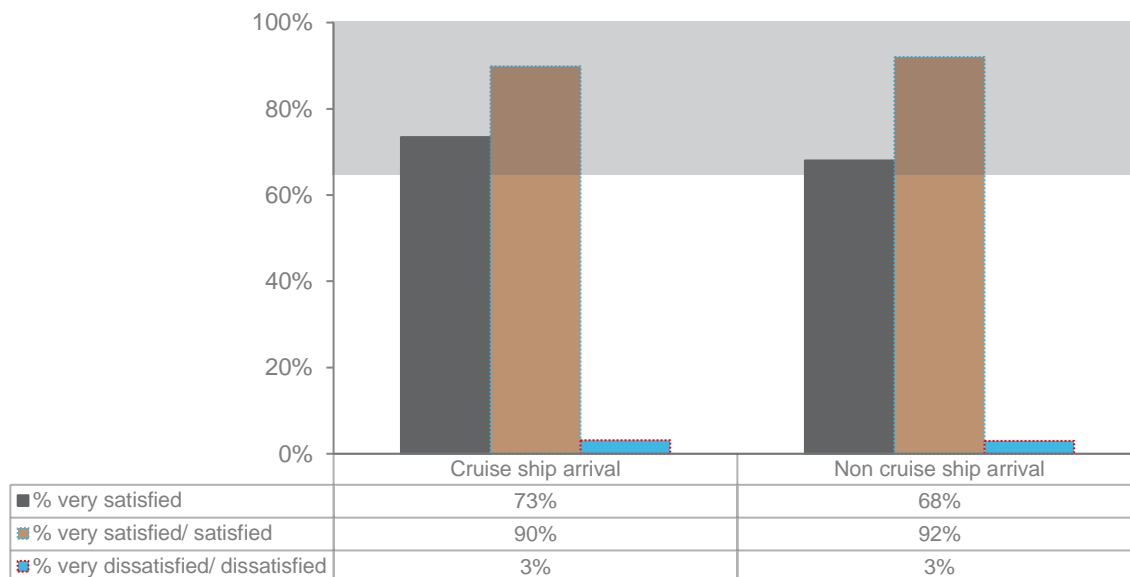
Q19.17 Please indicate how satisfied you were with...

Base: Cruise ship visitors responding, (22/23 n=60)

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 with cruise ship arrivals slightly more likely to be very satisfied (73% vs 68%).

Figure 69: Satisfaction with customer service received



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

Base: Cruise ship visitors responding, (22/23 n=128)

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%.

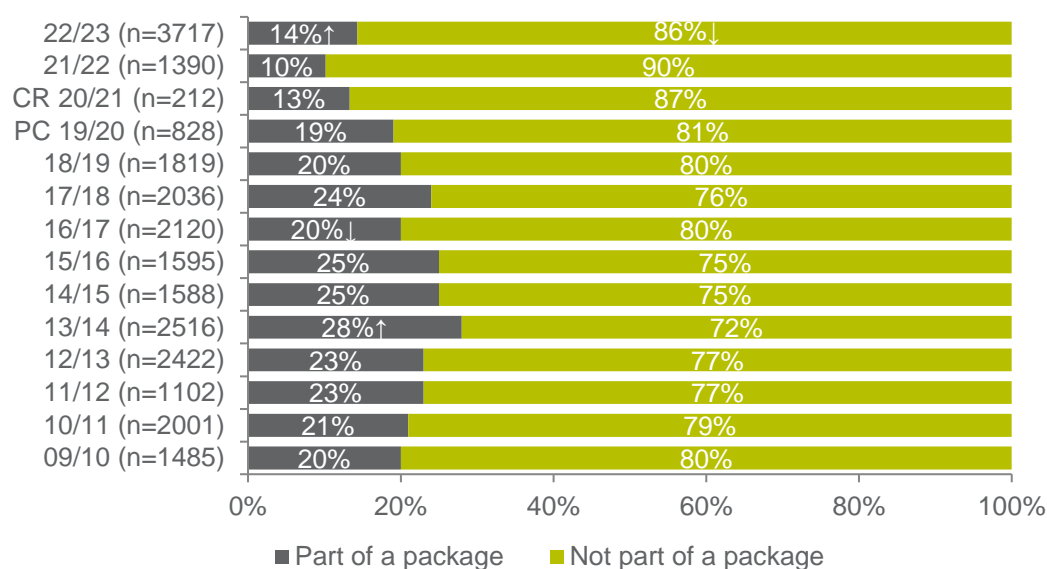
Appendix A: Visitor Expenditure

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 2022/23, the proportion of visitors whose trip to Kangaroo Island formed part of a travel package increased significantly since the previous wave (from 10% to 14%).

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 remained relatively consistent with previous waves across intrastate and interstate visitors and increased for international visitors (from 24% to 39%) - though this is not statistically significant.

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)
Trip part of a package	19%	22%	19%	20%	24%	15%	15%	11%	11%	14%	8%	9%
Not part of a package	81%	78%	81%	80%	76%	85%	85%	89%	89%	86%	92%	91%

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)
Trip part of a package	20%	19%	27%	19%	20%	18%	23%	19%	11%	12%	13%	15%
Not part of a package	80%	81%	73%	81%	80%	82%	77%	81%	89%	88%	87%	85%

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)
Trip part of a package	33%	31%	36%	40%	34%	36%	40%	33%	36%	67%	24%	39%
Not part of a package	67%	69%	64%	60%	66%	64%	60%	67%	64%	33%	76%	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 decreased 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)
Average	\$609.52	\$601.92	\$726.90	\$770.06	\$779.59	\$722.70	\$679.29	\$638.15	\$897.18	\$873.31	\$828.66
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
Median^	\$487.50	\$400.00	\$500.00	\$550.00	\$600.00	\$575.00	\$500.00	\$500.00	\$769.00	\$700.00	\$650.00
Mode [‡]	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500	\$1,000.00	\$1000.00	\$500.00
Min.	\$0.00	\$1.00	\$0.00	\$10.00	\$0.00	\$2.50	\$0.50	\$0.00	\$0.05	\$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

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)
Average	\$478.95	\$493.64	\$642.38	\$658.82	\$643.23	\$650.79	\$606.25	\$576.48	\$894.22	\$773.83	\$751.05
SD*	\$398.06	\$395.30	\$521.39	\$563.21	\$433.69	\$537.12	\$969.87	\$426.64	\$713.92	\$539.11	\$994.56
Median^	\$400.00	\$400.00	\$500.00	\$550.00	\$550.00	\$500.00	\$500.00	\$500.00	\$800.00	\$666.7	\$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
Min.	\$15.00	\$3.50	\$15.00	\$33.33	\$10.00	\$11.00	\$0.85	\$0.00	\$71.11	\$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

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)
Average	\$691.97	\$665.17	\$819.43	\$923.88	\$894.75	\$813.58	\$834.00	\$717.09	\$900.70	\$1,047.97	\$892.15
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
Median^	\$500.00	\$500.00	\$650.00	\$650.00	\$712.00	\$685.00	\$600.00	\$500.00	\$750.00	\$750.00	\$718.00
Mode [‡]	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$1,000.00	\$500.00	\$500.00	\$750.00	\$500.00	\$500.00
Min.	\$0.00	\$2.00	\$10.00	\$12.50	\$0.00	\$2.50	\$0.50	\$0.00	\$0.05	\$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

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)
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
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
Median^	\$400.00	\$328.00	\$350.00	\$450.00	\$490.00	\$400.00	\$350.00	\$350.00		\$387.5	\$450.00
Mode [‡]	\$500.00	\$250.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00		\$285.7	\$300.00
Min.	\$0.00	\$1.00	\$0.00	\$10.00	\$0.00	\$7.50	\$0.50	\$0.00		\$186.50	\$0.00
Max	\$24,000	\$50,000	\$16,400	\$42,500	\$10,150	\$6250	\$9,120	\$20,150		\$2,666.67	\$8,600.00

* 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 \$176.31 to \$188.54). For international visitors, average expenditure has increased from \$211.28 to \$226.00 while intrastate and interstate expenditure has remained relatively consistent- however, none of the differences for any visitor type were significant.

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)
Average	\$126.22	\$276.81	\$157.58	\$178.14	\$170.80	\$175.03	\$166.81	\$157.32	\$186.36	\$176.31	\$188.54↑
Standard Deviation*	\$142.18	\$650.05	\$209.36	\$266.72	\$168.60	\$154.44	\$250.24	\$307.68	\$120.13	\$144.56	\$170.35
Median^	\$100.00	\$175.00	\$125.00	\$131.70	\$133.30	\$130.00	\$125.00	\$125.00	\$178.60	\$150.00	\$150.00
Mode [‡]	\$125.00	\$250.00	\$125.00	\$125.00	\$125.00	\$125.00	\$125.00	\$125.00	\$200.00	\$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
Max	\$4,800	\$45,000	\$5,216	\$9500	\$3,500	\$2000	\$6,000	\$6,716.67	\$750.00	\$2,583.33	\$5,000.00

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)
Average	\$93.28	\$189.39	\$124.02	\$132.52	\$136.25	\$130.92	\$126.57	\$126.16	\$173.67	\$159.36	\$156.21
Standard Deviation*	\$75.30	\$180.01	\$87.87	\$109.27	\$115.98	\$109.21	\$135.45	\$104.92	\$110.01	\$107.16	\$111.58
Median^	\$74.80	\$125.00	\$100.00	\$111.10	\$114.70	\$107.10	\$104.20	\$111.10	\$150.00	\$140.60	\$131.30
Mode [‡]	125.00	\$100.00	\$166.67	\$125.00	\$125.00	\$125.00	\$125.00	\$120.00	\$200.00	\$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
Max	\$917	\$2,500	\$1,000	\$917	\$3,000	\$1,200	\$3,500	\$1,100.00	\$500.00	\$666.67	\$1,062.50

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)
Average	\$129.55	\$263.73	\$159.49	\$199.86↑	\$178.43	\$191.83	\$187.92	\$145.19	\$203.17	\$203.91	\$207.75
Standard Deviation*	\$112.47	\$315.82	\$123.94	\$314.08	\$153.56	\$158.08	\$316.75	\$121.32	\$131.23	\$188.46	\$193.24
Median^	\$100.00	\$178.60	\$133.30	\$140.00	\$150.00	\$150.00	\$125.00	\$125.00	\$187.50	\$166.7	\$166.70
Mode [‡]	\$125.00	\$250.00	\$125.00	\$125.00	\$125.00	\$250.00	\$125.00	\$125.00	\$125.00	\$250.0	\$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
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

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)
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
Standard Deviation*	\$226.81	\$1,213.54	\$422.75	\$315.63	\$271.33	\$196.01	\$220.23	\$550.79		\$183.99	\$223.27
Median^	\$123.50	\$270.00	\$125.00	\$150.00	\$150.00	\$166.70	\$133.30	\$125.00		\$158.30	\$166.70
Mode [‡]	\$150.00	\$250.00	\$125.00	\$150.00	\$125.00	\$125.00	\$100.00	\$83.30		\$650.00	\$250.00
Min.	\$0.83	\$3.33	\$0.00	\$8.33	\$0.00	\$6.67	\$0.17	\$125.00		\$8.24	\$0.00
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

* 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 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

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....

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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

Pardana 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					Very satisfied		Don't know	Didn't experience
		1	2	3	4	5	6	7		
19.1	Seeing wildlife in the natural environment	1	2	3	4	5	6	7	99	98
19.2	Your opportunity to learn more about the Island's natural environment	1	2	3	4	5	6	7	99	98
19.3	The quality of accommodation	1	2	3	4	5	6	7	99	98
19.4	The range of Island produce (food & wine)	1	2	3	4	5	6	7	99	98
19.5	The quality of Island produce (food & wine)	1	2	3	4	5	6	7	99	98
19.6	The availability of Island produce (food & wine)	1	2	3	4	5	6	7	99	98
19.7	The level of customer service you received	1	2	3	4	5	6	7	99	98
19.8	Your opportunity to learn more about the Island's history	1	2	3	4	5	6	7	99	98
19.9	The range of activities available	1	2	3	4	5	6	7	99	98
19.10	The quality of activities available	1	2	3	4	5	6	7	99	98
19.11	The availability of activities	1	2	3	4	5	6	7	99	98
19.12	The professionalism of tourism businesses	1	2	3	4	5	6	7	99	98
19.13	The quality of public toilets	1	2	3	4	5	6	7	99	98
19.14	The quality of roads	1	2	3	4	5	6	7	99	98
19.15	The quality of campgrounds	1	2	3	4	5	6	7	99	98
19.16	The quality of road signage	1	2	3	4	5	6	7	99	98
19.17	The quality of interpretive/ educational signage	1	2	3	4	5	6	7	99	98
19.18	The quality of picnic/ day use areas	1	2	3	4	5	6	7	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

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

Kantar Public

LEVEL 2, 199A RUNDLE STREET

ADELAIDE SA 5000

PH. (08) 8373 3822

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