



[Photo credit: South Australian Tourism Commission]

TOMM Kangaroo Island Resident Survey Report 2025

November 2025 | 12881

MCGREGOR TAN
RESEARCH. STRATEGY. SOLUTIONS.

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About this project

The research was conducted from the 25th of October to the 14th of November 2025.



Background

The purpose of this research project is to capture and track residents' attitudes toward tourism and related activities on Kangaroo Island. Additional questions from four stakeholders were added to the survey, with the results in the later half of the report.

The survey has been tracked against previous results where possible (2005/06 - 2023).



Sample

The survey was conducted using a multi-modal approach, achieving a total of n=413. The majority was achieved via online methods (61%) which included a client link and invitation to those on the McGregor Tan Panel. The remainder were achieved via CATI (phone interview, 39%) which involved calling residents of Kangaroo Island who were listed on a phone directory.



Guide to reading the report

This report centers on graphing the entire population, with any groups that were identified as being statistically significant being mentioned in the commentary. For example, two key subgroups include, location of residence and those aware of TOMM (68%).

When commenting on tracking, the percentage point (pp) difference over time will be discussed. This term refers to the absolute change between two percentages.



Rounding

Please keep in mind that due to rounding, some answers in single-response questions may not add up to exactly 100%. Additionally, percentages in multiple-response questions will sum to over 100% as this is based on the number of respondents, rather than the number of responses.



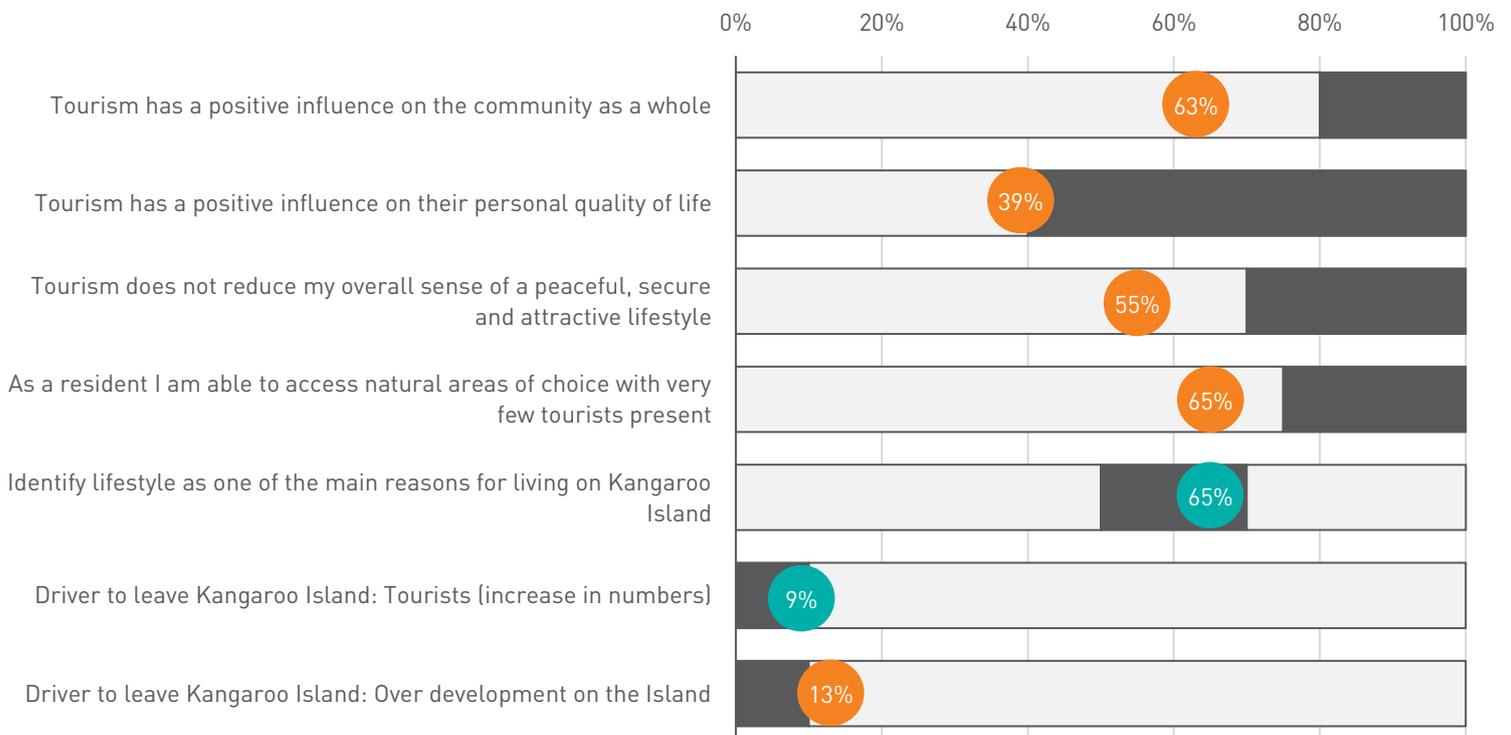
Summary of Indicators

Summary of social indicators



Most quality-of-life measures sit just outside the acceptable range this wave. While 63% believe tourism has a positive influence on the community and 55% feel it does not reduce their sense of peace and security, both remain slightly below the desired benchmark. Personal quality of life is also lower than preferred, with 39% saying tourism has a positive impact on their own day-to-day life. Lifestyle continues to be a strong drawcard, with 65% identifying it as a main reason for living on the island, although this too falls just short of the acceptable range. Drivers to leave the island remain relatively low, yet increased tourist numbers at 9% and concerns about over development at 13% are both at the top or just over the acceptable limits, signaling areas to monitor rather than immediate risks.

Tourism has a positive influence on quality of life



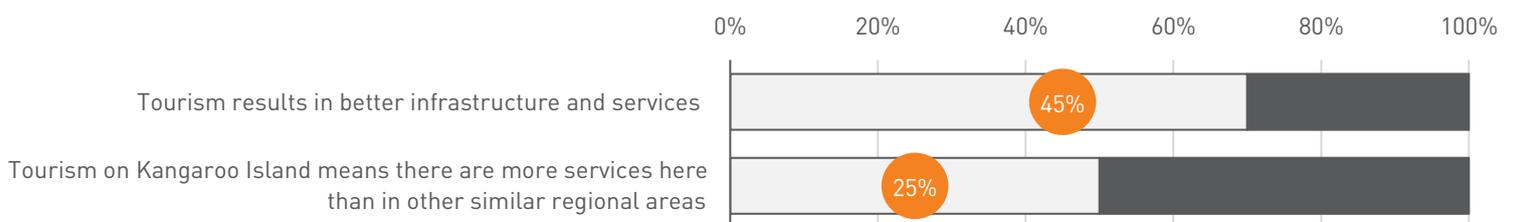
Summary of social indicators



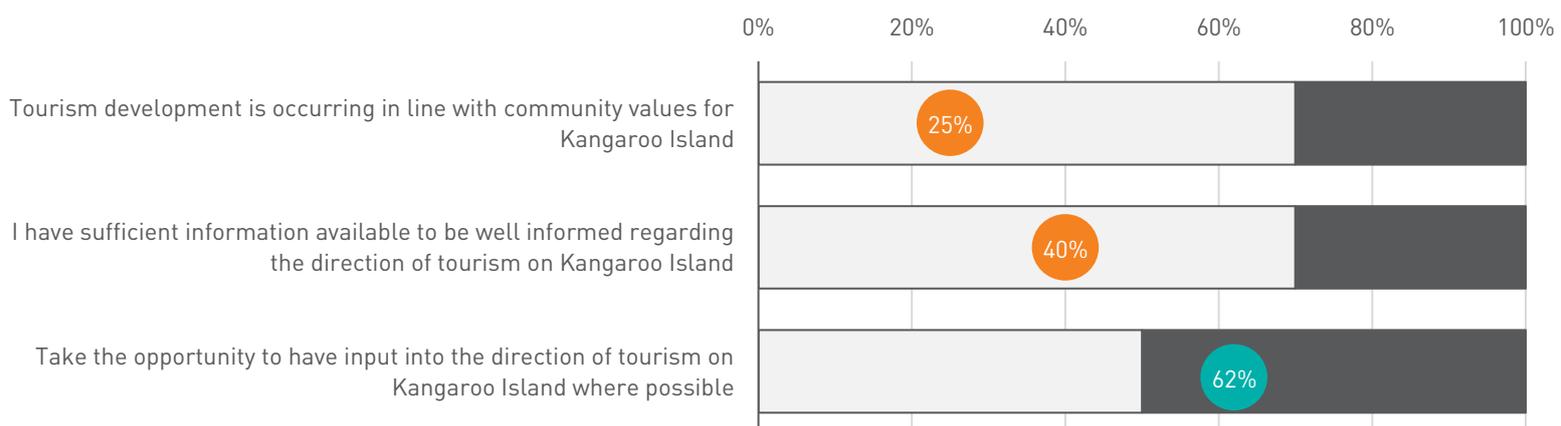
Perceptions of tourism's impact on services are mixed and remain below the acceptable range. Only 45% feel tourism improves infrastructure and services, and 25% believe it results in more services than similar regions. Tourism management measures also sit outside the preferred range.

Just 25% feel development aligns with community values and 40% feel well informed. Despite this, willingness to participate is strong, with 62% taking opportunities to provide input when they can.

Tourism has a positive impact on level of service for the region



Have opportunity for input into tourism management



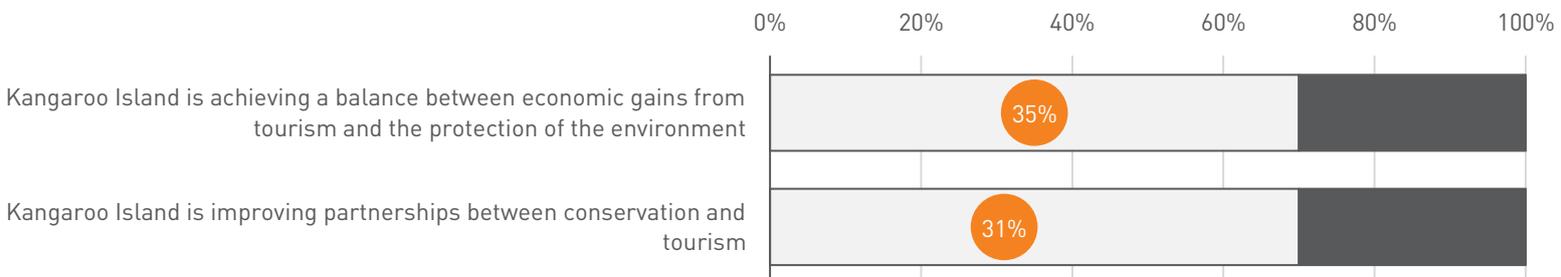
Summary of economic indicators



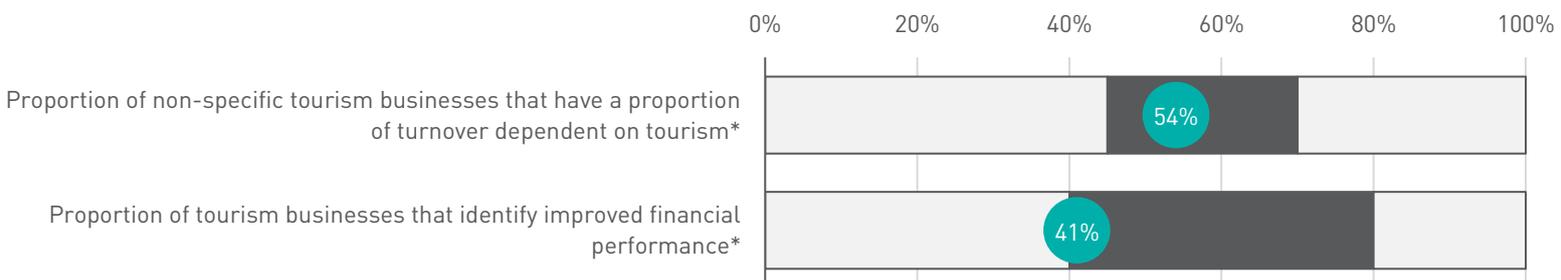
Perceptions of balance between tourism and environmental protection remain below the acceptable range. Only 35% feel the island is achieving a balance between economic gains and environmental protection, and 31% believe partnerships between conservation and tourism are improving.

Economic measures, however, show stronger results. Just over half of general businesses receive some income from tourism at 54%, and 41% of tourism businesses report improved financial performance, both within the acceptable range. Overall, residents are more confident in tourism's economic contribution than in its alignment with environmental goals.

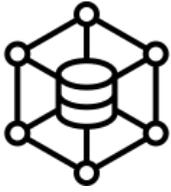
Belief of balance between tourism gains and environmental protection



Tourism improves economic benefits for Kangaroo Island

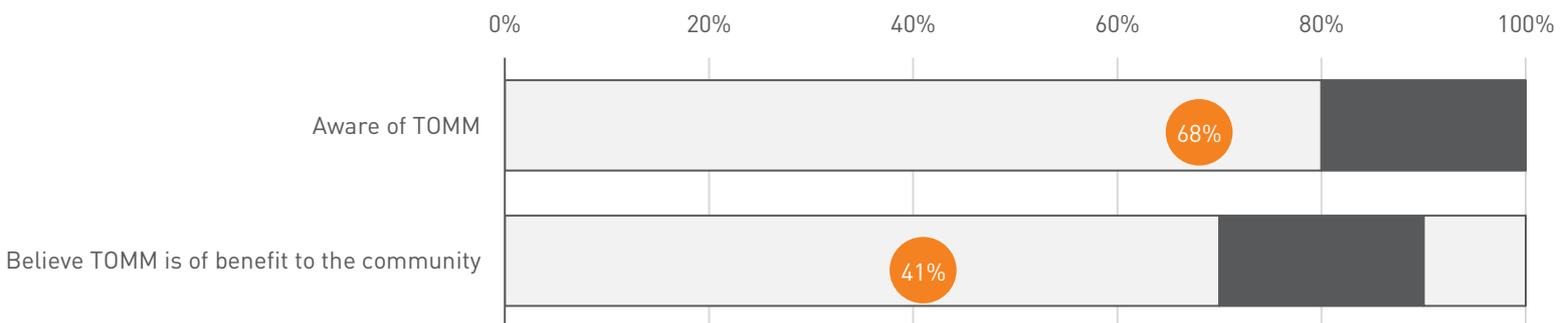


Summary of performance indicators



Awareness of TOMM remains steady at 68% but continues to fall below the acceptable range. Belief that TOMM benefits the community is even lower at 41%, indicating limited understanding of its value and impact. Together, these results suggest that TOMM is known by a majority of residents but is not widely seen as a tool that delivers clear community benefits.

TOMM is a well understood and utilised destination management tool



Summary of stakeholder findings

Department of Environment and Water



83%
Visited a Park



58%
Visited Flinders
Chase National Park



71%
Enjoy walking
at KI parks



84%
Agree that parks
provide community
spaces

Kangaroo Island Council



61%
Satisfied with
waste and
recycling



73%
Dissatisfied with
roads and
infrastructure

Kangaroo Island Landscape Board



33%
Participated in KILB
programs, grants or
information sharing



Top priority
Ensuring agriculture
is sustainable

Our Town



24%
Aware of Our Town but
have never engaged



74%
Of those disengaged
are potentially open
to involvement

South Australian Tourism Commission



82%
Feel sustainable tourism
in supporting a strong
community is important



76%
Feel that tourism activity in
supporting economic health of
the island is important

Kangaroo Island Tourism Alliance



14%
Agree that cruise ships
positively impact lifestyle

A photograph of two women enjoying a picnic on a grassy hill overlooking the ocean. One woman is sitting on a patterned blanket, and the other is standing next to her, holding a glass of wine. The background shows a clear blue sky and a vast ocean view. The text 'Executive Summary' is overlaid in white on the image.

Executive Summary

Key insights



Balancing tourism's value and its impacts

Residents increasingly recognise both the value and the strain of tourism. While tourism remains important to the island's economy, concerns around development, infrastructure pressure, and environmental impact are becoming more prominent, signaling a shifting balance that presents an opportunity to refine how tourism is managed moving forward.



More voices, less confidence

Although more residents are engaging in tourism discussions, confidence in how tourism is managed is softening. Rising participation is not yet being matched by improved perceptions, but the growing willingness to contribute provides a strong foundation for rebuilding alignment and shaping a more community-centred direction.



Cruise ships hit rough seas

Community sentiment toward cruise visitation remains weak, suggesting a need to re-engage residents and rebuild confidence in this aspect of tourism.

Executive Summary

The challenge: declining confidence amid growing engagement

The disconnect

Community participation in tourism direction has reached 62%, yet confidence in tourism management is weakening across nearly all core measures. Residents are engaging more but feeling heard less.

Key declines

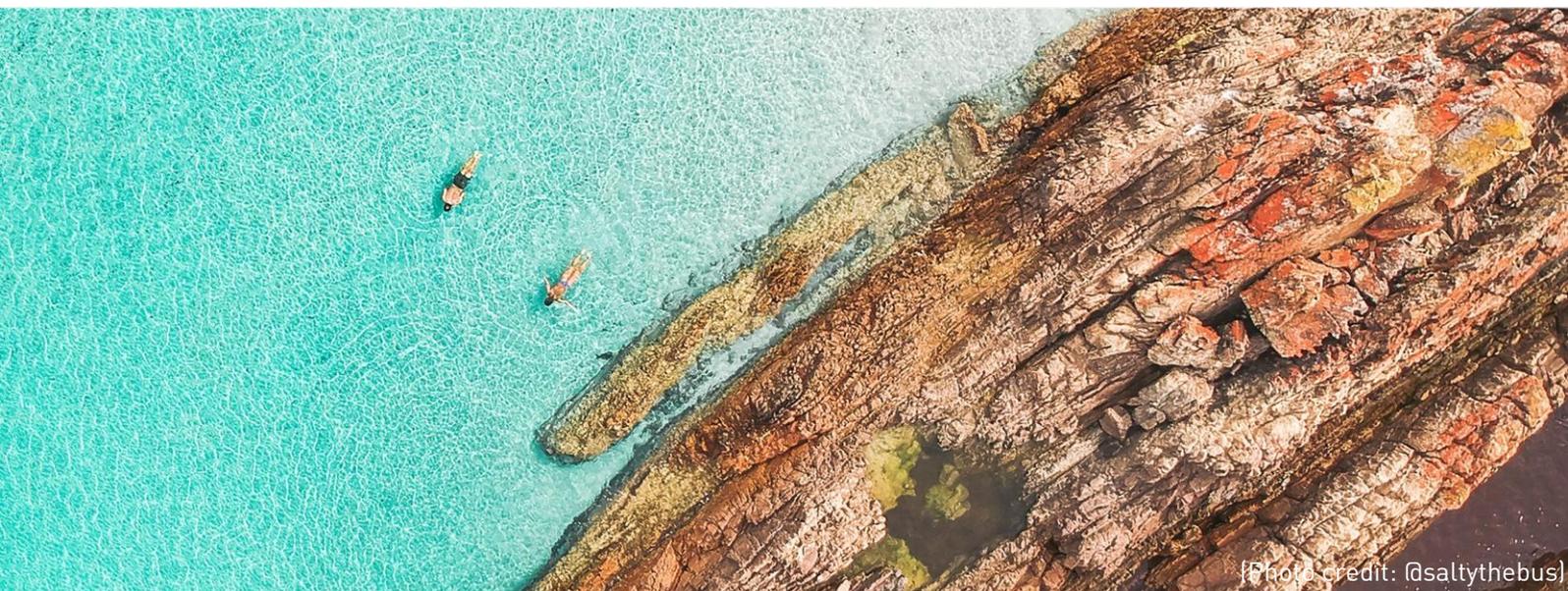
Tourism positively influences the community at 63%, down 7 percentage points (pp) from 2023. Only 25% believe development aligns with community values, representing the lowest on record. Just 35% of residents feel economic-environmental balance is being achieved, also the lowest recorded level. Agreement that tourism results in better infrastructure sits at 45%, another notable low. Those who feel well-informed about tourism direction have dropped to 40%, down from 66% in 2018/19.

What's driving this?

Residents choose to live on Kangaroo Island for lifestyle (65%) and environment (38%) but perceive tourism development moving in a different direction. Among those dissatisfied, 29% say local benefit isn't prioritised and 20% cite insufficient infrastructure. Environmental concerns are prominent, with 42% pointing to environmental damage and 21% saying profits don't stay local. Nearly one in five feel community voice isn't being respected in decisions.

The values gap

Residents aren't rejecting tourism itself. They're rejecting tourism that strains the environment, favours large operators over local interests, and doesn't deliver visible community benefit. The concern centres on scale, integration, and whether development reflects what people value about island life.



{Photo credit: @saltythebus}

Executive Summary (Continued)

Why participation hasn't improved confidence

Those who actively provide input into tourism direction are more likely to disagree that development aligns with values (51% disagree) and that environmental balance is being achieved (42% disagree). Engagement has given residents greater visibility into decisions they view as misaligned, without seeing their input reflected in outcomes. This creates a feedback loop where the most engaged residents become the most concerned.

Economic foundations remain stable but invisible

Over half of businesses (54%) receive some income from tourism, and 41% of tourism businesses report improved financial performance. Both sit within acceptable ranges, suggesting the economic foundations are sound. Yet residents don't clearly see how tourism investment translates into local infrastructure, services, or quality of life improvements. This creates a perception gap between economic contribution and community value.

TOMM awareness without perceived benefit

While 68% of residents know TOMM exists, only 41% of those aware believe it benefits the community. When asked why, 36% say it's not seen as resident-focused, 21% don't understand its purpose, and 20% see it as lacking visible results. TOMM is known but not understood as a tool that serves community interests or drives meaningful change.

Symbolic flashpoints

Cruise ships represent a particularly contentious issue, with only 14% agreeing they positively impact lifestyle. While their direct economic influence may be limited, they symbolise high-volume tourism that conflicts with island values around scale, integration, and environmental responsibility.

Opportunities to improve confidence

Strengthening community trust will require deliberate effort across several areas. Better communication about how TOMM findings inform decisions and how resident input is used could help close the information gap. When new tourism developments are approved, explaining how they align with community priorities and what local benefits they'll deliver would make the decision-making process clearer. Highlighting successful conservation partnerships and environmental protections could demonstrate that economic growth isn't coming at the environment's expense. Showing the direct link between tourism revenue and local infrastructure improvements would help residents see the tangible benefits. For cruise ships, exploring what drives community concern and whether better communication about their benefits might help align this segment with community expectations.

Bottom line

Residents are willing partners in tourism management but need greater transparency and visible alignment between decisions and community values. The challenge is demonstrating that tourism serves local interests and that resident input influences outcomes. This requires clearer communication, stronger connections between tourism and benefits, and addressing areas where current approaches don't align with what the community values about life on the island.

A photograph of three people standing on a sandy beach, looking out at the ocean. The man on the left is wearing a tan jacket and a cap. The woman in the middle is wearing a dark blue shirt and tan pants. The woman on the right is wearing a black sleeveless top and black pants. The background shows a clear blue sky, a calm blue ocean, and a rocky coastline with some vegetation. The text 'Social Indicators' is overlaid in white on the image.

Social Indicators

(Photo credit: South Australian Tourism Commission)

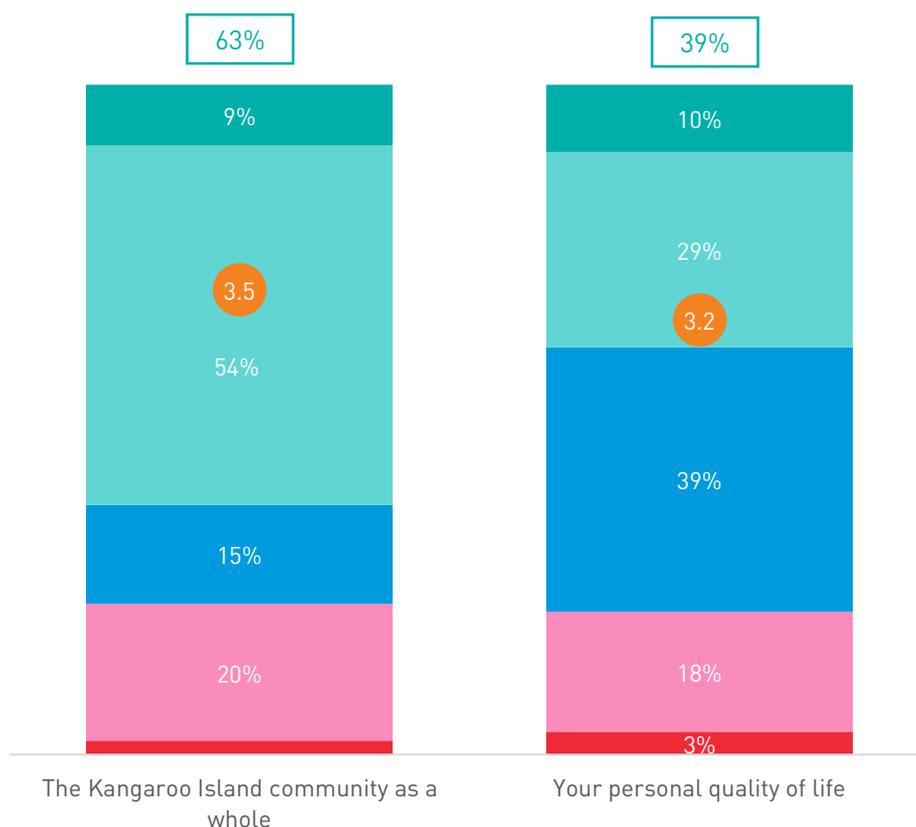
Impact of tourism

Overall, 63% felt tourism had a positive impact on the Kangaroo Island community. However, the personal impact was felt less, with only 39% saying it improved their own quality of life. For those working in tourism, the effect was stronger, with 69% agreeing it had a positive impact on their life.

While age demonstrated little influence across the majority of research variables, it emerged as a significant factor in perceptions of tourism's community impact. Respondents under 44 exhibited markedly more positive views (79%) compared to those 45 and older (60%).

Impact of tourism

■ 1 Very negatively
 ■ 2 Negatively
 ■ 3 No effect
 ■ 4 Positively
 ■ 5 Very positively
 ● Average



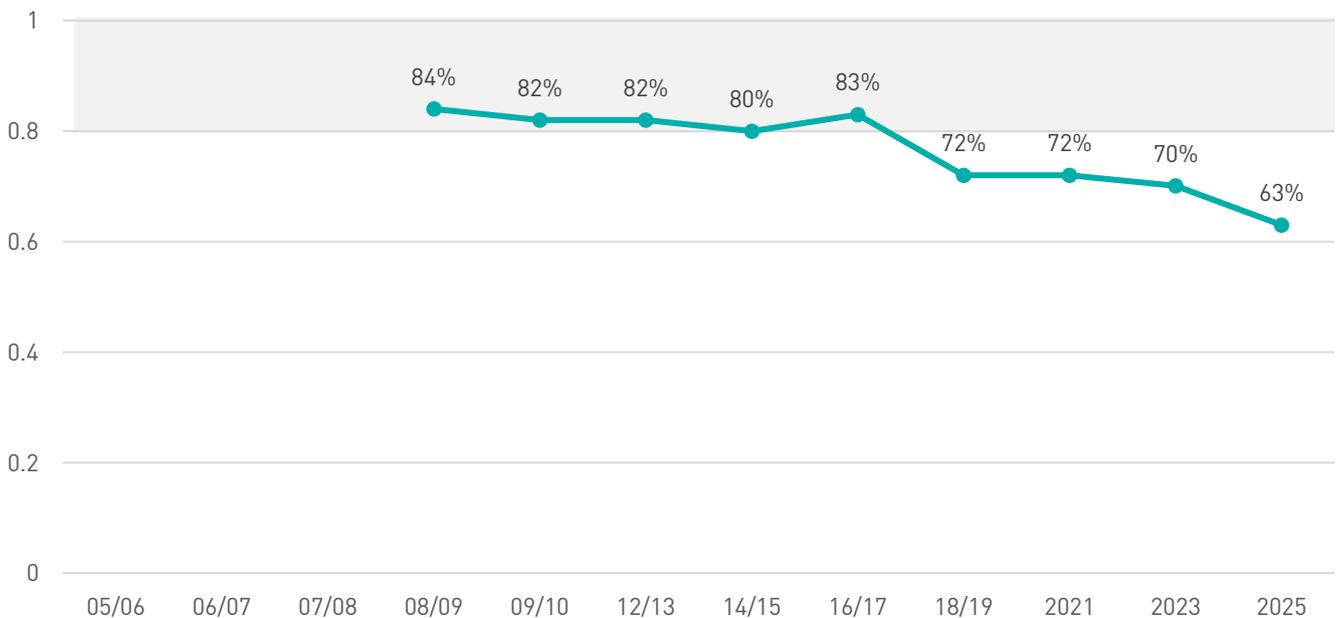
Effect of tourism on community

This wave shows a softening in how people view tourism's impact on the community, with perceptions down 7pp from 2023.

Views of tourism having a positive effect on the KI community have remained below the acceptable range since the 2018/2019 wave.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
Residents perceive that tourism has a positive influence on their quality of life	Proportion of residents who perceive that tourism has a positive effect on the community as a whole	80% - 100%	63%	X

Tourism has a positive effect on the community as a whole



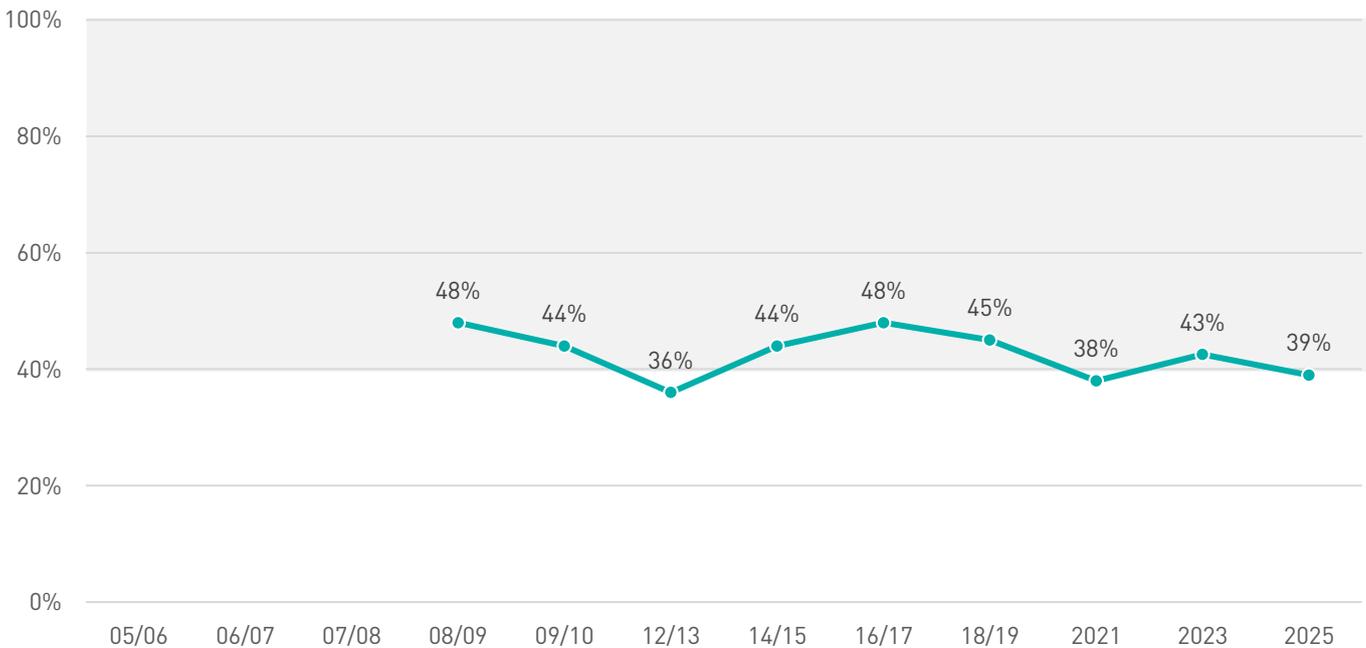
*Positive = Positive or Very positive

Effect of tourism on quality of life

Tourism was seen to have a positive effect on KI residents' quality of life by 39%. This is just 1pp below the acceptable range, which is a 4pp decrease from 2023 levels.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
Residents perceive that tourism has a positive influence on their quality of life	Proportion of residents who perceive that tourism has a positive effect on their personal quality of life	40% - 100%	39%	X

Tourism has a positive effect on your personal quality of life



*Positive = Positive or Very positive

Agreement with tourism impact

Residents were most aligned in feeling like ambassadors for the island (77%). With agreement also strong around the value of the tourism industry (71%) and the ease of accessing natural areas without tourists (65%).

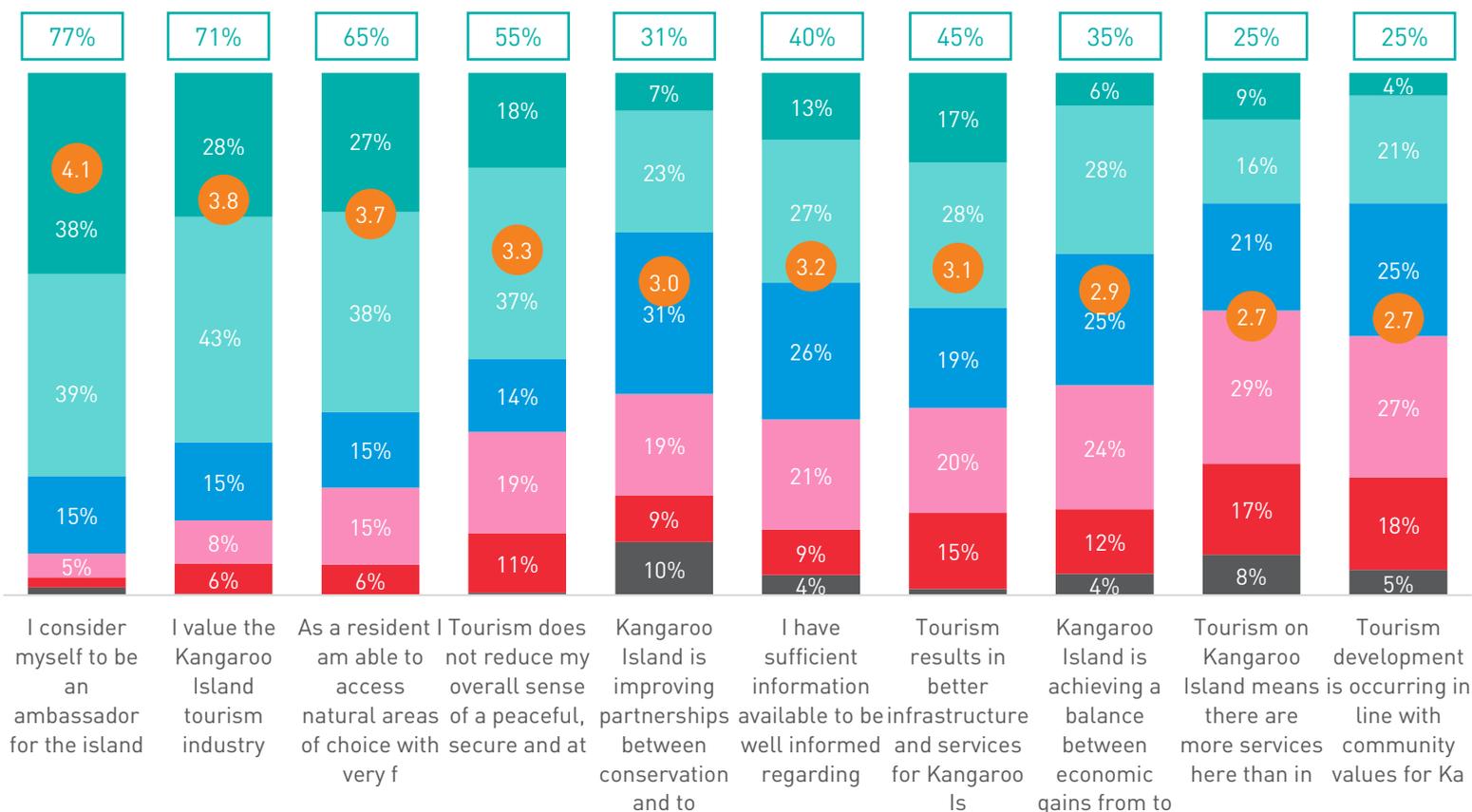
Lower agreement emerged around whether tourism development aligns with community values and whether tourism has led to more local services on the island (both 25%).

Those who take the opportunity to input on the island’s tourism direction were more likely to agree that they consider themselves an ambassador of the island (84%).

Younger groups, particularly those between the ages of 25 to 34 were more likely to agree that tourism on KI provides more services than other regional areas (63%).

Agreement level

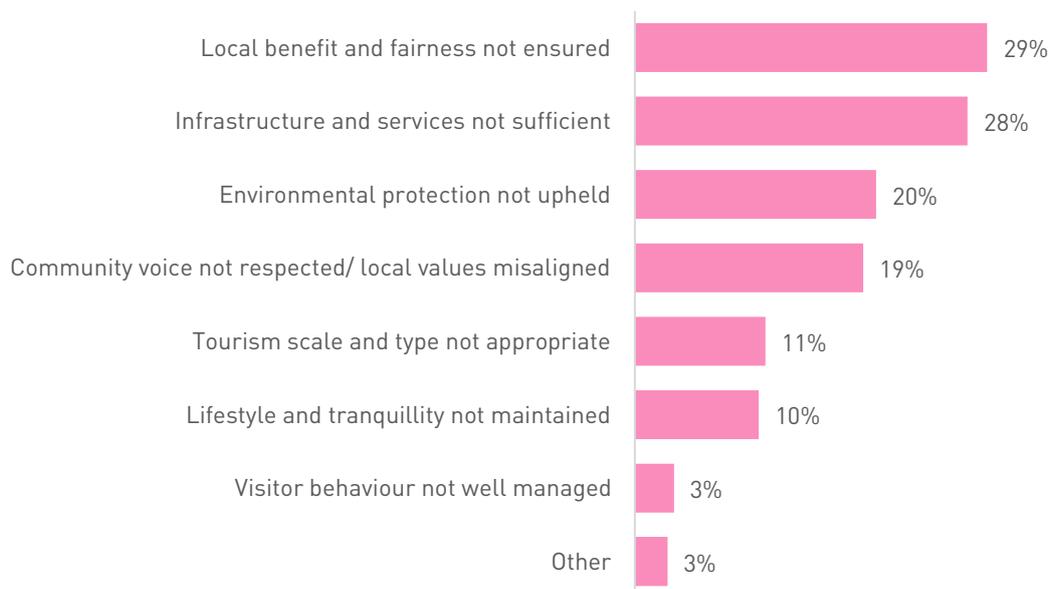
■ Don't know ■ 1 Strongly disagree ■ 2 Disagree ■ 3 Neither agree nor disagree ■ 4 Agree ■ 5 Strongly agree ● Average



Tourism misalignment with community value

Of the residents who do not feel tourism developments are aligned with community values (45%) concerns centre on limited local benefit, pressure on already stretched infrastructure, and risks to the natural environment. Many believe development can prioritise large operators over residents and that community voices are not always heard. Overall, they want tourism that protects the island's character and delivers fair, sustainable outcomes for Kangaroo Island.

Reasons for disagreeing that tourism development aligns with community values



Occasionally large tourist initiatives and developments are approved without consideration of impacts on the community, environment and infrastructure, in hopes of attracting the tourist dollar. Eg the Cruise ship crowds are overwhelming and short-term gain for just a few businesses. Also, huge tourism development being considered on North Coast Road Middle River will damage the environment and local infrastructure and community and there has been very minimal consultation. It's basically a fifth major town proposed for a heavenly remote place with multiple threatened species impacted.

I feel that some aspects of tourism development on Kangaroo Island aren't always aligned with community values because the focus can sometimes lean more toward large-scale infrastructure and visitor numbers rather than sustainability and local benefit. The community generally values the island's natural environment, wildlife, and sense of peace — elements that can be compromised if development isn't carefully managed. Many locals prefer a model of tourism that supports small businesses, protects the environment, and maintains the island's unique character, rather than projects that risk over-commercialising it. Aligning development with these community values means prioritising quality experiences, environmental care, and long-term resilience over short-term growth.

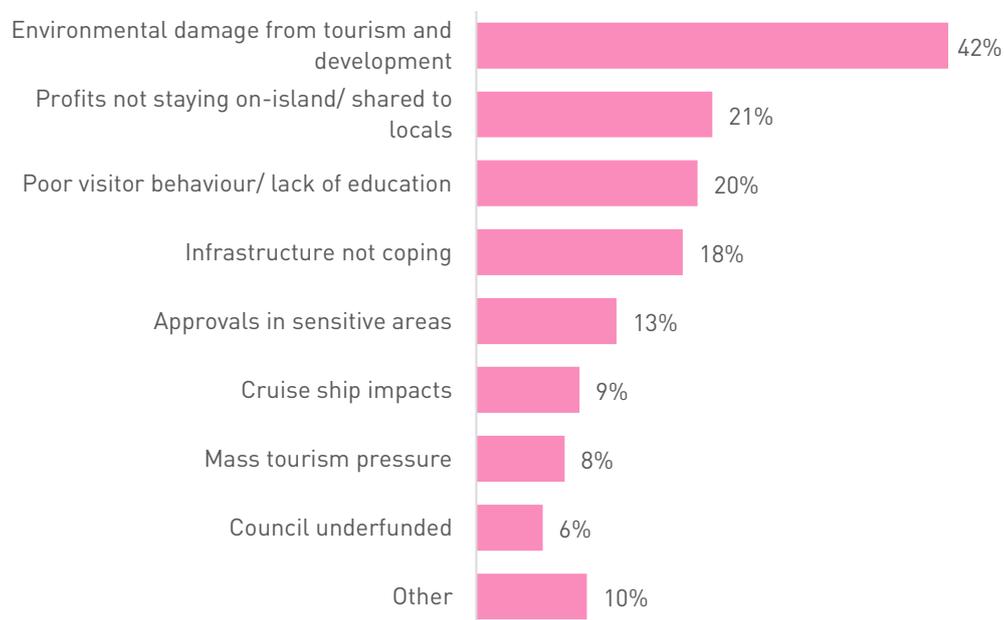
You either gain from it or you are forced to put up with the effects of it.. little flow on to locals that pay the rates..esp the bus loads that pass through and leave all their crap behind.

Because we have moved from encouraging medium stay (3-5 nights) to mass tourism (cruise ships) which places massive demand on resources without much benefit to islanders Moreover the high end tourism (SOL etc) is within a closed ecosystem whereby very little benefit flows to local business and environment Would like the metric for measurement of economic benefit to be firmly based on economic social and environmental benefits, to the disadvantaged in community (local labourer, checkout chick etc)

Economy-Environment Imbalance

Residents who do not feel the economic gains of tourism are balanced with environmental protection (36%) mainly point to environmental damage from tourism and development, limited local economic benefit, and poor visitor behaviour. Concerns also include infrastructure struggling to cope and approvals occurring in sensitive areas. Overall, they want tourism that delivers genuine local economic value while safeguarding Kangaroo Island's natural environment.

Reasons for disagreement that the economic gains of tourism are balanced with environmental protection



Money from tourists isn't spent in protecting anything.

Because they are in bed with national sparks and wildfires. Dodgy!

Not enough economic gains for local businesses, the money tends to go offshore.

KI being run by outsiders who only care about their hip pocket!

We need to implement a tourist tax.

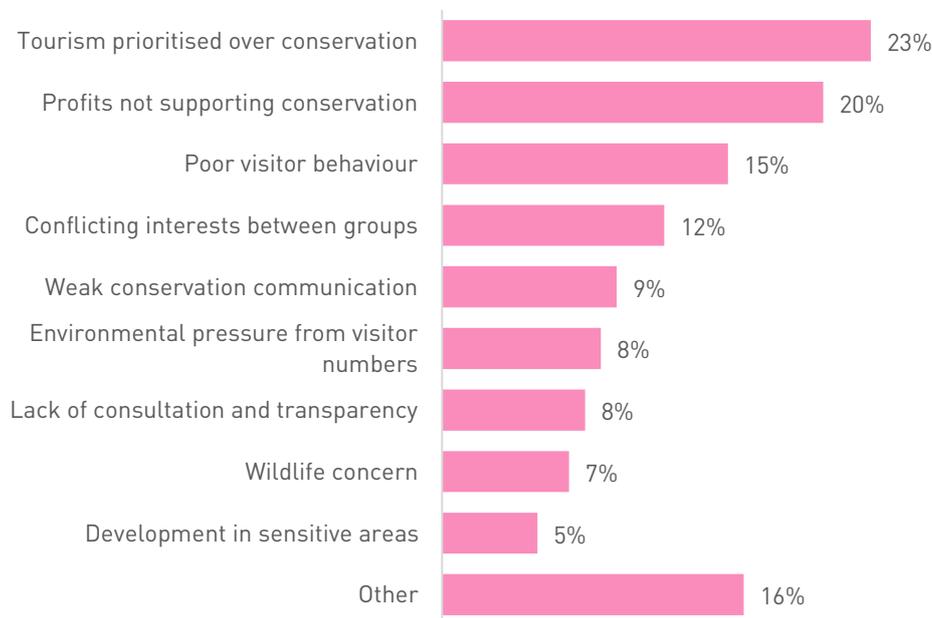
Don't want to spend money on protecting the animals.

Because the government is one of the biggest operators of tourism on KI and they are not a rate payer.

Conservation and tourism partnerships not improving

Residents who disagreed that Kangaroo Island is improving conservation and tourism partnerships (28%) feel tourism is too often prioritised over conservation, with limited reinvestment of profits into conservation efforts. Concerns also relate to poor visitor behaviour, conflicting interests between groups, and weak communication or consultation. Overall, they want stronger coordination, clearer roles, and tourism that directly supports Kangaroo Island’s environmental priorities.

Reasons for disagreement that Kangaroo Island is not improving conservation and tourism partnerships



The partnerships do not seem to include engagement of local experts/ecologists in most cases during planning. A few high-profile tourism providers are consistently engaged which does not capture all of the local knowledge or concerns of community volunteers/environmental non-Government agencies.

I feel Kangaroo Island isn't improving partnerships between conservation and tourism because the connection between these two sectors is still quite fragmented. While both share similar goals — protecting the environment and supporting sustainable livelihoods — there isn't always consistent collaboration or communication between conservation groups, local operators, and government bodies. Tourism development often moves ahead without fully integrating conservation priorities, and conservation initiatives sometimes overlook the potential role that responsible tourism can play in funding and promoting protection efforts. Strengthening these partnerships would require a shared vision, joint projects, and better coordination to ensure that tourism growth directly supports conservation outcomes rather than putting extra pressure on natural resources.

Developers are gaining approvals through the State Government and by passing Kangaroo Island Council and people. We cannot sustain this continued growth and development. Why can't one place in South Australia stay in developed. We live here because of the beauty and the quiet. It doesn't matter that people are building sustainable buildings. They shouldn't be getting approval to build here at all. Conservation means leaving things protected and natural, not developing.

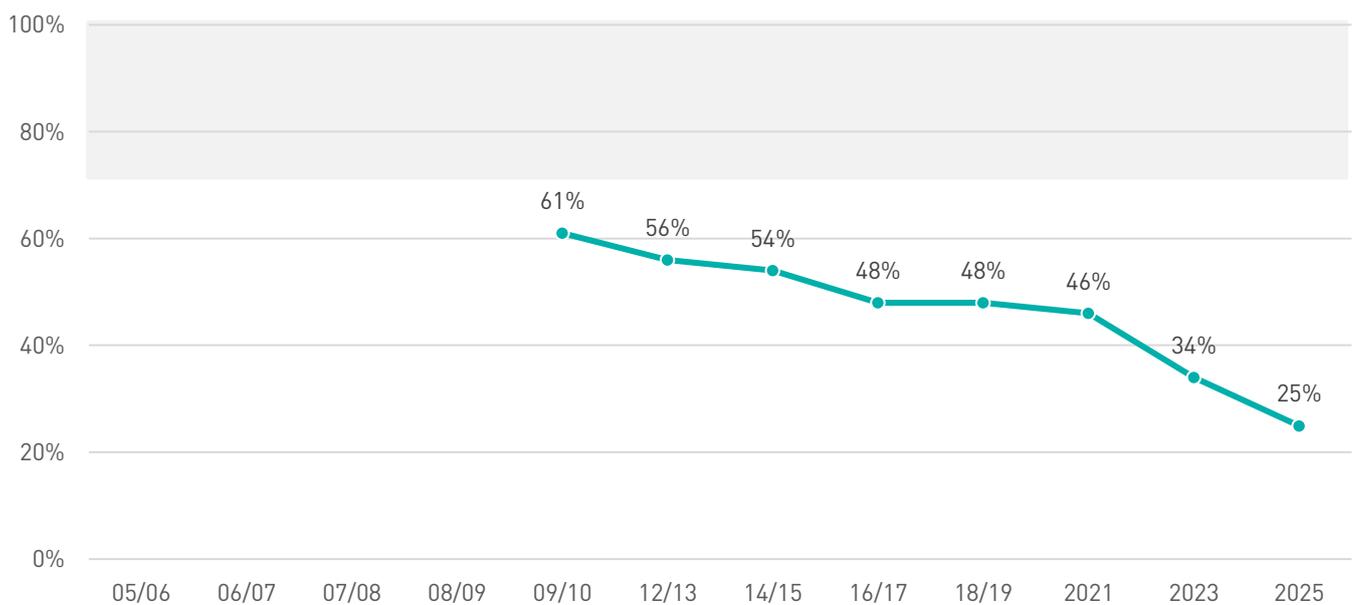
Tourism's impact on the community

One quarter of residents (25%) feel tourism development is aligned with community values, a measure that has been gradually easing over time. This trend indicates that residents are becoming less confident that tourism development reflects their community's priorities.

Residents who contribute to shaping tourism direction are also more likely to disagree that tourism development is occurring in line with community values, with 51% expressing disagreement. This indicates that those who are more engaged with tourism issues hold stronger concerns about how well development aligns with what the community values.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
Residents feel that they have the opportunity for input into tourism management on Kangaroo Island	Proportion of residents who believe that tourism development is occurring in line with community values	70% - 100%	25%	✘

Agree that tourism development is occurring in line with community values for Kangaroo Island



*Agree = Agree or Strongly agree; Disagree = Disagree or Strongly disagree, unless otherwise stated

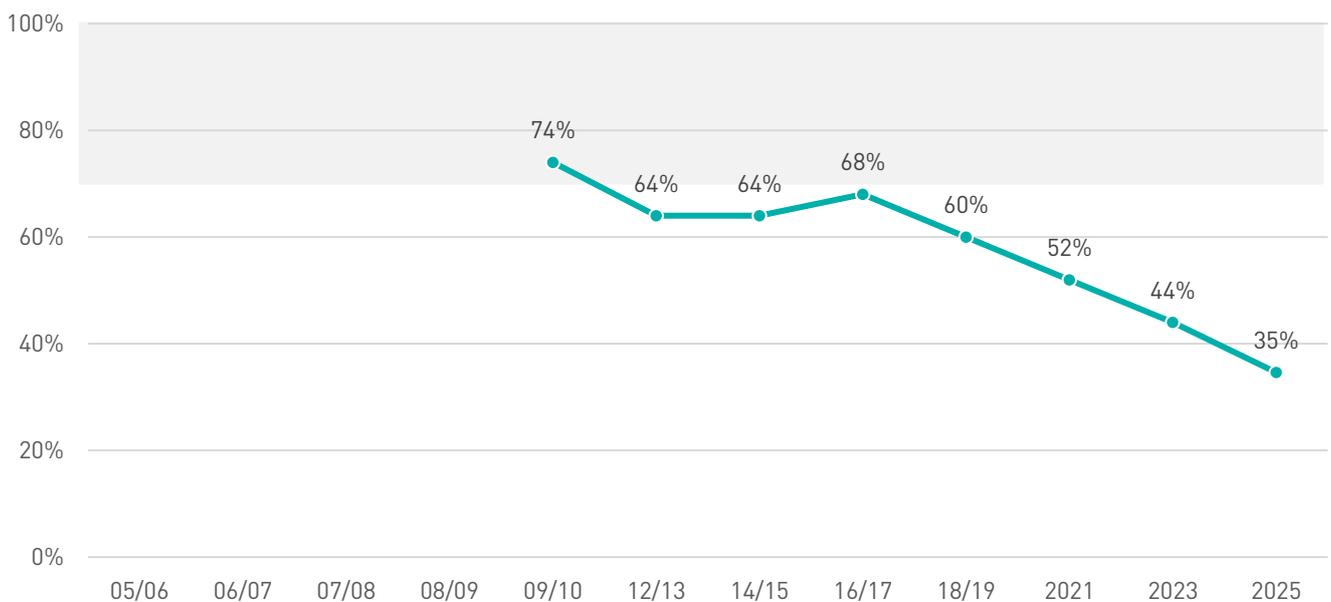
Economic and environmental balance

Agreement that Kangaroo Island is balancing the economic gains of tourism with environmental protection has softened to 35%, its lowest recorded level. This trend suggests residents are increasingly uncertain that the current approach is achieving the right balance between economic benefit and environmental care.

Residents who do contribute to shaping tourism direction are more likely to *disagree* (42%) that a balance is being achieved between economic gains and environmental protection. This suggests a disconnect, where even those actively sharing their views remain particularly concerned about this balance.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
Residents perceive that there is a balance between the gains from tourism and the protection of the environment	Proportion of residents who believe that Kangaroo Island is achieving a balance between economic gains from tourism and protection of the environment	70% - 100%	35%	✘

Agree that Kangaroo Island is achieving a balance between economic gains from tourism and the protection of the environment



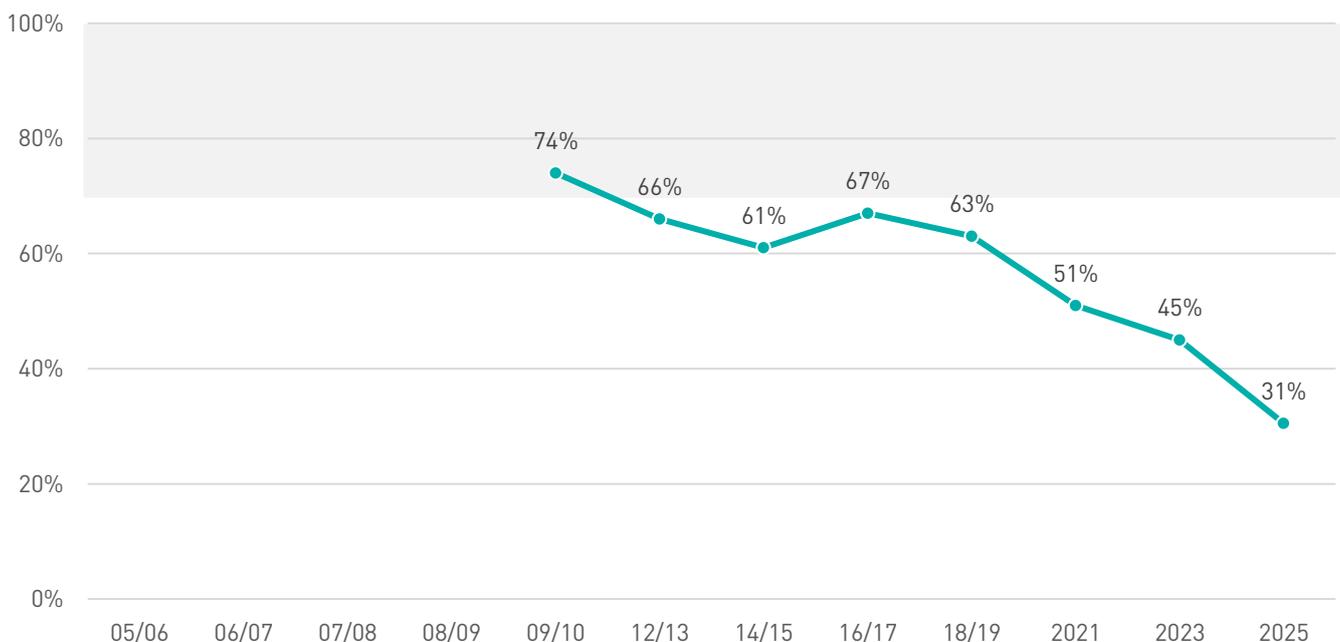
*Agree = Agree or Strongly agree; Disagree = Disagree or Strongly disagree, unless otherwise stated

Conservation and tourism partnerships

Agreement that Kangaroo Island is improving partnerships between conservation and tourism has declined to 31%, its lowest level since 2016/2017 and still below the benchmark.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
Residents perceive that there is a balance between the gains from tourism and the protection of the environment	Proportion of residents who believe that Kangaroo Island is improving partnerships between conservation and tourism	70% - 100%	31%	X

Agree that Kangaroo Island is improving partnerships between conservation and tourism



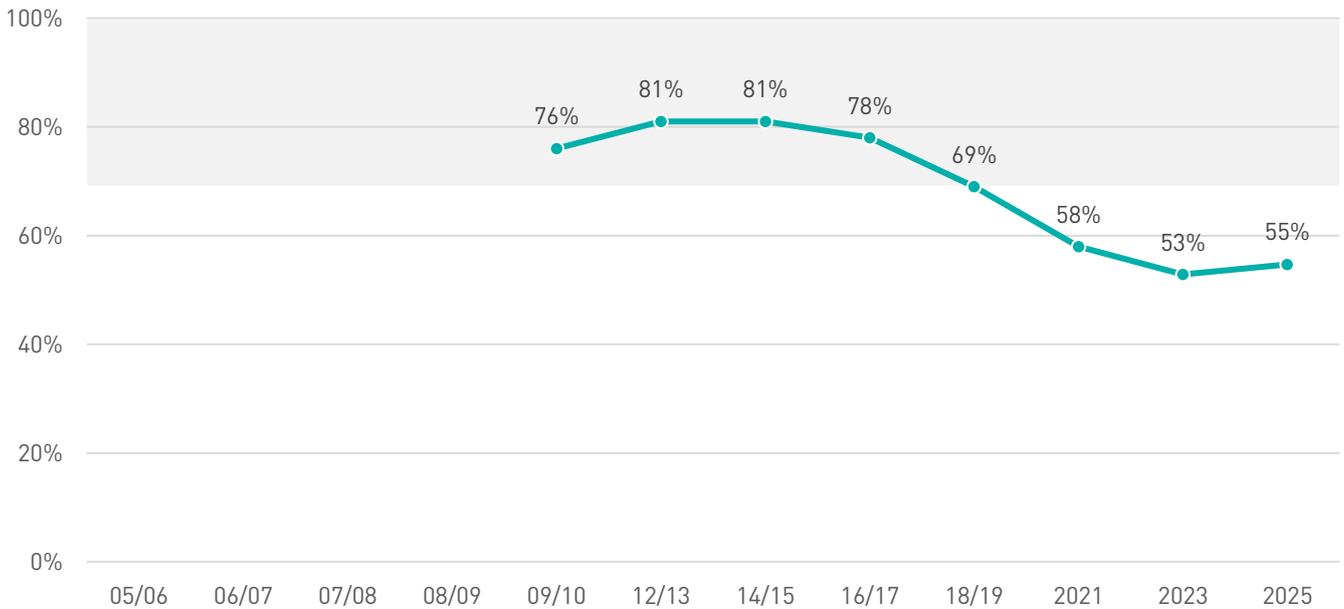
*Agree = Agree or Strongly agree; Disagree = Disagree or Strongly disagree, unless otherwise stated

Effect on lifestyle

There has been a small lift in the view that tourism does not reduce the island’s sense of a peaceful, secure and attractive lifestyle, up 2pp since 2023. However, this remains below the acceptable range of 70%, a level it hasn’t reached since the 2018/2019 wave.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
Residents perceive that tourism has a positive influence on their quality of life	Proportion of residents who perceive that tourism does not reduce their overall sense of a peaceful, secure and attractive lifestyle	70% - 100%	55%	✘

Agree that tourism does not reduce my overall sense of a peaceful, secure and attractive lifestyle



*Agree = Agree or Strongly agree; Disagree = Disagree or Strongly disagree, unless otherwise stated

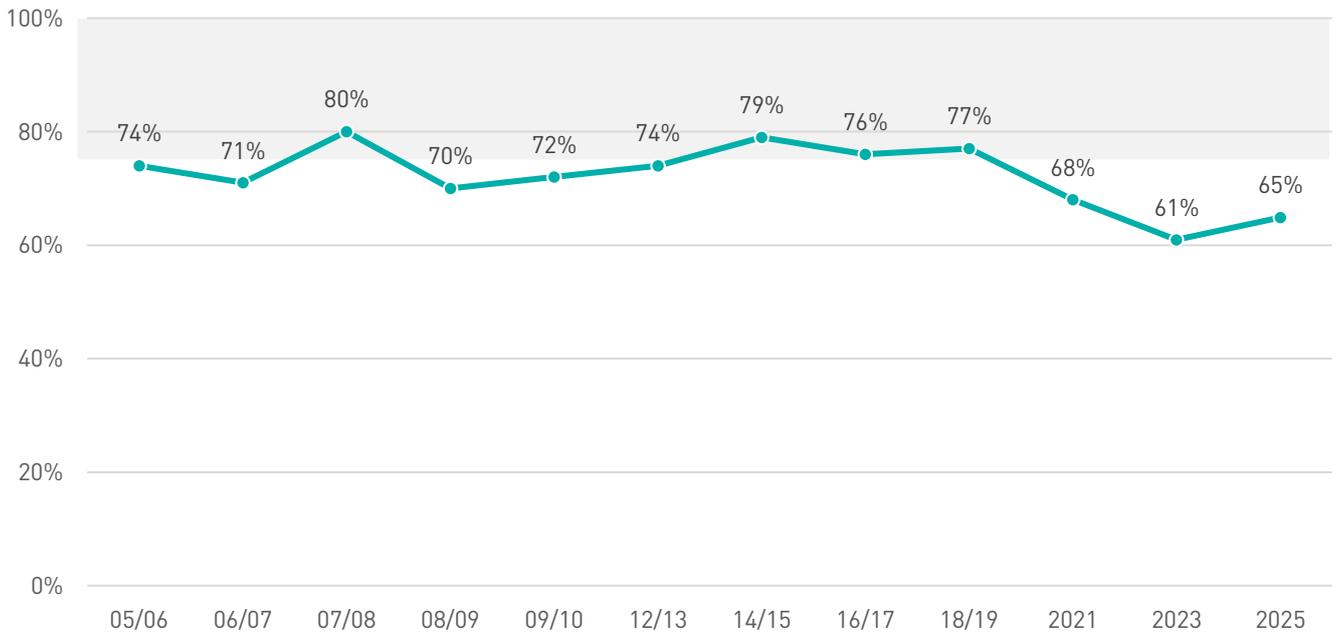
Presence of tourists

The perception that it is possible for residents to access natural areas of choice with very few tourists present has increased to 65%, a 4pp increase from 2023.

The results this wave are 10pp below the acceptable range of 75%.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
Residents perceive that tourism has a positive influence on their quality of life	Proportion of residents who feel that they can visit a natural area of their choice on the Island with very few tourists present	75% - 100%	65%	✘

Agree that as a resident I am able to access natural areas of choice with very few tourists present



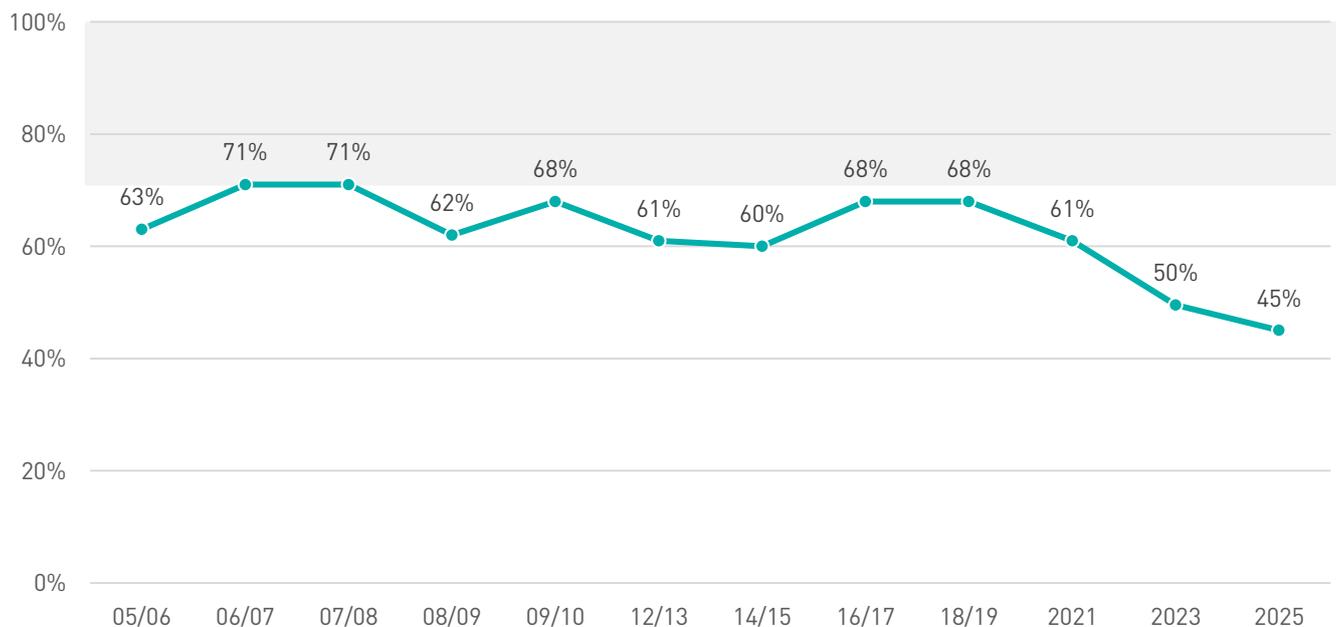
*Agree = Agree or Strongly agree

Tourism's impact on infrastructure

Agreement that tourism leads to improved infrastructure has softened over time, with 45% now agreeing. While this is lower than previous years and sits below the preferred benchmark of 70%, it provides a clear opportunity to explore how future tourism initiatives can better demonstrate their infrastructure benefits to the community.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
Residents perceive that tourism has a positive impact on the level of service for the region	Proportion of residents who believe that tourism results in better infrastructure and services	70% - 100%	45%	X

Agree that tourism results in better infrastructure and services



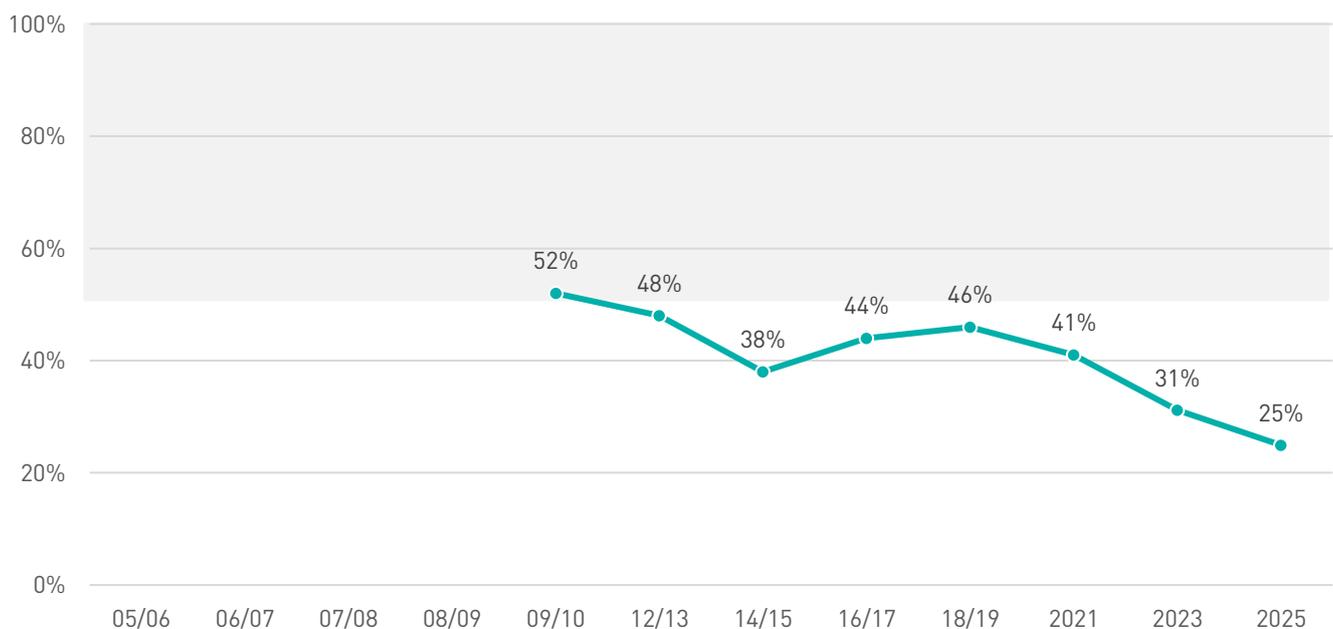
*Agree = Agree or Strongly agree; Disagree = Disagree or Strongly disagree, unless otherwise stated

Tourism's impact on services

Agreement that tourism leads to increased services in the region has eased again this wave. This measure has historically sat below the preferred benchmark, indicating a long-standing opportunity to strengthen community confidence in how tourism supports local services.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
Residents perceive that tourism has a positive impact on the level of service for the region	Proportion of residents who believe that because of tourism the Island has more services available than other similar sized regional areas in Australia	50% - 100%	25%	✘

Agree that tourism on Kangaroo Island means there are more services here than in other similar regional areas

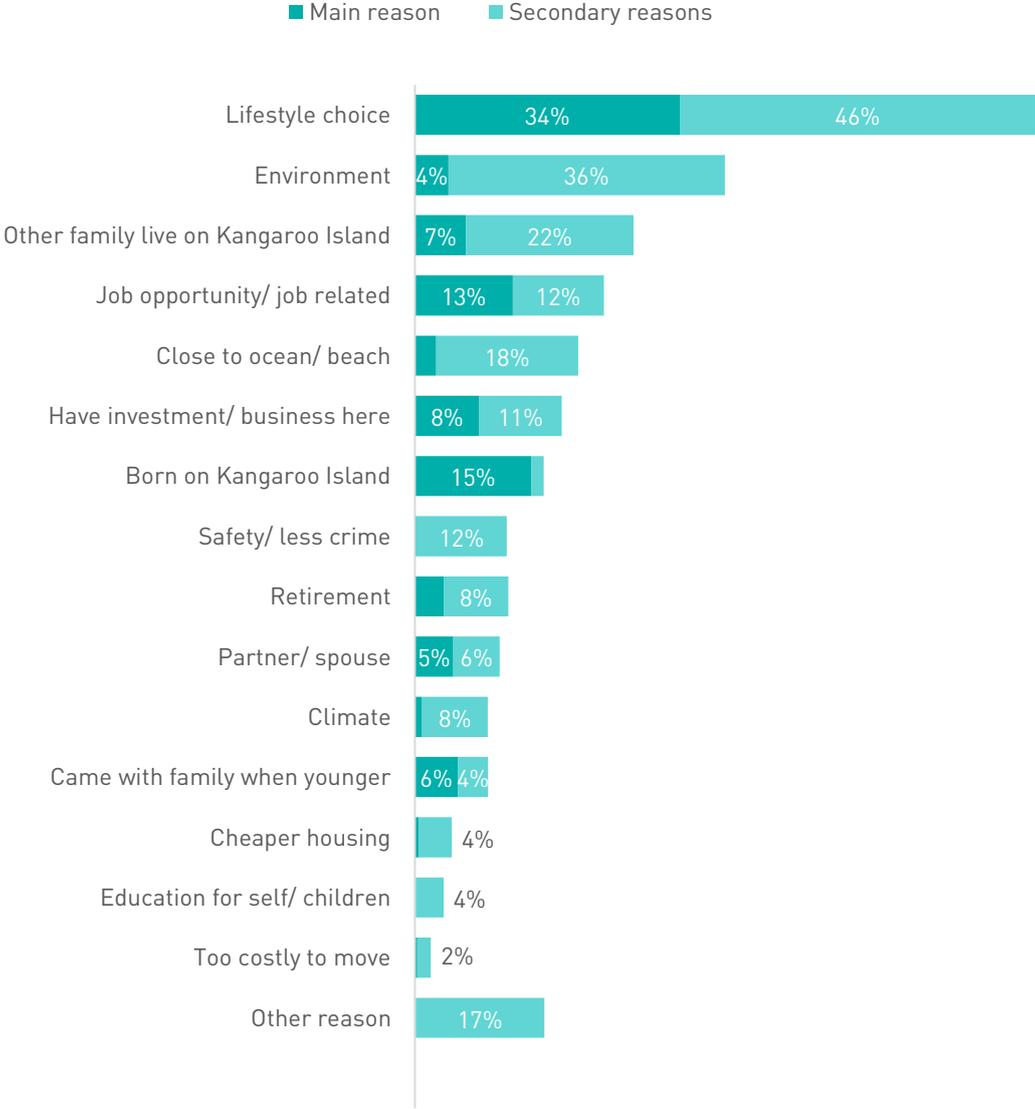


*Agree = Agree or Strongly agree; Disagree = Disagree or Strongly disagree, unless otherwise stated

Reasons for living on KI

Lifestyle is the clear anchor for living on Kangaroo Island, nominated by around one-third as their main reason and almost half as a secondary factor. Environment, family ties, and job opportunities also contribute, but lifestyle overwhelmingly underpins why residents choose to live on Kangaroo Island.

Reason to live on Kangaroo Island



Main reason for living on KI over time

The longer-term trend shows that lifestyle remains the main driver for choosing to live on Kangaroo Island, while job-related reasons have continued to decline. There's also steady growth in the proportion of residents who were born on Kangaroo Island and have chosen to stay. Other motivations shift slightly year to year but don't change the overall picture: living on Kangaroo Island is increasingly about quality of life and a strong connection to the place, rather than economic or environmental factors alone.

Main reason for living on KI	05/06	06/07	07/08	08/09	09/10	12/13	14/15	16/17	18/19	2021	2023	2025
Lifestyle choice	32%	33%	23%	26%	28%	34%	25%	22%	27%	29%	30%	34%
Born here	4%	1%	1%	10%	4%	8%	22%	20%	23%	13%	13%	15%
Job opportunity / job related	26%	30%	24%	22%	24%	17%	18%	20%	16%	12%	11%	13%
Have investment / business here	4%	5%	2%	6%	2%	4%	5%	5%	5%	8%	10%	8%
Other family live on Kangaroo Island	11%	10%	16%	9%	11%	9%	9%	8%	8%	9%	7%	7%
Came with family when younger	2%	4%	8%	5%	9%	9%	5%	3%	8%	4%	6%	6%
Partner / spouse	8%	6%	7%	5%	4%	6%	3%	6%	4%	4%	7%	5%
Environment	5%	4%	5%	5%	5%	2%	3%	9%	3%	10%	5%	4%
Retirement	3%	2%	3%	4%	3%	3%	3%	2%	2%	2%	4%	4%
Close to ocean / beach	0%	1%	1%	1%	0%	0%	1%	0%	1%	1%	3%	3%
Climate	<1%	2%	1%	<1%	1%	1%	1%	0%	1%	0%	1%	1%
Too costly to move	0%	0%	1%	0%	0%	0%	< 1%	0%	0%	0%	2%	0%
Safety / less crime	<1%	1%	1%	<1%	1%	2%	2%	1%	0%	1%	1%	0%
Cheaper housing	1%	<1%	<1%	0%	<1%	<1%	0%	1%	1%	0%	0%	0%
Education for self / children	<1%	0%	<1%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other reason	3%	0%	6%	5%	4%	2%	3%	2%	1%	6%	0%	0%

All reasons for living on KI over time

Across the combined reasons, there is a broadening set of lifestyle-aligned benefits becoming more prominent over time. Environment, coastal proximity, being born on Kangaroo Island, and investment or business ownership all feature more strongly in recent waves. These additions strengthen the overall picture that residents increasingly value a holistic mix of lifestyle, connection to place, and the natural environment. Job-related reasons continue to decline in relative importance.

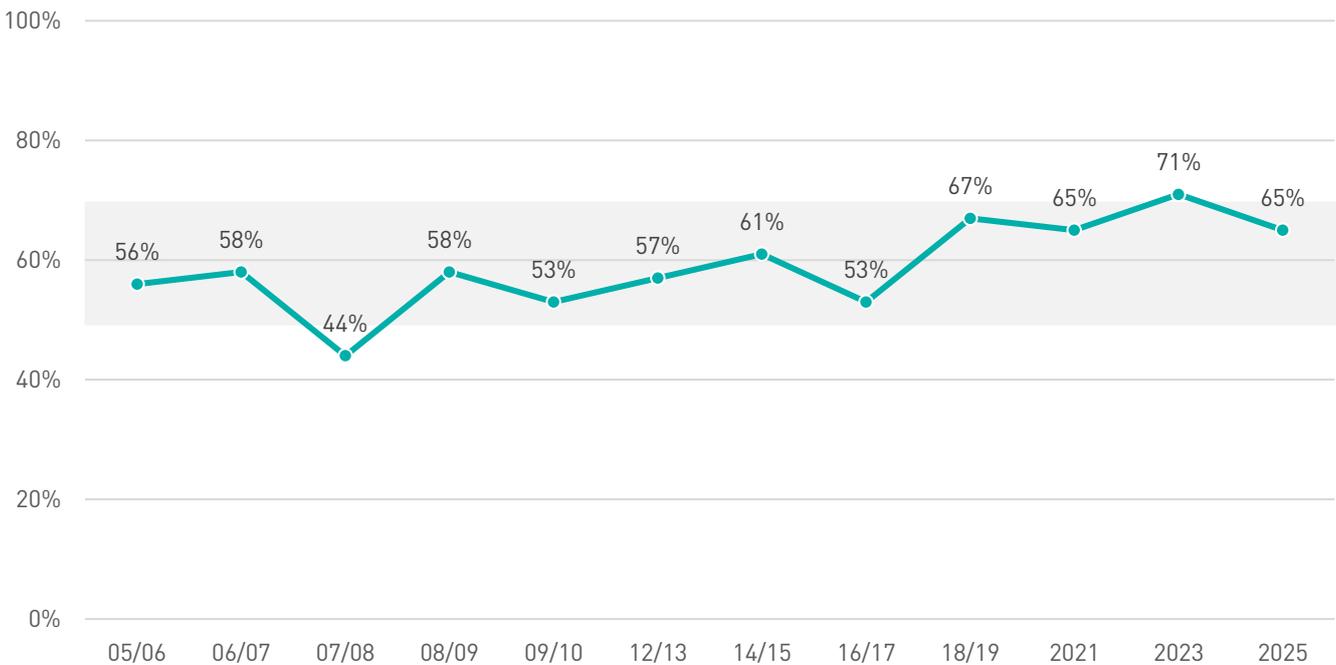
All reasons for living on KI	05/06	06/07	07/08	08/09	09/10	12/13	14/15	16/17	18/19	2021	2023	2025
Lifestyle choice	56%	58%	44%	58%	53%	57%	61%	53%	67%	65%	71%	65%
Environment	14%	19%	15%	16%	21%	15%	25%	28%	20%	31%	40%	38%
Born here					4%	13%	24%	25%	25%	15%	18%	16%
Other family live on Kangaroo Island	20%	24%	24%	27%	23%	21%	23%	26%	27%	20%	31%	27%
Job opportunity / job related	36%	44%	39%	36%	35%	29%	31%	32%	29%	26%	40%	23%
Close to ocean / beach	2%	8%	4%	5%	5%	1%	8%	9%	13%	8%	33%	21%
Have investment / business here	7%	8%	4%	11%	4%	8%	10%	11%	12%	15%	24%	18%
Safety / less crime	4%	9%	3%	3%	5%	11%	10%	8%	5%	6%	17%	12%
Retirement	4%	4%	5%	6%	5%	3%	5%	4%	4%	4%	14%	12%
Partner / spouse	10%	11%	9%	7%	7%	10%	7%	11%	9%	7%	17%	11%
Climate	3%	7%	4%	5%	4%	3%	9%	4%	6%	2%	17%	9%
Came with family when younger	4%	4%	11%	7%	11%	10%	10%	6%	10%	6%	12%	9%
Cheaper housing	1%	1%	1%	1%	1%	1%	2%	3%	4%	1%	6%	5%
Education for self / children	2%	1%	1%	2%	<1%	<1%	1%	0%	3%	1%	2%	4%
Too costly to move	0%	0%	1%	0%	<1%	<1%	0%	1%	1%	0%	4%	2%
Other reason	18%	9%	10%	24%	16%	10%	12%	7%	6%	10%	11%	16%

Lifestyle as a reason to live on KI

Agreement that lifestyle is a main reason for living on Kangaroo Island has eased slightly since 2023, now at 65%, and is in line with 2021 results. Overall, this measure continues to perform well, with most residents consistently attributing lifestyle as a key reason for living on Kangaroo Island.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
Residents perceive that tourism has a positive influence on their quality of life	Proportion of residents who identify lifestyle as one of the main reasons for living on Kangaroo Island	50% - 70%	65%	✓

Residents who identify lifestyle as one of the main reasons for living on Kangaroo Island



All reasons to leave

Reasons for leaving Kangaroo Island have shifted from employment-related motivations to practical, day-to-day pressures, particularly health access and the cost of living. Tourism-related reasons are increasing but remain secondary, while long-term residents appear slightly less steadfast in saying “nothing would make me leave.”

All reasons for leaving KI to live elsewhere	05/06	06/07	07/08	08/09	09/10	12/13	14/15	16/17	18/19	2021	2023	2025
Health problems/ no health support	13%	16%	14%	15%	10%	13%	15%	17%	17%	23%	36%	40%
Travel/ freight costs of getting things to Kangaroo Island too high	6%	5%	7%	3%	5%	5%	8%	7%	9%	5%	17%	24%
Family	12%	17%	19%	16%	14%	12%	14%	19%	14%	14%	16%	19%
High cost/ rising living costs on Kangaroo Island	10%	8%	8%	10%	9%	4%	8%	9%	6%	6%	11%	15%
Overdevelopment on the Island	6%	6%	4%	4%	3%	3%	5%	3%	9%	6%	11%	13%
Tourists (increase in numbers)	2%	3%	3%	2%	6%	3%	3%	3%	5%	6%	7%	9%
Crime increase	1%	<1%	0%	1%	1%	<1%	< 1%	< 1%	0%	1%	5%	5%
Environmental issues	4%	4%	7%	4%	2%	3%	2%	2%	5%	4%	4%	5%
Employment/ work	24%	29%	22%	24%	22%	17%	21%	24%	24%	9%	9%	4%
Travel/ to see the world	1%	2%	3%	2%	1%	1%	1%	1%	2%	0%	3%	3%
Education	6%	9%	6%	6%	3%	2%	7%	5%	3%	2%	4%	2%
Lack of culture	1%	2%	2%	1%	0%	1%	1%	2%	0%	0%	3%	2%
Isolation/ lack of people	2%	4%	3%	2%	3%	1%	3%	3%	2%	1%	3%	2%
Religion	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	11%	6%	12%	0%	10%	5%	1%	4%
Don't know	7%	2%	3%	6%	2%	3%	1%	2%	1%	7%	0%	5%
Nothing would make me leave/ no reason/ I wouldn't consider leaving	21%	26%	24%	24%	27%	31%	28%	23%	28%	26%	25%	19%

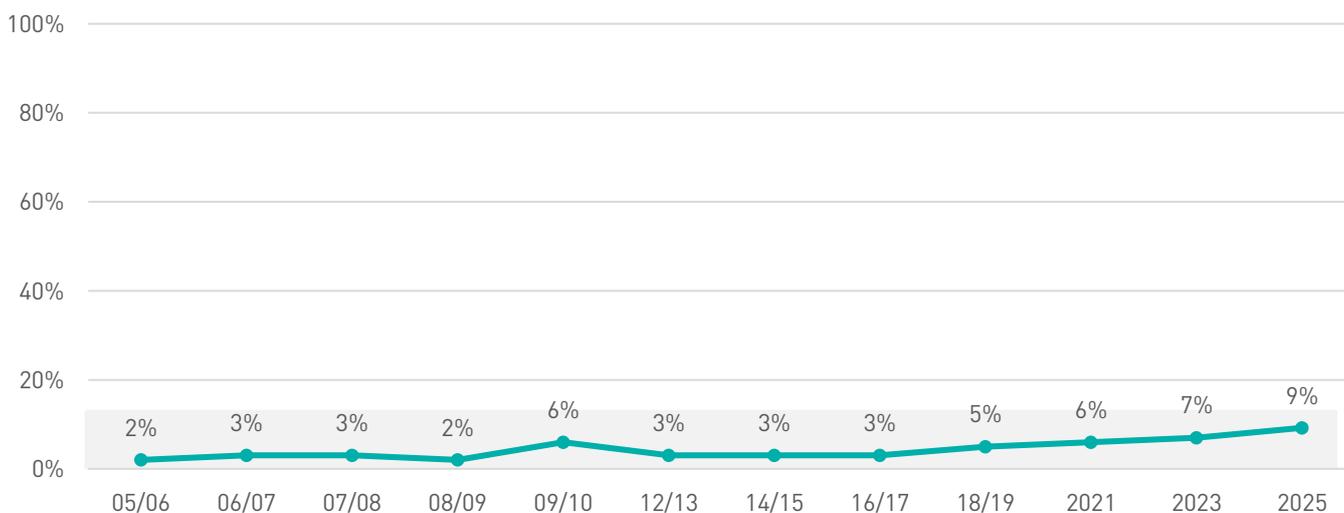
Tourism as a reason to leave

Citing tourism growth as a reason for leaving Kangaroo Island has risen slightly, indicating a growing negative sentiment. However, the 2025 result remains within a reasonable range.

Although the weighted result reaches 9%, unprompted mentions of tourism as a reason for leaving Kangaroo Island remain low at 4%. The higher figure comes from online respondents who were shown a full list of reasons, making them more likely to select tourism when prompted. This difference between CATI and online responses is expected and does not indicate heightened concern. Tourism is not a strong top-of-mind issue for most residents.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
Residents perceive that tourism has a positive influence on their quality of life	Proportion of residents who indicate a driver to leave Kangaroo Island would be an increase in tourists	0% - 10%	9%	✓

**What would make you leave KI and live elsewhere?
Tourists (increase in numbers)**

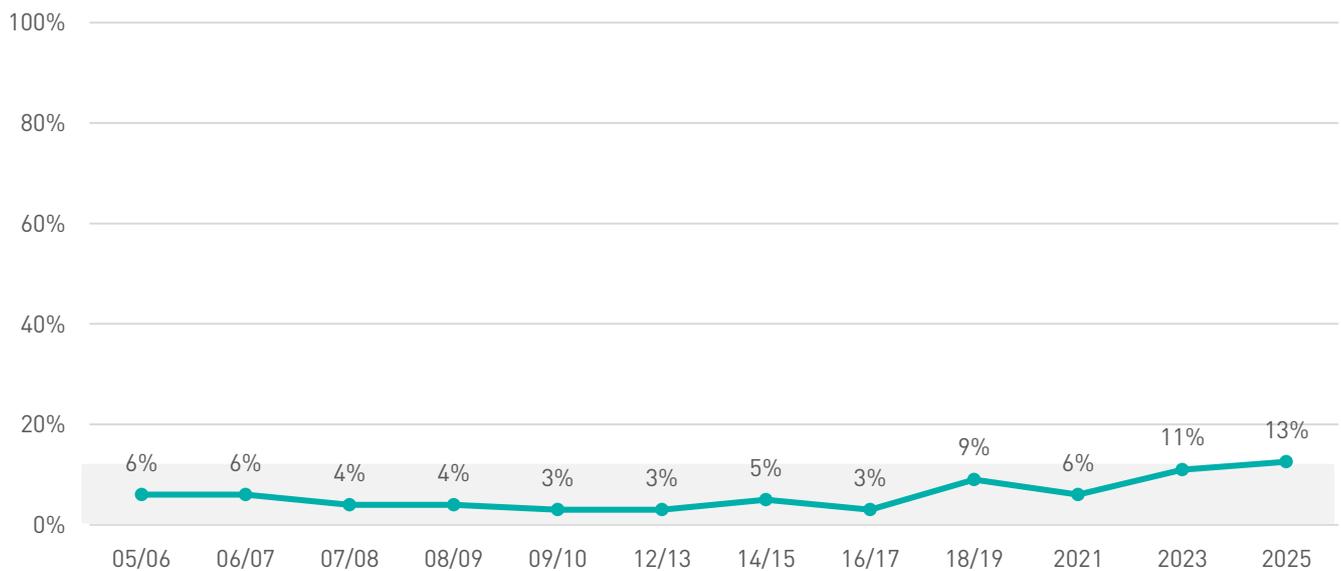


Overdevelopment as a reason to leave

While the weighted result reaches 13%, only 5% of CATI respondents mentioned development unprompted as a reason for leaving Kangaroo Island. The higher figure comes from online respondents selecting from a prompted list, which is expected in mixed-mode surveys. Overall, development is not a strong top-of-mind concern for most residents.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
Residents perceive that tourism has a positive influence on their quality of life	Proportion of residents who indicate a driver to leave Kangaroo Island would be development	0% - 10%	13%	X

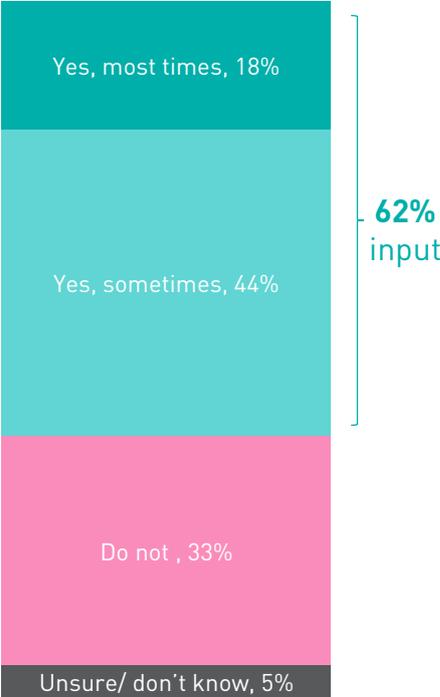
**What would make you leave KI and live elsewhere?
Overdevelopment on the Island**



Resident input into tourism direction

The majority of residents (62%) provide some level of input into the direction of tourism on the island. Input is more common among residents of Penneshaw (72%) and Vivonne Bay (94%), those aged 25 to 34 (88%) and 45 to 54 (76%), people working in tourism (77%), and those previously aware of TOMM (67%).

Provided input into the direction of tourism on Kangaroo Island

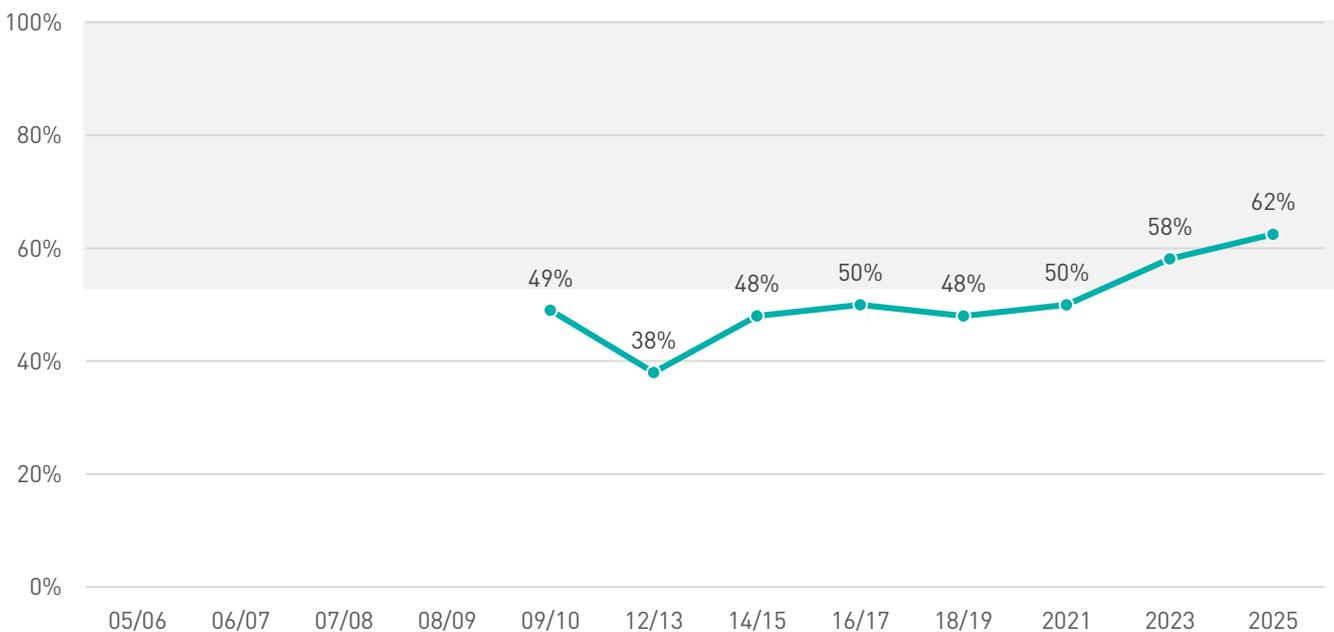


Resident opportunity for tourism direction

Community input into tourism direction has steadily increased, reaching 62% in 2025 and sitting well within the acceptable range. This shows that more residents feel able to contribute when opportunities arise. At the same time, several sentiment measures related to tourism development, environmental balance, and alignment with community values have declined. Taken together, this suggests that while engagement is improving, it has not yet translated into stronger confidence in how tourism is being managed.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
Residents feel that they have the opportunity for input into tourism management on Kangaroo island	Proportion of residents who indicate they take the opportunity to have input into the direction of tourism on Kangaroo Island when possible	50% - 100%	62%	✓

Provide input into the direction of tourism on Kangaroo Island when possible



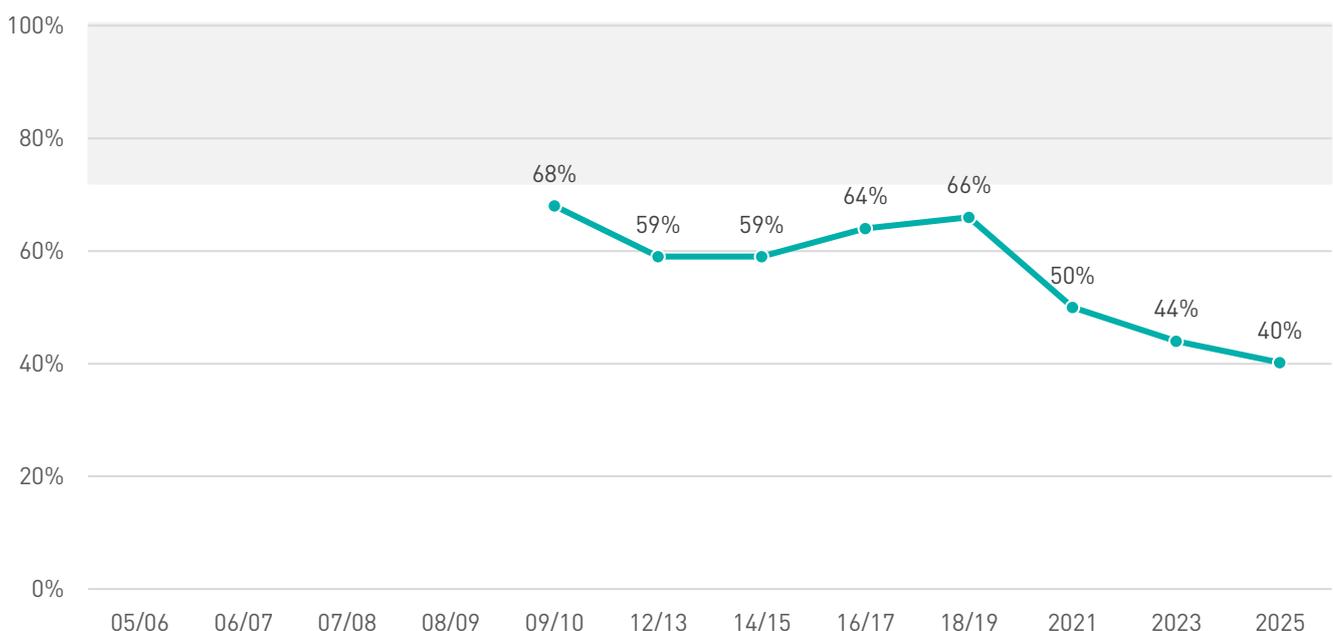
* Yes, most times or sometimes

Tourism information sufficiency

Two in five residents (40%) feel adequately informed about the direction of tourism on Kangaroo Island, which sits below the acceptable range. This measure has steadily declined since 2018/2019, when 66% felt sufficiently informed. The downward trend highlights a clear need to improve how information about tourism planning and decisions is communicated to the community.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
Residents feel that they have the opportunity for input into tourism management on Kangaroo Island	Proportion of residents who identify that they have sufficient information available to be well informed regarding the direction of tourism on Kangaroo Island	70% - 100%	40%	X

Agree that I have sufficient information available to be well informed regarding the direction of tourism on Kangaroo Island



*Agree = Agree or Strongly agree; Disagree = Disagree or Strongly disagree, unless otherwise stated



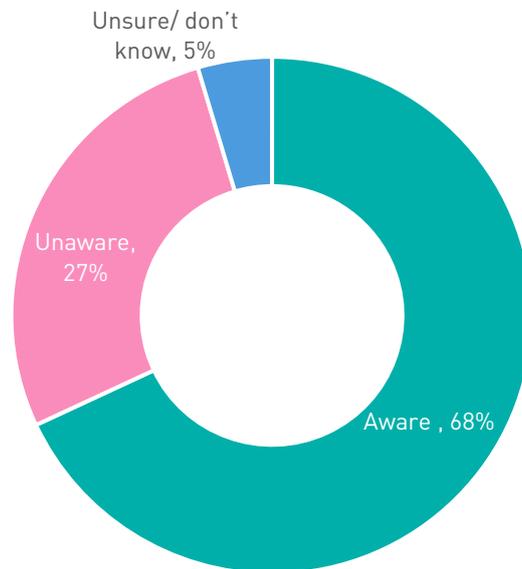
Environmental Indicators

Awareness of Kangaroo Island TOMM

Seven out of ten are aware of Kangaroo Island TOMM (68%).

Those living closest to Penneshaw were less likely to be aware of TOMM (55%), as were people who do not take the opportunity to provide input into tourism on KI (60%).

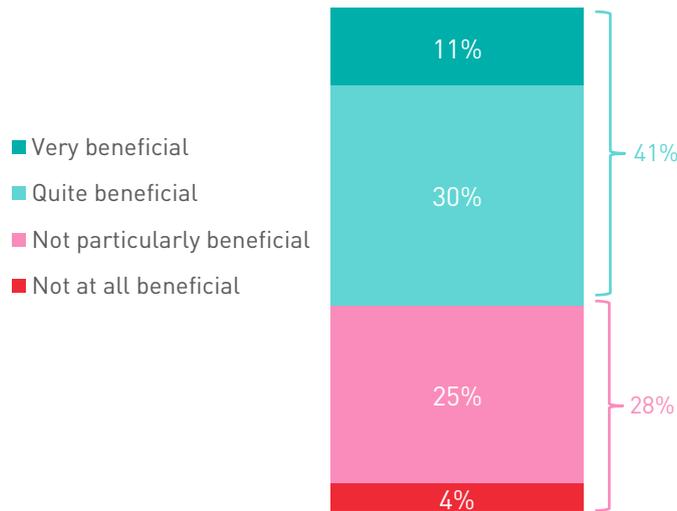
Awareness of Kangaroo Island TOMM



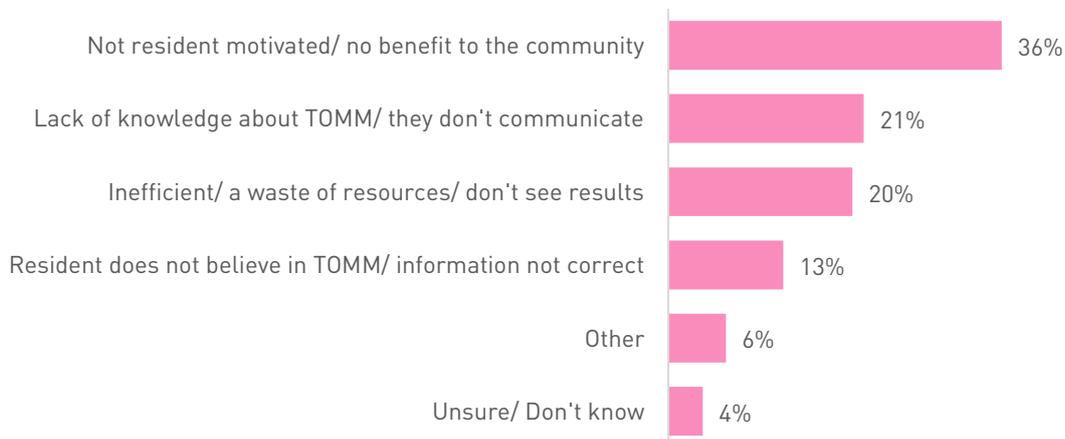
Perceptions of Kangaroo Island TOMM

Overall, perceptions of TOMM's value are mixed. About four in ten residents feel TOMM is beneficial to the community, while just over a quarter believe it is not. Among those who view TOMM as not beneficial, the main reasons centre on TOMM not being seen as resident-focused, limited awareness or communication about what TOMM does, and a lack of visible results.

TOMM's benefit to the community



Reasons for feelings of TOMM not being beneficial



They should be beneficial, but I do not think the organisations that invest in TOMM utilise the data enough to provide positive benefits for the community in their industry sector.

It does not have the financial backing it needs to follow through on implementation or solutions to issues raised.

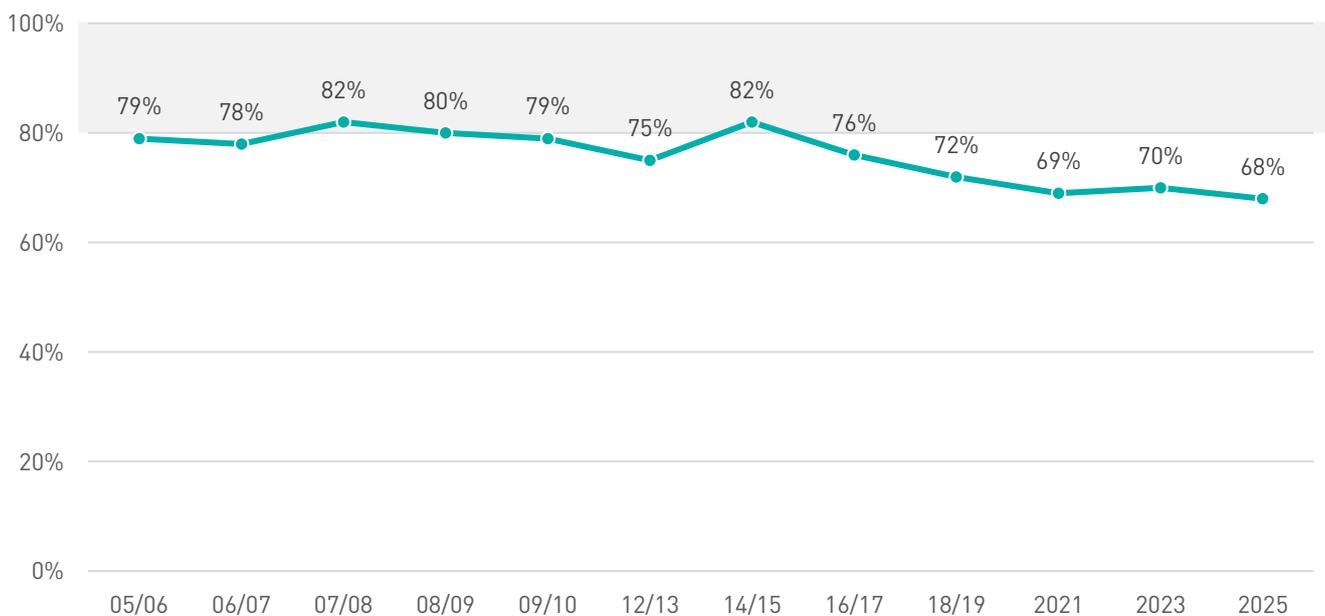
It is representative of the very businesses that want to profit from the destruction of the island and at the expense of people who enjoy the seclusion. The people it represents show minimal regard for differing opinions, are profit driven and many think they should be able to conduct tours etc. where they want but no one else should be allowed to go there. They don't care about primary production only growing their business and tourism. They are taking us down the path of Greece are hypocrites and self-entitled.

Awareness of Kangaroo Island TOMM

Awareness of Kangaroo Island TOMM remains broadly stable, sitting between 68% and 72% since 2018/2019. Although this is below the acceptable 80% benchmark, awareness has shown little movement over time and has only met the benchmark on a few occasions.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
TOMM is a well understood and utilised destination management tool for Kangaroo Island	Proportion of residents that are aware of TOMM	80% - 100%	68%	✘

Prior to today, have you heard of Kangaroo Island TOMM, the Tourism Optimisation Management Model?

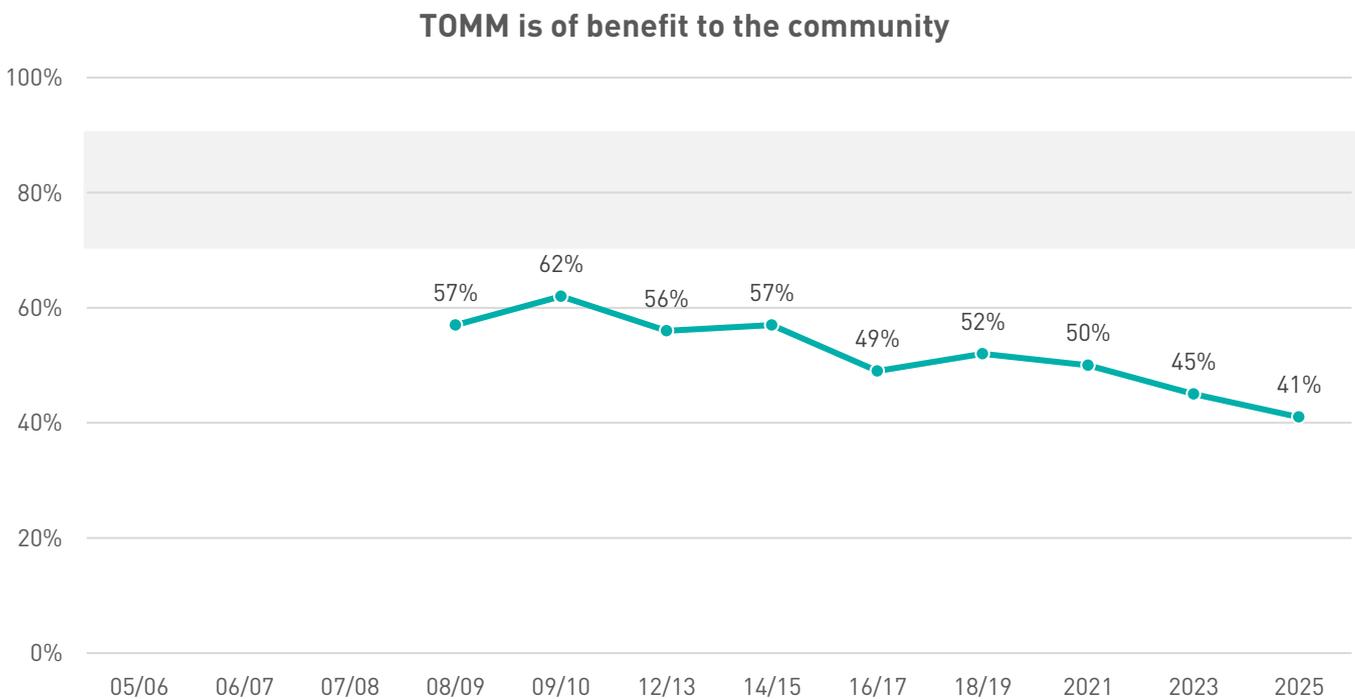


*Aware: Yes

Community benefit of TOMM

Belief that TOMM is of benefit to the community continues to trend well below the acceptable range of 70%. The 2025 result sits at 41%, which is consistent with the gradual decline observed over the past decade. After peaking at 62% in 2009/2010, community belief in TOMM’s benefit has steadily fallen and has not met the benchmark at any point.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
TOMM is a well understood and utilised destination management tool for Kangaroo Island	Proportion of residents who believe TOMM is of benefit to the community	70% - 90%	41%	✘



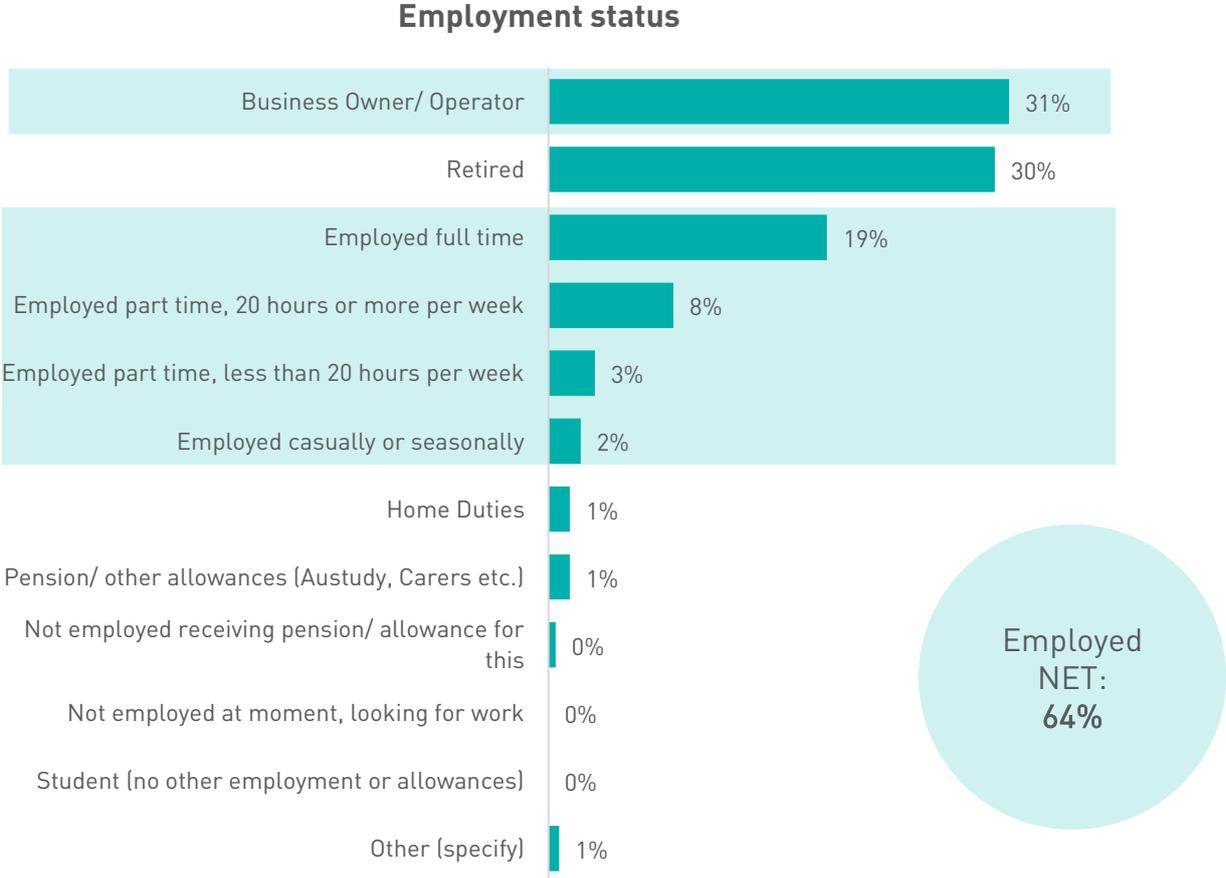
*Beneficial or Very beneficial; Including Don't know.



Economic Indicators

Employment status

A third (31%) of respondents identify as business owners or operators, reflecting Kangaroo Island’s strong small-business community. In addition, 30% are retirees and 19% are full-time employees.



Employment status over time

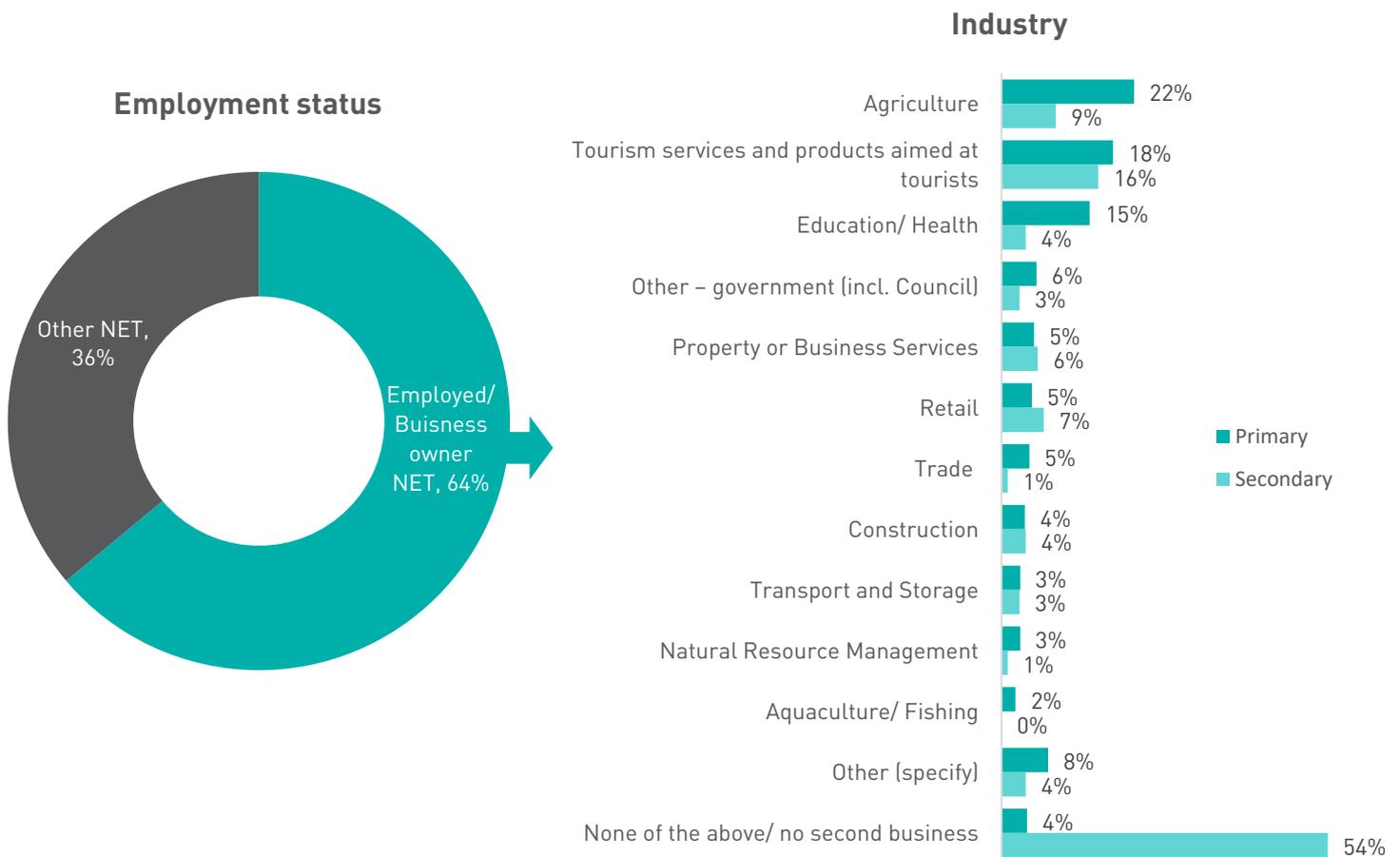
Overall employment patterns on Kangaroo Island have remained relatively steady over time. The proportion of residents who are employed sits in the mid-60% range in 2025, consistent with most previous years. Full-time employment has fluctuated across the long term but remains comparatively low in 2025 at 19%, while part-time employment continues to be a significant feature of the local workforce. The retiree population remains a prominent group, with levels consistently around 25% to 30% over the past decade.

Employment	05/06	06/07	07/08	08/09	09/10	12/13	14/15	16/17	18/19	2021	2023	2025
Employed (NET)	65%	67%	68%	65%	66%	59%	75%	71%	71%	57%	63%	64%
Employed full time	38%	38%	38%	39%	40%	19%	17%	20%	20%	16%	15%	19%
Employed part time, 20 hours or more per week	16%	12%	10%	10%	12%	10%	13%	8%	11%	7%	8%	8%
Employed casually or seasonally	7%	9%	9%	11%	8%	6%	5%	4%	3%	4%	5%	2%
Employed part time, less than 20 hours per week	4%	7%	10%	5%	6%	3%	5%	5%	4%	2%	2%	3%
Self employed	4%	2%	3%	2%	1%							
Business Owner/ Operator						21%	36%	33%	34%	29%	33%	31%
Retired	18%	19%	20%	25%	22%	27%	19%	23%	21%	35%	28%	30%
Home Duties	3%	4%	2%	2%	2%	3%	1%	2%	3%	1%	4%	1%
Pension/ other allowances (Austudy, Carers etc.)	4%	4%	3%	1%	2%	3%	2%	2%	1%	4%	2%	1%
Not employed receiving pension/ allowance for this	<1%	1%	1%	0%	2%	1%	1%	0%	0%	0%	1%	0%
Not employed at moment, looking for work	1%	2%	1%	1%	1%	3%	0%	< 1%	1%	0%	1%	0%
Refused	<1%	0%	0%	<1%	1%	<1%	0%	1%	0%	0%	0%	2%
Student (no other employment or allowances)	2%	0%	0%	2%	4%	<1%	<1%	1%	2%	0%	0%	0%
Other (specify)	1%	1%	2%	2%	<1%	3%	1%	< 1%	0%	2%	0%	1%

Employment industries

Two thirds (64%) of respondents are employed or business owners, while the remaining 36% fall into other categories such as retirees, home duties or those not currently working. Among those with employment or business activity, agriculture is most common primary industry connection, with 22% reporting it as their primary income and 9% as a secondary source. Parndana residents were more likely to gain their primary income via agriculture (56%).

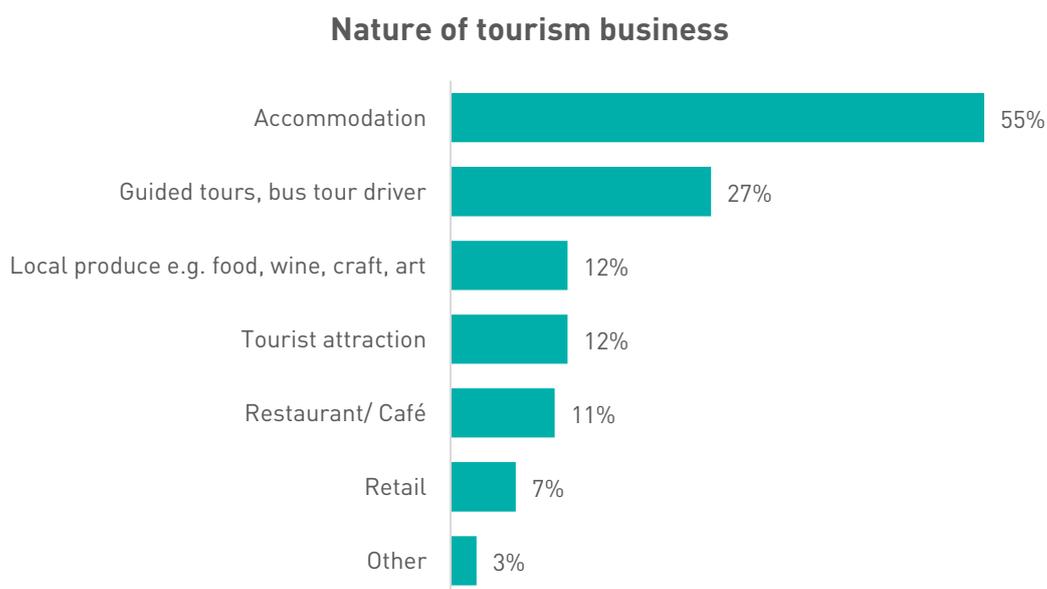
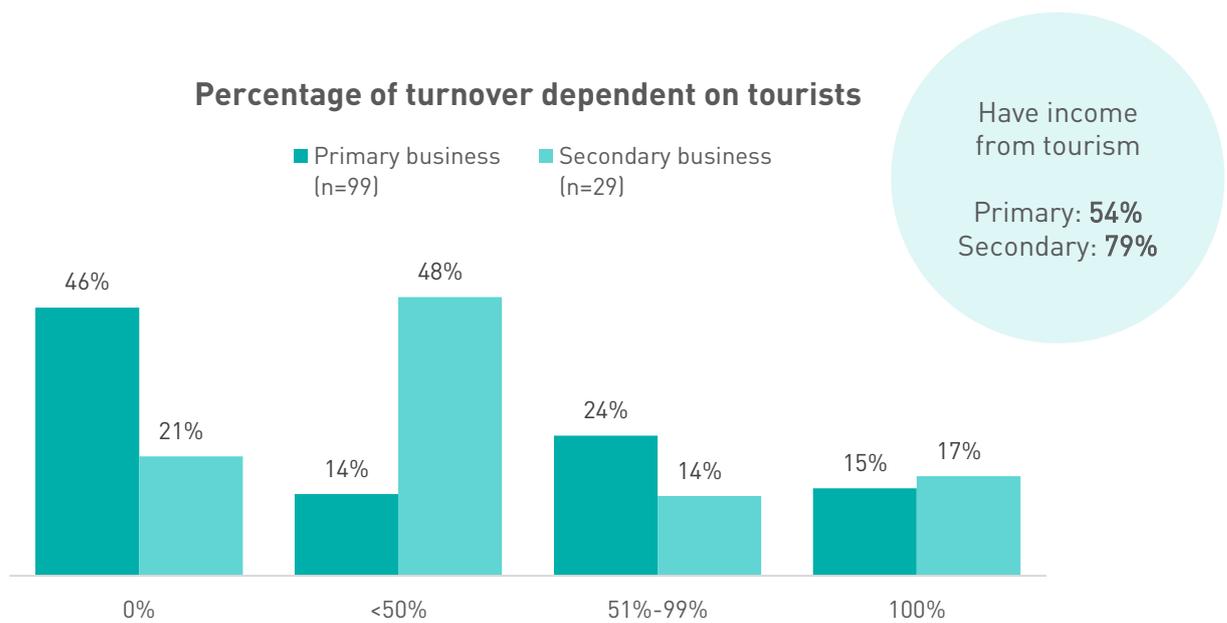
Tourism is a close second, with 18% primary employed and 16% with a second role in the industry.



Tourism turnover

When looking at residents' primary sources of income, two non-tourism industries show a strong reliance on visitor spending. In retail, 63% report that between 50% and 99% of their income depends on tourists. In transport and construction, 60% estimate that up to 50% of their income is tourism-dependent. This highlights the wider economic reach of tourism beyond businesses directly classified as part of the tourism sector.

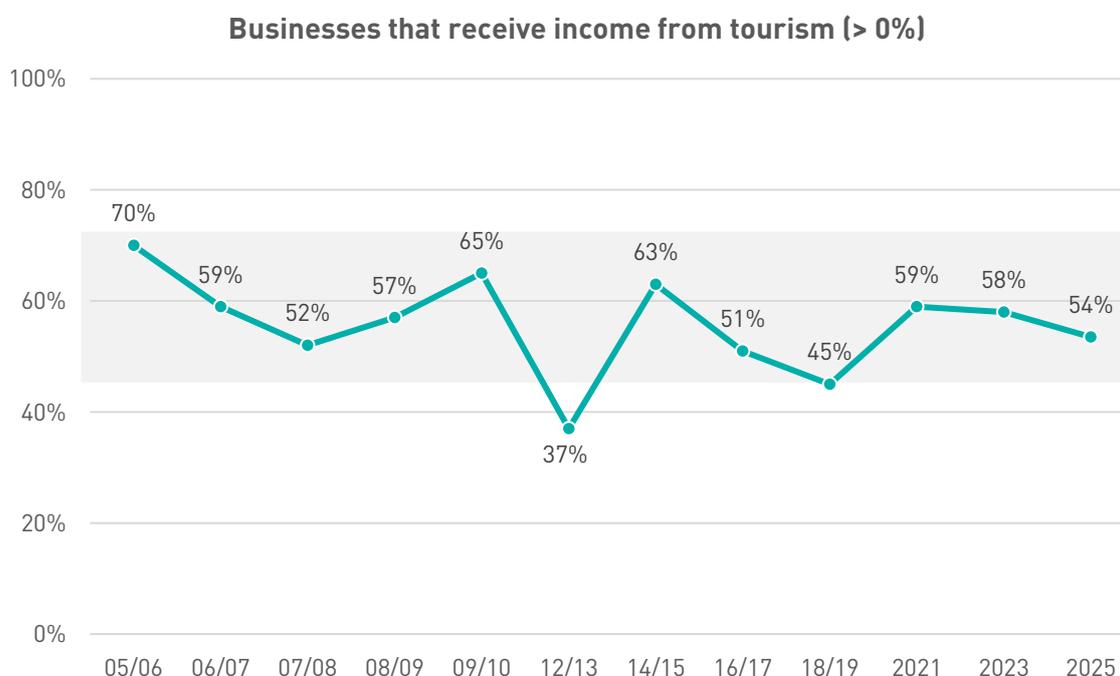
Accommodation stands out as the leading business type, constituting 55% of the prevalent nature of tourism businesses. This is followed by guided tours and local produce.



Tourism turnover over time

In 2025, 54% of businesses reported receiving some income from tourism, placing the result within the acceptable range of 45% to 70%. This level of tourism-related income has been relatively stable over time, with most years showing at least half of businesses benefiting from visitor spending.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
Tourism optimises economic benefits for Kangaroo Island	Proportion of non-specific tourism businesses that have a proportion of turnover dependent on tourism	45% - 70%	54%	✓



*Tourism, agriculture, aquaculture, retail, transport and storage.

Tourism turnover

Across the long term, the proportion of primary businesses receiving no tourism income has gradually increased, rising from around 30% in earlier years to 46% in 2025. At the same time, those earning less than half of their turnover from tourism have declined, while businesses fully dependent on tourists have remained stable at around 15% to 20%.

Secondary business income shows a similar long-term pattern, with the share reporting no tourism income decreasing slightly in 2025, and a steady proportion continuing to earn between 1% and 50% of their secondary turnover from visitors.

The mix of business types has also shifted. Accommodation providers now account for 55% of businesses in 2025, the highest level recorded and continuing an upward trend.

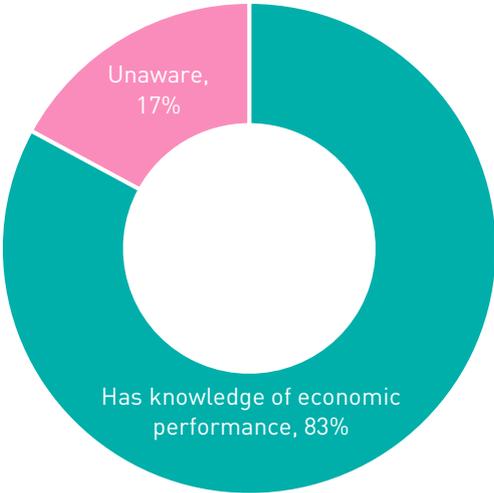
	05/06	06/07	07/08	08/09	09/10	12/13	14/15	16/17	18/19	2021	2023	2025
Primary Business												
0%	30%	41%	48%	43%	35%	63%	37%	59%	64%	41%	42%	46%
<50%	28%	21%	16%	20%	24%	16%	17%	14%	9%	16%	13%	14%
50-99%	23%	17%	17%	23%	28%	15%	22%	10%	13%	19%	20%	24%
100%	18%	20%	19%	15%	14%	6%	24%	16%	15%	24%	24%	15%
Secondary Business												
0%	33%	14%	36%	46%	43%	73%	31%	35%	35%	23%	35%	21%
<50%	47%	44%	28%	20%	16%	12%	50%	41%	11%	36%	49%	48%
50-99%	8%	14%	15%	17%	18%	7%	17%	13%	23%	36%	9%	14%
100%	13%	29%	21%	17%	23%	9%	2%	11%	32%	5%	7%	17%
Nature of business												
Accommodation	45%	32%	35%	33%	58%	56%	30%	60%	46%	58%	45%	55%
Local produce e.g. food, wine, craft, art	8%	7%	9%	9%	2%	13%	13%	4%	6%	23%	27%	12%
Guided tours, bus tour driver	15%	25%	23%	26%	14%	29%	21%	22%	20%	9%	18%	27%
Retail	3%	12%	3%	3%	12%	17%	11%	7%	8%	11%	12%	7%
Tourist attraction	6%	5%	6%	0%	6%	16%	11%	6%	7%	9%	12%	12%
Restaurant/ Café	6%	3%	11%	6%	8%	12%	16%	8%	18%	5%	9%	11%
Other (specify)	3%	15%	11%	20%	16%	15%	18%	8%	5%	5%	7%	3%

Financial performance

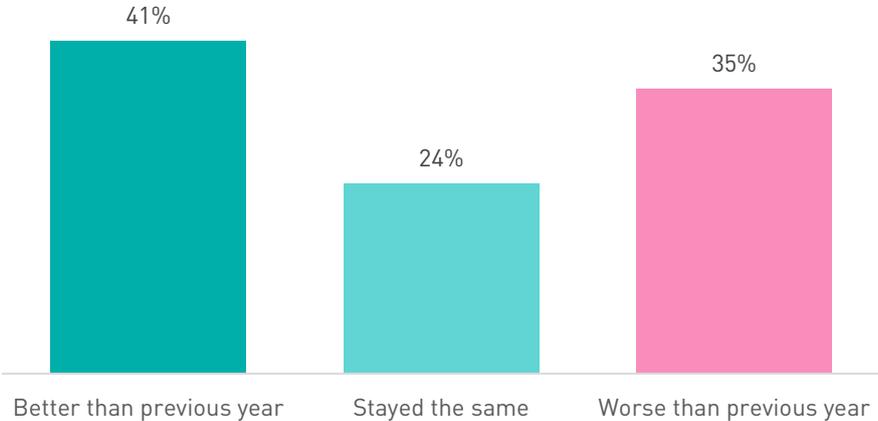
Of those who were aware of their workplace’s financial performance (83%), 41% reported that business had improved compared with the previous year, 35% said they were financially worse off, and 24% experienced no change. This spread of results points to a largely mixed and stabilising economic environment, where some businesses are recovering, others are still under strain, and a sizeable group is holding steady rather than shifting in either direction.

There were minimal differences in performance across industries. The only notable variation was among tourist attractions, where all respondents reported no change in performance (100%), although this reflects a very small sample of three businesses.

Knowledge of the business’ financial performance the last 12 months



Financial performance the last 12 months

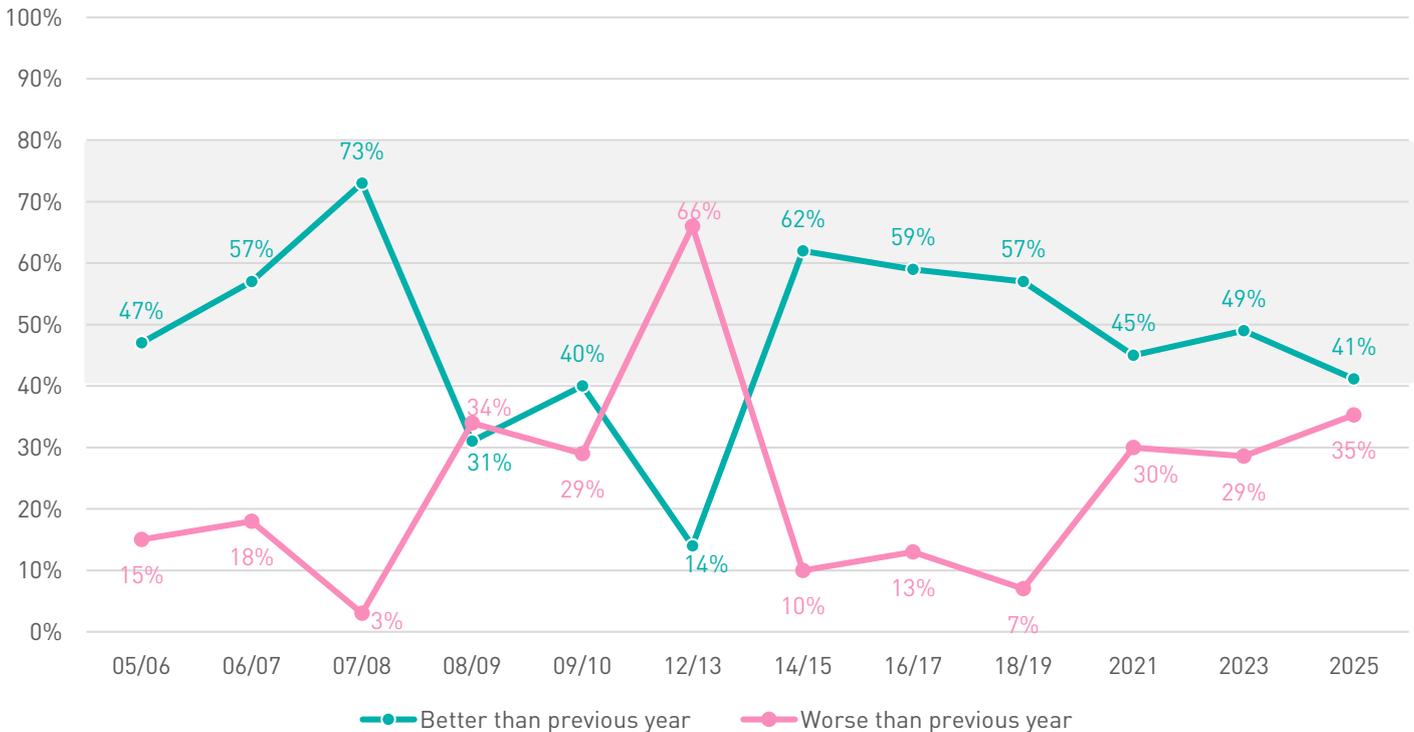


Financial performance

Although there has been a slight softening in the latest result, the overall pattern suggests a steady operating environment rather than significant swings. Similarly, the share reporting worse performance has hovered around the same levels across these waves, indicating that the industry is experiencing a more balanced and predictable period compared with the more volatile results seen in earlier years.

Optimal condition	Indicator	Acceptable Range	2025 Result	Result
Tourism optimises economic benefits for Kangaroo Island	Proportion of tourism businesses that identify improved financial performance	40% - 80%	41%	✓

Business performance compared to previous year





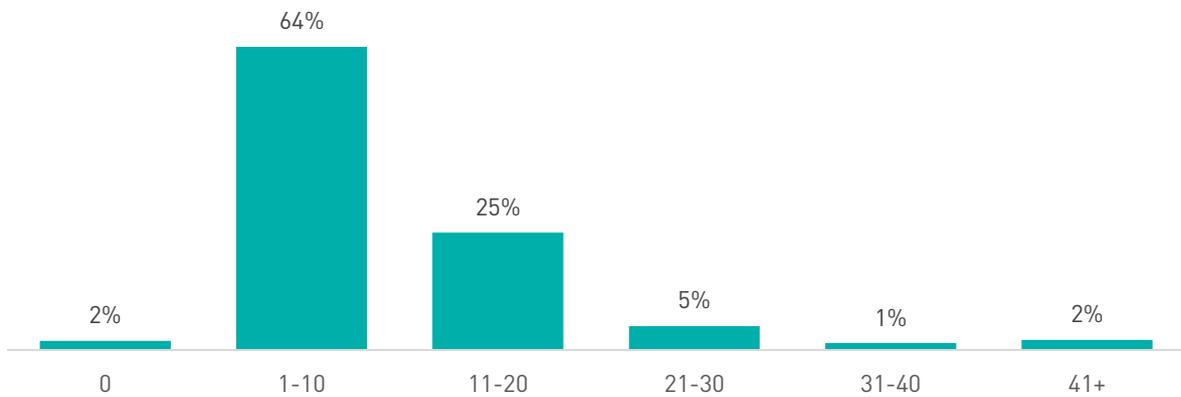
Kangaroo Island Travel

Island departures

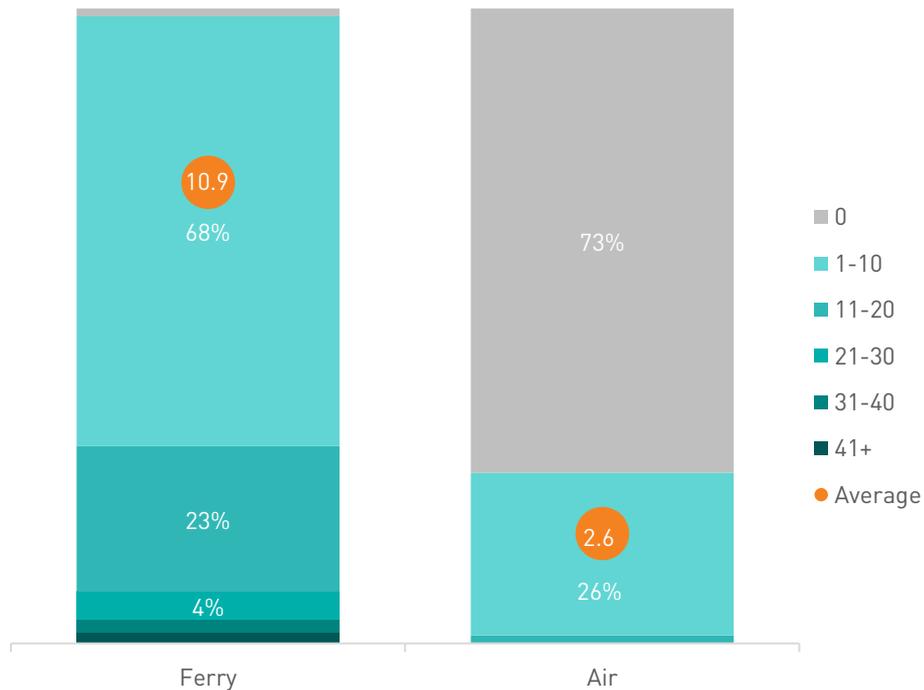
Most residents continue to leave Kangaroo Island only occasionally, with 64% departing between one and ten times in the past year and a further 25% leaving between eleven and twenty times. Very frequent departures remain uncommon.

Travel off the island is dominated by the ferry. Nearly all higher frequency travellers use the ferry, with an average of eleven trips per year compared with fewer than three by air. Air travel remains limited, with most residents reporting no flights at all in the past twelve months.

Frequency of Kangaroo Island departures in the past 12 months



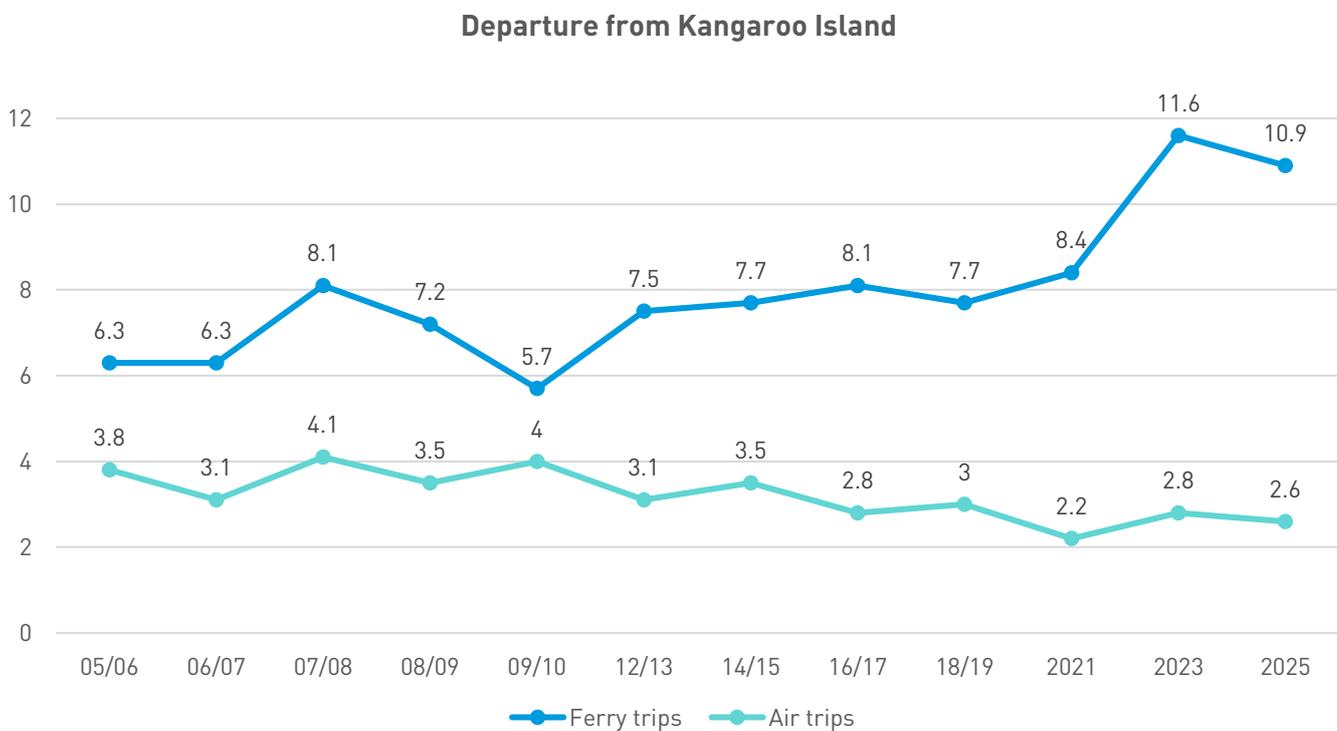
Method of departure



Departures over time

Ferry use has increased noticeably in recent waves. After sitting between seven and eight trips for many years, average ferry departures rose to 8.4 in 2021, peaked at 11.6 in 2023 and remain elevated at 10.9 in 2025. This indicates a sustained uplift in reliance on the ferry for off-island travel.

Air departures, on the other hand, have stayed relatively stable over the long term, fluctuating only slightly between two and four trips per year. The long running pattern shows that while the ferry remains the dominant mode of travel, air travel continues to play a much smaller and mostly unchanged role.



A photograph of a sunset over the ocean. The sun is low on the horizon, creating a bright orange and yellow glow in the sky. Two people are silhouetted against the sunset, standing on a ship's deck. The deck has a railing in the foreground. The overall mood is serene and contemplative.

Satisfaction with Agencies

(Photo credit: Frame)

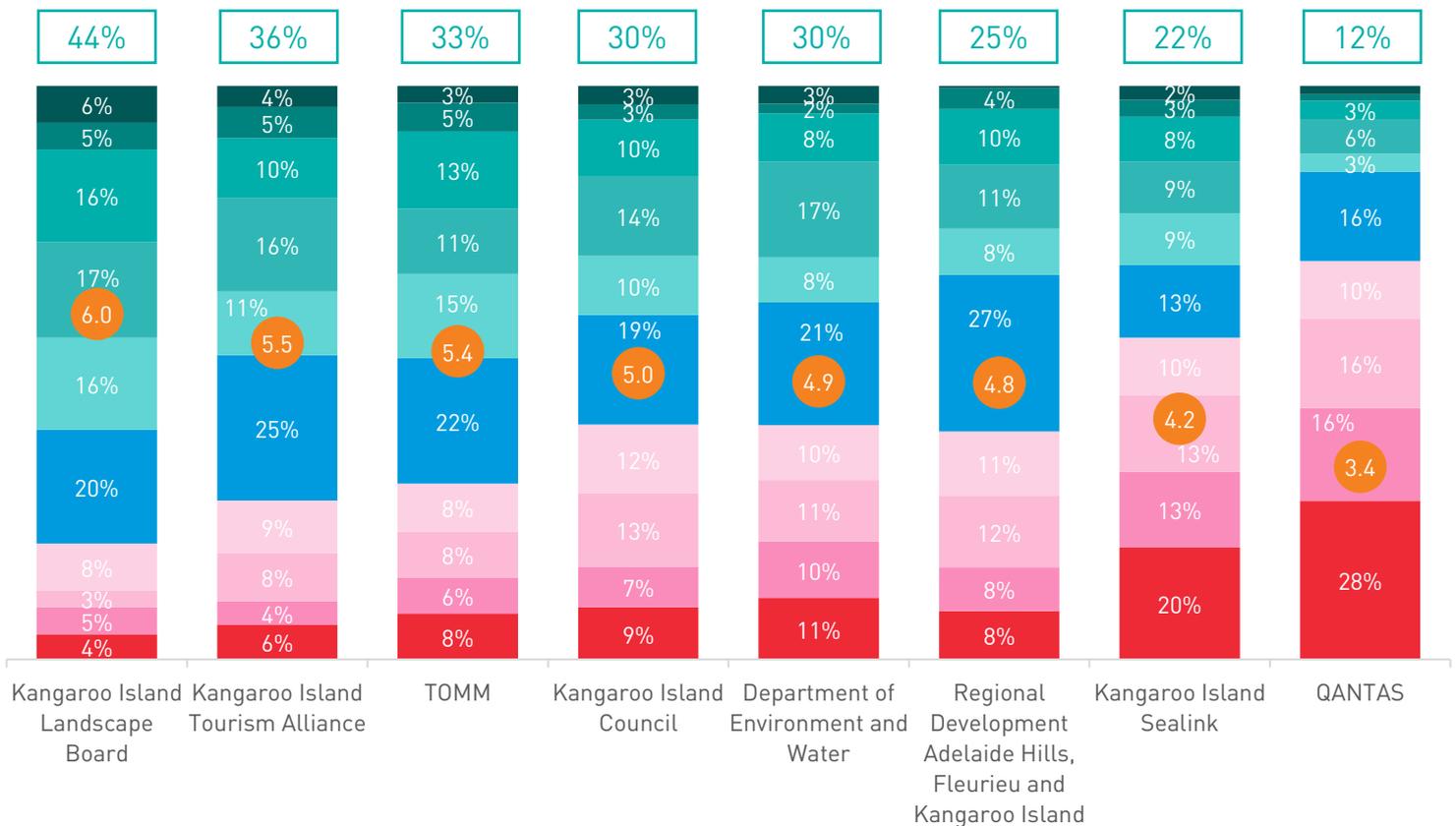
Satisfaction with organisation

The Kangaroo Island Landscape Board is the strongest performer, with 44% satisfied, followed by the Kangaroo Island Tourism Alliance (36%) and TOMM (33%)

Transport providers perform weakest, with 22% satisfied with Sealink and 12% satisfied with QANTAS.

Organisation satisfaction

Legend: 1 (Totally dissatisfied), 2, 3, 4, 5, 6, 7, 8, 9, 10 (Totally satisfied), Average



Satisfaction with organisation

Satisfaction generally peaked in the mid-2000s, with most organisations recording their strongest results between 2005 and 2008. Examples from this period include consistently higher ratings for services such as Kangaroo Island Sealink and TOMM. In more recent years, results have settled into more moderate ranges across the board, reflecting a broader shift from earlier highs to more measured levels.

Total satisfied (7-10)	05/06	06/07	07/08	08/09	09/10	12/13	14/15	16/17	18/19	2021	2023	2025
Kangaroo Island Landscape Board	50%	47%	50%	35%	48%	44%	43%	44%	43%	37%	40%	44%
Kangaroo Island Tourism Alliance	61%	55%	64%	58%	59%	52%	51%	55%	54%	46%	39%	36%
TOMM	50%	44%	54%	48%	56%	41%	48%	42%	47%	40%	35%	33%
Department of Environment and Water	46%	43%	44%	40%	41%	38%	42%	41%	45%	33%	30%	30%
Kangaroo Island Council	25%	33%	37%	37%	30%	26%	40%	34%	34%	35%	31%	30%
Regional Development Adelaide Hills, Fleurieu and Kangaroo Island	41%	34%	42%	32%	39%	37%	21%	28%	29%	27%	24%	25%
Kangaroo Island Sealink	71%	65%	72%	67%	65%	57%	52%	49%	48%	59%	27%	22%
QANTAS										26%	9%	12%



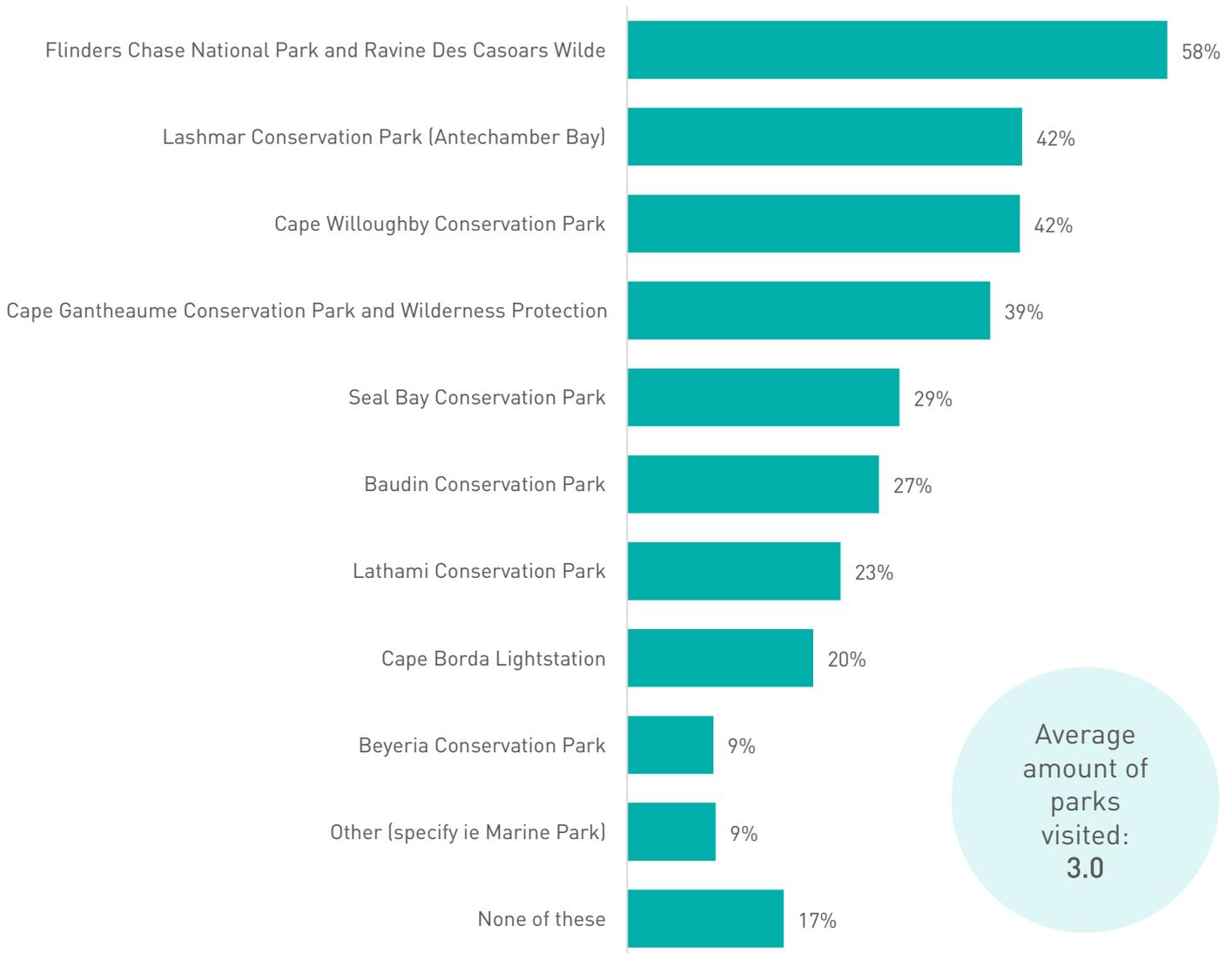
Stakeholder: Department of Environment and Water

Park visitation

A large majority (83%) have attended a park in the last 12 months, with Flinders Chase the most visited park (58%), reinforcing its role as the island's primary natural attraction. Lashmar and Cape Willoughby follow at 42%, showing strong engagement with key coastal parks. Most residents visit multiple parks, with an average of three visited in the past twelve months. However, 17% did not visit any parks, indicating a notable minority who are not currently engaging with the island's park network.

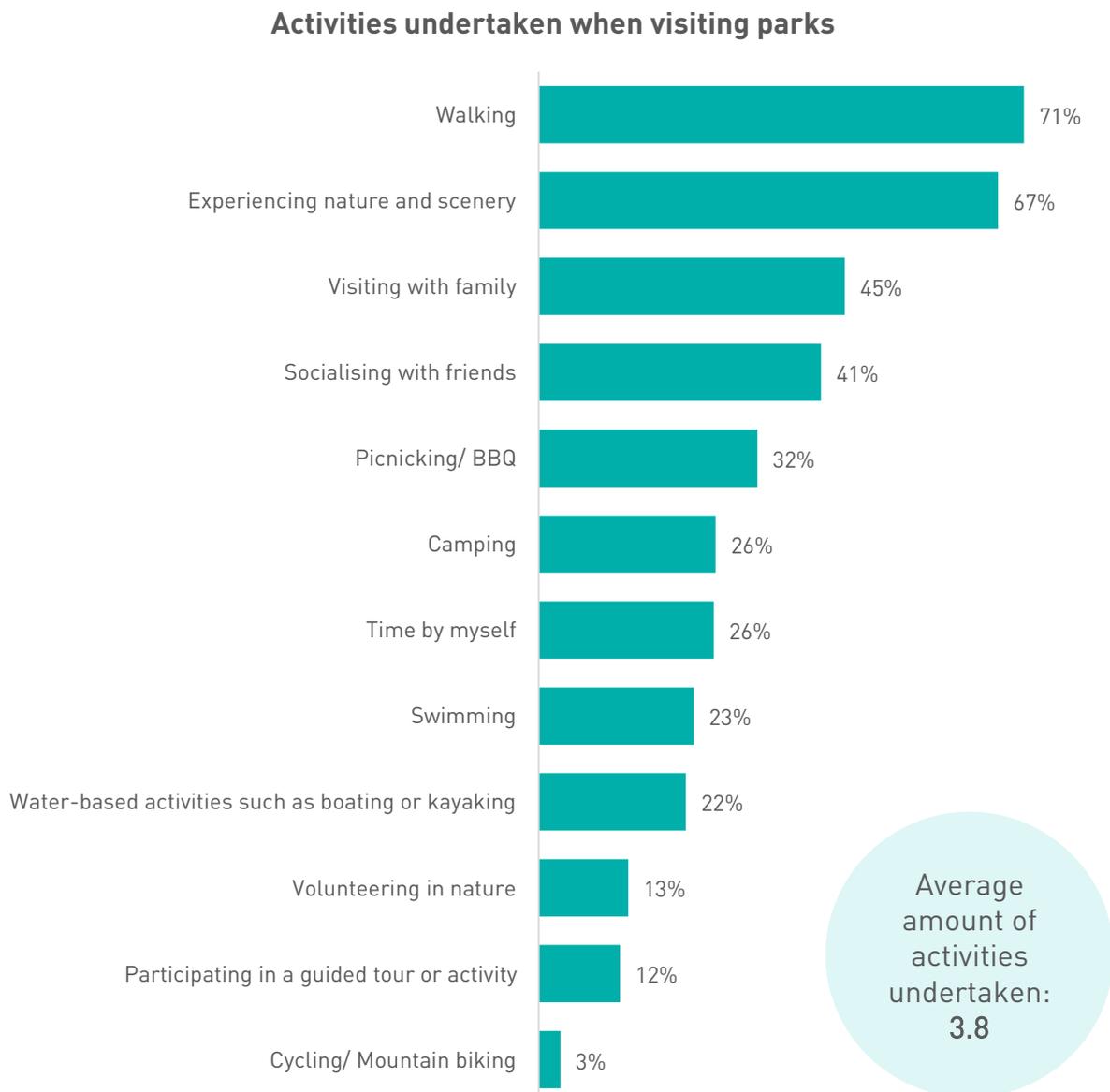
Those residing closest to Penneshaw were more likely to visit more parks, averaging 3.6 compared to just 2.1 for Parndana residents.

Parks visited in the past 12 months



Park activities

Park visits are driven primarily by simple, nature-based activities. Walking (71%) and experiencing scenery (67%) dominate, showing that residents value low-impact ways of connecting with the environment. Social and family activities remain important, with 45% visiting with family and 41% socialising with friends. More involved activities such as camping, swimming or water-based recreation attract around one quarter of visitors. Guided activities and volunteering are less common, and cycling remains very low at 3%.



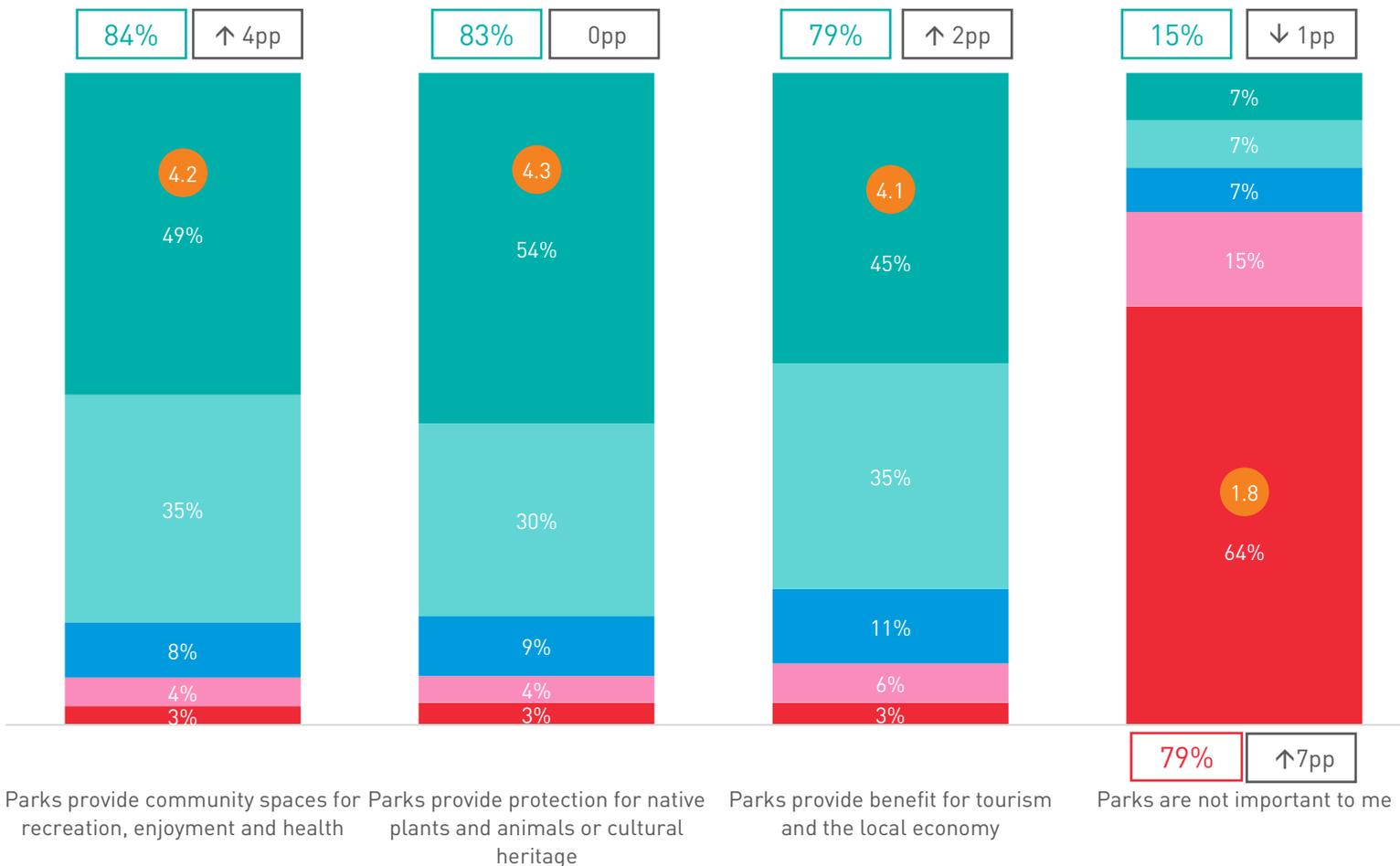
Park perceptions

Residents place strong value on parks. Large majorities agree that parks provide important community spaces (84%), protect native plants, animals and cultural heritage (83%), and benefit tourism and the local economy (79%).

These results highlight broad recognition of both the social and environmental roles parks play on the island. Only a small minority view parks as unimportant (15%).

Value of parks

1 Strongly disagree 2 Somewhat disagree 3 Neither agree nor disagree 4 Somewhat agree 5 Strongly agree ● Average





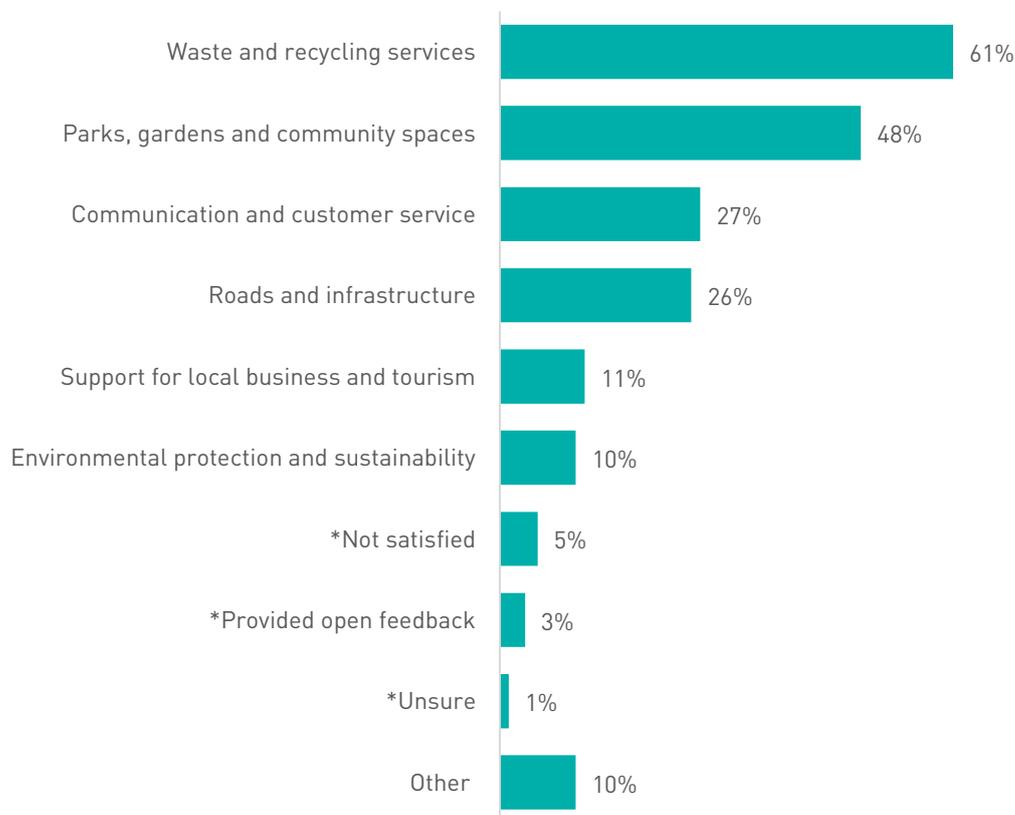
Stakeholder: Kangaroo Island Council

(Photo credit: South Australian Tourism Commission)

Satisfaction with services

Residents are most satisfied with council performance in waste and recycling services (61%), followed by parks, gardens and community spaces (48%). Satisfaction drops sharply across other areas, with only around one quarter satisfied with communication, customer service, roads and infrastructure.

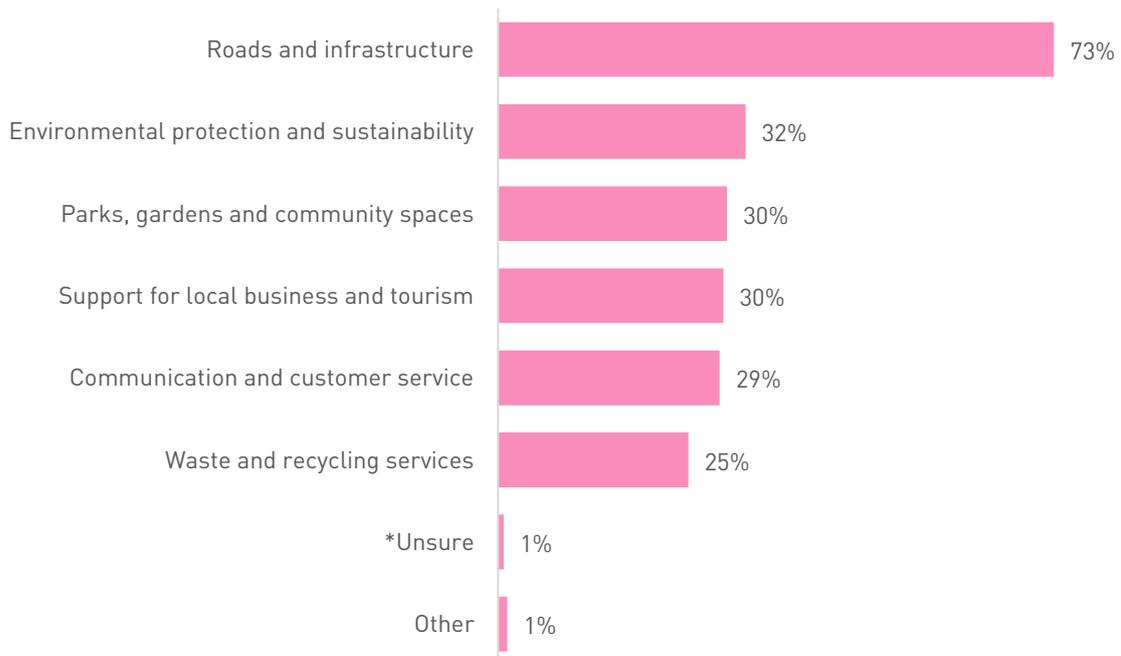
Satisfaction with council performance aspects



Dissatisfaction with services

Dissatisfaction is highest for roads and infrastructure, with 73% of residents expressing concern, making it the council's most significant performance issue. Around one third of residents are also dissatisfied with environmental protection and sustainability (32%), parks and community spaces (30%), support for local business and tourism (30%) and communication and customer service (29%).

Dissatisfaction with council performance aspects





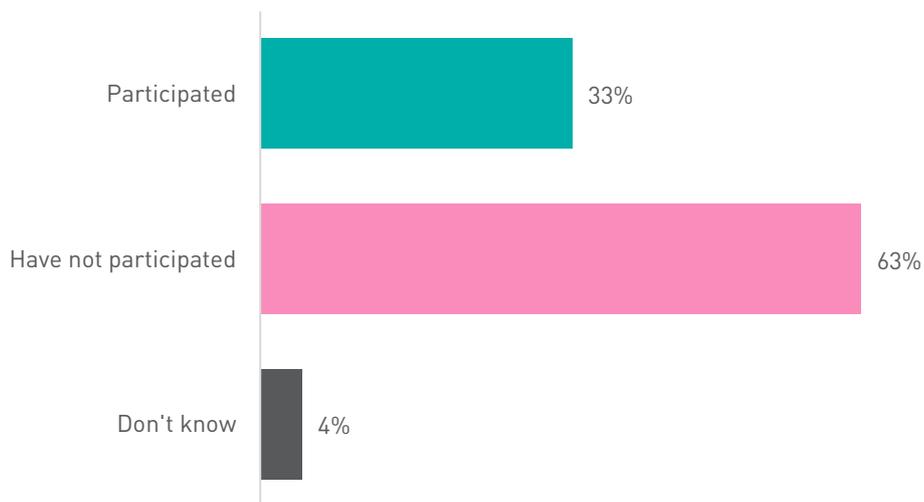
Stakeholder: Kangaroo Island Landscape Board

Participations and priorities

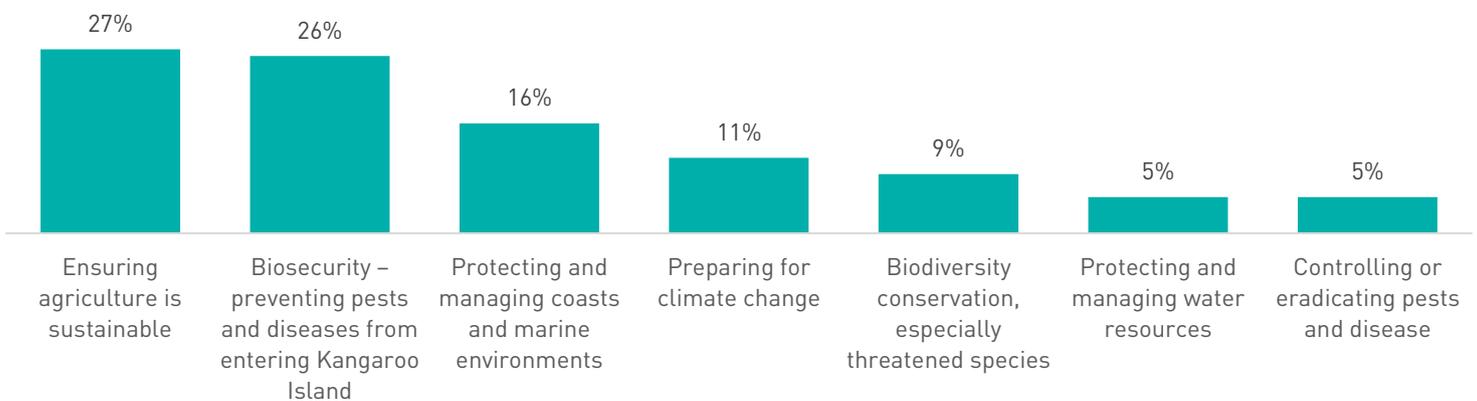
Only one third of residents have participated in Kangaroo Island Landscape Board programs, grants or information sharing, indicating relatively limited direct engagement with the Board's initiatives.

Despite this, residents hold clear views on natural resource priorities. Ensuring sustainable agriculture (27%) and strengthening biosecurity to prevent pests and diseases (26%) rank as the top concerns, reflecting the island's heavy reliance on primary industries and its vulnerability to ecological threats.

Participation in Kangaroo Island Landscape Board programs, grants or information sharing



**Top priority of natural resource management
Ranked first**



A person wearing a wide-brimmed hat and a light-colored sweater stands on a sand dune, looking out over a vast desert landscape. The sky is a clear, vibrant blue with a few wispy clouds. The sand dunes are light-colored and dotted with small, scrubby bushes. The overall scene is bright and open.

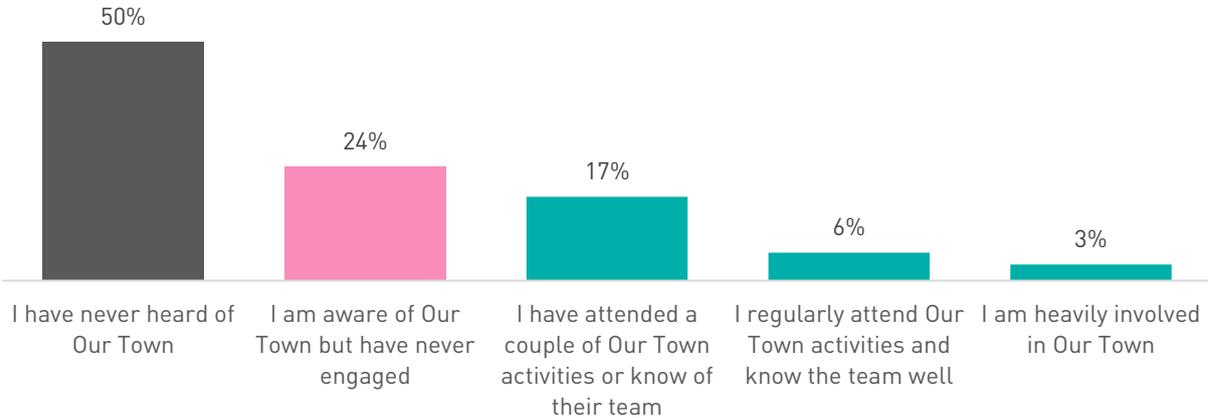
Stakeholder: Our Town

Our Town Engagement

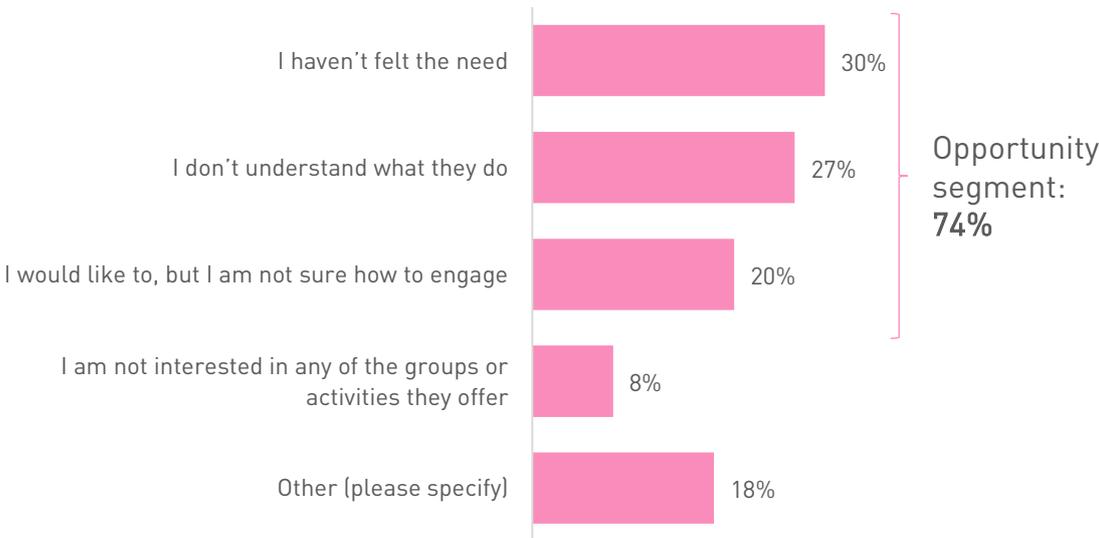
Awareness and involvement in Our Town vary across the community. Half of residents have not heard of the program, while one quarter are aware of it but have not yet engaged. Others have had some interaction, with 17% attending a couple of activities and a smaller group regularly or heavily involved.

Among those who have not participated, the most common reasons are not feeling the need at 30% or not being clear on what the program offers at 27%. Another one in five say they would be interested but are unsure how to get involved. Together, these residents form what can be considered an Opportunity Segment, a group that is not disengaged but simply unactivated. Their barriers relate to awareness and clarity rather than resistance, which suggests strong potential to increase participation through clearer communication and more visible, easy pathways into the program.

Involvement in Our Town



Reason for disengagement





Stakeholder: South Australian Tourism Commission

Importance of tourism

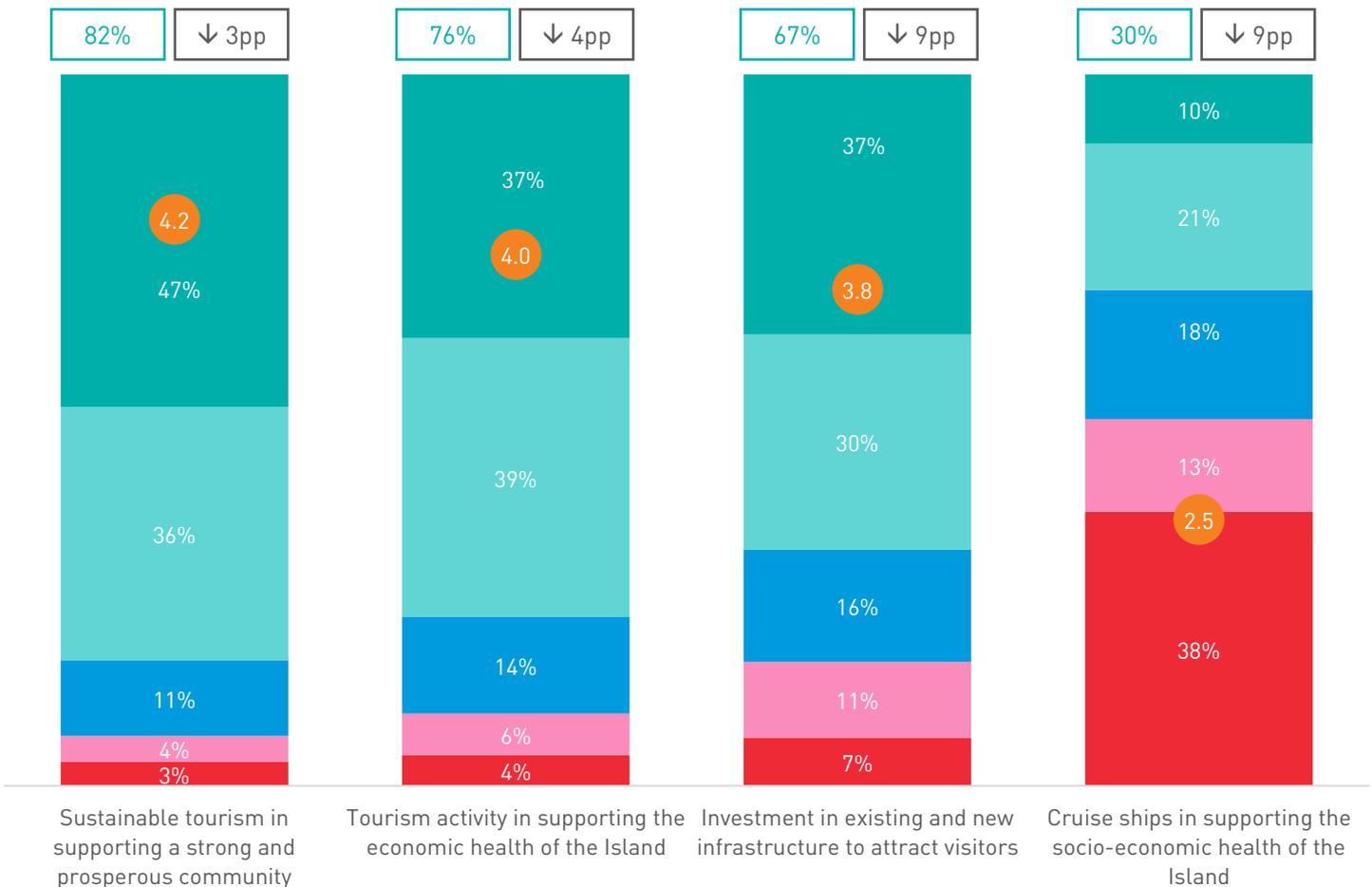
Residents place the strongest importance on sustainable tourism (82%) and tourism’s role in supporting the island’s economy (76%). Two thirds also value investment in visitor infrastructure. Those who work in tourism show even higher support across all three areas, with almost universal agreement that they are important.

Cruise ships stand apart, with only 30% of residents rating them as important, and support remains comparatively low even among tourism workers at 31%.

All measures have shown a decrease in importance this wave, particularly investment in infrastructure and cruise ship supporting the island (both down 9 percentage points).

Importance of tourism measures

■ 1 Not at all important ■ 2 Somewhat unimportant ■ 3 Neither important nor unimportant ■ 4 Somewhat important ■ 5 Very important ● Average





Stakeholder: Kangaroo Island Tourism Alliance

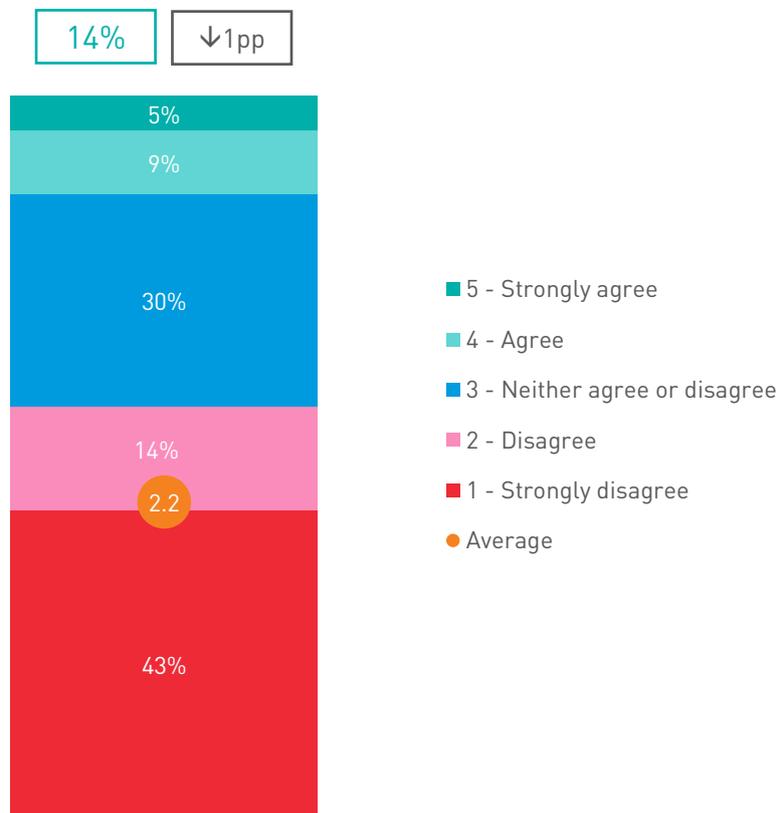
Cruise ships and resident lifestyle

Only 14% of residents agree that cruise ship visitation has a positive impact on their lifestyle. Most hold a neutral or negative view, with 30% neither agreeing nor disagreeing and a combined 57% disagreeing.

Younger residents between the ages of 18 and 34 (48%) were more likely to agree.

Agreement on this matter is similar to 2023, with just a 1 percentage point decrease in agreement this wave (14%).

Agreement that cruise ship visitation has a positive impact on lifestyle

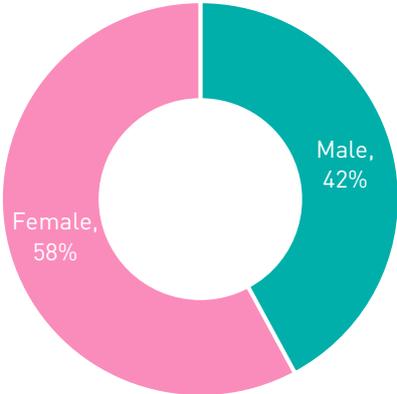




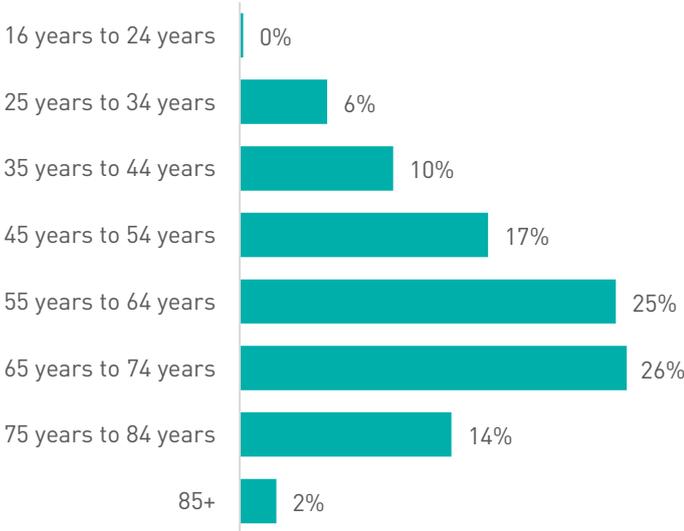
Appendix: Respondent Profile

Respondent profile

Gender



Age groups



Closest town

