Visitor Exit Survey 2024/25

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Verian respectfully acknowledges the Traditional Owners of the lands on which we live and operate, and pay our respects to all Elders, past and present.

We recognise their strengths and enduring connection to lands, waters and skies as the Custodians of the oldest continuing cultures on the planet. We remain committed to actively contributing to Australia's reconciliation journey through listening and learning, sharing diverse voices with our clients and working together for a better tomorrow.

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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 2024/25 Visitor Exit Survey (VES).

Summary of TOMM Indicators

Summary of Economic Indicators

Optimal Conditions	Ref	Indicators	Acceptable Range	Wave 23 (24/25)	
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%	96%	✓
	EC1f	Average annual total expenditure per visit	5% - 10%↑	$822.66 [2.7% decrease]	✗
	EC1g	Annual number of visitors to Kangaroo Island	0% - 20%*↑	1%	✓
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%	71%	✓
	EC2d	Proportion of customers that are highly satisfied with the professionalism of tourism operators	65% - 100%	68%	✓
	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%	60%	✓

Summary of Experiential Indicators

Optimal Conditions	Ref	Indicators	Acceptable Range	Wave 23 (24/25)	
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%	96%	✓
	EX1c	Proportion of visitors that experienced scenic variety without crowds	90% - 100%	95%	✓
	EX1d	Proportion of visitors that experienced cultural heritage and history of settlement	70% - 100%	67%	✗
	EX1e	Proportion of visitors that experienced spectacular scenery and coastal landscapes	90% - 100%	Question removed in 2024/25	
	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%	Question removed in 2024/25	

Optimal Conditions	Ref	Indicators	Acceptable Range	Wave 23 (24/25)	
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	EX1h	Proportion of visitors that experienced local Kangaroo Island produce	80% - 100%	83%	✓
	EX1i	Proportion of visitors that believe Kangaroo Island offers one of Australia's top three nature & wildlife experiences	70% - 100%	78%	✓
	EX1j	Proportion of visitors that believe Kangaroo Island has a friendly local community	80% - 100%	92%	✓
	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%	90%	✓
	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%	87%	✗

Optimal Conditions	Ref	Indicators	Acceptable Range	Wave 23 (24/25)	
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%	75%	✓
	EX2b	Proportion of visitors who were very satisfied with their opportunity to learn more about the Island's natural environment	70% - 100%	62%	✗
	EX2c	Proportion of visitors who were very satisfied with their opportunity to learn more about the Island's history	70% - 100%	49%	✗
	Ex2d	Proportion of visitors who were very satisfied with the range, quality and availability of activities available	70% - 100%	Range: 58% Quality: 60% Avail: 56%	✗
	EX2e	Proportion of visitors who were very satisfied with the quality of accommodation	70% - 100%	63%	✗
	EX2f	Proportion of visitors who were very satisfied with the range, quality and availability of Kangaroo Island produce	70% - 100%	Range: 58% Quality: 65% Avail: 56%	✗
	EX2g	Proportion of visitors that are very satisfied with the level of customer service they receive	80% - 100%	71%	✗
	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%	Picnic: 55% Sign: 45% Toilets: 52% Road sign: 48% Camp: 54% Road: 31%	✗
	EX2i	Proportion of visitors that would recommend Kangaroo Island as a holiday destination to others as a result of their experience	90% - 100%	96%	✓
	EX2j	Proportion of repeat visitation	30% - 50%	36%	✓

Summary of Environmental Indicators

Optimal Conditions	Ref	Indicators	Acceptable Range	Wave 23 (24/25)	
Visitor activity has minimal negative impacts on the natural environment	EN2b	Proportion of visitations to natural areas occurring on managed sites	70% - 100%	74%	✓
	EN2e	Proportion of visitors aware of quarantine regulations prior to arriving on Kangaroo Island	70% - 100%	73%	✓

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.

Verian, previously under the Colmar Brunton and Kantar Public banners, has carried out research with Kangaroo Island visitors as part of the TOMM monitor for the past seventeen financial years. The following report details the findings from the TOMM Visitor Exit Survey conducted throughout the 2024/25 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 has remained consistent, with data collected via a self-completion survey, which visitors collected at entry and exit points to the Island (airport, ferry and cruise ship departure points) from July 2024 to June 2025. 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 (French, German, Italian, simplified Chinese and traditional Chinese). 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 codes 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. No data was collected via the tour buses during the 2024/25 wave.

In the 2023/24 wave, a tailored version of the survey was developed to capture relevant feedback from cruise ship visitors to Kangaroo Island. A total of n=101 surveys from cruise ship visitors have been reported in this wave.

Compared to the VES 2023/24 (n=3397), the 2024/25 wave of the VES collected fewer responses, with n=2183 surveys completed. While participation was lower, this is still a strong level of engagement, supported by the TOMM Management Committee's continued efforts to promote the VES across various touch points. As with previous years, the majority of responses were submitted online (n=90%), highlighting a clear preference 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, the Verian team 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 historically been weighted based on visitor population figures for air, sea, and tour bus departures. Due to no bus surveys being collected this wave, only air and sea weights have been applied.

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 Verian. 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 Verian with the resulting weights. The population figures are not provided to Verian 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 largely unchanged since 2017/18, with the following minor adjustments made over recent waves:

- In the 2019/20 wave, 'sea' options to arrive/depart the island were further distinguished with 'ferry' and 'cruise ships' added. Results have been split in the 24/25 version of the report where relevant.
- In the 2023/24 wave, a tailored version of the survey was developed for cruise ship visitors to Kangaroo Island.
- In the 2024/25 wave, several updates were made:
    - The questions to capture spend were simplified to not distinguish those who booked their trip as part of a package (Q9-Q13 were removed);
    - A question was added to capture bookings made prior to arrival (Q28);
    - A question was added to capture the activities undertaken (Q29);
    - A question was added about the most important experiences and whether they were achieved (Q30);
    - Two experiential statements were removed (Q18.4 - Spectacular scenery and coastal beauty and Q18.6 - Farming and rural landscapes) and one was moved into new Q30 (Q18.1 - Viewing Australia's wildlife in natural surroundings); and
    - Satisfaction with the national parks experience was added (Q19.19).

Restructuring & reanalysis of previous wave data

The reader should be aware that before analysis was conducted for the survey data for the 2004/05 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 2024/25 sample of n=2183 can be reported within a +/-2.1% 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 47.9% and 52.1%. 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
2183	±2.1%
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 questions on the financial subject. Respondents that have left out information might influence the overall result leading to a less accurate overall analysis.

In order to make more valid comparisons over time, the data cleaning procedure was applied to not only the 2024/25 wave, but the prior waves as well. If any changes have been made to data cleaning due to changes in questionnaire, these have been noted throughout the report.

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 and air (with no tour bus surveys completed in the 2024/25 wave) 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.

In order to present the most recent waves of data, earlier waves prior to 2009 have been removed from the 2024/25 report. Review of data from earlier waves can be done via the 2023/24 report. 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

2024/25 in a nutshell

The results of Wave 23 of the VES are largely consistent with the 2023/24 survey and continue to show positive outcomes across a range of areas.

Contextual factors: Among the highlights of the 2024/25 period was Kangaroo Island being ranked as #2 in the 2024 Lonely Planet Top Regional Hotlist. In addition to this, numerous developments and upgrades took place, including:

- The New Flinders Chase National Park Visitor Centre was opened;
- Upgrades were made to the Kangaroo Island Wilderness Trail;
- Improvements were made to Kelly Hill Caves;
- Improvements were also made to the Remarkable Rocks boardwalk;
- Port upgrades continued at Cape Jervis and Penneshaw with the announcement of two new ferries joining the fleet upon completion. The upgrades had the potential to cause some visitor disruption throughout the wave;
- A temporary berthing pontoon was set-up at Penneshaw to receive cruise-ship tenders; and
- Development took place at The Cliffs Kangaroo Island Golf Course.

These accolades, developments and improvements are important to consider when reviewing the results from the current wave.

Economic indicators: Almost all indicators, except the average annual total expenditure, were found to be within the acceptable range.

The overall level of visitation increased slightly, by 1% in the 2024/25 wave. 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 (96%). Overall, there was a decrease in the average annual expenditure (-2.7%, from $845.67 to $822.66).

Economic indicators relating to whether tourism operators excel in their business professionalism (71%) and the proportion of visitors who were very satisfied with the professionalism of tourism operators (68%) also remained stable. The level of positive and negative comments remained consistent.

Positively, the proportion of visitors whose average spend per night exceeds $200 increased significantly again from 53% in the 2023/24 wave to 60% in 2024/25, the highest result to date.

Experiential indicators: The indicators under '**Kangaroo Island delivers authentic and credible experiences consistent with its positioning**' are within the acceptable range, with the exception of EX1m '*Proportion of visitors very satisfied with their overall experience on Kangaroo Island'* (87%) and Ex1d '*Proportion of visitors that experienced cultural heritage and history of settlement'* (67%). While not in the acceptable range, these results are largely consistent with previous years. Repeat visitation remains unchanged (36%) within the acceptable range.

Regarding indicators under '**the majority of visitors leave the island highly satisfied with their experience**', while close, many are outside of the acceptable range. However, the improvements made in recent waves continue to be observed across these measures, including the proportion of visitors who were very satisfied with seeing native wildlife in its natural environment, which was again in the acceptable range.

Economic Indicators

Overview

The 2024/25 results relating to the first economic condition ***'Tourism optimises economic benefits for Kangaroo Island'*** continued to show the positive outcomes observed in the 2023/24 wave.

The proportion of visitors who stayed for the day increased (18% compared to 13% in the 2023/24 wave) while the proportion that stayed overnight decreased (82% compared to 87% in 2023/24), however the average number of nights increased slightly at 4.5 (compared to 4.3 in 2023/24) and within the acceptable range. The proportion of visitors recommending Kangaroo Island as a holiday destination also remained high, at 96%, well within the acceptable range.

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 high at 94%. While the number of negative comments increased slightly at 47% (compared to 44% in 2023/24).

Finally, the third economic condition ***'Kangaroo Island attracts its high yield target markets'*** increased significantly from 53% to 60% of surveyed visitors spending more than $200 per night.

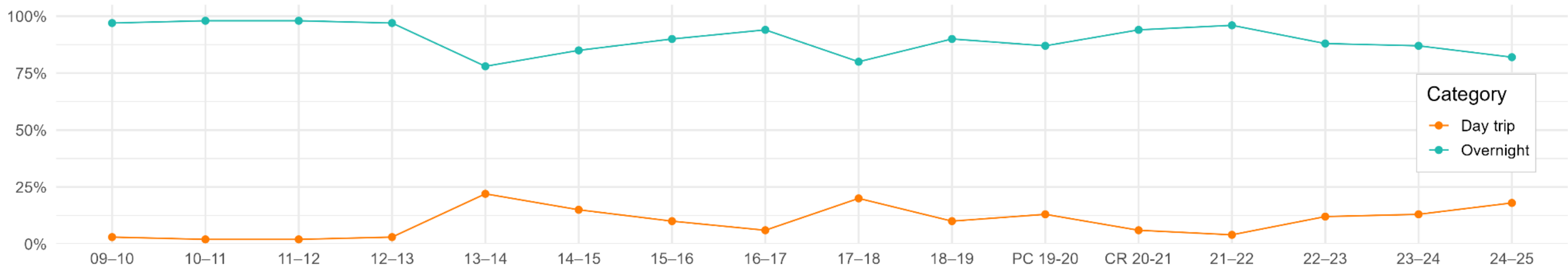
Annual average number of nights stayed (EC1d)

Optimal Conditions	Indicator	Acceptable Range	24/25 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

Consistent with previous waves, most visitors to KI were overnight visitors (staying at least one night on the island), although there was a significant increase in the proportion of day trippers compared to 23/24.

Figure 1: Length of stay over time



Category	09–10	10–11	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	23–24	24–25
Day trip	3%	2%	2%	3%	22%↑	15%↓	10%↓	6%↓	20%↑	10%↓	13%	6%↓	4%	12%↑	13%	18%↑
Overnight	97%	98%	98%	97%	78%↓	85%↑	90%↑	94%↑	80%↓	90%↑	87%	94%↑	96%	88%↓	87%	82%↓

Q6. *Did you stay one or more nights or was it a day trip?* Note: Arrows indicate significant change in score from previous year.
Base: Visitors responding (24/25 n= 2172)

Significant differences between subgroups:
Consistencies with observations from the previous wave:

- More intrastate (90%) and interstate (81%) visitors stayed one or more nights than international visitors (68%); whereas more international (32%) and interstate (19%) visitors only stayed for a day trip compared to intrastate (10%)
- More air arrivals (99%) stayed one or more nights than sea arrivals (80%)
- More repeat visitors stayed one or more nights compared to first-time visitors (86% vs 80%)

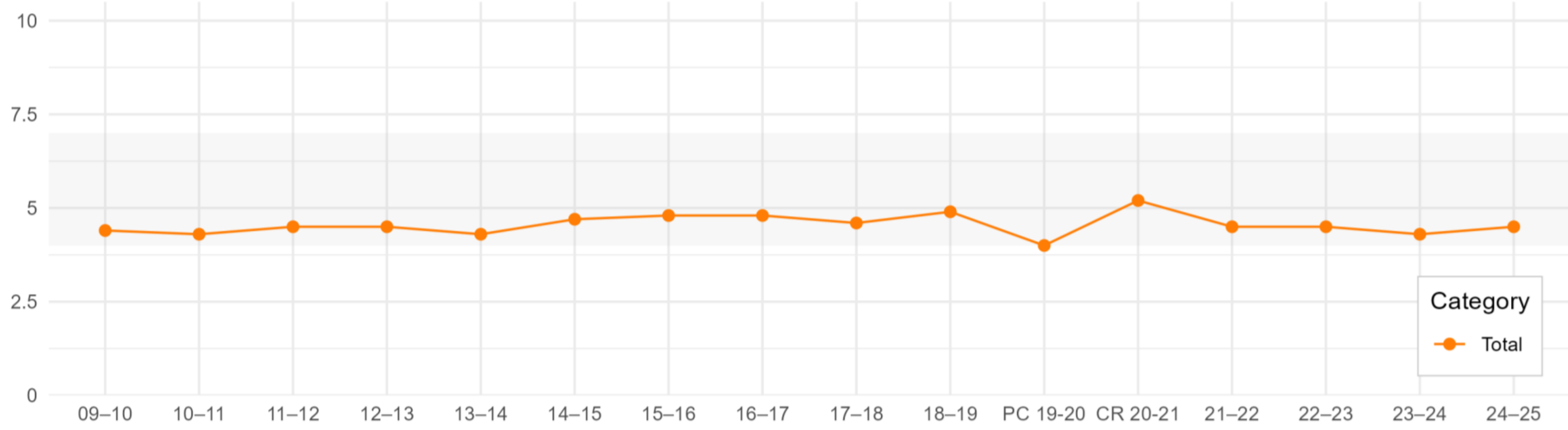
New in 24/25

- More summer visitors (21%) were day trippers than those who visited in winter and autumn (winter 15%, autumn 15%)

Length of stay

The average number of nights stayed on Kangaroo Island has increased slightly since the last wave, though not significant (4.5 vs 4.3). 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



Category	09–10	10–11	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	23–24	24–25
Total	4.4	4.3	4.5	4.5	4.3	4.7↑	4.8	4.8	4.6	4.9	4↓	5.2↑	4.5	4.5	4.3	4.5

Q6. *Did you stay one or more nights or was it a day trip?*
Base: Visitors responding (24/25 n= 1781)

Note: Missing cases excluded. Day visitors excluded from calculation.
Note: Arrows indicate significant change in score from previous year

Significant differences between subgroups:
Consistent with observations from the previous wave:

- Visitors who spent up to $200 a night stayed significantly longer (avg. 6.0 nights) than those who spent more than $200 a night (3.5);
- Repeat visitors stayed longer (5.0 nights) than first time visitors (4.1); and
- Intrastate (4.7) and interstate visitors (4.6) stayed significantly longer compared to international visitors (2.9).

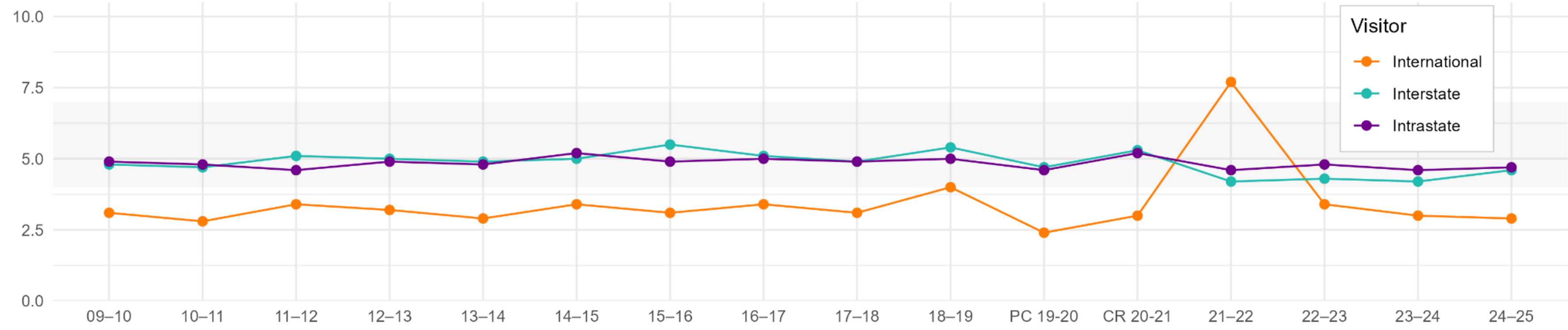
New in 2024/25:

- Summer and autumn visitors stayed longer (both 4.7 nights) than visitors in other seasons (winter 4.0, spring 4.1).

Average number of nights by visitor origin

The length of stay significantly increased for interstate visitors since the previous wave (4.6 vs 4.2), while international and intrastate visitors had no significant changes.

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



Visitor	09–10	10–11	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	23–24	24–25
International	3.1	2.8	3.4↑	3.2	2.9	3.4	3.1	3.4	3.1	4↑	2.4↓	3	7.7	3.4	3	2.9
Interstate	4.8	4.7	5.1	5	4.9	5	5.5	5.1	4.9	5.4	4.7↓	5.3	4.2	4.3	4.2	4.6↑
Intrastate	4.9	4.8	4.6	4.9	4.8	5.2	4.9	5	4.9	5	4.6	5.2	4.6	4.8	4.6	4.7

Q6. *Did you stay one or more nights or was it a day trip?*
Base: Visitors responding, 24/25 Intrastate n=681, Interstate n=918, International n=181

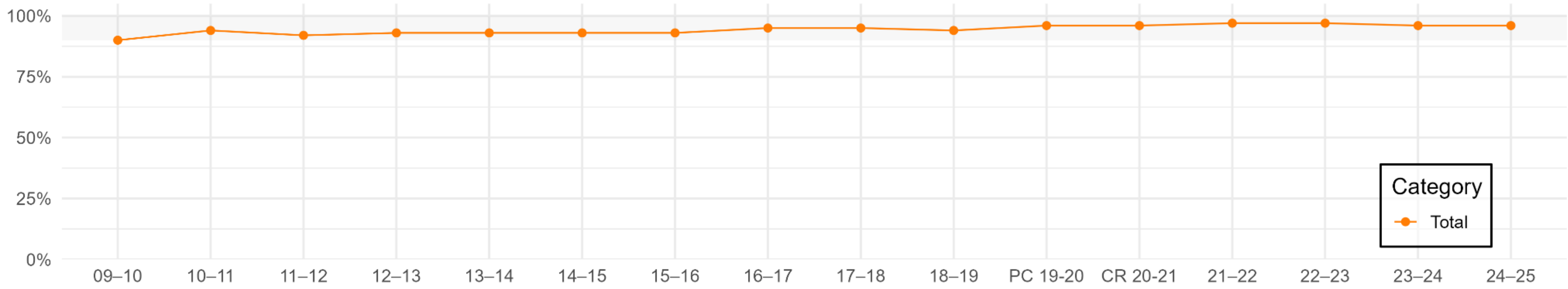
Note: Missing cases excluded.
Note: Arrows indicate significant change in score from previous year.

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

Optimal Conditions	Indicator	Acceptable Range	24/25 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 relatively consistent since the last wave (both 96%); this result sits in the top half of the acceptable range of 90-100%.

Figure 4: Willingness to recommend



Category	09–10	10–11	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	23–24	24–25
Total	90%	94%↑	92%	93%	93%	93%	93%	95%	95%	94%	96%	96%	97%	97%	96%↓	96%

Q23. *Would you recommend Kangaroo Island as a holiday destination to others based on this trip?*
Base: Visitors responding (24/25 n= 2172)

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

Significant differences between subgroups:
Consistent with observations from the previous wave:

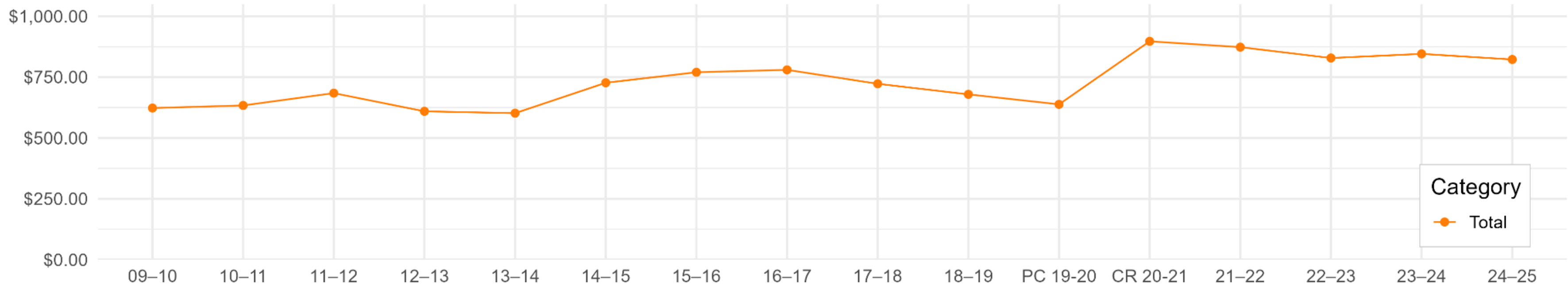
- More visitors who stayed one or more nights (97%) would recommend Kangaroo Island to others than those that came for a day trip (92%);
- More non-cruise ship visitors were likely to recommend than cruise ship arrivals (96% vs 87%); and
- More repeat visitors are likely to recommend than first-time visitors (97% vs 95%).

Average expenditure per visit (EC1f)

Optimal Conditions	Indicator	Acceptable Range	24/25 Result
Tourism optimises economic benefits for Kangaroo Island	Average annual total expenditure per visit	5% - 10% increase	✘

The average spend in the 2024/25 period ($822.66) decreased by 2.7% compared to the last wave ($845.67) and therefore does not meet the acceptable range of 5% to 10% increase.

Figure 5: Increase in average annual total expenditure per person per visit



Category	09–10	10–11	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	23–24	24–25
Total	$623	$633.65	$684.31	$609.52	$601.87	$726.9↑	$770.06	$780.02	$722.7↓	$679.29	$638.15	$897.18↑	$873.31	$828.66	$845.67	$822.66

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?
Q14(new) Please estimate how much you spent on each part of your trip to Kangaroo Island?
Q15 How many people did these costs cover?

Base: Visitors responding (24/25 n= 1618)
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
Note: A simplified version of the expenditure question was introduced in 2024/25 to collect more complete and accurate spend information

Significant differences between subgroups:
Consistent with observations from the previous wave:

- Air arrivals ($1363.90) spent significantly more than sea arrivals ($763.10);
- First time visitors ($870.10) spent significantly more than repeat visitors ($740.40);
- Visitors that spent more than $200 per night ($1162.80) spent significantly more than visitors that spent only up to $200 per night ($609.70);
- Non cruise ship visitors ($850.90 spend significantly more than cruise ship visitors ($244.70); and
- Those that stayed one or more nights ($930.60) spent significantly more than day trippers ($324.00).

New in 24/25:

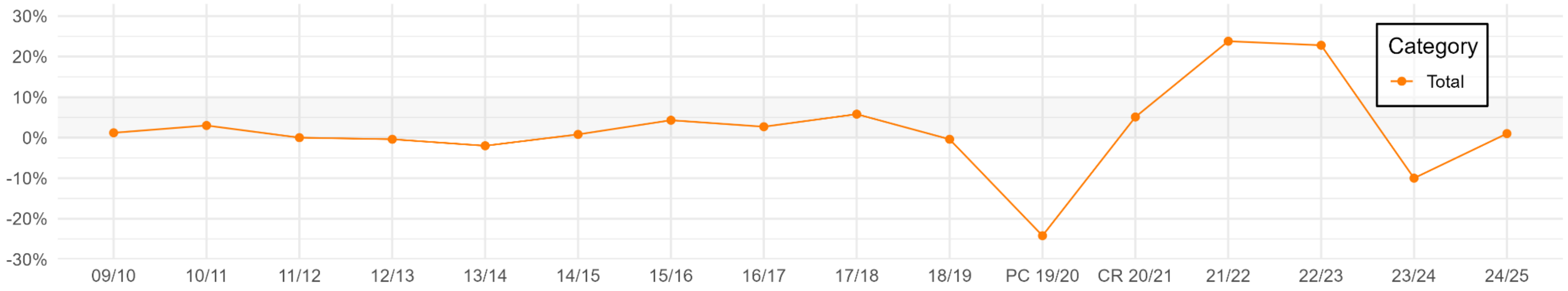
- Interstate visitors spent more ($914.30) than intrastate ($746.90) and International visitors ($642.20); and
- Visitors in Autumn (889.50) spend significantly more than those in winter ($750.90), summer ($808.10) and Spring ($799.40).

Annual number of visitors (EC1g)

Optimal Conditions	Indicator	Acceptable Range	24/25 Result
Tourism optimises economic benefits for Kangaroo Island	Annual number of visitors to Kangaroo Island	0% - 20% increase	✓

A small increase in the annual number of visitors was observed between the 2023/24 and current wave (1%). This placed the 2024/25 result in the acceptable range.

Figure 6: Increase in annual number of visitors



Category	09/10	10/11	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	23/24	24/25
Total	1.2%	3%	0%	-0.4%	-2%	0.8%	4.3%	2.7%	5.8%	-0.4%	-24.2%	5.1%	23.8%	22.8%	-10%	1%

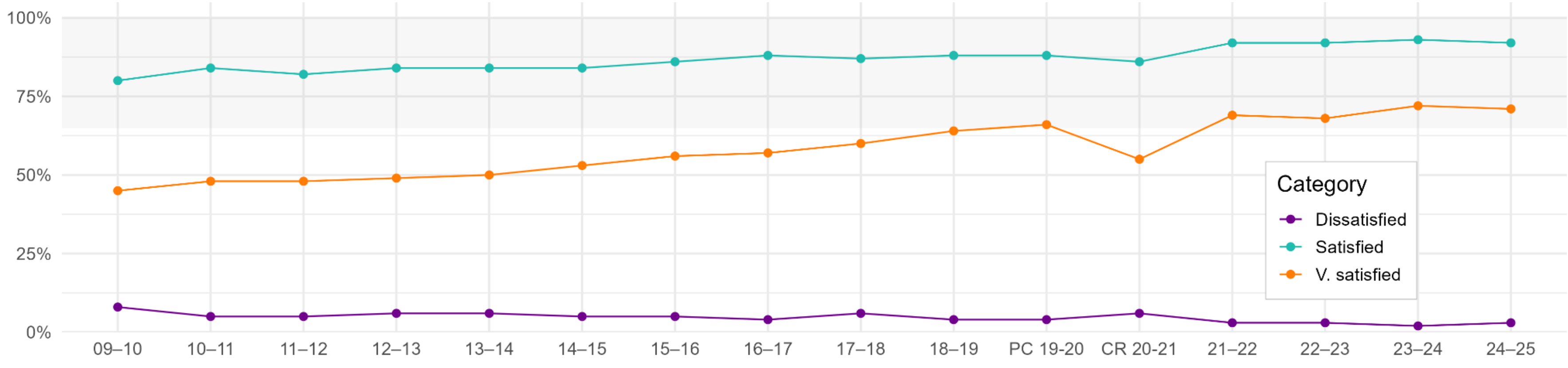
Note: Data provided by TOMM Committee.

Satisfaction with customer service received (EC2c)

Optimal Conditions	Indicator	Acceptable Range	24/25 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 2024/25 period (71%) were satisfied/very satisfied with the level of customer service they received which has remained relatively consistent since the last wave. The percentage of visitors who reported being very satisfied with the customer service they received has slightly decreased since the last wave (71% vs 72%) although this is not significant and still falls within the acceptable range.

Figure 7: Satisfaction with customer service received



Category	09–10	10–11	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	23–24	24–25
V. satisfied	45%	48%	48%	49%	50%	53%	56%	57%	60%	64%	66%	55%↓	69%↑	68%	72%↑	71%
Satisfied	80%	84%↑	82%	84%	84%	84%	86%	88%	87%	88%	88%	86%	92%	92%	93%	92%
Dissatisfied	8%	5%↓	5%	6%	6%	5%	5%	4%	6%	4%	4%	6%	3%	3%	2%	3%

Q19.7 Please indicate how satisfied you were with the level of customer service you received.
Base: Visitors responding (24/25 n= 2130)
Note: Don't know, didn't experience and missing cases excluded.
Note: This measure is also used for indicator EX2g with an acceptable range of 80% - 100%.

Significant differences between subgroups:
New in 2024/25:

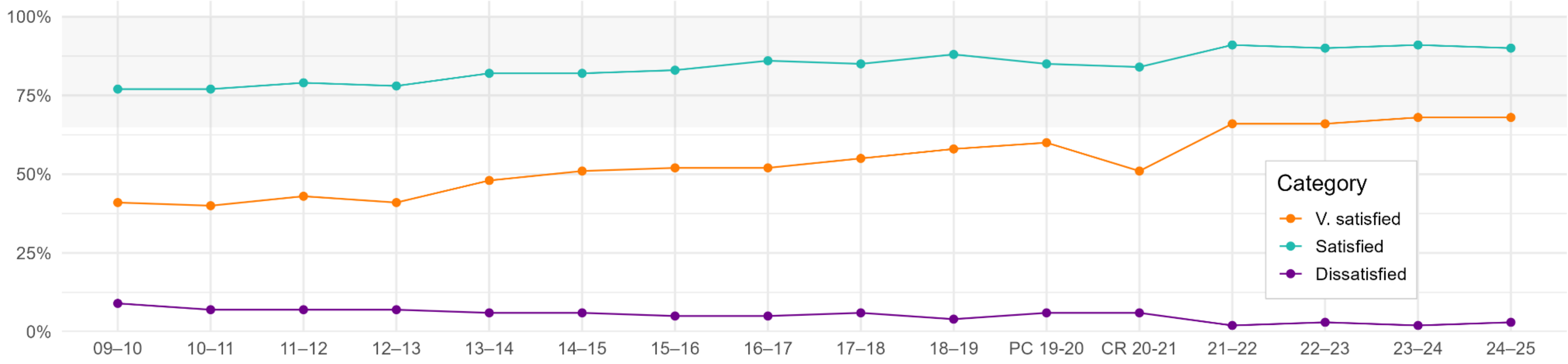
- Day trippers are significantly more dissatisfied (5%) than those who stayed one or more nights (2%).

Satisfaction with professionalism of tourism operators (EC2d)

Optimal Conditions	Indicator	Acceptable Range	24/25 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 2024/25 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 tourism operators in the 2024/25 period (68%) is consistent with the previous wave and continues to remain in the acceptable range.

Figure 8: Satisfaction with professionalism of tourism operators



Category	09–10	10–11	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	23–24	24–25
V. satisfied	41%	40%	43%	41%	48%↑	51%	52%	52%	55%	58%	60%	51%	66%↑	66%	68%	68%
Satisfied	77%	77%	79%	78%	82%↑	82%	83%	86%	85%	88%	85%	84%	91%	90%	91%	90%
Dissatisfied	9%	7%	7%	7%	6%	6%	5%	5%	6%	4%	6%	6%	2%	3%	2%	3%

Q19.12 Please indicate how satisfied you were with the professionalism of tourism businesses.

Base: Visitors responding (24/25 n=1904)
Note: Don't know, didn't experience and missing cases excluded.

Significant differences between subgroups:
Consistent with observations from the previous wave:

- Day trippers (76%) were more likely to be very satisfied than overnight visitors (67%); and
- More cruise passengers are very dissatisfied (9%) compared to non-cruise passengers (3%).

New in 2024/25:

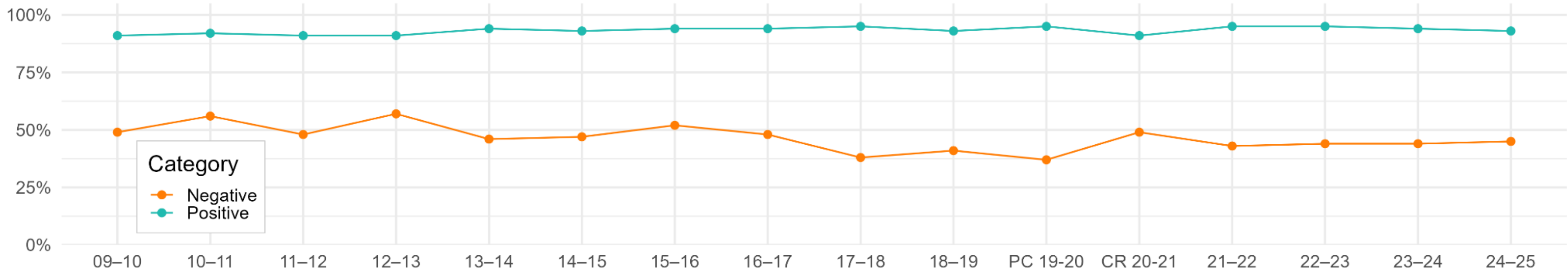
- Interstate visitors (92%) are significantly more likely to be satisfied than intrastate visitors (87%).

Compliments and complaints (EC2e)

Optimal Conditions	Indicator	Acceptable Range	24/25 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 2024/25 remained relatively consistent with the previous wave, while negative comments had a slight increase (not significant) meaning this indicator did not fall within the acceptable range.

Figure 9: Number of compliments and complaints received



Category	09–10	10–11	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	23–24	24–25
Positive	91%	92%	91%	91%	94%↑	93%	94%	94%	95%	93%↓	95%	91%	95%	95%	94%	93%
Negative	49%	56%↑	48%↓	57%↑	46%↓	47%	52%↑	48%	38%↓	41%	37%	49%	43%	44%	44%	45%

Q25. *Are there any individuals or businesses you would like to draw our attention to for compliments/improvement?*

Base: Visitors responding (24/25 n= 1425)
Note: Don't know and missing cases excluded.

Significant differences between subgroups:
New in 2024/25:

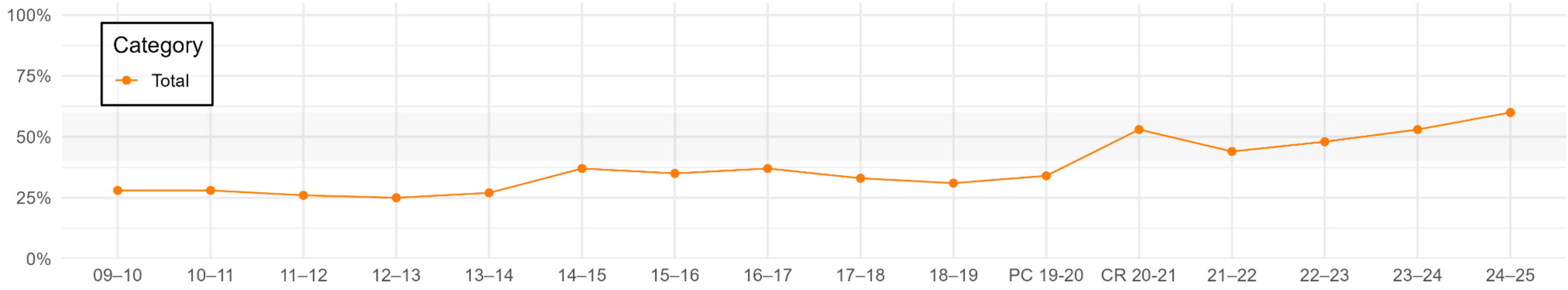
- More first-time visitors provided positive comments (95%) than repeat visitors (91%);
- Summer and Autumn visitors provided more negative comments (51% and 47%) than spring visitors (36%); and
- Sea arrivals provided more negative comments (47%) than air arrivals (36%).

Average spend per night over $200 (EC3c)

Optimal Conditions	Indicator	Acceptable Range	24/25 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 2024/25 who reported an average spend of over $200 per night has significantly increased since the previous wave (60% vs 53% in 2023/24) reaching the top end of the 40-60% goal.

Figure 10: Average spend per night over $200



Category	09–10	10–11	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	23–24	24–25
Total	28%	28%	26%	25%	27%	37%↑	35%	37%	33%	31%	34%	53%↑	44%	48%	53%↑	60%↑

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?*
Base: Visitors responding, (24/25 n=1022)
Note: Day trippers excluded.
Note: Missing cases excluded.

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?*
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 differences between subgroups:
Consistent with observations from the previous wave:

- More air arrivals (87%) spent over $200 per night on average than those arriving by sea (55%);
- More first time visitors (70%) spent over $200 per night than repeat visitors (43%); and
- More intrastate visitors (54%) spent only up to $200 a night than interstate (33%) and international visitors (26%). As such, more interstate (67%) and international (74%) visitors spent more than $200 per night than intrastate visitors.

New in 2024/25:

- More Autumn visitors (63%) spent over $200 per night (on average) than winter visitors (54%).

Summary of sub-group scores for economic indicators (24/25)

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)	• Intrastate and interstate visitors • All seasons • Sea and air arrivals • Repeat and first-time visitors • Spent up to $200 per night	• Intrastate and interstate visitors • Summer and Autumn 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%)	• All subgroups	• Stayed one or more nights • Non-cruise ship visitors
EC1f	Average annual total expenditure per visit (5-10% increase)	• Summer visitors • Cruise ship visitors • Interstate visitors • Air arrivals • Spend up to $200 per night • Day trippers	• Interstate visitors • Summer and Autumn visitors • First time visitors • Air arrivals • More than $200 per night • Stay one or more nights
EC2c	Proportion of visitors that are very satisfied with the level of customer service they receive (65-100%)	• All subgroups	• None
EC2d	Proportion of customers that are highly satisfied with the professionalism of tourism operators (65-100%)	• All subgroups	• Day trippers
EC2e	The number of compliments and complaints received from visitors	• There are no statistically significant differences for **increases** to compliments or **decreases** to complaints amongst any subgroups from the previous year.	• First-time visitor (compliments) • Summer and autumn visitors (complaints) • Sea (complaints) • Stayed one or more nights (complaints)
EC3c	Proportion of visitors whose average spend per night exceeds $200 (40-60%)	• All subgroups	• International and interstate visitors • Autumn visitors • First-time visitors • Air arrivals

Experiential Indicators

Overview

All but two of the ***'Kangaroo Island delivers authentic and credible experiences consistent with its positioning'*** indicators fell within their respective acceptable ranges in the 2024/25 period.

The indicators which did not fall within the acceptable range were the proportion of visitors *'that experienced cultural heritage and history of settlement'*, which dropped just outside the acceptable range to 67% and the proportion of visitors '*very satisfied with their overall experience on Kangaroo Island*', which achieved the highest result on record at 87%, but was still just outside the acceptable range of 90-100%.

The condition ***'The majority of visitors leave the island highly satisfied with their experience' Seeing native wildlife in natural environment*** (75%) achieved a significant increase and the highest result to date.

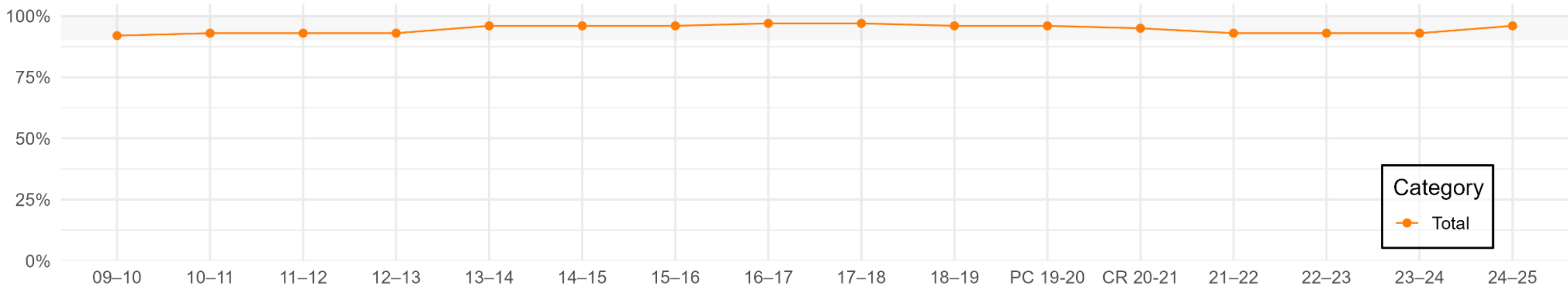
The proportion of visitors that would recommend Kangaroo Island as a holiday destination (96%) and the proportion of repeat visitation (36%) both remained unchanged and within the acceptable range.

Viewed wildlife in natural environment (EX1b)

Optimal Conditions	Indicator	Acceptable Range	24/25 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors that viewed wildlife in the natural environment	90% - 100%	✓

Significantly more visitors surveyed in 2024/25 (96%) viewed Australia's wildlife in natural surroundings during their visit to Kangaroo Island compared with the previous year (93%).

Figure 11: Visitors that viewed Australia's wildlife in natural surrounding



Category	09–10	10–11	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	23–24	24–25
Total	92%	93%	93%	93%	96%↑	96%	96%	97%	97%	96%	96%	95%	93%	93%	93%	96%↑

Q18.2 For each of the following please indicate whether experienced this while on Kangaroo Island?
Base: Visitors responding, (24/25 n=2139)

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 differences between subgroups:

Consistent with the previous year:

- More visitors staying one or more nights saw wildlife in natural surroundings than day trippers (97% vs 87%); and
- More non-cruise ship arrivals saw wildlife in natural surroundings than cruise ship arrivals (96% vs 79%).

New in 2024/25:

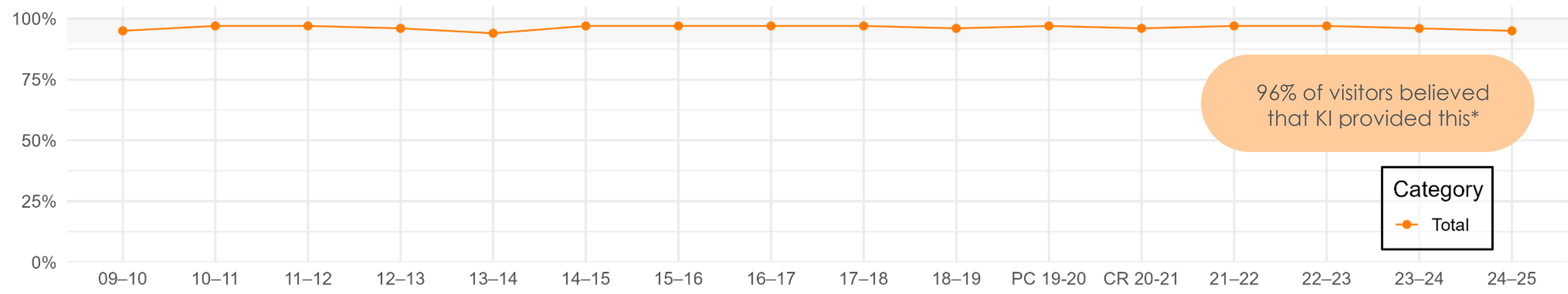
- More interstate visitors saw wildlife in natural surroundings than intrastate visitors (96% vs 94%); and
- More first time visitors saw wildlife in natural surroundings than repeat visitors (96% vs 94%).

Experienced scenic variety without crowds (EX1c)

Optimal Conditions	Indicator	Acceptable Range	24/25 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 (95%) of the visitors surveyed during 2024/25 experienced scenic variety without crowds; this is consistent with the previous years and falls within the acceptable range of 90%-100%.

Figure 12: Visitors that experienced scenic variety without crowds



Category	09–10	10–11	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	23–24	24–25
Total	95%	97%	97%	96%	94%↓	97%↑	97%	97%	97%	96%	97%	96%	97%	97%	96%	95%

Q18.2 For each of the following please indicate whether experienced this while on Kangaroo Island?
Base: Visitors responding (24/25 n= 2157)

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 differences between subgroups:
Consistent with the previous year:

- More visitors staying one or more nights experienced scenic variety without crowds than day trippers (97% vs 87%).

New in 2024/25:

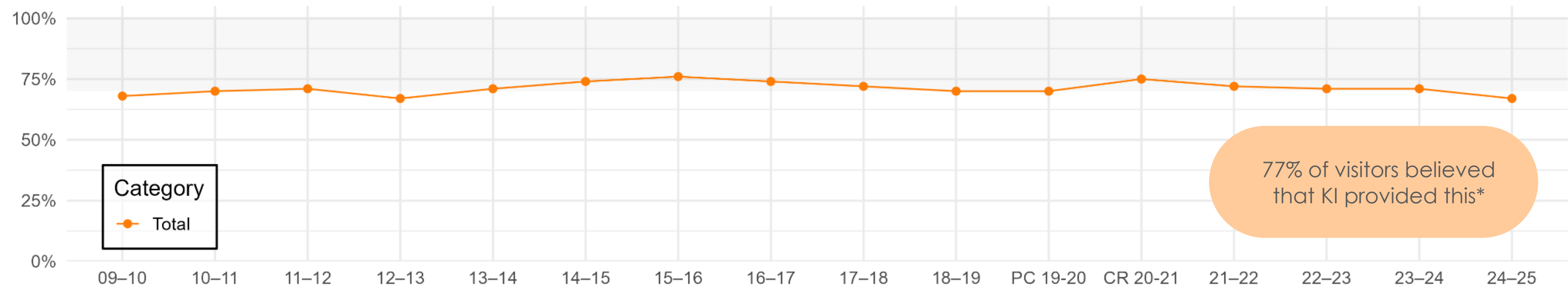
- First time visitors were significantly more likely to experience scenic variety without crowds than repeat visitors (70% vs 62%); and
- Interstate visitors (96%) are significantly more likely to experience scenic variety without crowds than International visitors (92%).

Experienced cultural heritage and history of settlement (EX1d)

Optimal Conditions	Indicator	Acceptable Range	24/25 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%	✘

Over two in three surveyed visitors in the 2024/25 period indicated they experienced the cultural heritage and history of the settlement (67%). This is a significant decrease from the 2023/24 result, dropping outside the acceptable range of 70-100% for the first time since 2012/13.

Figure 13: Visitors that experienced cultural heritage and history of settlement



Category	09–10	10–11	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	23–24	24–25
Total	68%	70%	71%	67%↓	71%↑	74%	76%	74%	72%	70%	70%	75%	72%	71%	71%	67%↓

Q18.3 *For each of the following please indicate whether you experienced this while on Kangaroo Island?*
Base: Visitors responding, (24/25 n=2146)

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 differences between subgroups:

Consistent with the previous year:

- More first time visitors experienced Kangaroo Island's cultural heritage and history of settlement compared to repeat visitors (70% vs 62%).

New in 2024/25:

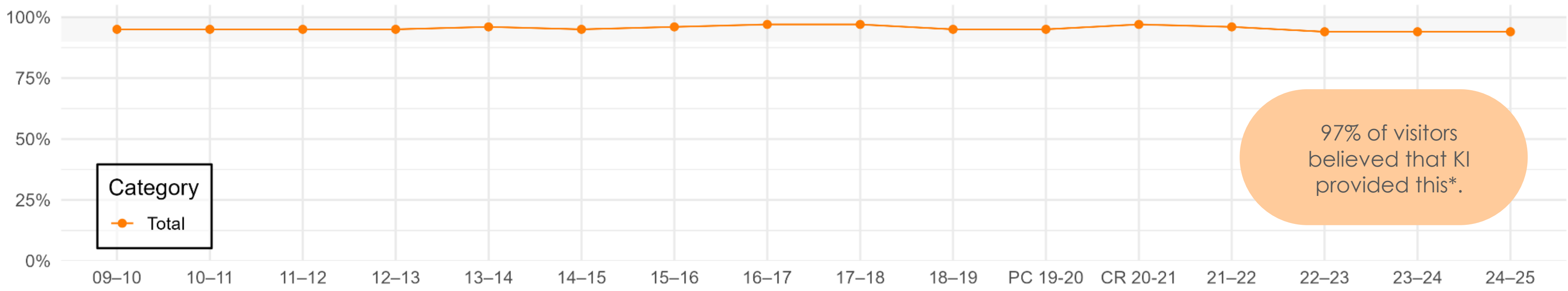
- Interstate visitors (72%) were significantly more likely to experience cultural heritage and history of settlement compared to both Intrastate (63%) and International visitors (57%); and
- Day trippers (62%) were less likely than those who stayed one or more nights (68%) to experience Kangaroo Island's cultural heritage and history of settlement.

Experienced areas of untouched natural beauty (EX1f)

Optimal Conditions	Indicator	Acceptable Range	24/25 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 2024/25 has remained consistent with the last wave (both 94%). This result continues to be within the acceptable range of 90-100%.

Figure 14: Visitors that experienced areas of untouched natural beauty



Category	09–10	10–11	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	23–24	24–25
Total	95%	95%	95%	95%	96%	95%	96%	97%	97%	95%	95%	97%	96%	94%	94%	94%

Q18.5 *For each of the following please indicate whether you experienced this while on Kangaroo Island?*
Base: Visitors responding, (24/25 n=2153)

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 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 (83%); and
- More non-cruise ship arrivals (95%) experienced areas of untouched natural beauty than cruise ship arrivals (65%).

New in 2024/25:

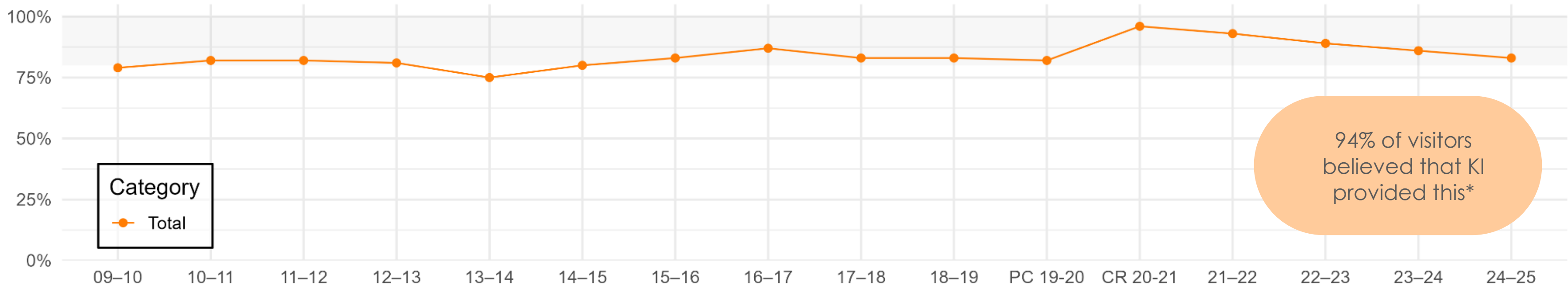
- Autumn visitors (97%) experienced areas of untouched natural beauty than repeat visitors more than any other season (summer 92%, winter and spring 93%).
- First time visitors (95%) experienced areas of untouched natural beauty than repeat visitors (92%).

Experienced local Kangaroo Island produce (EX1h)

Optimal Conditions	Indicator	Acceptable Range	24/25 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 86% to 83%. This is the third consecutive wave that has seen a significant decrease.

Figure 15: Visitors that experienced local Kangaroo Island produce



Category	09–10	10–11	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	23–24	24–25
Total	79%	82%	82%	81%	75%↓	80%↑	83%	87%↑	83%	83%	82%	96%↑	93%	89%↓	86%↓	83%↓

Q18.7 *For each of the following please indicate whether you experienced this while on Kangaroo Island?*
Base: Visitors responding, (24/25 n=2151)

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 differences between subgroups:
Consistent with the previous year:

- More intrastate (87%) and interstate visitors (83%) experienced Kangaroo Island produce than international visitors (71%);
- More repeat visitors experienced Kangaroo Island's produce than first-time visitors (87% vs 81%);
- More visitors who stayed one or more nights experienced Kangaroo Island produce than day trippers (89% vs 55%); and
- More non-cruise ship arrivals experienced Kangaroo Island producer than cruise ship arrivals (84% vs 70%).

New in 2024/25:

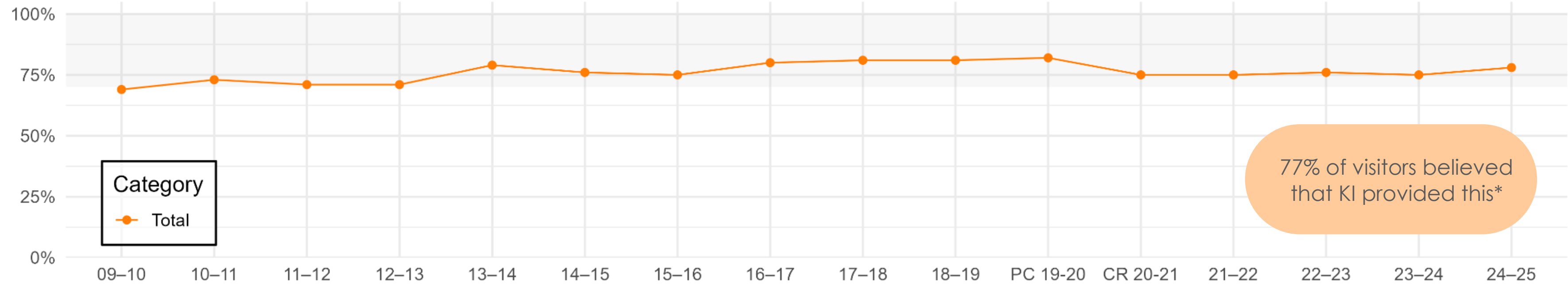
- Those who spend more than $200 per night (on average) (91%) experienced Kangaroo Island produce than those who spent up to $200 per night (87%).

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

Optimal Conditions	Indicator	Acceptable Range	24/25 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 significantly increased since the previous wave (78% vs 75%) maintaining its position within the acceptable range of 70%-100%.

Figure 16: Visitors that experienced Kangaroo Island as one of Australia's top three nature & wildlife experiences



Category	09–10	10–11	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	23–24	24–25
Total	69%	73%	71%	71%	79%↑	76%	75%	80%↑	81%	81%	82%	75%	75%	76%	75%	78%↑

Q18.8 *For each of the following please indicate whether you experienced this while on Kangaroo Island?*
Base: Visitors responding, (24/25 n=2138)

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 differences between subgroups:

Consistent with the previous year:

- More first-time visitors experienced Kangaroo Island as one of Australia's top three nature and wildlife experiences than repeat visitors (82% vs 72%); and
- More non-cruise ship arrivals (80%) experienced Kangaroo Island as one of Australia's top three nature and wildlife experiences than cruise ship arrivals (53%).

New in 2024/25:

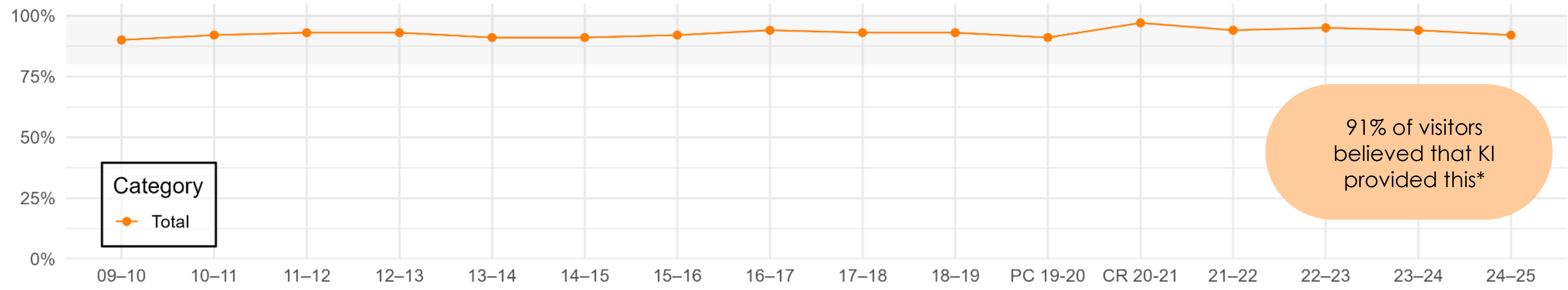
- More international visitors (86%) and interstate visitors (80%) experienced Kangaroo Island as one of Australia's top three nature and wildlife experiences compared to intrastate visitors (74%); and
- More of those who stayed one or more nights (80%) experienced Kangaroo Island as one of Australia's top three nature and wildlife experiences compared to day trippers (72%).

Kangaroo Island has a friendly local community (EX1j)

Optimal Conditions	Indicator	Acceptable Range	24/25 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 92% in 2024/25; this is a significant decreased since the last wave (94%). This continues to remain within the acceptable range of 80%-100%.

Figure 17: Visitors that experienced a friendly local community on Kangaroo Island



Category	09–10	10–11	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	23–24	24–25
Total	90%	92%	93%	93%	91%	91%	92%	94%	93%	93%	91%	97%↑	94%	95%	94%	92%↓

Q18.9 For each of the following please indicate whether you experienced this while on Kangaroo Island?
Base: Visitors responding, (24/25 n=2150)

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 differences between subgroups:
Consistent with the previous year:

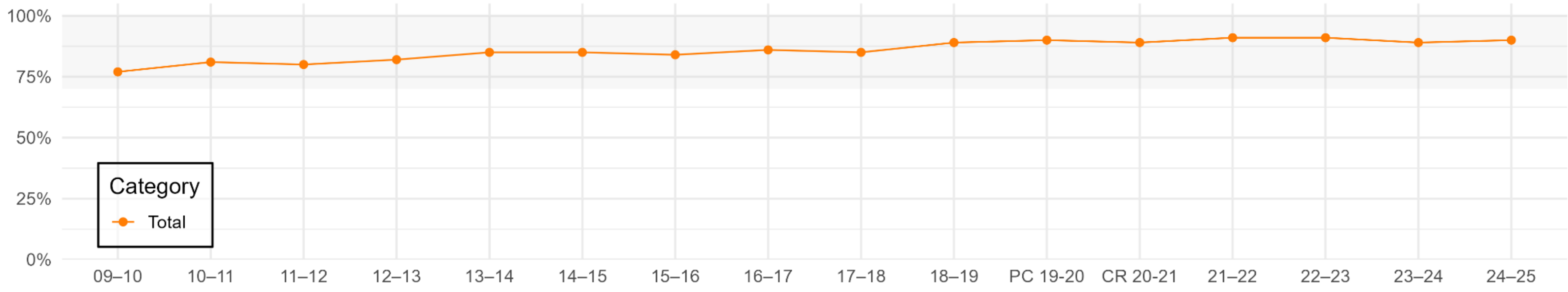
- More visitors who stayed one or more nights reported experiencing a friendly local community compared to day trippers (94% vs 84%);
- More intrastate (92%) and interstate (93%) visitors reported experiencing a friendly local community compared to international visitors (87%); and
- Repeat visitors were more likely to report experiencing a friendly local community than first-time visitors (94% vs 91%).

Agreement with positioning statement (EX1k)

Optimal Conditions	Indicator	Acceptable Range	24/25 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 (90%). This is a slight (not significant) increase from the previous year, with the result falling safely within the acceptable range of 70%-100%.

Figure 18: Visitors who agree that Kangaroo Island is a wild and welcoming destination



Category	09–10	10–11	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	23–24	24–25
Total	77%	81%↑	80%	82%	85%	85%	84%	86%	85%	89%↑	90%	89%	91%	91%	89%	90%

Q24 *To what extent do you agree or disagree with this statement?*
Base: Visitors responding, (24/25 n=2171)
Note: Missing cases excluded

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

Significant differences between subgroups:
Consistent with the previous year:

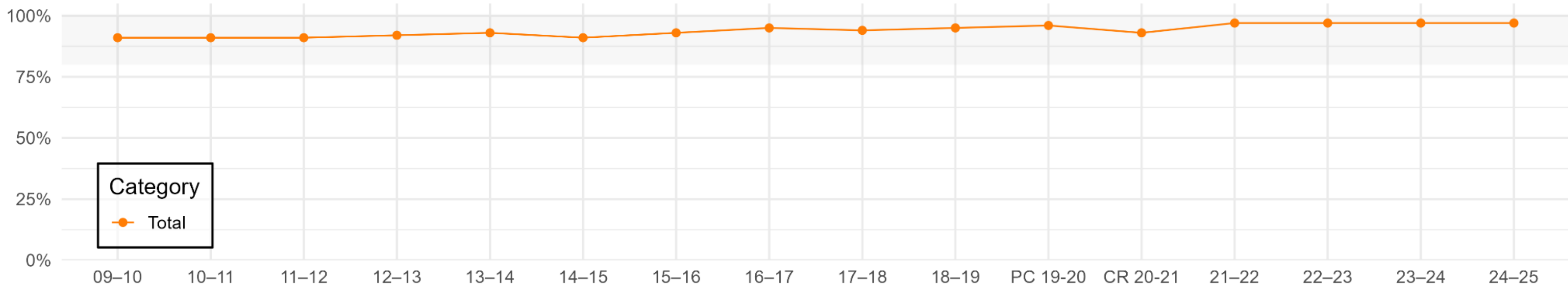
- Visitors who stayed one or more nights (91%) were more likely to agree with the statement compared day trippers (84%); and
- More non-cruise ship arrivals agreed with the statement than cruise ship arrivals (90% vs 76%).

Matching expectation set by marketing materials (EX1I)

Optimal Conditions	Indicator	Acceptable Range	24/25 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 for the fourth consecutive wave; therefore, this result continues to remain within the acceptable range of 80-100%.

Figure 19: Visitors stating that their experience matched or exceeded the expectation set by marketing materials



Category	09–10	10–11	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	23–24	24–25
Total	91%	91%	91%	92%	93%↑	91%↓	93%	95%	94%	95%	96%	93%	97%	97%	97%	97%

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

Base: Visitors responding, (24/25 n=2166)
Note: Missing cases excluded

Significant differences between subgroups:
Consistent with the previous year:

- More interstate (34%) and international (33%) visitors reported their visit as exceeding expectations than intrastate visitors (26%).

New in 2024/25:

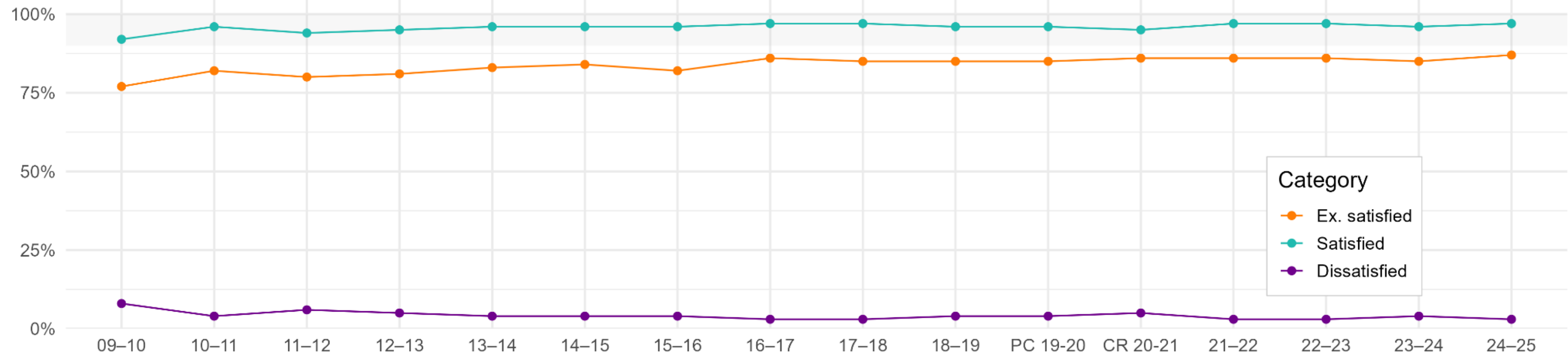
- Less autumn visitors (26%) reported their visit as exceeding expectations than summer, spring (both 33%) and winter (35%) visitors;
- Those that arrived by air were more likely to report their visit as exceeding expectations than those who arrived by sea (41% vs 29%);
- First time visitors (35%) are significantly more likely than repeat visitors (24%) to have their visit exceeded their expectations;
- Those who spend more than $200 per night (33%) are more likely to have their experience exceed their expectations than those who spend up to $200 (28%);&
- Cruise ship arrivals are significantly more likely to find their visit worse than expected than others (6% vs 3%).

Satisfaction with overall experience (EX1m)

Optimal Conditions	Indicator	Acceptable Range	24/25 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors extremely satisfied** with their overall experience on Kangaroo Island	90% - 100%	✘

The proportion of surveyed visitors who stated they were extremely satisfied with their overall experience on Kangaroo Island in this wave (87%) was a slight increase (not significant) from the previous wave (85%). This result continues to put the score just outside of the acceptable range of 90%-100% although it is the closest it has ever been.

Figure 20: Visitors who were very satisfied with their overall experience on Kangaroo Island**



Category	09–10	10–11	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	23–24	24–25
Ex. satisfied	77%	82%↑	80%	81%	83%	84%	82%	86%↑	85%	85%	85%	86%	86%	86%	85%	87%
Satisfied	92%	96%↑	94%	95%	96%	96%	96%	97%	97%	96%	96%	95%	97%	97%	96%	97%
Dissatisfied	8%	4%↓	6%	5%	4%	4%	4%	3%	3%	4%	4%	5%	3%	3%	4%	3%

Q22 *Taking into account all aspects of your visit to Kangaroo Island, how would you rate your overall satisfaction?*
Base: Visitors responding, (24/25 n=2170)

Note: Missing cases excluded.
** Rated 8-10 on an eleven-point scale, where 0 means extremely dissatisfied and 10 means extremely satisfied.

Significant differences between subgroups:
Consistent with the previous year:

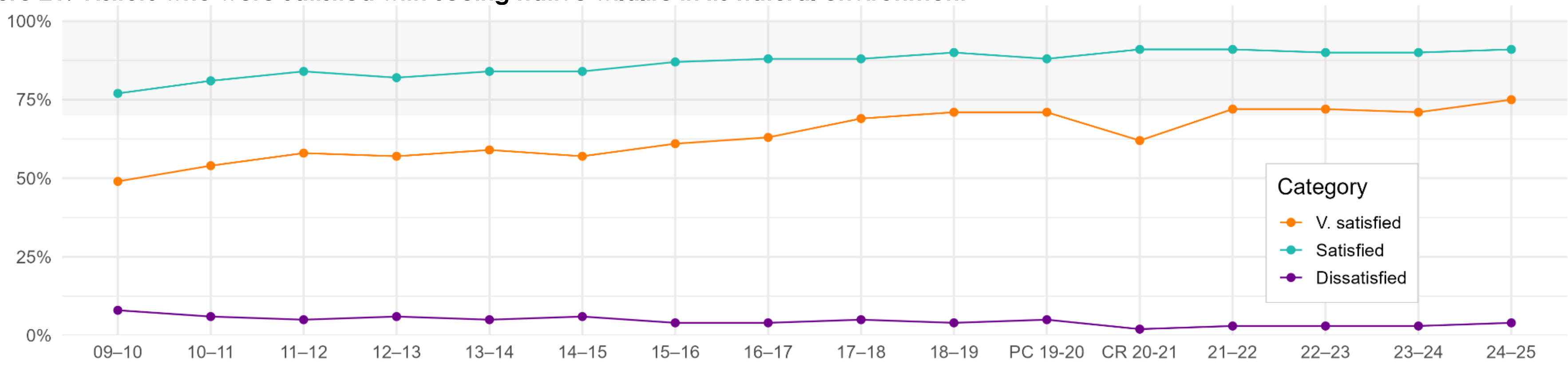
- Those that stayed one or more nights were more likely to be satisfied (97%) and extremely satisfied (89%) with their overall experience compared to day trippers (94%, 78% respectively); and
- More non-cruise ship arrivals were very satisfied with their overall experience than cruise ship arrivals (88% vs 72%).

Seeing native wildlife in its natural environment (EX2a)

Optimal Conditions	Indicator	Acceptable Range	24/25 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%	✓

Three in four visitors (75%) were very satisfied with seeing native wildlife in its natural environment. This is a significant increase from the previous wave (71%), continuing to fall within the acceptable range of 70-100%.

Figure 21: Visitors who were satisfied with seeing native wildlife in its natural environment



Category	09–10	10–11	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	23–24	24–25
V. satisfied	49%	54%↑	58%	57%	59%	57%	61%	63%	69%↑	71%	71%	62%	72%	72%	71%	75%↑
Satisfied	77%	81%↑	84%	82%	84%	84%	87%	88%	88%	90%	88%	91%	91%	90%	90%	91%
Dissatisfied	8%	6%	5%	6%	5%	6%	4%	4%	5%	4%	5%	2%	3%	3%	3%	4%

Q19.1 *Please indicate how satisfied you were with....* Note: Don't know, didn't experience and missing cases excluded.
Base: Visitors who experienced it, (24/25 n=2123)

Significant differences between subgroups:
Consistent with the previous year:
- More visitors who stayed one or more nights were satisfied (92%) and extremely satisfied (76%) with seeing native wildlife in its natural environment compared to day trippers (86% and 69% respectively); and
- More non-cruise arrivals were satisfied and extremely satisfied than cruise ship arrivals (91% vs 84%).

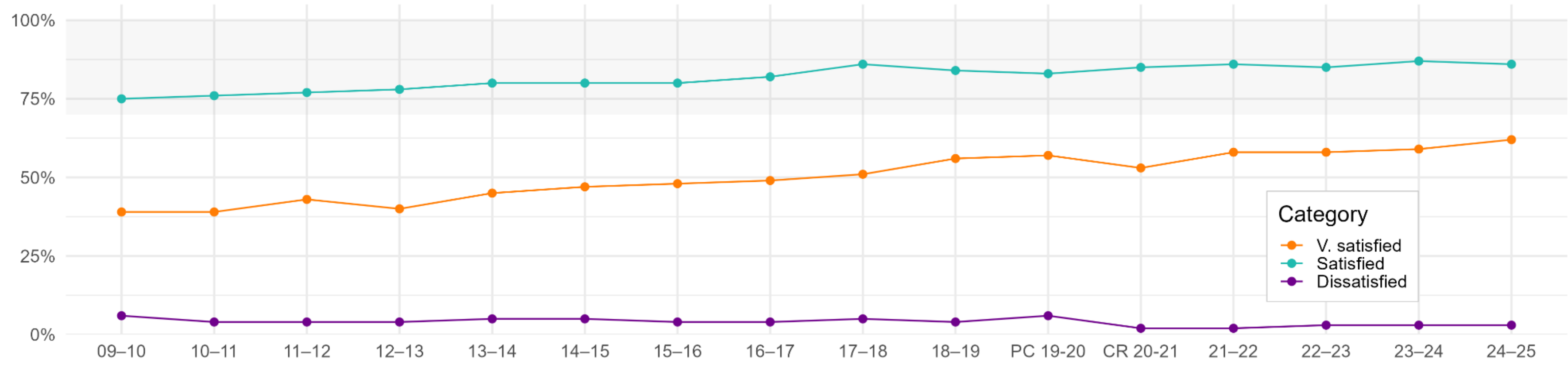
New in 2024/25:
- Those who spent up to $200 per night were more likely to be very satisfied than those who spent more than $200 per night (79% vs 75%) with seeing native wildlife in its natural environment.

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

Optimal Conditions	Indicator	Acceptable Range	24/25 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%	✘

Almost two thirds of visitors (62%) reported they were very satisfied with the opportunity to learn more about the Island's natural environment. Although this remains outside the acceptable range of 70-100% this represents a significant improvement upon the previous wave (59%) and is the highest result on record.

Figure 22: Visitors who were very satisfied with their opportunity to learn more about the Island's natural environment



Category	09–10	10–11	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	23–24	24–25
V. satisfied	39%	39%	43%	40%	45%↑	47%	48%	49%	51%	56%	57%	53%	58%	58%	59%	62%↑
Satisfied	75%	76%	77%	78%	80%	80%	80%	82%	86%↑	84%	83%	85%	86%	85%	87%	86%
Dissatisfied	6%	4%	4%	4%	5%	5%	4%	4%	5%	4%	6%↑	2%↓	2%	3%↑	3%	3%

Q19.2 *Please indicate how satisfied you were with....*
Base: Visitors who experienced it, (24/25 n=2030)

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

Significant differences between subgroups:

New in 2024/25:

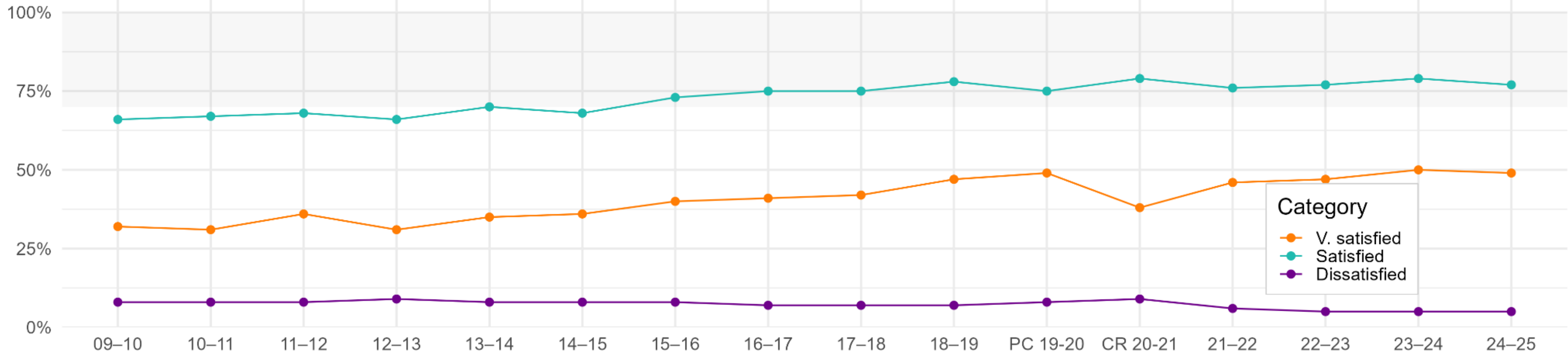
- Non-cruise arrivals were significantly more satisfied with their opportunity to learn more about the Island's natural environment than cruise arrivals (86% vs 73%).

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

Optimal Conditions	Indicator	Acceptable Range	24/25 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%	✘

Almost half (49%) of visitors surveyed this wave were very satisfied with their opportunity to learn more about the Island's history; this remains consistent with recent research waves. Continuing to fall outside the acceptable range of 70%-100%.

Figure 23: Satisfaction with opportunity to learn more about the Island's history



Category	09–10	10–11	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	23–24	24–25
V. satisfied	32%	31%	36%↑	31%↓	35%↑	36%	40%	41%	42%	47%	49%	38%↓	46%	47%	50%↑	49%
Satisfied	66%	67%	68%	66%	70%↑	68%	73%↑	75%	75%	78%	75%	79%	76%	77%	79%	77%
Dissatisfied	8%	8%	8%	9%	8%	8%	8%	7%	7%	7%	8%	9%	6%	5%	5%	5%

Q19.8 *Please indicate how satisfied you were with....*
Base: Visitors who experienced it, (24/25 n=2123)
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"

Significant differences between subgroups:

Consistent with the previous year:

- Day trippers were more satisfied (82%) and very satisfied (60%) than those who stayed one night or more (76% and 46% respectively).

New in 2024/25:

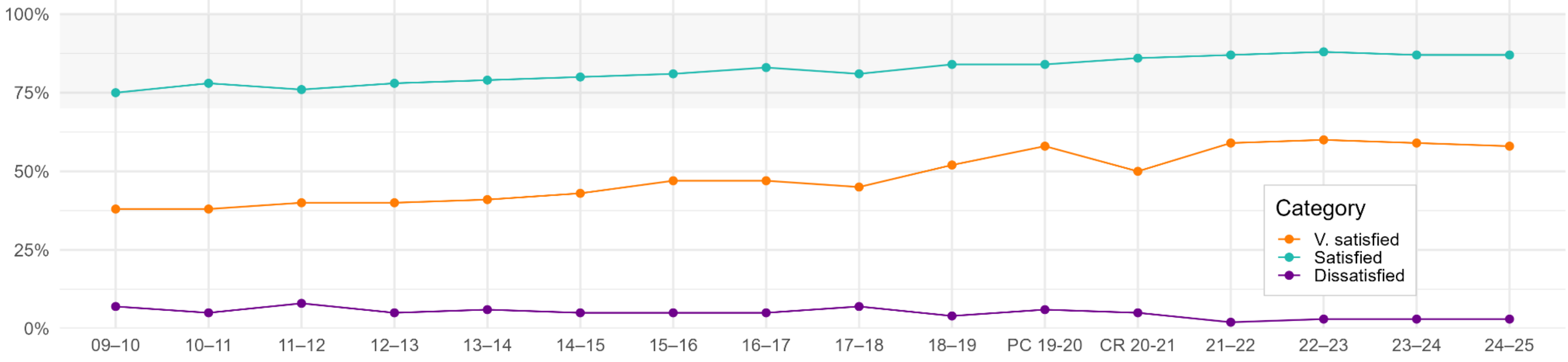
- Spring visitors (81%) were more likely to be very satisfied than winter visitors (73%);
- First time visitors were more satisfied (79%) than those who were repeat visitors (74%); and
- Cruise arrivals are more likely to be very satisfied (65%) than non-cruise arrivals (48%).

Range, quality and availability of activities (EX2d)

Optimal Conditions	Indicator	Acceptable Range	24/25 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 decreased (not significantly) by one percent since the previous wave from 59% to 58%, however, visitors who were very satisfied with the quality of activities remained consistent (both 60%). Positively, the availability of activities increased (not significantly) by one percent from the previous wave from 55% to 56%. Consistent with previous waves, results for all three measures fall short of the acceptable range of 70%-100%.

Figure 24: Satisfaction with the range activities



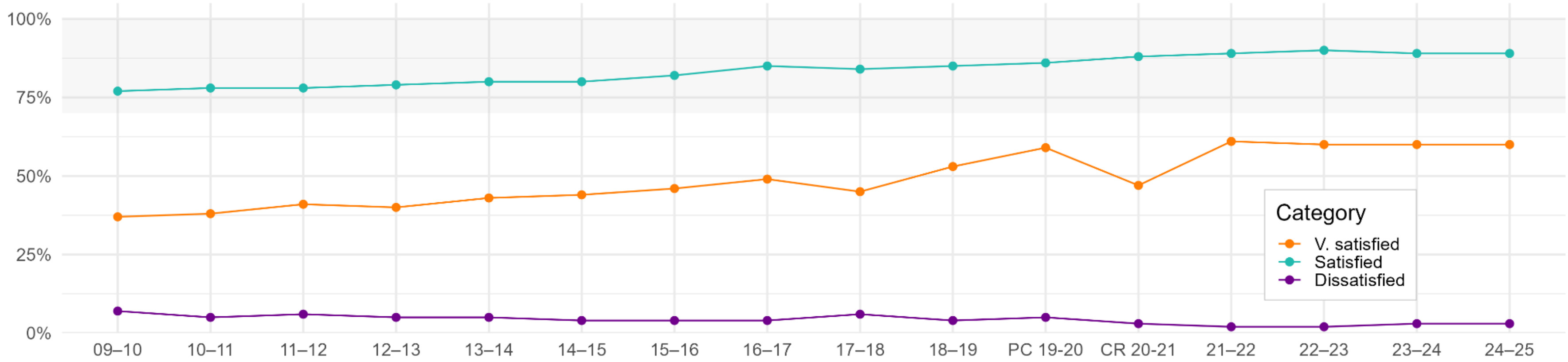
Category	09–10	10–11	11–12	12–13	13–14	14–15	15–16	16–17	17–18	18–19	PC 19-20	CR 20-21	21–22	22–23	23–24	24–25
V. satisfied	38%	38%	40%	40%	41%	43%	47%	47%	45%	52%↑	58%↑	50%	59%	60%	59%	58%
Satisfied	75%	78%	76%	78%	79%	80%	81%	83%	81%	84%	84%	86%	87%	88%	87%	87%
Dissatisfied	7%	5%	8%↑	5%↓	6%	5%	5%	5%	7%	4%↓	6%	5%	2%	3%	3%	3%

Q19.9 *Please indicate how satisfied you were with....* Note: Don't know, didn't experience and missing cases excluded.
Base: Visitors who experienced it, (24/25 n=1997)

Significant differences between subgroups:
Consistent with the previous year:
- More sea arrivals were very satisfied with the range of activities than air arrivals (59% vs 51%).

New in 2024/25:
- More repeat visitors were very satisfied with the range of activities than first time visitors (61% vs 56%);
- Those who stay one or more nights are more satisfied (88%) and very satisfied (59%) with the range of activities than day trippers (79% and 51% respectively); and
- Those who spend up to $200 per night were more satisfied with the range of activities than those who spend more than $200 (91% vs 87%).

Figure 25: Satisfaction with the quality of activities



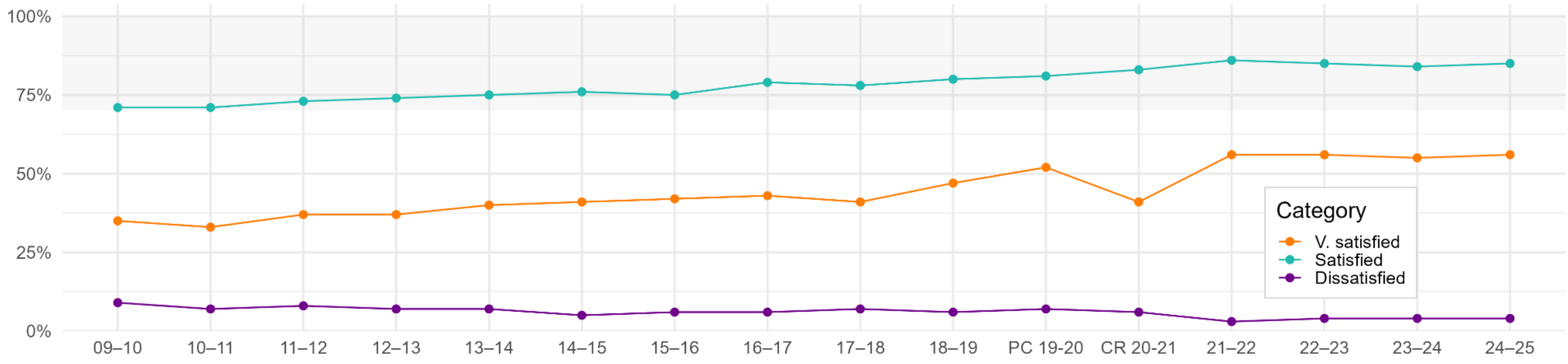
Category	09–10	10–11	11–12	12–13	13–14	14–15	15–16	16–17	17–18	18–19	PC 19-20	CR 20-21	21–22	22–23	23–24	24–25
V. satisfied	37%	38%	41%	40%	43%	44%	46%	49%	45%	53%↑	59%↑	47%↓	61%↑	60%	60%	60%
Satisfied	77%	78%	78%	79%	80%	80%	82%	85%	84%	85%	86%	88%	89%	90%	89%	89%
Dissatisfied	7%	5%	6%	5%	5%	4%	4%	4%	6%	4%	5%	3%	2%	2%	3%	3%

Q19.10 *Please indicate how satisfied you were with....*
Base: Visitors who experienced it, (24/25 n=1938)
Note: Don't know, didn't experience and missing cases excluded.

Significant differences between subgroups:
New in 2024/25:

- Those who stayed one or more nights were more satisfied with the quality of activities than day trippers (90% vs 85%); and
- Cruise arrivals are more likely to be dissatisfied with the quality of activities than non- cruise arrivals (9% vs 3%).

Figure 26: Satisfaction with the availability of activities



Category	09–10	10–11	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	23–24	24–25
V. satisfied	35%	33%	37%	37%	40%	41%	42%	43%	41%	47%↑	52%	41%	56%↑	56%	55%	56%
Satisfied	71%	71%	73%	74%	75%	76%	75%	79%	78%	80%	81%	83%	86%	85%	84%	85%
Dissatisfied	9%	7%	8%	7%	7%	5%↓	6%	6%	7%	6%	7%	6%	3%	4%	4%	4%

Q19.11 *Please indicate how satisfied you were with....*
Base: Visitors who experienced it, (24/25 n=1924)
Note: Don't know, didn't experience and missing cases excluded

Significant differences between subgroups:
New in 2024/25:

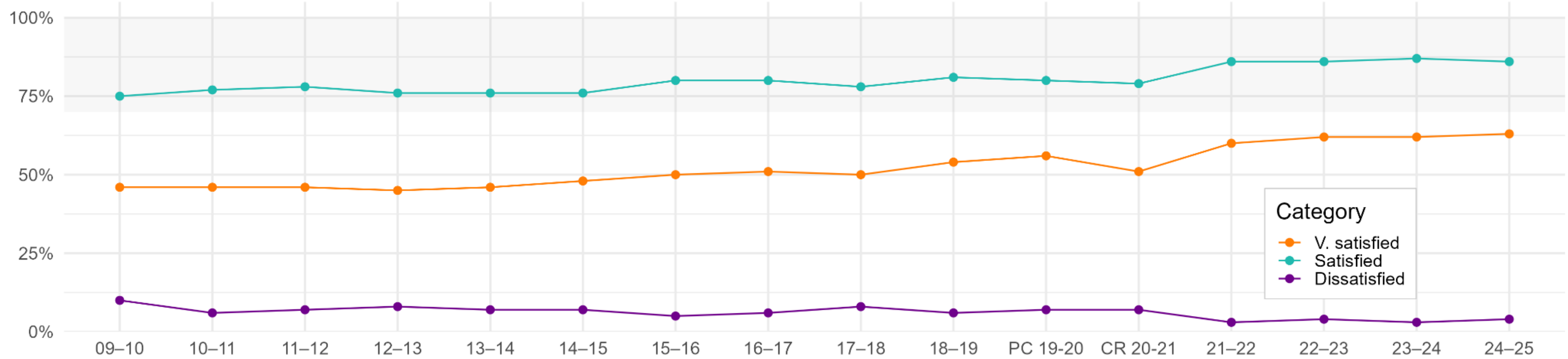
- Those who spend up to $200 per night were more satisfied with the availability of activities than those who spend more than $200 (88% vs 84%);
- Day trippers are more likely to be dissatisfied with the availability of activities compared to those who stay one or more nights (7% vs 3%); and
- Non-cruise arrivals are significantly more satisfied than those who arrive by cruise (85% vs 75%).

Quality of accommodation (EX2e)

Optimal Conditions	Indicator	Acceptable Range	24/25 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 2024/25 has remained fairly consistent with the previous wave (63% vs 62%). Unfortunately, the results continue to remain outside the acceptable range of 70%-100%.

Figure 27: Satisfaction with quality of accommodation



Category	09–10	10–11	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	23–24	24–25
V. satisfied	46%	46%	46%	45%	46%	48%	50%	51%	50%	54%↑	56%	51%	60%	62%	62%	63%
Satisfied	75%	77%	78%	76%	76%	76%	80%↑	80%	78%	81%	80%	79%	86%	86%	87%	86%
Dissatisfied	10%	6%↓	7%	8%	7%	7%	5%	6%	8%	6%	7%	7%	3%	4%↑	3%↓	4%

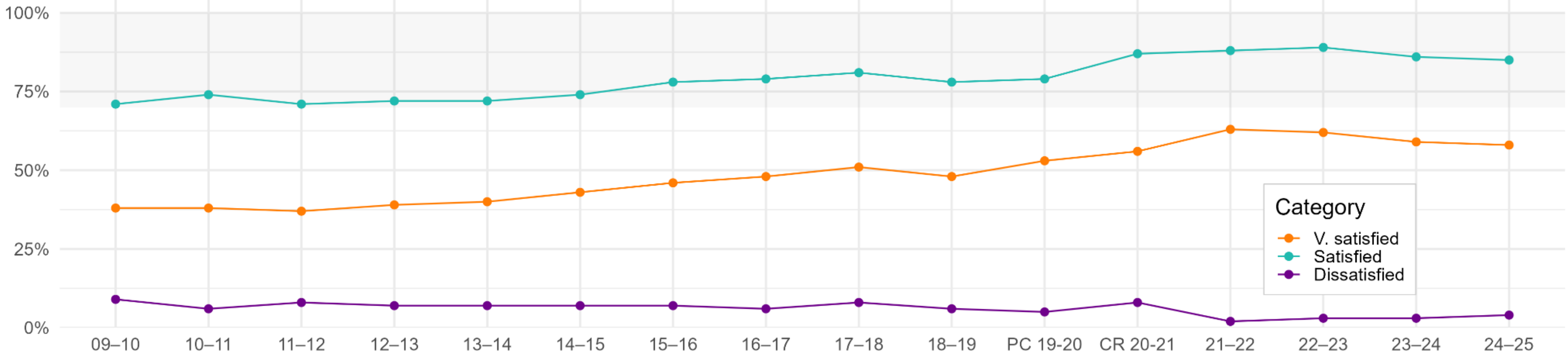
Q19.3 *Please indicate how satisfied you were with....*
Base: Visitors who experienced it, (24/25 n=1710)
Note: Don't know, didn't experience and missing cases excluded.

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

Optimal Conditions	Indicator	Acceptable Range	24/25 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 remained fairly consistent since the previous wave across range (from 59% to 58% - not significant), quality (from 64% to 65%) and availability (both 56%) of Kangaroo Island produce. All these indicators remain outside of the acceptable range (70%-100%).

Figure 28: Satisfaction with the range of local Kangaroo Island produce



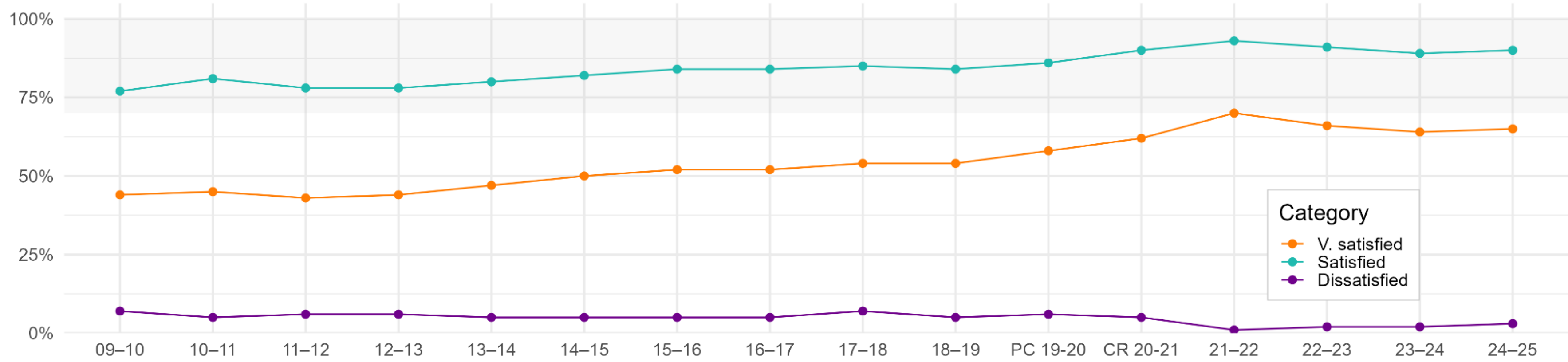
Category	09–10	10–11	11–12	12–13	13–14	14–15	15–16	16–17	17–18	18–19	PC 19-20	CR 20-21	21–22	22–23	23–24	24–25
V. satisfied	38%	38%	37%	39%	40%	43%	46%	48%	51%	48%	53%↑	56%	63%	62%	59%↓	58%
Satisfied	71%	74%	71%	72%	72%	74%	78%↑	79%	81%	78%	79%	87%↑	88%	89%	86%↓	85%
Dissatisfied	9%	6%↓	8%	7%	7%	7%	7%	6%	8%	6%	5%	8%	2%	3%	3%	4%

Q19.4 *Please indicate how satisfied you were with....* Note: Don't know, didn't experience and missing cases excluded
Base: Visitors who experienced it, (24/25 n=1894)

Significant differences between subgroups:
New in 2024/25:

- Day trippers are more likely to be dissatisfied with the range of produce compared to those who stay one or more nights (6% vs 3%);
- More cruise arrivals were dissatisfied with the range of produce compared to non-cruise arrivals (11% vs 3%); and
- More repeat visitors were very satisfied (63%) compared to first time visitors (56%).

Figure 29: Satisfaction with the <u>quality</u> of local Kangaroo Island produce



Category	09–10	10–11	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	23–24	24–25
V. satisfied	44%	45%	43%	44%	47%	50%	52%	52%	54%	54%	58%	62%	70%	66%↓	64%↓	65%
Satisfied	77%	81%↑	78%	78%	80%	82%	84%	84%	85%	84%	86%	90%	93%	91%	89%↓	90%
Dissatisfied	7%	5%	6%	6%	5%	5%	5%	5%	7%	5%	6%	5%	1%	2%↑	2%	3%

Q19.5 *Please indicate how satisfied you were with....*
Base: Visitors who experienced it, (24/25 n=1892)

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

Significant differences between subgroups:

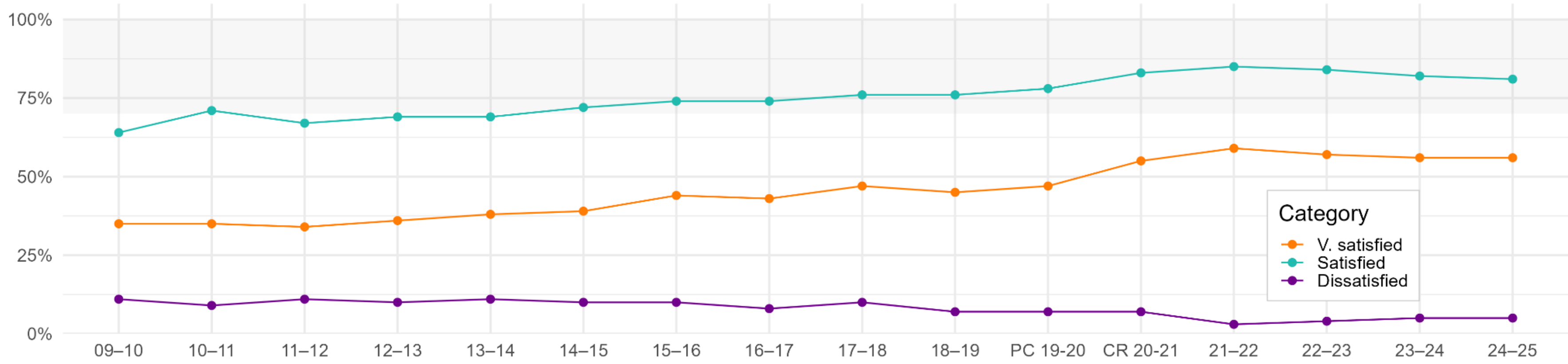
Consistent with the previous year:

- More intrastate visitors (70%) were very satisfied with the quality of Kangaroo Island produce compared to interstate visitors (64%) and international visitors (59%); and
- More repeat visitors were very satisfied (69%) compared to first time visitors (63%).

New in 2024/25:

- More day trippers (5%) were dissatisfied compared to those who stayed one or more nights (2%); and
- More cruise arrivals (8%) were dissatisfied compared to non-cruise arrivals (2%).

Figure 30: Satisfaction with the availability of local Kangaroo Island produce



Category	09–10	10–11	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	23–24	24–25
V. satisfied	35%	35%	34%	36%	38%	39%	44%	43%	47%	45%	47%	55%	59%	57%	56%	56%
Satisfied	64%	71%↑	67%	69%	69%	72%	74%	74%	76%	76%	78%	83%	85%	84%	82%	81%
Dissatisfied	11%	9%	11%	10%	11%	10%	10%	8%	10%	7%↓	7%	7%	3%	4%	5%	5%

Q19.6 *Please indicate how satisfied you were with....*
Base: Visitors who experienced it, (24/25 n=X)

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

Significant differences between subgroups:
Consistent with the previous year:

- More repeat visitors were very satisfied (60%) compared to first time visitors (54%).

New in 2024/25:

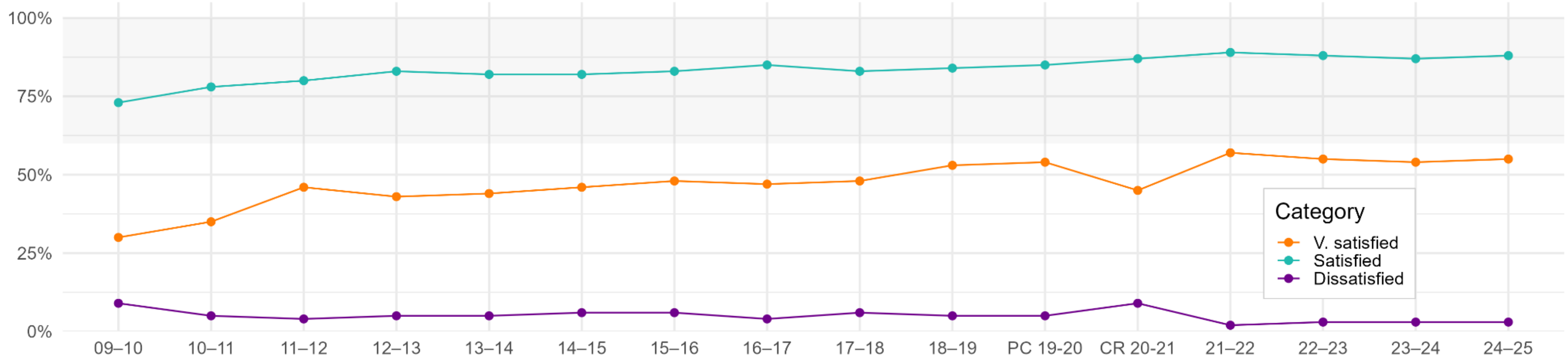
- Day trippers are more likely to be dissatisfied than those who stayed one or more nights (8% vs 5%).

Quality of public tourism infrastructure (EX2h)

Optimal Conditions	Indicator	Acceptable Range	24/25 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%	✘

The proportion of visitors who were very satisfied with the quality of various elements of Kangaroo Island's public tourism infrastructure increased significantly in 2024/25 from the previous wave for quality of roads (from 27% to 31%). While satisfaction remained consistent for picnic and day use areas (from 54% to 55% - not significant), interpretive/educational signage (44% to 45% - not significant), public toilets (from 53% to 52% - not significant), road signage (from 45% to 48% - not significant), and campgrounds (52% to 54% - not significant). All elements of public tourism infrastructure continue to remain below the acceptable range of 60-100%.

Figure 31: Satisfaction with the quality of picnic & day use areas

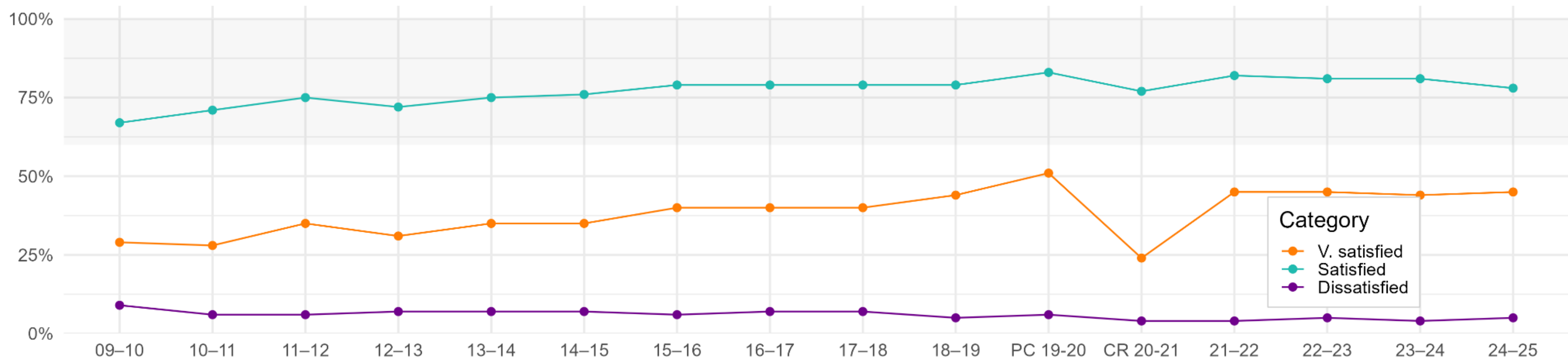


Category	09–10	10–11	11–12	12–13	13–14	14–15	15–16	16–17	17–18	18–19	PC 19-20	CR 20-21	21–22	22–23	23–24	24–25
V. satisfied	30%	35%	46%↑	43%	44%	46%	48%	47%	48%	53%	54%	45%	57%	55%	54%	55%
Satisfied	73%	78%↑	80%	83%	82%	82%	83%	85%	83%	84%	85%	87%	89%	88%	87%	88%
Dissatisfied	9%	5%↓	4%	5%	5%	6%	6%	4%	6%	5%	5%	9%	2%	3%	3%	3%

Q19.18 *Please indicate how satisfied you were with....* Note: Don't know, didn't experience and missing cases excluded.
Base: Visitors who experienced it, (24/25 n=1224)

Significant differences between subgroups:
New in 2024/25:
- More of those who spent up to $200 per night (58%) were very satisfied with the quality of picnic and day use areas compared to those who spent more than $200 (52%).

Figure 32: Satisfaction with the quality of <u>interpretive & educational signage</u>



Category	09–10	10–11	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	23–24	24–25
V. satisfied	29%	28%	35%↑	31%	35%	35%	40%	40%	40%	44%	51%↑	24%↓	45%↑	45%	44%	45%
Satisfied	67%	71%	75%	72%	75%	76%	79%	79%	79%	79%	83%	77%	82%	81%	81%	78%↓
Dissatisfied	9%	6%↓	6%	7%	7%	7%	6%	7%	7%	5%	6%	4%	4%	5%	4%	5%↑

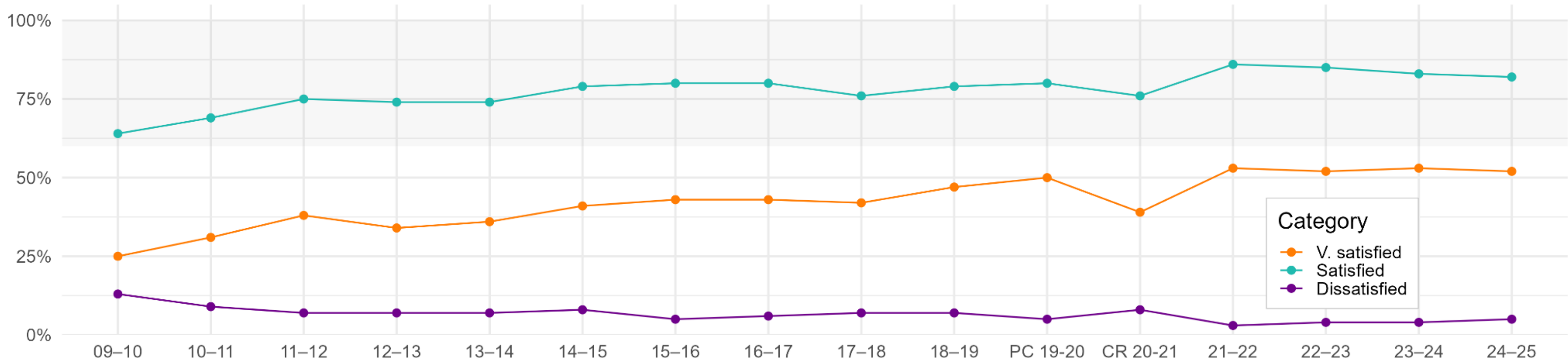
Q19.17 *Please indicate how satisfied you were with....*
Base: Visitors who experienced it, (24/25 n=1469)

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

Significant differences between subgroups:
Consistent with the previous year:

- More day trippers were satisfied than those who stayed one or more nights (84% vs 77%).

Figure 33: Satisfaction with the quality of public toilets



Category	09–10	10–11	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	23–24	24–25
V. satisfied	25%	31%↑	38%↑	34%	36%	41%↑	43%	43%	42%	47%	50%	39%	53%↑	52%	53%	52%
Satisfied	64%	69%↑	75%↑	74%	74%	79%↑	80%	80%	76%	79%	80%	76%	86%↑	85%	83%	82%
Dissatisfied	13%	9%↓	7%	7%	7%	8%	5%↓	6%	7%	7%	5%	8%	3%	4%	4%	5%

Q19.13 *Please indicate how satisfied you were with....* Note: Don't know, didn't experience and missing cases excluded.
Base: Visitors who experienced it, (24/25 n=1469)

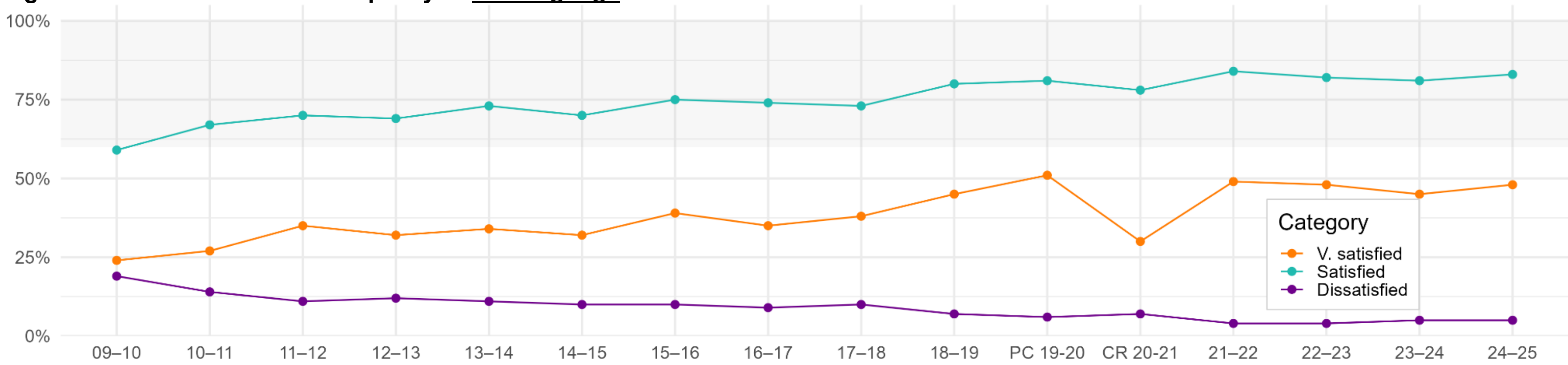
Significant differences between subgroups:
Consistent from the previous year:

- Those who stayed one or more nights were more likely to be satisfied than day trippers (84% vs 77%); and
- Winter and spring visitors are more likely to be satisfied (89% and 85%) than summer and autumn (Both 80%) visitors.

New in 2024/25:

- Both interstate and international visitors (both 85%) were more satisfied than intrastate visitors (78%);
- Interstate visitors also more likely to be very satisfied compared to intrastate visitors (54% vs 48%);
- More air arrivals were satisfied than sea arrivals (89% vs 81%); and
- Non-cruise arrivals are more likely to be satisfied compared to cruise arrivals (83% vs 68%).

Figure 34: Satisfaction with the quality of road signage



Category	09–10	10–11	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	23–24	24–25
V. satisfied	24%	27%	35%↑	32%	34%	32%	39%↑	35%	38%	45%↑	51%↑	30%↓	49%↑	48%	45%↓	48%
Satisfied	59%	67%↑	70%	69%	73%↑	70%	75%↑	74%	73%	80%↑	81%	78%	84%	82%	81%	83%
Dissatisfied	19%	14%↓	11%↓	12%	11%	10%	10%	9%	10%	7%↓	6%	7%	4%	4%	5%	5%

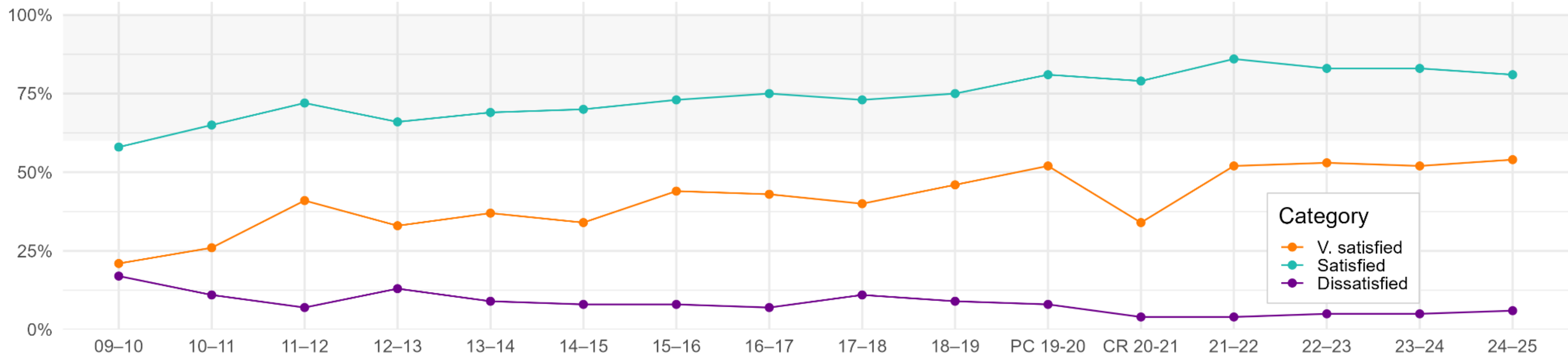
Q19.16 *Please indicate how satisfied you were with....*
Base: Visitors who experienced it, (24/25 n=1932)

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

Significant differences between subgroups:
New in 2024/25:

- More Sea arrivals were satisfied (84%) and very satisfied (49%) compared to air arrivals (77% and 39% respectively).

Figure 35: Satisfaction with the quality of campgrounds



Category	09–10	10–11	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	23–24	24–25
V. satisfied	21%	26%	41%↑	33%↓	37%	34%	44%↑	43%	40%	46%	52%	34%	52%	53%	52%	54%
Satisfied	58%	65%↑	72%	66%	69%	70%	73%	75%	73%	75%	81%	79%	86%	83%	83%	81%
Dissatisfied	17%	11%↓	7%	13%↑	9%↓	8%	8%	7%	11%	9%	8%	4%	4%	5%	5%	6%

Q19.15 *Please indicate how satisfied you were with....*
Base: Visitors who experienced it, (24/25 n=2158)

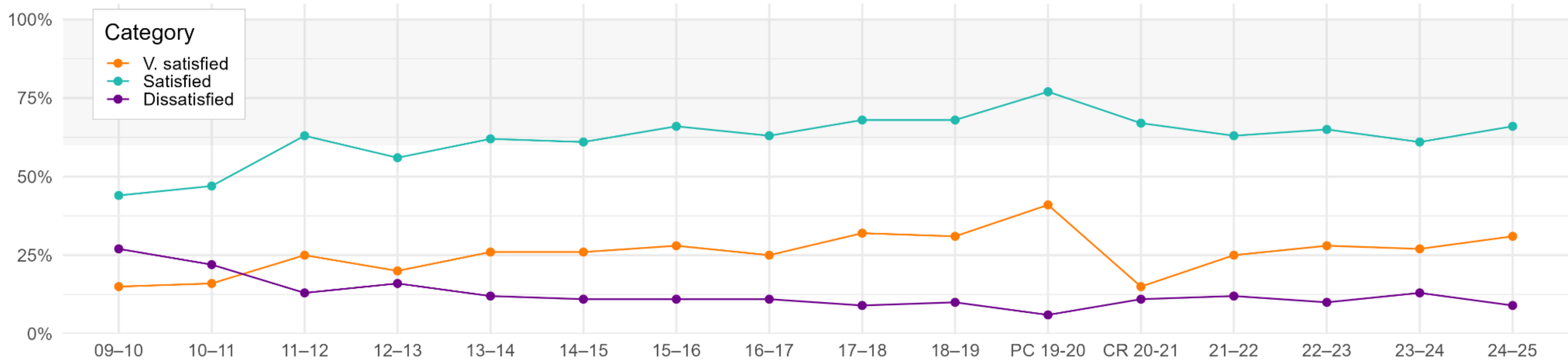
Note: Don't know, didn't experience and missing cases excluded.

Significant differences between subgroups:

New in 2024/25:

- Air arrivals are significantly more likely to be dissatisfied with the quality of campgrounds compared to sea arrivals (14% vs 6%).

Figure 36: Satisfaction with the quality of roads



Category	09–10	10–11	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	23–24	24–25
V. satisfied	15%	16%	25%↑	20%↓	26%↑	26%	28%	25%	32%↑	31%	41%↑	15%↓	25%↑	28%↑	27%	31%↑
Satisfied	44%	47%	63%↑	56%↓	62%↑	61%	66%↑	63%	68%↑	68%	77%↑	67%	63%	65%	61%↓	66%↑
Dissatisfied	27%	22%↓	13%↓	16%	12%↓	11%	11%	11%	9%	10%	6%↓	11%	12%	10%↓	13%↑	9%↓

Q19.14 *Please indicate how satisfied you were with....*
Base: Visitors who experienced it, (24/25 n=2126)

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

Significant differences between subgroups:
Consistent with the previous year:

- More first-time visitors were satisfied (68%) and very satisfied (34%) than repeat visitors (62% and 27% respectively); and
- Day trippers were more satisfied (72%) and very satisfied (40%) than those who stayed one or more nights (65% and 40% respectively).

New in 2024/25:

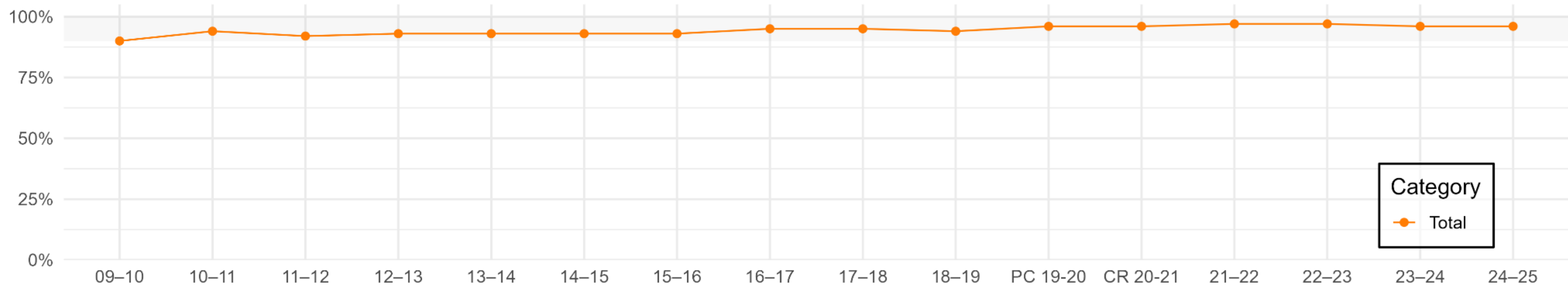
- More winter visitors were satisfied (70%) and very satisfied (34%) than autumn (61% and 26%), while spring visitors were more satisfied (73%) and very satisfied (38%) than summer (65% and 31% respectively) and autumn visitors (61% and 26% respectively); and
- More interstate and international visitors were satisfied (70% and 69% respectively) and very satisfied (35% and 37% respectively) than intrastate visitors (60% and 23%).

Recommendation of Kangaroo Island as holiday destination (EX2i)

Optimal Conditions	Indicator	Acceptable Range	24/25 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 is consistent with the last wave (both 96%) and continues to sit well within the acceptable range of 90%-100%.

Figure 37: Willingness to recommend



Category	09–10	10–11	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	23–24	24–25
Total	90%	94%↑	92%	93%	93%	93%	93%	95%	95%	94%	96%	96%	97%	97%	96%↓	96%

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

Base: Visitors responding, (24/25 n=2116)
Note: Missing cases excluded.

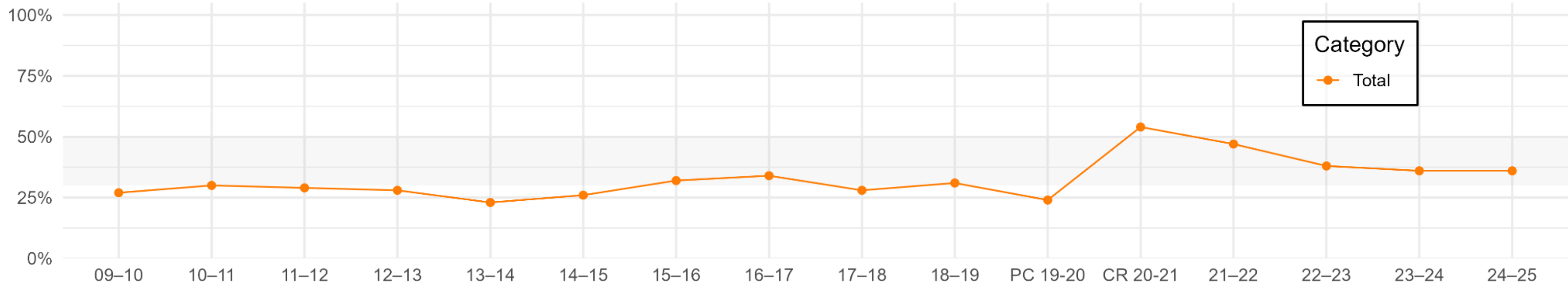
Significant differences between subgroups:
Consistent with the previous year:
- More visitors who stayed one or more nights would recommend than day trippers (99% vs 97%); and
- More non-cruise ship arrivals (99%) would recommend than cruise ship arrivals (94%).

Repeat visitation (EX2j)

Optimal Conditions	Indicator	Acceptable Range	24/25 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 2024/25 remains the same as the previous wave (both 36%) within the acceptable range of 30-50%. *The acceptable range was formerly 30%-60% to cover the COVID recovery result but has returned to 30-50%.

Figure 38: Repeat visitation



Category	09–10	10–11	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	23–24	24–25
Total	27%	30%	29%	28%	23%↓	26%	32%↑	34%	28%↓	31%	24%↓	54%↑	47%	38%↓	36%	36%

Q3 *Have you ever visited Kangaroo Island before this trip?*
Base: Visitors responding, (24/25 n=2176)
Note: Don't know and missing cases excluded

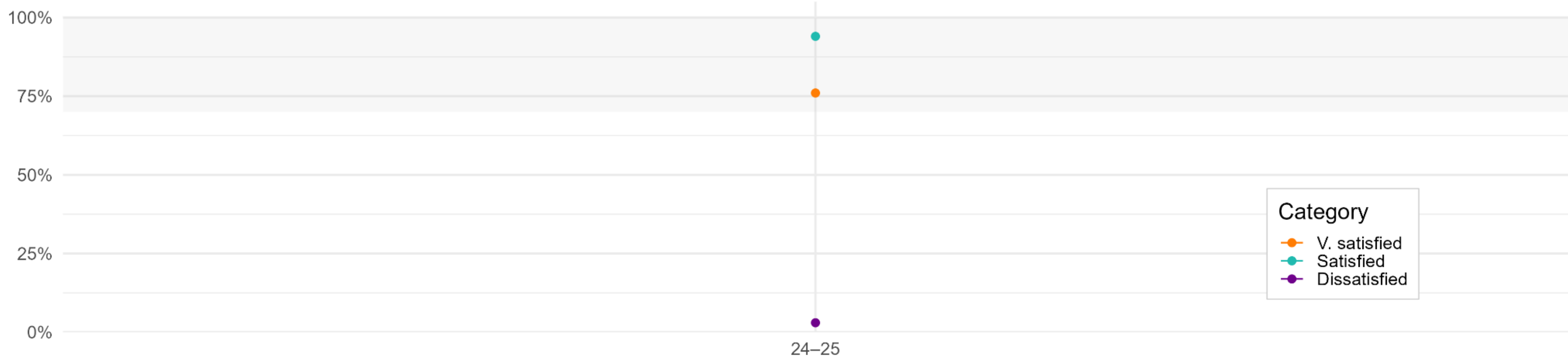
Significant differences between subgroups:
Consistent with the previous year:

- More intrastate visitors were repeat visitors (72%) compared to interstate (19%) and international visitors (7%);
- A greater proportion of those who spent up to $200 per night were repeat visitors than those who spent more than $200 per night (53% vs 28%);
- More of those that had stayed one or more nights on the island were repeat visitors compared to day-trippers (37% vs 28%);
- More sea arrivals were repeat visitors than air arrivals (38% vs 19%);
- More summer visitors were repeat visitors (39%) compared to spring visitors (31%); and
- More cruise arrivals were repeat visitors than non-cruise arrivals (47% vs 35%).

Satisfaction with national parks experience (new question in 2024/25)

Around three quarters (76%) of those who experienced national parks were very happy with their experience with only 3% dissatisfied.

Figure 39: Visitor satisfaction with national parks experience



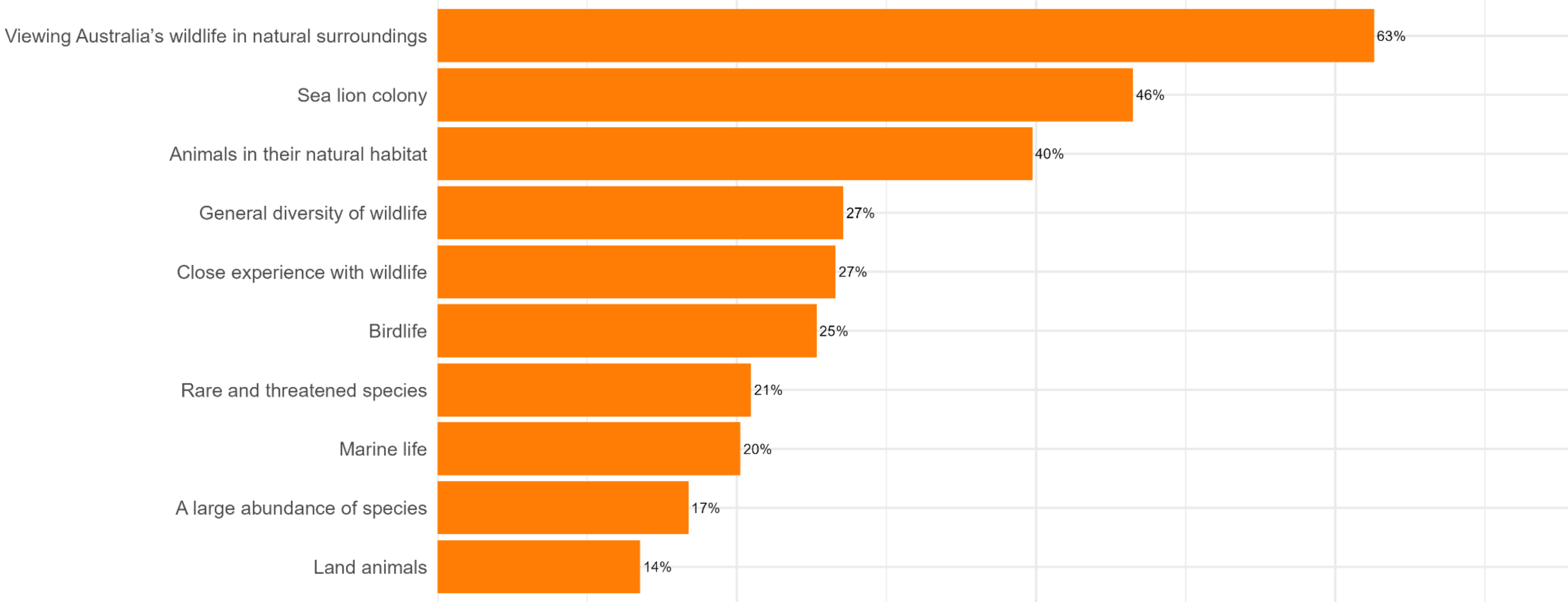
Category	24–25
V. satisfied	76%
Satisfied	94%
Dissatisfied	3%

Q19_19 *Please indicate how satisfied you were with…*
Base: Visitors responding, (24/25 n=1511)
Note: Don't know and missing cases excluded

Most important experiences (new question in 2024/25)

The top experiences that visitors most want to experience include viewing Australia's wildlife in natural surroundings (63%), the sea lion colony (46%), and experiencing animals in their natural habitat (40%).

Figure 40: Top three most important experiences



Q30.	*For each of the following, please indicate whether this was one of the three most important things you wanted to experience.*	Base:	Visitors responding, (24/25 n=1774)
		Note:	Don't know and missing cases excluded

Nature experiences (new question in 2024/25)

Almost all visitors to Kangaroo Island experienced viewing Australia's wildlife in natural surroundings and animals in their natural habitat (95% and 94%).

Figure 41: Proportion of visitors Who experienced nature and wildlife

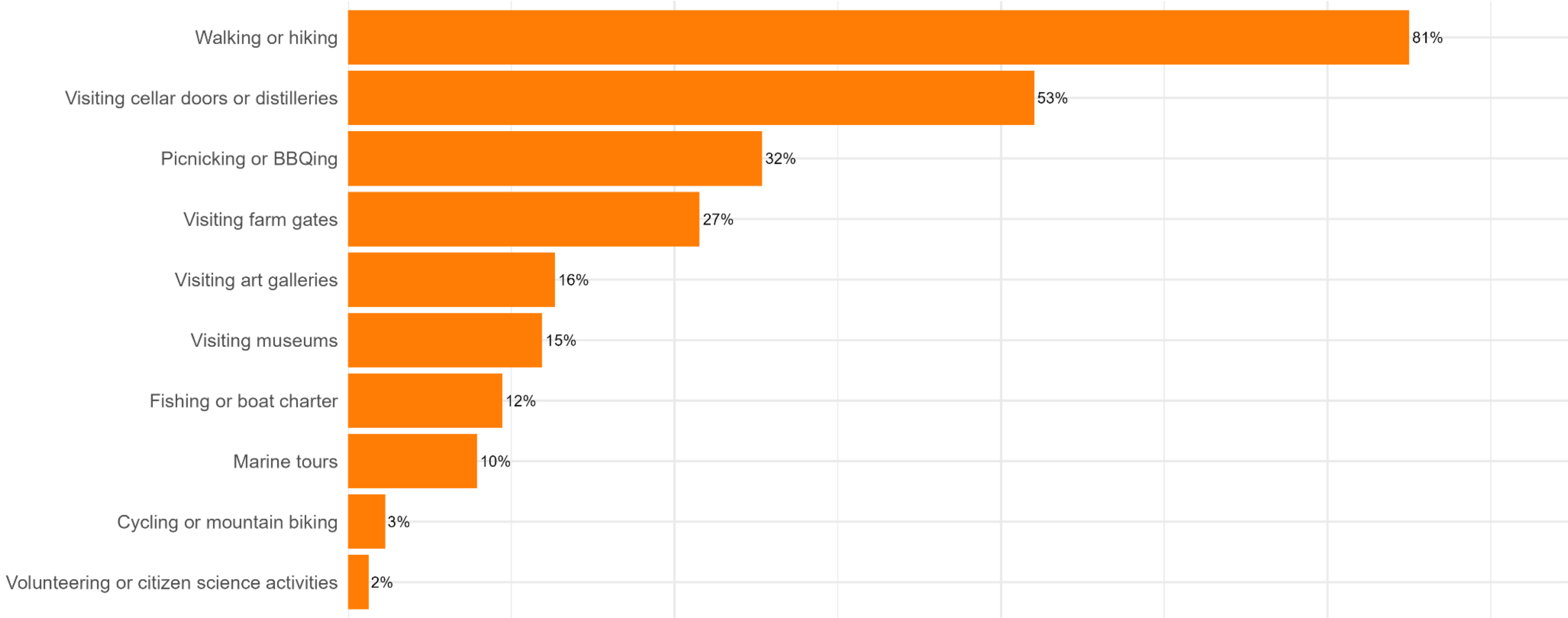
Q30b. *For each of the following, please indicate whether you experienced this while on Kangaroo Island.*

Base: Visitors responding, (24/25 n=1729-1797)
Note: Don't know and missing cases excluded

Most common activities (new question in 2024/25)

The most common activities undertaken by visitors to Kangaroo Island was walking or hiking (81%), followed by visiting cellar doors or distilleries (53%).

Figure 42: Activities visitors undertook on the island



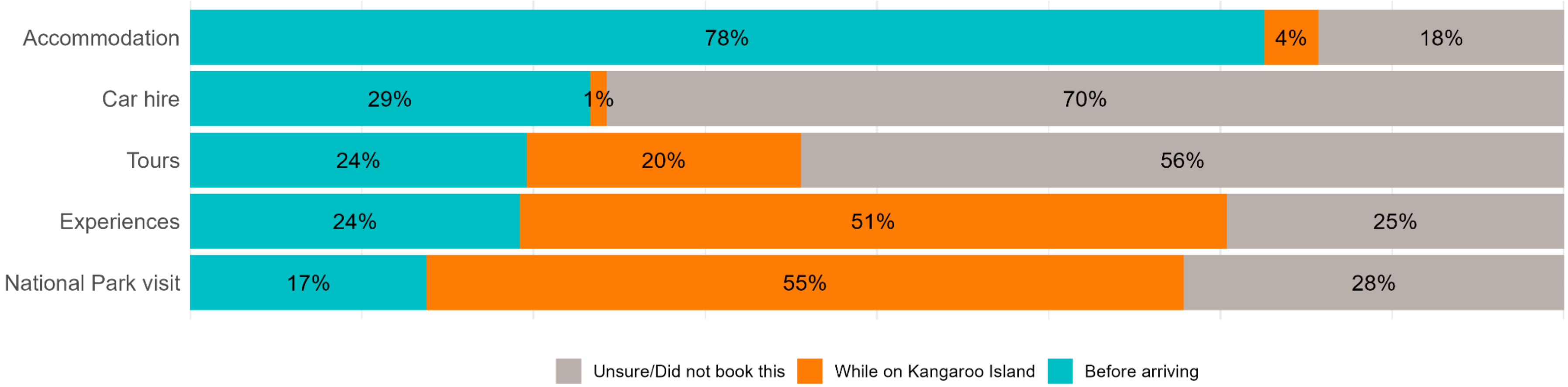
Q29. *Which of the following activities did you undertake while on Kangaroo Island?*

Base: Visitors responding, (24/25 n=1843)
Note: Don't know and missing cases excluded

Booking aspects of the trip (new question 2024/25)

The majority of visitors booked their accommodation before arriving on the island (78%) while experiences and national park visits were more commonly booked while on the island (51% and 55% respectively).

Figure 43: When visitors booked various aspects of their trip



Q28.	*When did you book the following parts of your trip to Kangaroo Island?*
Base:	Visitors responding, (24/25 min n=1647)
Note:	Don't know and missing cases excluded

Summary of sub-groups scores for experiential condition ‘Kangaroo Island delivers authentic and credible experiences consistent with its positioning’ – (24/25)

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	• All sub-groups except cruise ship arrivals and day trippers	• Interstate visitors • Stayed one or more nights • First-time visitors • Non-cruise ship arrivals
EX1c	Proportion of visitors that experienced scenic variety without crowds	• All sub-groups except cruise ship arrivals and day trippers	• Stayed one or more nights • Non-cruise ship arrivals • Interstate visitors
EX1d	Proportion of visitors that experienced cultural heritage and history of settlement	• Interstate visitors • Spring visitors • First-time visitors • Air arrivals	• Interstate visitors • Stayed one or more nights • First-time visitors
EX1f	Proportion of visitors that experienced areas of untouched natural beauty	• All sub-groups except cruise ship arrivals and day trippers	• Stayed one or more nights • Autumn visitors • First-time visitor • Non-cruise ship arrivals

Summary of sub-groups scores for experiential condition ‘Kangaroo Island delivers authentic and credible experiences consistent with its positioning’ (continued) – (24/25)

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	• All sub-groups except international visitors, day trippers and cruise ship arrivals	• Intrastate visitors • Repeat visitors • Stayed one or more nights • More than $200 per night • Non-cruise ship arrivals
EX1i	Proportion of visitors that believe Kangaroo Island offers one of Australia’s top three nature & wildlife experiences	• All sub-groups except cruise ship arrivals	• International visitors • Stayed one or more nights • First-time visitors • Non-cruise ship arrivals
EX1j	Proportion of visitors that believe Kangaroo Island has a friendly local community	• All sub-groups	• Intrastate and interstate 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	• All sub-groups	• 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	• All sub-groups	• Non-cruise ship arrivals
EX1m	Proportion of visitors extremely satisfied with their overall experience on Kangaroo Island	• None	• 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’ – (24/25)

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	• All subgroups except day trippers and cruise ship arrivals	• Stayed one or more nights • Those who spent up to $200 per night • Non-cruise ship arrivals
EX2b	Proportion of visitors who were very satisfied with their opportunity to learn more about the Island’s natural environment	• None	• None
EX2c	Proportion of visitors who were very satisfied with their opportunity to learn more about the Island’s cultural history	• None	• Day trippers • Cruise ship arrivals
Ex2d	Proportion of visitors who were very satisfied with the range, quality and availability of activities	• None	• Range: Repeat visitors, sea arrivals, stayed one or more nights, non- cruise arrivals • Quality: none • Availability: none
EX2e	Proportion of visitors who were very satisfied with the quality of accommodation	• None	• None
EX2f	Proportion of visitors who were very satisfied with the range, quality and availability of Kangaroo Island produce	• Quality: intrastate visitors, cruise ship arrivals	• Range, quality and availability: repeat visitors • Quality: intrastate visitors
EX2g	Proportion of visitors that are very satisfied with the level of customer service they receive	• None	• None
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	• Picnic areas: international visitors, spring visitors, day trippers	• Picnic areas: those who spent up to $200 per night • Interpretative/educational signage: None • Public toilets: interstate visitors • Road signage: sea arrivals • Roads: interstate, international, spring, winter and first-time visitors, and day trippers

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)
EX2i	Proportion of visitors that would recommend Kangaroo Island as a holiday destination to others as a result of their experience	• All sub-groups	• 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) – (24/25)

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	• All subgroups except interstate, international visitors, air arrivals and day trippers • Note intrastate and those who spent up to $200 per night exceeded range	• 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'***, both measures fell within the acceptable range in the 2024/25 wave.

The proportion of visitations to natural areas occurring on managed sites was consistent at 74%, and the proportion of visitors aware of quarantine regulations prior to arriving on Kangaroo Island remained consistent at 73%.

In 2024/25, the most commonly visited location was the Penneshaw township (72%), however this was significantly lower than in 2023/24 (76%), followed by Admirals Arch (68%) which was significantly higher than 2023/24, and then the Kingscote township (66%). Other significant changes from last year's results include an increase in visitation to the Remarkable Rocks (from 63% to 66%), Seal Bay (from 62% to 65%) and Kelly Hill Caves (from 11% to 16%). The only other significant decreases in visitation related to American River (from 48% to 45%) and Prospect Hill (from 23% to 11%).

Awareness amongst first time and repeat visitors of the quarantine regulations decreased (first time from 88% to 86% and repeat from 97% to 95%), however this still indicates a strong overall level of awareness.

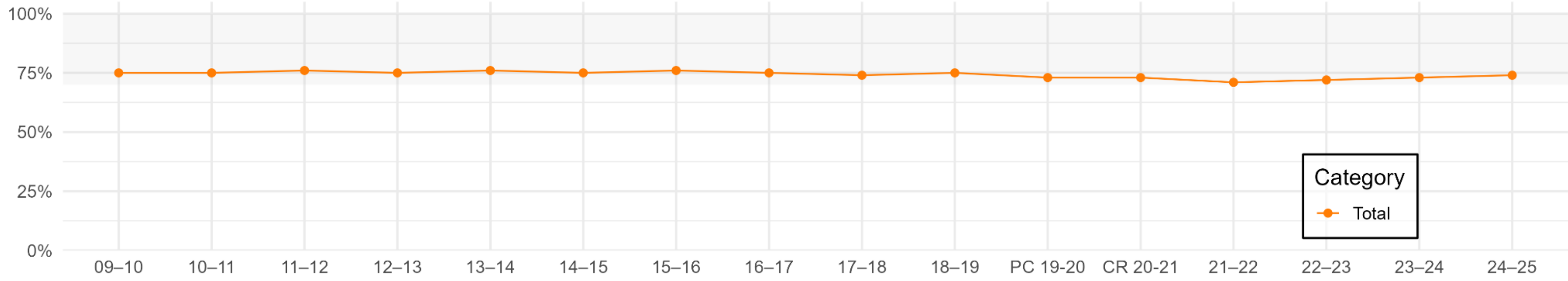
Awareness levels for specific prohibited items decreased across all measures, with the only decrease that wasn't statistically significant relating to declared weeds.

Visits to natural areas occurring on managed sites (EN2b)

Optimal Conditions	Indicator	Acceptable Range	24/25 Result
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 (70-100%) and has increased one percent since last wave (from 73% to 74% - not significant).

Figure 44: Proportion of visitations to natural areas occurring on managed sites



Category	09–10	10–11	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	23–24	24–25
Total	75%	75%	76%	75%↓	76%↑	75%↓	76%↑	75%↓	74%	75%	73%↓	73%	71%	72%	73%↑	74%

Q17 Which of these locations did you visit while on Kangaroo Island this time?
Base: Visitors responding (24/25 n=2176)

Significant differences between subgroups:

Consistent with previous wave

- More interstate visitors visited managed sites than intrastate visitors (75% vs 71%);
- More international visitors visited managed sites than interstate visitors (77% vs 75%);
- More day trippers visited managed sites than those visiting for one or more nights (86% vs 73%); and
- More first-time visitors visited managed sites than repeat visitors (75% vs 72%).

New in 2024/25:

- More air arrivals visited managed sites than sea arrivals (75% vs 74%);
- More autumn visitors visited managed sites than summer visitors (74% vs 76%); and
- More cruise ship visitors visited managed sites than non-cruise ship visitors (82% vs 74%).

Locations visited

Consistent with the previous wave, the most visited location was the Penneshaw township (72%), however it has seen a significant decrease in visitation along with, American River Township (45%), and Prospect Hill (11%) from 2023/24. Positively other locations including Admirals Arch (68%), Remarkable Rocks (66%), Seal Bay (65%) and Kelly Hill Caves (16%) have seen a significant increase in visitation from 2023/24.

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)	23/24 (n=3397)	24/25 (n=2176)
Kingscote Township	85%	88%	85%	88%	84%	85%	65%	74%	78%	78%	70%	73%	67%	87%	78%	73%	67%	66%
Flinders Chase National Park (M)	76%	81%	80%	80%	79%	80%	82%	80%	82%	76%	81%	76%	72%	51%	55%	52%	53%	55%
Penneshaw Township	78%	85%	79%	81%	78%	79%	68%	74%	77%	77%	74%	73%	65%	81%	82%	80%	76%	72%↓
Admirals Arch (M)	-	-	77%	80%	77%	79%	83%	82%	80%	78%	82%	80%	77%	72%	66%	65%	65%	68%↑
Remarkable Rocks (M)	-	-	77%	79%	77%	78%	82%	80%	78%	77%	80%	76%	71%	65%	63%	64%	63%	66%↑
Seal Bay (M)	73%	76%	69%	71%	68%	67%	77%	69%	70%	68%	71%	68%	72%	56%	58%	63%	62%	65%↑
Vivonne Bay (UM)	62%	66%	69%	66%	65%	67%	62%	63%	59%	57%	63%	58%	51%	53%	62%	58%	54%	55%
American River Township	49%	58%	55%	58%	57%	58%	44%	53%	58%	58%	50%	53%	49%	75%	60%	53%	48%	45%↓
Emu Bay (M)	48%	48%	52%	52%	51%	57%	42%	44%	51%	47%	47%	51%	51%	68%	64%	60%	54%	53%
Parndana Township	47%	52%	51%	52%	53%	50%	39%	45%	49%	45%	42%	38%	36%	45%	41%	36%	32%	29%
Stokes Bay (M)	43%	41%	47%	45%	44%	51%	39%	43%	46%	45%	43%	45%	36%	51%	49%	49%	45%	46%
Kelly Hill Caves (M)	-	-	32%	30%	30%	22%	22%	21%	24%	26%	23%	27%	24%	1%	2%	4%	11%	16%↑
Cape Willoughby Light Station (M)	31%	33%	31%	33%	33%	32%	25%	34%	37%	37%	28%	30%	31%	47%	37%	34%	30%	29%
Little Sahara (UM)	22%	25%	28%	24%	22%	22%	18%	18%	16%	17%	13%	19%	19%	15%	22%	20%	17%	17%
Hanson Bay (UM)	28%	32%	27%	27%	25%	30%	39%	35%	34%	33%	42%	37%	37%	12%	14%	16%	16%	16%
Pennington Bay (M)	23%	27%	27%	29%	29%	28%	21%	24%	26%	26%	24%	27%	24%	33%	29%	30%	27%	27%

	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)	23/24 (n=3397)	24/25 (n=2176)
Cape Borda Light Station (M)	20%	23%	25%	29%	26%	23%	24%	24%	26%	23%	26%	23%	21%	7%	21%	20%	18%	16%
Snelling Beach (UM)	19%	17%	20%	19%	16%	19%	13%	14%	17%	18%	18%	16%	11%	22%	17%	19%	17%	19%
Antechamber Bay (M)	19%	22%	18%	23%	22%	20%	16%	18%	20%	16%	13%	13%	11%	22%	19%	16%	14%	14%
Brown's Beach (M)	-	-	18%	20%	21%	21%	13%	17%	23%	17%	17%	18%	15%	23%	19%	18%	16%	15%
Island Beach (UM)	18%	18%	14%	18%	20%	18%	13%	14%	16%	14%	15%	16%	14%	19%	19%	15%	14%	15%
Western River Cove (UM)	14%	10%	14%	12%	11%	13%	10%	13%	12%	12%	10%	10%	8%	13%	11%	11%	8%	9%
Baudin Conservation Park (UM)	-	-	12%	17%	16%	17%	12%	16%	19%	18%	16%	16%	13%	13%	16%	14%	13%	12%
Murray Lagoon (UM)	-	-	12%	13%	12%	13%	4%	11%	11%	9%	10%	9%	8%	7%	7%	8%	7%	6%
Lathami Conservation Park (M)	-	-	8%	9%	8%	8%	8%	8%	9%	8%	8%	7%	7%	8%	7%	8%	7%	8%
Prospect Hill** (UM)	-	-	-	-	-	-	-	-	-	7%	7%	5%	25%	33%	30%	27%	23%	22%
Raptor Domain^^ (M)	-	-	-	-	-	-	-	3%	3%	2%	2%	1%	<1%	1%	2%	1%	1%	1%
Kingscote Silos#	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	34%	36%	35%

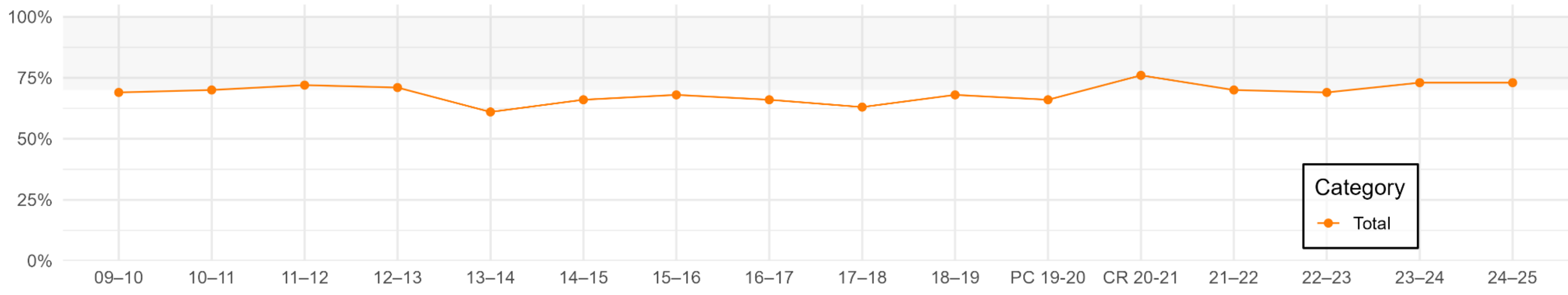
Q17 *Which of these locations did you visit while on Kangaroo Island this time?*
Base: Visitors responding, (24/25 n=2176) ^^New in 2014/15, **New in 2016/17, #New in 2022/23, M = Managed site, UM = Unmanaged site

Awareness of quarantine regulations prior to arriving (EN2e)

Optimal Conditions	Indicator	Acceptable Range	24/25 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%	✓

For the second consecutive wave the proportion of visitors aware of quarantine regulations prior to arrival falls within the acceptable range (70-100%). This is following a consistent score from the previous wave (73%).

Figure 45: Awareness of any quarantine regulations prior to visitation



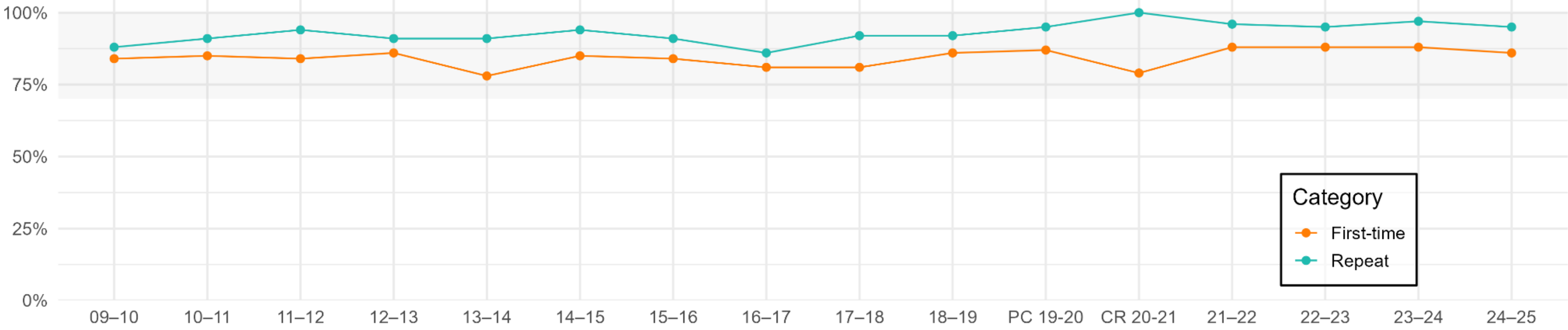
Category	09–10	10–11	11–12	12–13	13–14	14–15	15–16	16–17	17–18	18–19	PC 19-20	CR 20-21	21–22	22–23	23–24	24–25
Total	69%	70%	72%	71%	61%↓	66%↑	68%	66%	63%	68%	66%	76%↑	70%	69%	73%↑	73%

Q16a Were you aware of all Kangaroo Island's quarantine regulations
Q16b If yes, when did you find out this information
Base: Visitors responding, (24/25 n=1931)

Significant differences between subgroups:
Consistent with the previous year:

- More intrastate (88%) and interstate (81%) visitors were aware before their visit to the island compared with international visitors (72% were aware prior). Additionally, more intrastate visitors were aware prior to their visit than interstate visitors;
- More repeat visitors were aware prior to their visit (88%) than first time visitors (79%);
- More cruise ship arrivals were aware after arriving (33%) compared to non-cruise ship arrivals (15%);
- More visitors who spent up to $200 were aware before their visit (89%) in contrast to those who spent more than $200 (82%); and
- More visitors that stayed one or more nights (85%) were aware before their visit compared to those that stayed for only a day trip (69%).

Figure 46: Awareness of any quarantine regulations (regardless of prior or during visit) by repeat and first-time visitors



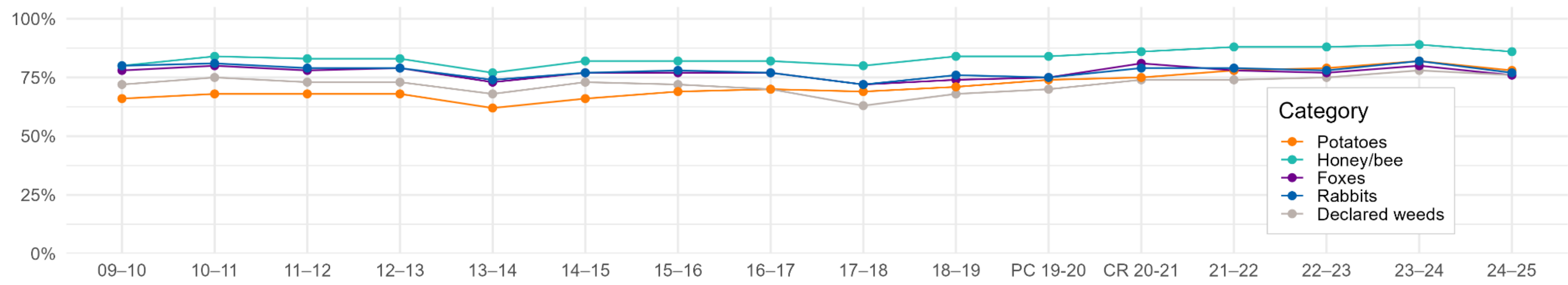
Category	09–10	10–11	11–12	12–13	13–14	14–15	15–16	16–17	17–18	18–19	PC 19-20	CR 20-21	21–22	22–23	23–24	24–25
First-time	84%	85%	84%	86%	78%↓	85%↑	84%	81%	81%	86%	87%	79%	88%	88%	88%	86%↓
Repeat	88%	91%	94%	91%	91%	94%	91%	86%	92%↑	92%	95%	100%↑	96%↓	95%	97%↑	95%↓

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, (24/25 n=738), first time visitors responding, (24/25 n=1191).

Awareness of specific prohibited items

Awareness of each prohibited item in 2024/25 has decreased significantly from the previous year for all categories besides weeds. Consistent with previous waves, awareness of honey/bee products being prohibited is highest (86%), whereas foxes now equal declared weeds with the lowest awareness (76%).

Figure 47: Awareness of Prohibited Items



Category	09–10	10–11	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	23–24	24–25
Potatoes	66%	68%	68%	68%	62%↓	66%	69%	70%	69%	71%	74%	75%	78%	79%	82%↑	78%↓
Honey/bee	80%	84%↑	83%	83%	77%↓	82%↑	82%	82%	80%	84%	84%	86%	88%	88%	89%	86%↓
Foxes	78%	80%	78%	79%	73%↓	77%↑	77%	77%	72%↓	74%	75%	81%	78%	77%	80%↑	76%↓
Rabbits	80%	81%	79%	79%	74%↓	77%	78%	77%	72%↓	76%	75%	79%	79%	78%	82%↑	77%↓
Declared weeds	72%	75%	73%	73%	68%↓	73%↑	72%	70%	63%↓	68%	70%	74%	74%	75%	78%↑	76%

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

Base: Visitors responding, (24/25 n=2173)
Note: Missing cases excluded.

Significant differences between subgroups:

Consistent with the previous year:

- More repeat visitors were aware of the regulations around all prohibited items than first time visitors;
- More sea arrivals were aware of the regulations than those arriving by air;
- More of those who stayed one or more nights were aware of all the regulations than day trippers;
- More intrastate visitors were aware of all the quarantine regulations than international visitors. Furthermore, more intrastate visitors were aware of all the quarantine regulations than interstate visitors. More interstate visitors were aware of all the quarantine regulations than international visitors; and
- More visitors who spent only up to $200 were aware of all the regulations compared to visitors who spent more than $200.

New in 2024/25:

- Non-cruise arrivals were more aware of all of the regulations compared to cruise arrivals.

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 first-time visitors.

Aware of regulations prohibiting the import of…	(a) First time visitors n=1390	(b) Repeat visitors n=782
Honey/bee products	82%	93%↑
Rabbits	73%	85%↑
Potatoes	75%	84%↑
Foxes	72%	84%↑
Declared weeds	73%	81%↑

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

Sources of information about quarantine regulations

The proportion of visitors providing further comment about where they had sourced information about quarantine regulations for Kangaroo Island remained consistent with the previous wave (14% vs 15%). Of those who provided information, the most common source was on the ferry / ferry terminal (31%), followed by brochures/tourist material (17%) and the internet (14%).

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

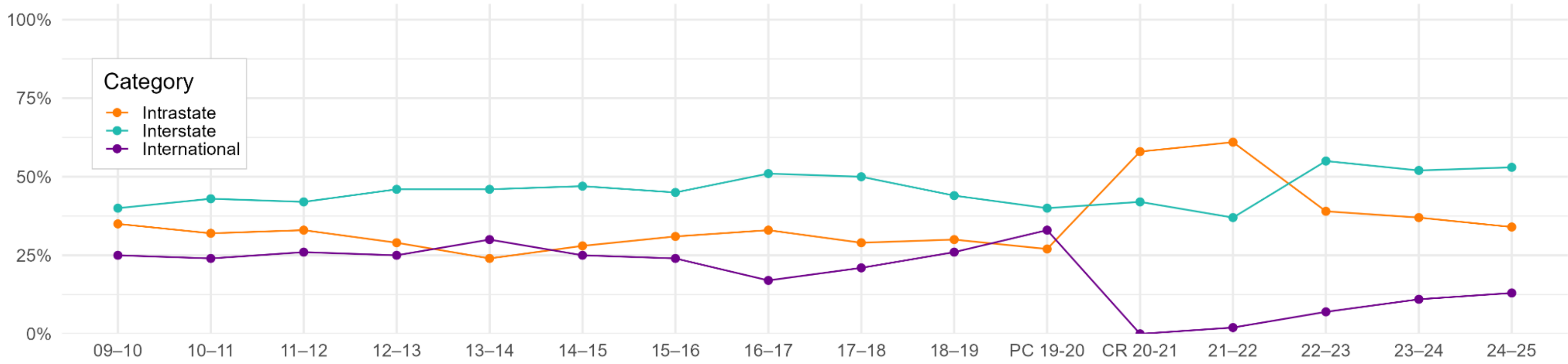
Indicator		Sub-groups who were within the Acceptable range for the indicator	Sub-groups who scored more highly for the indicator (compared to their comparative sub-group)
EN2b	Proportion of visitations to natural areas occurring on managed sites	• All sub-groups	• International visitors • Air visitors • Winter visitors • First-time visitors • Day trippers • Cruise ship arrivals
EN2e	Proportion of visitors aware of quarantine regulations prior to arriving on Kangaroo Island	All groups except: • International visitors • First time visitors • Air arrivals • Day trippers • Cruise ship arrivals	• Intrastate visitors • Sea arrivals • Repeat visitors • Those who spent up to $200 per night • Stayed one or more nights • Non-cruise ship arrivals

Visitor profile

Visitor Origin

The proportion of international visitors compared with interstate and intrastate visitors has continued to increase significantly (11% in 2023/24 to 13% in 2024/25) and is gradually approaching pre-Covid levels. While levels of interstate travellers are consistent with the previous wave at 53% of all visitors. The proportion of intrastate travellers has seen a significantly decrease from the previous wave (37% to 34%).

Figure 48: Visitor Origin over time



Category	09–10	10–11	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	23–24	24–25
Intrastate	35%	32%	33%	29%	24%↓	28%↑	31%	33%	29%	30%	27%	58%↑	61%	39%↓	37%	34%↓
Interstate	40%	43%	42%	46%	46%	47%	45%	51%↑	50%	44%↓	40%↓	42%	37%	55%↑	52%↓	53%
International	25%	24%	26%	25%	30%↑	25%↓	24%	17%↓	21%	26%↑	33%↑	0%↓	2%↑	7%↑	11%↑	13%↑

Q4 *Where do you live?*
Base: Visitors responding, (24/25 n=2175)
Note: *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.
Note: **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 2024/25 period, results are largely consistent with previous years.

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)	23/24 (n=1780)	24/25 (n=1147)
VIC	39%	27%	36%	45%	36%	42%	43%	34%	39%	36%	41%	34%	34%	31%	37%	33%	36%	32%	28%	30%	35%	36%	34%
NSW	43%	52%	40%	36%	38%	35%	29%	36%	35%	35%	32%	39%	33%	34%	35%	38%	36%	37%	37%	32%	32%	33%	32%
QLD	11%	8%	13%	7%	10%	11%	15%	14%	12%	13%	13%	13%	17%	20%	14%	12%	15%	17%	11%	24%	19%	18%	20%
WA	3%	3%	6%	7%	7%	5%	8%	9%	8%	8%	9%	9%	10%	10%	7%	11%	8%	8%	5%	6%	8%	8%	9%
ACT	1%	4%	1%	4%	5%	3%	3%	4%	3%	4%	2%	2%	3%	3%	3%	2%	3%	3%	7%	3%	2%	2%	3%
TAS	2%	0%	2%	0%	2%	2%	1%	2%	2%	3%	1%	1%	2%	1%	2%	2%	2%	2%	5%	3%	2%	2%	2%
NT	1%	7%	2%	1%	2%	3%	<1%	1%	1%	1%	3%	1%	2%	1%	1%	1%	1%	1%	7%	3%	2%	1%	1%

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

International visitor origin

The number of international visitors continues to increase to pre-COVID-19 levels (PC 2019/20 n=283, 2024/25 n=273). Consistent with the last wave, most international visitors came from USA/Canada (26%).

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)	23/24 (n=391)	24/25 (n=273)
USA / Canada	29%	24%	24%	23%	19%	25%	23%	24%	22%	20%	14%	-	5%	21%	26%	26%
Other European countries	13%	14%	16%	15%	22%	16%	15%	22%	8%	19%	11%	-	9%	18%	16%	15%
United Kingdom	22%	22%	19%	18%	12%	21%	20%	16%	22%	12%	13%	-	14%	22%	17%	12%
Germany	12%	10%	10%	12%	15%	12%	14%	9%	15%	10%	13%	-	-	7%	7%	8%
Other Asia	5%	3%	6%	3%	8%	3%	4%	3%	2%	7%	6%	-	27%	7%	6%	5%
New Zealand	2%	2%	2%	2%	4%	3%	3%	3%	13%	2%	5%	100%	23%	5%	3%	5%
Other countries	0%	1%	1%	1%	2%	1%	1%	1%	3%	1%	3%	-	-	3%	1%	2%
France	8%	10%	8%	9%	5%	7%	6%	5%	5%	8%	12%	-	23%	5%	3%	4%
Italy	9%	11%	12%	15%	9%	7%	9%	14%	4%	12%	12%	-	-	9%	13%	15%
India	0%	1%	1%	1%	1%	1%	0%	<1%	4%	0%	2%↑	-	-	1%	1%	2%
China / Hong Kong	1%	1%	1%	2%	3%	4%	5%	3%	2%	8%	9%	-	-	2%	5%	5%
Japan	1%	0%	1%	0%	1%	1%	1%	1%	0%	0%	0%	-	-	-	1%	1%

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

At a total level, 2024/25 age profile has remained consistent with the previous wave with no significant changes.

Figure 49: 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)	23/24 (n=3352)	24/25 (n=2158)
15 – 24 years	6%	4%	6%	6%	6%	4%	5%	4%	5%	6%	7%	1%	8%	6%	6%	5%
25 – 44 years	31%	29%	27%	31%	31%	25%	25%	21%	23%	28%	29%	15%	35%	32%	32%	33%
45 – 64 years	47%	47%	44%	44%	42%	44%	45%	45%	43%	40%	42%	47%	41%	41%	43%	41%
65+ years	16%	19%	23%	19%	21%	27%	26%	31%	29%	25%	19%	37%	16%	21%	20%	20%

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)	23/24 (n=1209)	24/25 (n=751)
15 – 24 years	6%	4%	5%	7%	4%	3%	5%	5%	6%	7%	9%	2%	9%	9%	8%	7%
25 – 44 years	31%	31%	32%	32%	30%	27%	30%	19%	25%	30%	38%	11%	38%	34%	38%	38%
45 – 64 years	52%	49%	40%	43%	47%	50%	41%	47%	43%	40%	37%	53%	39%	40%	40%	39%
65+ years	12%	16%	22%	18%	18%	19%	24%	29%	26%	21%	14%	34%	13%	16%	15%	15%

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)	23/24 (n=1756)	24/25 (n=1130)
15 – 24 years	4%	3%	3%	4%	5%	2%	3%	2%	2%	3%	5%	0%	5%	4%	4%	3%
25 – 44 years	25%	21%	15%	23%	26%	18%	15%	17%	22%	18%	23%	20%	31%	30%	26%↓	28%
45 – 64 years	51%	51%	55%	51%	42%	46%	52%	45%	43%	46%	45%	38%	45%	41%	46%↑	45%
65+ years	20%	25%	27%	22%	27%	34%	30%	36%	33%	32%	23%	42%	19%	24%	24%	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)	23/24 (n=382)	24/25 (n=268)
15 – 24 years	10%	7%	13%	8%	9%	9%	8%	6%	10%	8%	8%	-	14%	9%	7%	9%
25 – 44 years	42%	43%	39%	43%	38%	34%	37%	35%	22%	42%	31%	-	27%	32%	38%	40%
45 – 64 years	34%	35%	33%	34%	37%	33%	35%	40%	44%	31%	43%	-	27%	41%	39%	33%
65+ years	14%	15%	16%	16%	15%	23%	19%	19%	24%	18%	17%	100%	32%	17%	16%	24%

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)

	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)	23/24 (n=3397)	24/25 (n=2176)
Total Female	**55%**	**53%**	**55%**	**52%**	**54%**	**51%**	**52%**	**52%**	**51%**	**50%**	**50%**	**50%**
Under 15 years	9%	7%	7%	7%	7%	10%	9%	3%	8%	9%	8%	8%
15 - 24 years	6%	4%	2%	4%	3%	4%	6%	4%	9%	5%	5%	5%
25 - 44 years	12%	9%	10%	8%	8%	11%	12%	3%	13%	11%	12%	12%
45 - 64 years	17%	18%	15%	17%	17%	14%	16%	21%	13%	14%	14%	15%
65 plus years	11%	15%	20%	16%	17%	12%	9%	21%	8%	10%	10%	10%
Total Male	**45%**	**47%**	**45%**	**48%**	**46%**	**49%**	**48%**	**48%**	**49%**	**50%**	**50%**	**50%**
Under 15 years	8%	7%	5%	7%	5%	8%	10%	1%	9%	9%	9%	9%
15 - 24 years	3%	2%	3%	4%	2%	4%	5%	3%	5%	5%	5%	5%
25 - 44 years	10%	9%	9%	8%	7%	11%	11%	7%	14%	12%↓	12%	12%
45 - 64 years	14%	16%	15%	17%	16%	15%	14%	18%	13%	15%	15%	15%
65 plus years	10%	13%	14%	16%	15%	11%	9%	20%	8%	10%	10%	10%

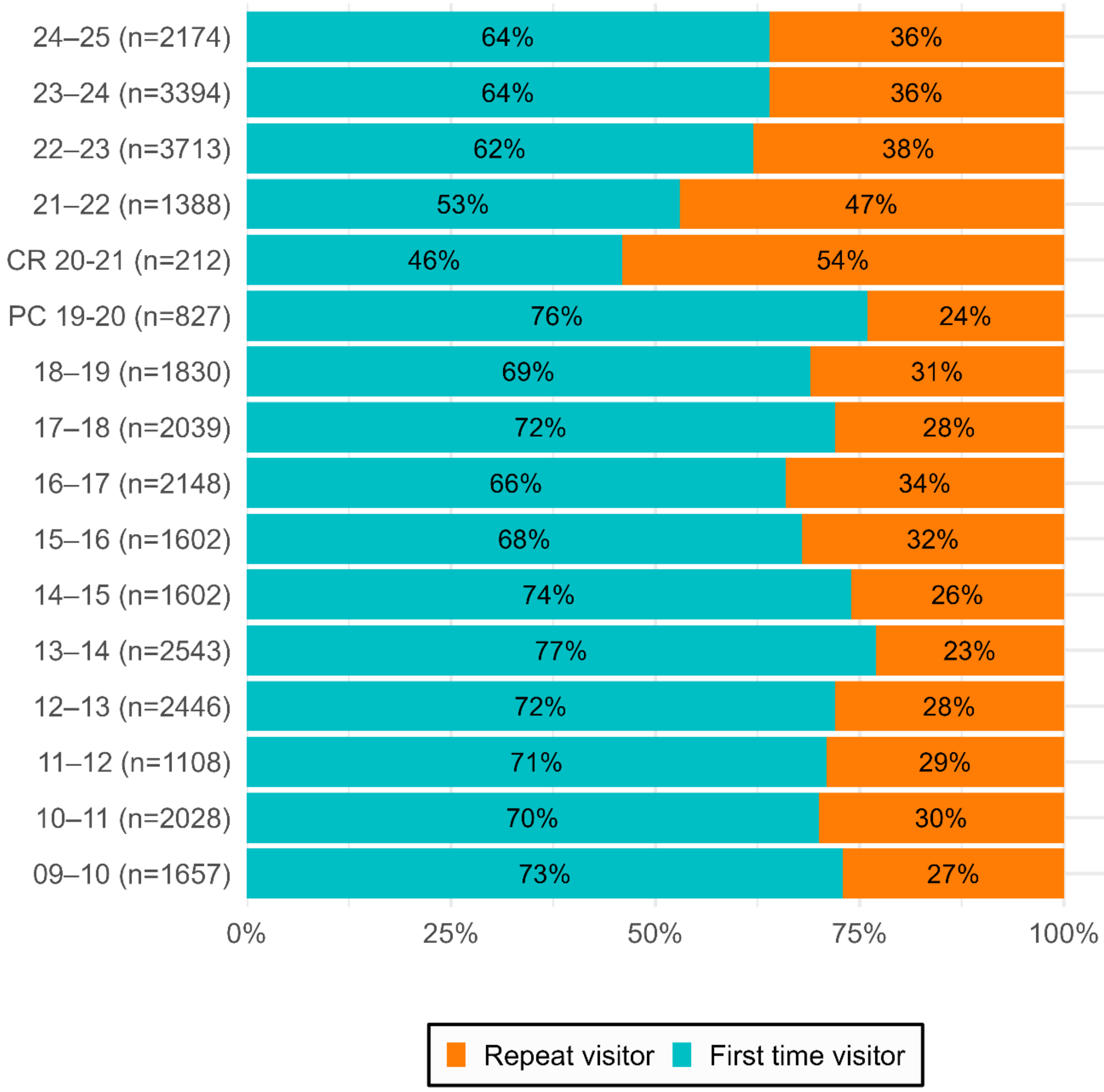
Q27 *Please record the number of people you are travelling with in each of the following categories.*
Base: *All responses – entire travel party accounted for*
Note: *Missing cases excluded.*
Note: Question revised in 2010/11 to ask age and gender of entire travel party.

Incidence of repeat visitation

For the first time since the COVID-19 recovery period in 2020/21, first time visitation to Kangaroo Island has not increased. While remaining identical to the previous wave, first time visitation continues to make up just over two thirds of visitation to the island (64%).

Of the 36% of return visitors who have previously visited Kangaroo Island, 4% visited via cruise ship, 2% visited via a coach/day tour, and 30% (the majority), visited via another method.

Figure 50: Incidence of repeat visitation to Kangaroo Island over time



Incidence of repeat visitation by visitor origin

Repeat visitation in this wave has remained consistent for interstate visitors since the previous wave (17% vs 19%) and increased for intrastate visitors back to 2022/23 levels (from 69% to 72%) - though this is not significant. Visitation has also decreased, again, not significantly, for international visitors from 10% to 7%.

Table 7: Repeat Visitation to Kangaroo Island by Visitor Origin over time

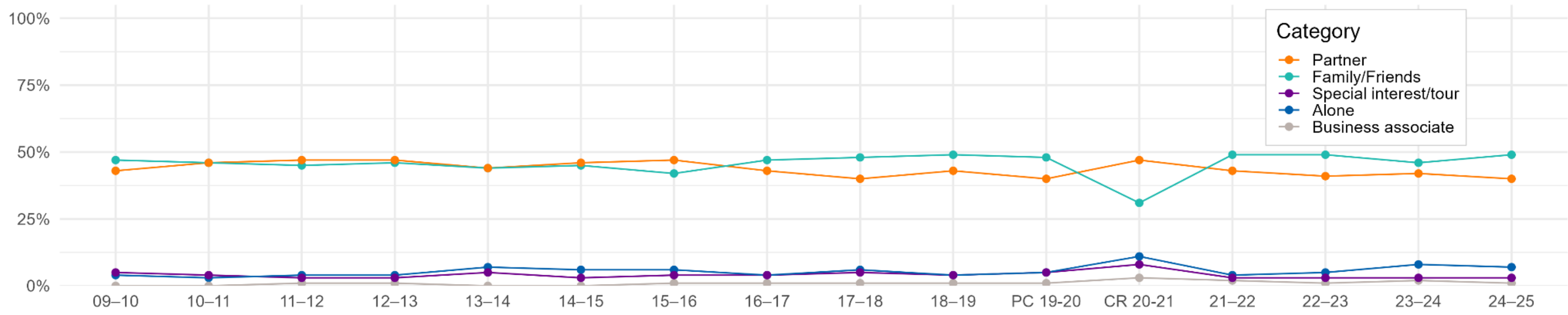
	Intrastate	Interstate	International
00/01	68%	17%	5%
01/02	70%	18%	8%
02/03	67%	14%	6%
03/04	79%	19%	4%
04/05	68%	14%	4%
05/06	63%	16%	5%
06/07	68%	16%	5%
07/08	68%	14%	5%
08/09	60%	15%	6%
09/10	61%	11%	4%
10/11	67%	16%	4%
11/12	66%	14%	8%
12/13	65%	17%	6%
13/14	69%	12%	4%
14/15	67%	12%	3%
15/16	71%	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%
23/24	69%	17%	10%
24/25	72%	19%	7%*

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, 21/22 n=22, 24/25 n=19

Travel party

While travelling with family and friends (49%) and with a partner (40%) remain the most prevalent travel parties, there has been a significant increase in the proportion of visitors travelling with family and friends (from 46% to 49%) returning to the levels of 22/23.

Figure 51: Travel party over Time



Category	09–10	10–11	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	23–24	24–25
Partner	43%	46%	47%	47%	44%	46%	47%	43%	40%	43%	40%	47%	43%	41%	42%	40%
Family/Friends	47%	46%	45%	46%	44%	45%	42%	47%↑	48%	49%	48%	31%↓	49%↑	49%	46%↓	49%↑
Special interest/tour	5%	4%	3%	3%	5%↑	3%↓	4%	4%	5%	4%	5%	8%	3%	3%	3%	3%
Alone	4%	3%	4%	4%	7%↑	6%	6%	4%	6%	4%	5%	11%	4%↓	5%↑	8%↑	7%
Business associate	0%	0%	1%	1%	0%	0%	1%	1%	1%	1%	1%	3%	2%	1%	2%↑	1%

Q2 *On this trip, who did you travel with?*
Base: Visitors responding, (24/25 n=2074)
Note: Missing cases excluded.

Travel party by visitor origin

Table 8: Travel party by visitor origin over time

Intrastate Visitors	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)	23/24 (n=1198)	24/25 (n=734)
With family and friends	56%	58%	65%	58%	61%	60%	55%	54%	63%	60%	54%	35%	55%	57%	51%	57%↑
With a partner	36%	36%	30%	36%	30%	35%	38%	34%	27%	31%	31%	40%	36%	34%	35%	30%↓
With a special interest group	3%	2%	1%	2%	3%	2%	3%	5%	3%	3%	4%	12%	2%	2%	1%	2%
Alone	5%	3%	2%	3%	5%	3%	4%	5%	6%	4%	6%	7%	4%	5%	10%	7%↓
With business associate (with or without spouse)	<1%	1%	1%	1%	1%	1%	<1%	2%	1%	1%	5%	5%	2%	2%	4%	3%

Interstate Visitors	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)	23/24 (n=1655)	24/25 (n=1073)
With family and friends	46%	42%	35%	44%	40%	39%	37%	44%	42%	42%	49%	25%	37%	45%	44%	45%
With a partner	48%	51%	57%	49%	49%	54%	51%	47%	45%	50%	43%	57%	54%	47%	47%	45%
With a special interest group	3%	5%	2%	2%	5%	2%	4%	5%	6%	4%	4%	2%	6%	3%	3%	3%
Alone	3%	2%	6%	4%	6%	5%	7%	4%	7%	3%	4%	15%	3%	4%	5%	6%
With business associate (with or without spouse)	<1%	<1%	<1%	<1%	<1%	<1%	1%	<1%	<1%	<1%	-	<1%	<1%	<1%	1%	<1%

International Visitors	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)	23/24 (n=386)	24/25 (n=266)
With family and friends	38%	38%	37%	36%	38%	38%	34%	43%	42%	45%	41%	67%	59%	37%	36%	42%
With a partner	45%	51%	51%	54%	48%	43%	52%	49%	48%	44%	45%	33%	32%	38%	43%	41%
With a special interest group	12%	4%	7%	4%	5%	6%	5%	4%	3%	4%	7%	-	-	10%	7%	6%
Alone	5%	5%	5%	5%	9%	13%	7%	4%	6%	6%	6%	-	9%	15%	13%	11%
With business associate (with or without spouse)	<1%	<1%	1%	<1%	<1%	<1%	2%	<1%	1%	<1%	-	-	-	<1%	<1%	<1%

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

Types of Accommodation

In 2024/25, luxury lodge/retreats were used significantly more (from 4% to 7%). The most common types of accommodation continue to be a hotel/motel (23%) and holiday home (21%).

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)	23/24 (n=2836)	24/25 (n=1782)
Hotel / motel	28%	29%	26%	32%	30%	25%	25%	23%	25%	22%	24%	25%	25%	25%	26%	24%	24%	28%	38%	24%	22%	25%	23%
Holiday home	28%	13%	19%	26%	27%	21%	21%	22%	21%	26%	23%	22%	22%	27%	25%	25%	24%	23%	20%	25%	23%	23%	21%
Apartment / unit	-	-	-	-	-	-	-	12%	10%	10%	9%	11%	9%	7%	10%	13%	13%	11%	14%	11%	11%	10%	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%	15%	14%
Cabin / Cottage	18%	18%	17%	11%	12%	11%	10%	15%	11%	13%	13%	12%	12%	10%	12%	11%	11%	11%	7%	9%	8%	8%	10%
Luxury lodge / retreat^	-	-	-	-	-	-	-	9%	8%	8%	8%	8%	10%	7%	9%	8%	5%	8%	4%	4%	4%	4%	7%↑
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%	10%	11%
Backpacker hostel	3%	5%	7%	4%	4%	3%	2%	6%	4%	5%	4%	5%	4%	4%	3%	1%	1%	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%	9%	8%
Own property	-	-	-	-	-	-	-	<1%	1%	<1%	1%	1%	1%	<1%	1%	1%	<1%	1%	<1%	2%	2%	1%	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.
Note: ^ 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

Accommodation is mostly consistent in 2024/25 with no statistically significant differences noted amongst international visitors. Less interstate visitors stayed at a hotel/motel (from 28% to 25%) and more opted for luxury lodges/retreats (from 4% to 7%) and bed & breakfast or farm stays (from 9% to 12%). Amongst intrastate visitors, there was a significant increase in those staying with in a cabin (from 7% to 11%) and luxury lodge/retreats (from 3% to 5%).

Table 10: Accommodation Used by Visitor Origin

	Intrastate							Interstate							International						
	18/19 (n=356)	PC 19/20 (n=203)	CR 20/21 (n=81)	21/22 (n=795)	22/23 (n=1241)	23/24 (n=1119)	24/25 (n=681)	18/19 (n=722)	PC 19/20 (n=328)	CR 20/21 (n=118)	21/22 (n=526)	22/23 (n=1811)	23/24 (n=1435)	24/25 (n=918)	18/19 (n=417)	PC 19/20 (n=252)	CR 20/21 (n=3)	21/22 (n=19)	22/23 (n=228)	23/24 (n=277)	24/25 (n=182)
Hotel / motel	15%	16%	34%	21%	15%	16%	15%	24%	27%	45%	29%	26%	29%	25%↓	39%	42%	67%	26%	40%	44%	41%
Holiday home	36%	31%	21%	30%	32%	28%	26%	21%	24%	18%	17%	18%	20%	19%	13%	12%	33%	5%	14%	15%	13%
Apartment / unit	12%	15%	13%	11%	11%	10%	10%	13%	8%	15%	11%	12%	10%	12%	12%	11%	-	5%	8%	11%	12%
Camping, caravan or motorhome	11%	7%	6%	9%	10%	11%	9%	24%	18%	15%	18%	20%	18%	18%	14%	9%	-	37%	12%	10%	7%
Cabin	11%	9%	9%	8%	8%	7%	11%↑	12%	13%	3%	10%	8%	9%	11%	10%	10%	-	5%	8%	6%	4%
Luxury lodge/Retreat	3%	4%	2%	5%	3%	3%	5%↑	5%	6%	6%	3%	5%	4%	7%↑	8%	13%	-	-	5%	8%	13%
Bed & breakfast or farm stay	7%	11%	9%	12%	12%	12%	12%	9%	10%	<1%	11%	11%	9%	12%↑	5%	6%	-	16%	9%	9%	7%
Backpacker hostel	1%	-	-	1%	-	0%	0%	1%	1%	-	<1%		<1%	<1%	2%	1%	-	-	-	-	-
Friends / relatives	8%	6%	2%	8%	12%	16%	15%	4%	5%	1%	3%	4%	4%	5%	1%	1%	-	5%	5%	1%	1%
Own property	1%	3%	-	2%	4%	3%	4%	<1%	1%	<1%	1%	1%	<1%	<1%	<1%	-	-	-	1%	-	-

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 2024/25 has remained consistent with the previous wave (87% to 86%). There has been reduced satisfaction with rented apartments (from 89% to 84%), camping/caravans/motorhomes (from 86% to 78%), self-contained bed & breakfasts/farm stays (from 90% to 87%), and Backpacker hostels (from 100% to 67%). Only luxury lodge/retreats had an increase in satisfaction (from 93% to 95%).

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)	23/24 (n=2771)	24/25 (n=1710)
Total Satisfaction	**78%**	**76%**	**77%**	**80%**	**80%**	**80%**	**79%**	**78%**	**79%**	**75%**	**86%**	**86%**	**87%**	**86%**
Hotel / motel	79%	66%	75%	71%	71%	73%	71%	77%	74%	82%	78%	83%	80%	79%
Holiday home	84%	91%	87%	87%	93%	85%	88%	88%	89%	73%	94%	91%	92%	91%
Rented apartment or flat or unit	82%	84%	81%	78%	93%	84%	86%	84%	77%	77%	83%	85%	89%	84%↓
Camping, caravan or motor home	67%	60%	59%	64%	70%	72%	66%	71%	76%	67%	80%	82%	86%	78%↓
Cabin	68%	67%	72%	63%	85%	77%	75%	80%	84%	51%	91%	77%	86%	87%
Luxury lodge/Retreat	80%	80%	87%	86%	84%	86%	87%	88%	81%	99%	96%	95%	93%	95%↑
Hosted bed & breakfast or farm stay	87%	89%	93%	92%	82%	84%	73%	82%	89%	99%	95%	85%	93%	93%
Self-contained bed & breakfast or farm stay	77%	93%	82%	96%	79%	95%	88%	83%	75%	100%	86%	91%	90%	87%↓
Backpacker hostel	63%	72%	56%	69%	52%	69%	80%	59%	100%	-	80%	-	100%	67%↓
Friends / relatives	78%	87%	94%	91%	89%	93%	95%	86%	80%	96%	95%	93%	94%	94%

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

	2024/25
A) Luxury Lodge / Retreat	95% ↑H, ↑I
B) Friends / Relatives	94% ↑I
C) Hosted bed & breakfast	93%
D) Holiday home	91% ↑I
E) Self-contained bed & breakfast or farm stay	87%
F) Own property	87%
G) Cabin	87%
H) Rented apartment or flat or unit	84%
I) Hotel / Motel	79%

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

Perceptions of Kangaroo Island's offerings have remained largely stable, with a slight drop in cultural heritage and settlement history (80% to 77%) and a small increase in the view that it is one of Australia's top three nature and wildlife experiences (74% to 77%).
Visitor experiences on Kangaroo Island showed slight declines in island produce (86% to 82%), friendliness and local community (94% to 92%), and cultural heritage and settlement history (71% to 67%). On a positive note, more Australians felt they experienced it as one of the country's top three nature and wildlife destinations (75% to 78%).

Table 13: Credible vs. experienced attributes and attractions

	Credible									Experienced								
	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)	23/24 (min n=2499)	24/25 (min n=2176)	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)	23/24 (min n=2327)	24/25 (min n=2146)
Spectacular scenery and coastal beauty	99%	99%	99%	99%	100%	99%	99%	99%	-	99%	99%	99%	99%	100%	99%	99%	99%	-
Areas of untouched natural beauty	97%	97%	97%	96%	97%	97%	97%	97%	97%	97%	97%	95%	95%	97%	96%	94%	94%	94%
Viewing Aus' wildlife in natural surroundings	98%	98%	98%	99%	97%	97%	98%	98%	-	97%	97%	96%	96%	95%	93%	93%	93%	95%
Scenic variety without crowds of people	96%	96%	95%	96%	98%	99%	97%	96%	96%	97%	97%	96%	97%	96%	97%	97%	96%	95%
Farming and rural landscapes	94%	94%	93%	93%	97%	97%	96%	95%	-	92%	88%	87%	87%	92%	90%	88%	89%	-
Island produce (food & wine)	94%	91%	93%	91%	99%	98%	97%	95%	93%	87%	83%	83%	82%	96%	93%	89%	86%	83%↓
A friendly local community	91%	92%	91%	91%	94%	94%	94%	93%	91%	94%	93%	93%	91%	97%	94%	95%	94%	92%↓
The cultural heritage and history of settlement	80%	80%	78%	78%	78%	81%	83%	80%	77%↓	74%	72%	70%	70%	75%	72%	71%	71%	67%↓
One of Australia's top 3 nature and wildlife exp'	66%	67%	72%	77%	65%	76%	77%	74%	77%↑	80%	81%	81%	82%	75%	75%	76%	75%	78%↑

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, except for decreased satisfaction with the quality of interpretive signs (81% to 78%) and increase in the quality of the roads (61% to 66%).

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	23/24	24/25
Your national parks experience	-	-	-	-	-	-	-	-	-	-	-	-	-	94%
The level customer service you received	82%	84%	84%	84%	86%	88%	87%	88%	88%	86%	92%	92%	93%	92%
Seeing wildlife in the natural environment	84%	82%	84%	84%	87%	88%	88%	90%	88%	91%	91%	90%	90%	91%
The quality of Island produce (food & wine)	78%	78%	80%	82%	84%	84%	85%	84%	86%	90%	93%	91%	89%	90%
The quality of activities available	78%	79%	80%	80%	82%	85%	84%	85%	86%	88%	89%	90%	89%	89%
The professionalism of tourism businesses	79%	78%	82%	82%	83%	86%	85%	88%	85%	84%	91%	90%	91%	90%
The range of activities available	76%	78%	79%	80%	81%	83%	81%	84%	84%	86%	87%	88%	87%	87%
The quality of accommodation	78%	76%	76%	76%	80%	80%	78%	81%	80%	79%	86%	86%	87%	86%
Your opportunity to learn more about the Island's natural environment	77%	78%	80%	80%	80%	82%	86%	84%	83%	85%	86%	85%	87%	86%
The quality of picnic/day use areas	80%	83%	82%	82%	83%	85%	83%	84%	85%	87%	89%	88%	87%	88%
The range of island produce (food & wine)	71%	72%	72%	74%	78%	79%	81%	78%	79%	87%	88%	89%	86%	85%
The availability of activities	73%	74%	75%	76%	75%	79%	78%	80%	81%	83%	86%	85%	84%	85%
The quality of interpretive/ educational signage	75%	72%	75%	76%	79%	79%	79%	79%	83%	77%	82%	81%	81%	78%↓
Your opportunity to learn more about the Island's history**	68%	66%	70%	68%	73%	75%	75%	78%	75%	79%	76%	77%	79%	77%
The availability of island produce (food & wine)	67%	69%	69%	72%	74%	74%	76%	76%	78%	83%	85%	84%	82%	81%
The quality of public toilets	75%	74%	74%	79%	80%	80%	76%	79%	80%	76%	86%	85%	83%	82%
The quality of road signage	70%	69%	73%	70%	75%	74%	73%	80%	81%	78%	84%	82%	81%	83%
The quality of campgrounds	72%	66%	69%	70%	73%	75%	73%	75%	81%	79%	86%	83%	83%	81%
The quality of roads	63%	56%	62%	61%	66%	63%	68%	68%	77%	67%	63%	65%	61%	66%↑

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* <u>*cultural*</u> *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. Reasons for dissatisfaction have remained consistent with the previous year.

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)	23/24 (n=497)	24/25 (n=286)
Road Infrastructure	13%	10%	6%	9%	9%	8%	7%	6%	24%	26%	33%	29%	39%↑	32%
Better road signage (attractions/ airport/ ferry)^	—	7%	5%	9%	7%	6%	8%	4%	10%	19%	14%	16%	15%	19%
Quality of Accommodation / or lack of	5%	5%	2%	3%	3%	4%	2%	4%	4%	6%	12%	11%	7%	8%
Bad quality / availability public toilets / bins / picnic areas	3%	4%	3%	3%	3%	4%	3%	3%	4%	22%	7%	9%	8%	10%
Customer service and friendless/ or lack of	4%	3%	3%	3%	3%	3%	2%	1%	6%	10%	13%	8%	6%	6%
Limited Trading Hours	3%	4%	3%	4%	5%	3%	4%	1%	10%	7%	10%	7%	8%	7%
Expenses at KI	5%	3%	2%	4%	4%	3%	2%	1%	11%	-	5%	9%	7%	5%
Lack of restaurants, cafes, other eating places	1%	1%	1%	2%	2%	3%	2%	1%	5%	6%	11%	6%↓	8%	10%
More / better tourist information	3%	3%	3%	3%	4%	3%	3%	2%	27%	7%	15%	10%	10%	9%
Habitat / Wildlife	2%	1%	1%	2%	1%	1%	1%	1%	6%	3%	2%	3%	3%	4%
Too much roadkill	1%	1%	1%	2%	1%	1%	1%	0%	5%	3%	3%	3%	1%	3%
Availability of local produce	1%	2%	1%	2%	3%	2%	1%	1%	3%	3%	4%	6%	3%	6%
Quality/ availability of activities/ tour guides	3%	3%	1%	3%	2%	3%	3%	3%	13%	6%	5%	11%↑	9%	14%
Bad/ lack of food options in restaurants	2%	2%	1%	3%	1%	2%	1%	1%	1%	13%	7%	4%	4%	7%
Mobile phone coverage	<1%	<1%	<1%	<1%	<1%	1%	0%	0%	3%	<1%	1%	1%	2%	1%
Other	2%	3%	8%	4%	6%	2%	0%	1%	9%	10%	10%	6%	3%	4%
Everything fine / not dissatisfied	2%	2%	1%	2%	4%↑	3%	7%	1%	4%	6%	2%	2%	2%	3%
Did not comment	60%	56%	67%	60%	59%	63%	70%	78%	5%	-	1%	1%	6%↑	2%

Q20. *For any item in question 19 above that you have expressed dissatisfaction with, please provide further comment.*
Base: 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 with no significant differences in suggestions.

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)	23/24 (n=1957)	24/25 (n=1184)
Improve road infrastructure	10%	9%	6%	10%	8%	5%	7%	7%	9%	18%	13%	13%	14%	11%
Improve road signage/ attraction signage/ improve map/ provide map^	—	6%	3%	6%	5%	3%	5%	4%	10%	10%	6%	7%	7%	8%
Improve quality/ number of stores, restaurants, takeaway shops	4%	4%	3%	4%	3%	4%	5%	3%	8%	14%	14%	9%	9%	8%
Lower the cost of travel	9%	8%	5%	7%	7%	3%	6%	4%	3%	2%	6%	8%	8%	10%
More/ accurate tourist information	8%	8%	5%	9%	9%	5%	6%	6%	11%	14%	10%	11%	12%	11%
Reduce expenses on the Island (activities, food, petrol etc.)	5%	4%	3%	3%	3%	2%	1%	1%	4%	2%	3%	3%	4%	3%
Extend length of stay	2%	2%	3%	3%	4%	2%	1%	2%	3%	-	3%	5%	5%	6%
Improve public transport, bus/ taxi / infrastructure	2%	1%	1%	1%	1%	1%	2%	1%	4%	2%	1%	4%	6%↑	8%
Extend trading hours (shops/ restaurants/ tours/ petrol stations)	2%	3%	3%	2%	4%	3%	3%	3%	6%	6%	4%	5%	4%	4%
Improve quality/ availability of accommodation	1%	1%	1%	3%	3%	1%	2%	1%	3%	4%	3%	5%	3%↓	3%
More activities / wildlife viewing opportunities	1%	2%	3%	4%	1%	2%	3%	3%	7%	<1%	4%	5%	7%	8%
Improve mobile phone/ Internet coverage	1%	1%	1%	1%	2%	2%	1%	2%	2%	2%	3%	3%	2%	1%

	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)	23/24 (n=1957)	24/25 (n=1184)
Improve public infrastructure (public toilets, rubbish bins, picnic areas etc.)	1%	3%	2%	1%	1%	1%	5%	4%	3%	14%	3%	4%	5%	5%
Reduce roadkill/ speed limits	1%	3%	2%	2%	2%	2%	1%	1%	3%	6%	1%	3%	3%	3%
More/ better local produce	2%	2%	1%	2%	3%	2%	1%	1%	3%	0%	2%	2%	2%	2%
Improve customer service/ friendliness of locals	1%	1%	2%	1%	2%	1%	1%	1%	2%	2%	2%	2%	2%	1%
Keep KI untouched/ limit development	3%	3%	1%	1%	2%	2%	2%	2%	4%	12%	2%	3%	3%	2%
Car rental - reduce costs/ availability/ provide more information	1%	1%	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%	5%↓	3%
No Comment / no suggestion	49%	47%	55%	41%	46%	60%	56%	62%	25%	17%	11%	10%	10%	13%↑
Positive comment	-	-	-	-	-	-	-	-	-	-	-	-	-	17%

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=71) of the total sample were dissatisfied overall in 2024/25, scoring a 5 or below out of 10 for Q22: Overall Satisfaction. Compared to the total sample, these visitors tended to arrive by be day trippers (30% vs 16%), and arrive by cruise (14% vs 4%).

Table 17: Who was dissatisfied?

	23/24 respondents (min n=125)	Total 24/25 respondents (min n=71)
Travel party		
Travelling with family or friends	46%	46%
Travelling with partner	42%	44%
Travelling with special interest/tour group	6%	5%
Travelling alone	5%	5%
Travelling with business associates (with or without spouse)	3%	0%
Season visited		
Winter	9%	14%
Spring	24%	24%
Summer	43%	36%
Autumn	24%	25%
Previous visitation		
Yes	34%	34%
No	66%	66%
Visitor Origin		
Intrastate	35%	36%
Interstate	53%	51%
International	11%	13%
Arrival transportation		
Air	3%	11%
Sea	97%	89%
Type of stay		
Day trip	22%	30%
Overnight	78%	70%

	23/24 respondents (min n=125)	Total 24/25 respondents (min n=71)
Trip as part of package		
Yes	16%	15%
No	84%	85%
Spend		
Up to $200 per night	51%	36%
More than $200 per night	49%	64%

Table 18: What were they dissatisfied with?

	24/25 dissatisfied respondents (min n=22)	Total 24/25 respondents (min n=501)
	% Very dissatisfied / dissatisfied (bottom 2 box out of 5)	
The quality of campgrounds	50%	6%
The availability of activities	47%	4%
The quality of interpretive/ educational signage	46%	5%
The quality of activities available	43%	3%
The availability of Island produce (food & wine)	43%	5%
The range of activities available	41%	3%
The range of Island produce (food & wine)	41%	4%
The professionalism of tourism businesses	40%	3%
Seeing wildlife in the natural environment	36%	4%
Your opportunity to learn more about the Island's natural environment	36%	3%
The quality of roads	35%	9%
Your national parks experience	34%	3%
The quality of road signage	34%	5%
The quality of public toilets	34%	5%
The quality of picnic/ day use areas	33%	3%
The quality of accommodation	33%	4%
Your opportunity to learn more about the Island's history	32%	5%
The quality of Island produce (food & wine)	31%	3%
The level of customer service you received	25%	3%

Table 19: Reasons for dissatisfaction (Q20)

	24/25 respondents n=286
Road Infrastructure	32%
Better road signage (attractions/ airport/ ferry)	19%
Quality/ availability of activities/ tour guides	14%
Bad quality / availability public toilets / bins / picnic areas	10%
A lack of restaurants, cafes and other eating places	10%
More / better tourist information	9%
Quality of Accommodation / or lack of	8%
Bad/ lack of food options in restaurants	7%
Limited Trading Hours	7%
More local produce	6%
Customer service and friendless/ or lack of	6%
Expenses at KI	5%
Habitat / Wildlife	4%
Too much roadkill	3%
Mobile phone coverage	1%
Other	4%
Everything fine / not dissatisfied	3%
No Comments / NA / Blank Cells	2%

Q20 *For any item in question 19 above that you have expressed dissatisfaction with, please provide further comment.*
Base: Total visitors responding

Seasonal variances

The proportion of visitors by season

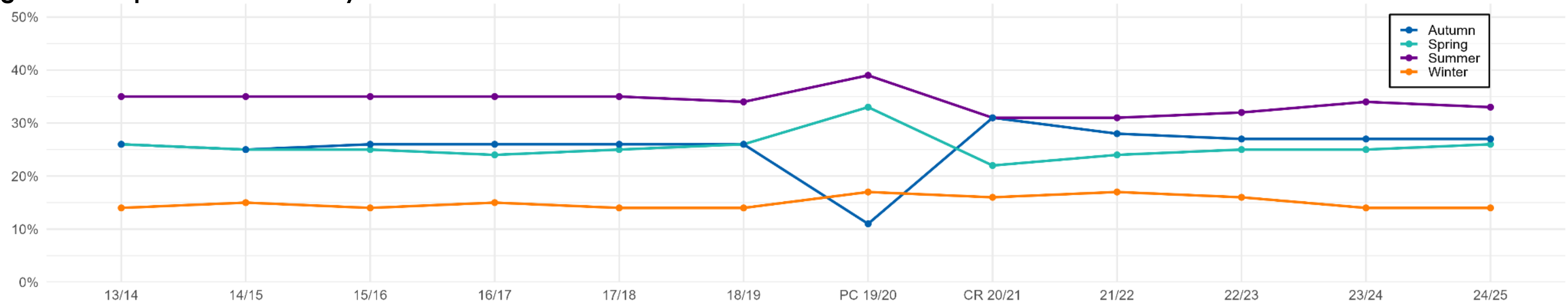
The distribution of visitors to Kangaroo Island who completed a survey across each season varies and should be considered when viewing the results throughout this section. Most surveys for the 2024/25 period were completed in summer, with the lowest number of completes in winter.

Table 20: Base size by season

Season	2024/25 count
Winter	361
Spring	428
Summer	716
Autumn	671
Total	**2176**
These figures are direct from the KI Visitor Exit Survey	

Summer continues to be the most popular season to visit Kangaroo Island, accounting for 33% visitors in 2024/25. The seasonal proportions in visitation have remained relatively consistent across waves, besides the major disruptions in pre-COVID 19/20.

Figure 52: Proportion of visitors by season



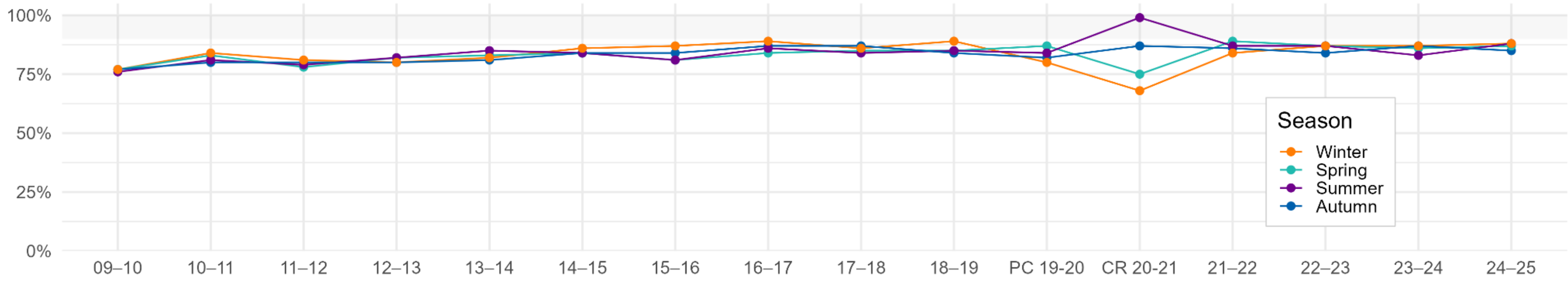
Season	13/14	14/15	15/16	16/17	17/18	18/19	PC 19/20	CR 20/21	21/22	22/23	23/24	24/25
Winter	14%	15%	14%	15%	14%	14%	17%	16%	17%	16%	14%	14%
Spring	26%	25%	25%	24%	25%	26%	33%	22%	24%	25%	25%	26%
Summer	35%	35%	35%	35%	35%	34%	39%	31%	31%	32%	34%	33%
Autumn	26%	25%	26%	26%	26%	26%	11%	31%	28%	27%	27%	27%

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 similar for those who visited in winter, spring and autumn (85%-88%) and significantly higher for summer visitors (88%).

Figure 53: Visitors who were extremely satisfied with their overall experience on Kangaroo Island by season**



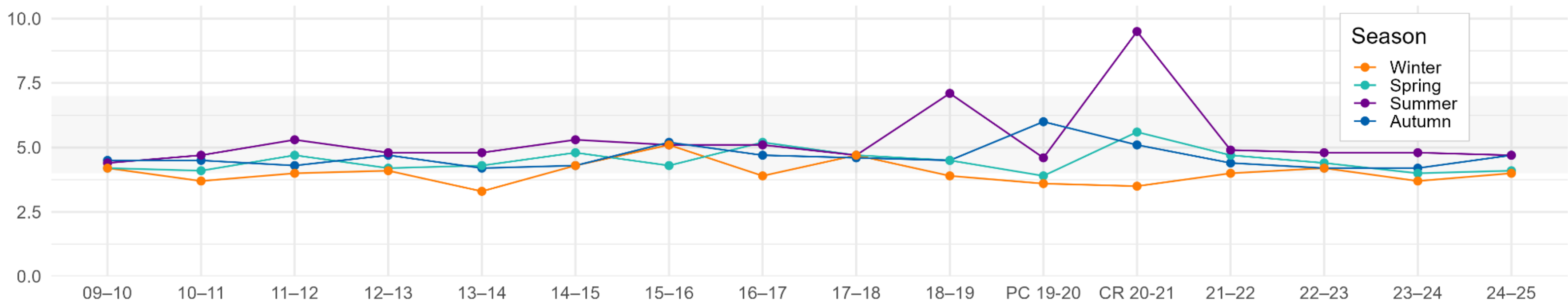
Season	09–10	10–11	11–12	12–13	13–14	14–15	15–16	16–17	17–18	18–19	PC 19-20	CR 20-21	21–22	22–23	23–24	24–25
Winter	77%	84%	81%	80%	82%	86%	87%	89%	86%	89%	80%↓	68%	84%	87%	87%	88%
Spring	77%	83%	78%	82%	83%	84%	81%	84%	85%	85%	87%	75%	89%	87%	86%	87%
Summer	76%	81%	79%	82%	85%	84%	81%	86%	84%	85%	84%	99%↑	87%↓	87%	83%↓	88%↑
Autumn	77%	80%	80%	80%	81%	84%	84%	87%	87%	84%	82%	87%	86%	84%	87%	85%

Q22 *Taking into account all aspects of your visit to Kangaroo Island, how would you rate your overall satisfaction?*
Base: Visitors responding, (24/25 n=2176)
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 2024/25 has increased since the previous wave during autumn (4.2 to 4.7 nights). Winter (3.7 to 4) also increased - however this was not significant, and spring (4.1) and summer (4.7) have remained the same.

Figure 54: Average number of nights stayed by season



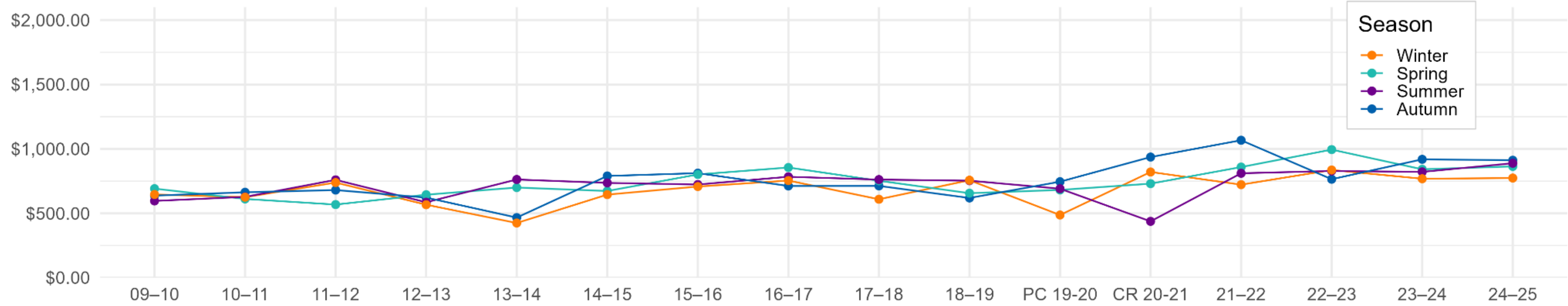
Season	09–10	10–11	11–12	12–13	13–14	14–15	15–16	16–17	17–18	18–19	PC 19-20	CR 20-21	21–22	22–23	23–24	24–25
Winter	4.2	3.7	4	4.1	3.3	4.3↑	5.1	3.9	4.7↑	3.9	3.6	3.5	4	4.2	3.7	4
Spring	4.2	4.1	4.7	4.2	4.3	4.8	4.3	5.2↑	4.7	4.5	3.9↓	5.6	4.7	4.4	4	4.1
Summer	4.4	4.7	5.3	4.8	4.8	5.3	5.1	5.1	4.7	7.1↑	4.6↓	9.5	4.9	4.8	4.8	4.7
Autumn	4.5	4.5	4.3	4.7	4.2	4.3	5.2↑	4.7	4.6	4.5	6	5.1	4.4	4.2	4.2	4.7↑

Q6 *Did you stay one or more nights or was it a day trip?*
Base: Visitors responding, (24/25 n=2176)
Note: Arrows indicate significant change in score from previous year

Average expenditure per visit by season

Expenditure by season has remained consistent with the last wave with no significant changes.

Figure 55: Average total expenditure per person per visit by season



Season	09–10	10–11	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	23–24	24–25
Winter	$646.17	$625.52	$739	$567.06	$424.94↓	$645.37↑	$708	$754.59	$609.22	$757.21	$487.15↓	$820.99↑	$722.79	$836.3	$768.67	$774.01
Spring	$691.76	$611.68↓	$568.19	$644.44	$700.23	$673.43	$801.79↑	$855.82	$753.09↓	$656.36	$681.7	$730.55	$859.19	$994.83↑	$841.9↓	$864.03
Summer	$596.35	$627.79	$760.02	$585.99	$762.74	$736.29	$723.9	$783.89	$762.16	$753.58	$691.18	$437.75	$811.01↑	$828.72	$821.69	$888.8
Autumn	$637.35	$663.5	$680.81	$622.19	$467.11↓	$790.17↑	$811.79	$712.63↓	$713.11	$619.23↓	$745.71	$936.91	$1067.39	$764.96↓	$919.3↑	$912.23

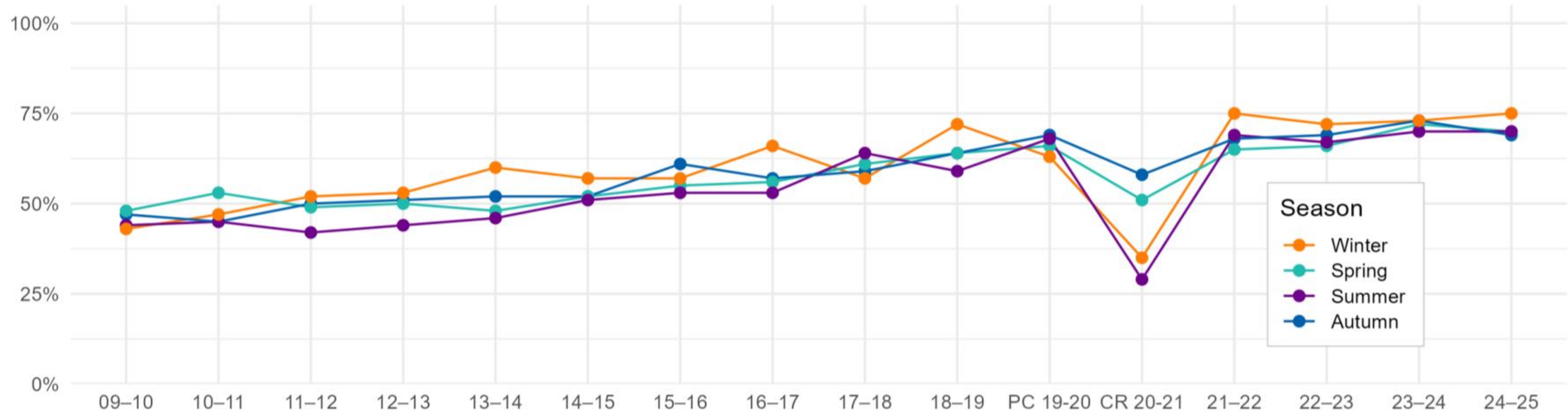
Q6 *Did you stay one or more nights or was it a way trip?*
Q8 *What was the cost of the total package?*
Q11 *What is your best guess of the total Kangaroo Island component of the package?*
Q13 *What additional money did you spend on top of the package whilst on the Island?*
Q14 *Please indicate how much you spent on your trip to Kangaroo Island?*
Q14(new) Please estimate how much you spent on each part of your trip to Kangaroo Island?

Q15 *How many people did these costs cover?*
Base: Visitors responding, (24/25 n=1731)
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
Note: A simplified version of the expenditure question was introduced in 2024/25 to collect more complete and accurate spend information

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 has continued to increase across all seasons, though none of these differences are significant.

Figure 56: Visitors who were very satisfied with customer service received by season



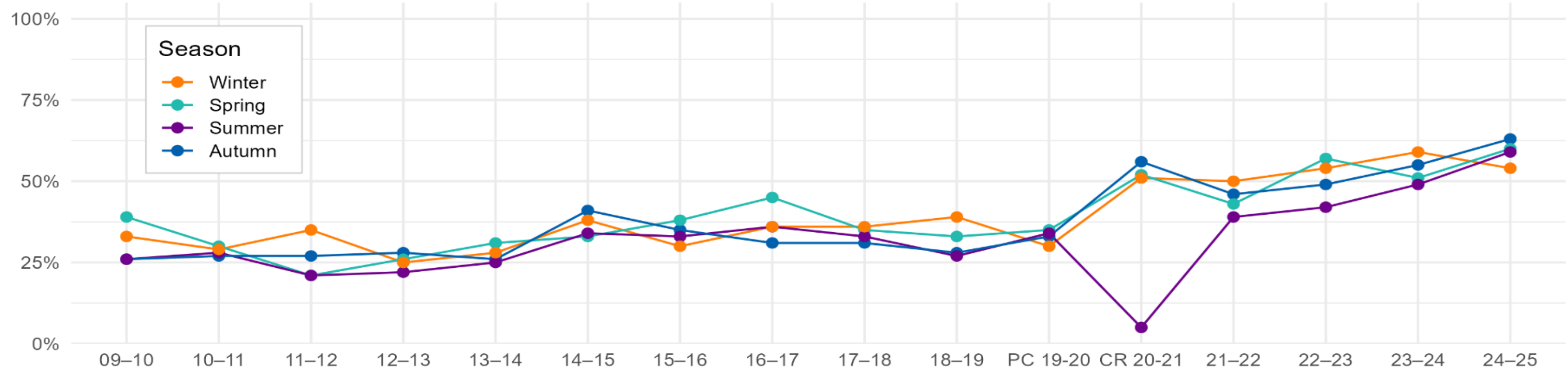
Season	09–10	10–11	11–12	12–13	13–14	14–15	15–16	16–17	17–18	18–19	PC 19-20	CR 20-21	21–22	22–23	23–24	24–25
Winter	43%	47%	52%	53%	60%	57%	57%	66%	57%	72%	63%	35%	75%↑	72%	73%	75%
Spring	48%	53%	49%	50%	48%	52%	55%	56%	61%	64%	66%	51%	65%	66%	72%↑	70%
Summer	44%	45%	42%	44%	46%	51%	53%	53%	64%↑	59%	68%	29%	69%	67%	70%	70%
Autumn	47%	45%	50%	51%	52%	52%	61%↑	57%	59%	64%	69%	58%	68%	69%	73%↑	69%

Q19.7 *Please indicate how satisfied you were with the level of customer service you received.*
Base: Visitors who experienced it, (24/25 n=1955)
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 (51% to 60%), summer (49% to 59%) and autumn (55% to 63%), all of which were significant increases.

Figure 57: Visitors who spent $200+ per night by season



Season	09–10	10–11	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	23–24	24–25
Winter	33%	29%	35%	25%↓	28%	38%	30%	36%	36%	39%	30%	51%	50%	54%	59%	54%
Spring	39%	30%	21%↓	26%	31%	33%	38%	45%	35%↓	33%	35%	52%	43%	57%↑	51%	60%↑
Summer	26%	28%	21%	22%	25%	34%↑	33%	36%	33%	27%	34%	5%↓	39%↑	42%	49%↑	59%↑
Autumn	26%	27%	27%	28%	26%	41%↑	35%	31%	31%	28%	33%	56%	46%	49%	55%↑	63%↑

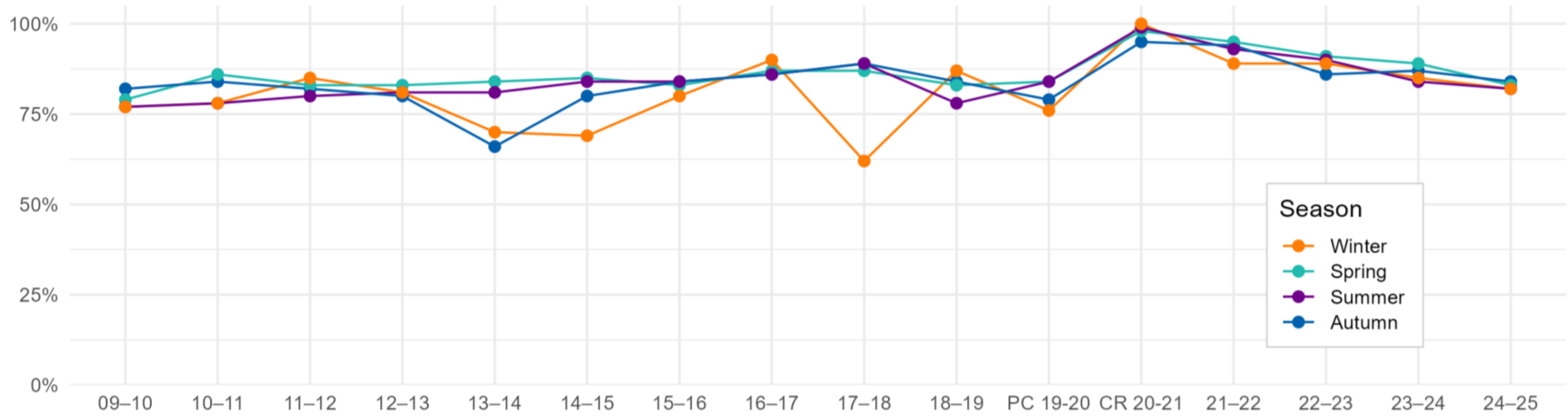
Q6 *Did you stay one or more nights or was it a day trip?*
Q8 *What was the cost of the total package?*
Q11 *What is your best guess of the total Kangaroo Island component of the package?*
Q13 *What additional money did you spend on top of the package whilst on the Island?*
Q14 *Please indicate how much you spent on your trip to Kangaroo Island?*
Q15 *How many people did these costs cover?*

Base: Visitors responding, (24/25 n=1731)
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 trend downwards following the COVID-19 recovery period for all seasons except for autumn; this decrease was statistically significant for spring visitors (from 89% to 83%).

Figure 58: Visitors that experienced local Kangaroo Island produce by season



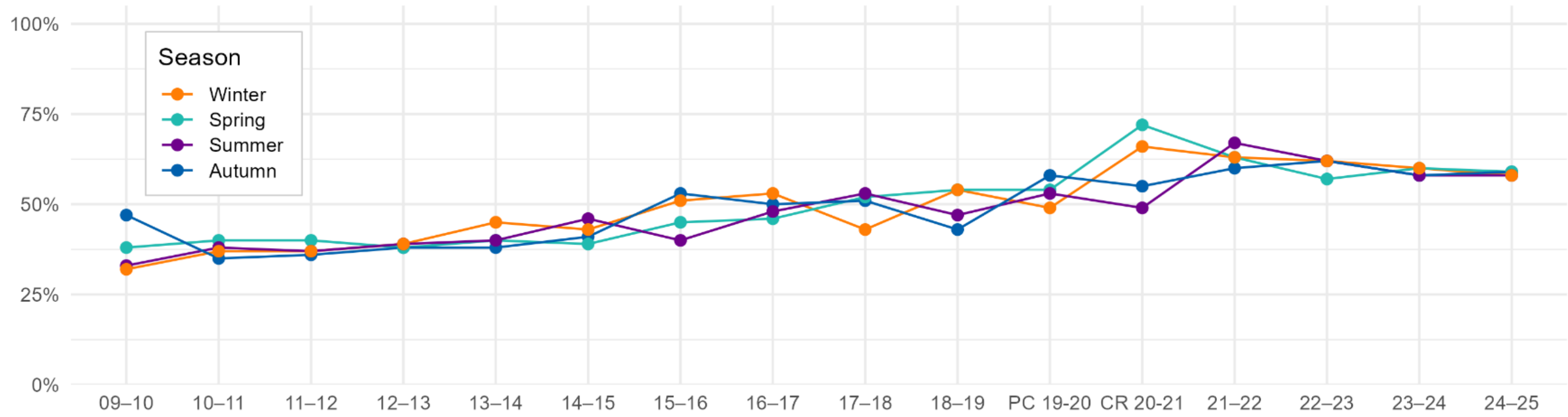
Season	09–10	10–11	11–12	12–13	13–14	14–15	15–16	16–17	17–18	18–19	PC 19-20	CR 20-21	21–22	22–23	23–24	24–25
Winter	77%	78%	85%	81%	70%↓	69%	80%↑	90%↑	62%↓	87%↑	76%↓	100%↑	89%↓	89%	85%	82%
Spring	79%	86%	83%	83%	84%	85%	83%	87%	87%	83%	84%	98%↑	95%	91%↓	89%	83%↓
Summer	77%	78%	80%	81%	81%	84%	84%	86%	89%	78%↓	84%	99%↑	93%↓	90%↓	84%↓	82%
Autumn	82%	84%	82%	80%	66%↓	80%↑	84%	86%	89%	84%↓	79%	95%	94%	86%↓	87%	84%

Q18.8 For each of the following please indicate whether you experienced this while on Kangaroo Island?
Base: Visitors responding, (24/25 n=2138)
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 has remained consistent for all seasons since last wave.

Figure 59: Visitors very satisfied with the <u>range</u> of local Kangaroo Island produce by season

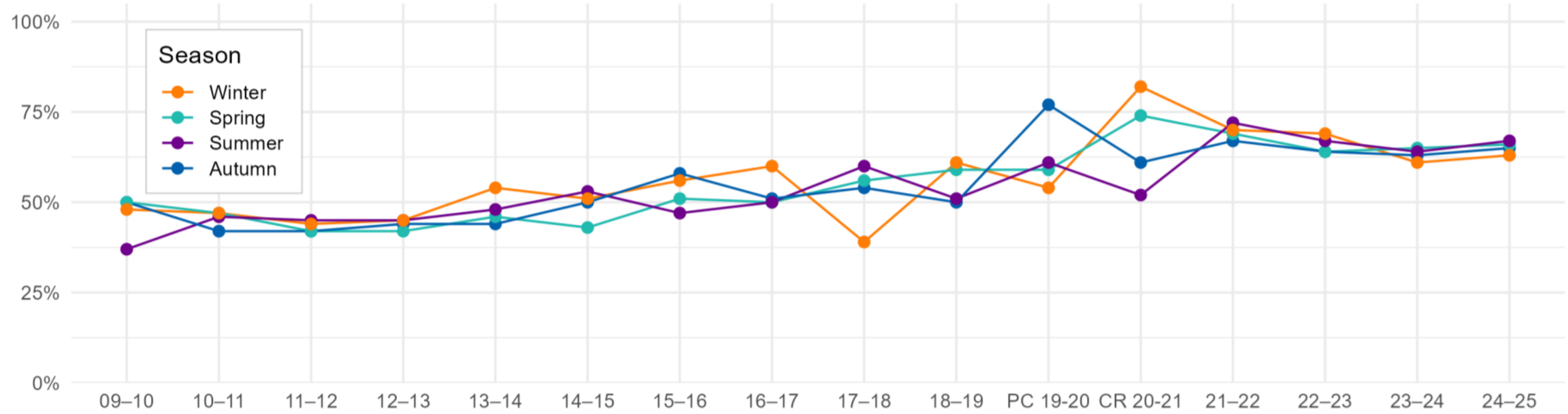


Season	09–10	10–11	11–12	12–13	13–14	14–15	15–16	16–17	17–18	18–19	PC 19-20	CR 20-21	21–22	22–23	23–24	24–25
Winter	32%	37%	37%	39%	45%	43%	51%	53%	43%	54%	49%	66%	63%	62%	60%	58%
Spring	38%	40%	40%	38%	40%	39%	45%	46%	52%	54%	54%	72%	63%	57%	60%	59%
Summer	33%	38%	37%	39%	40%	46%	40%	48%	53%	47%	53%	49%	67%	62%	58%↓	58%
Autumn	47%	35%↓	36%	38%	38%	41%	53%↑	50%	51%	43%↓	58%	55%	60%	62%	58%	59%

Q19.4 *Please indicate how satisfied you were with....*
Base: Visitors who experienced it, (24/25 n=1894)
Note: Don't know, didn't experience and missing cases excluded

Levels of satisfaction with the quality of local produce have remained consistent for all seasons since the previous wave.

Figure 60: Visitors very satisfied with the quality of local Kangaroo Island produce by season

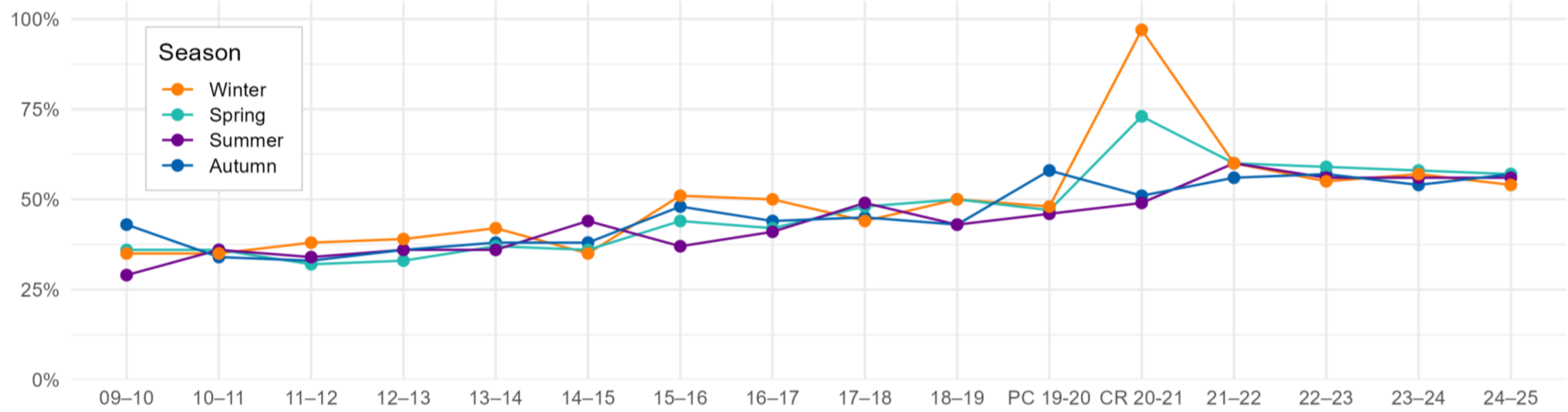


Season	09–10	10–11	11–12	12–13	13–14	14–15	15–16	16–17	17–18	18–19	PC 19-20	CR 20-21	21–22	22–23	23–24	24–25
Winter	48%	47%	44%	45%	54%	51%	56%	60%	39%↓	61%↑	54%	82%	70%	69%	61%↓	63%
Spring	50%	47%	42%	42%	46%	43%	51%	50%	56%	59%	59%	74%	69%	64%	65%	66%
Summer	37%	46%↑	45%	45%	48%	53%	47%	50%	60%↑	51%↓	61%	52%	72%	67%	64%	67%
Autumn	50%	42%	42%	44%	44%	50%	58%	51%	54%	50%	77%↑	61%	67%	64%	63%	65%

Q19.5 *Please indicate how satisfied you were with....*
Base: Visitors who experienced it, (24/25 n=1892)
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 has slightly decreased for autumn and increased in winter- though these differences are not statistically significant.

Figure 61: Visitors very satisfied with the availability of local Kangaroo Island produce by season



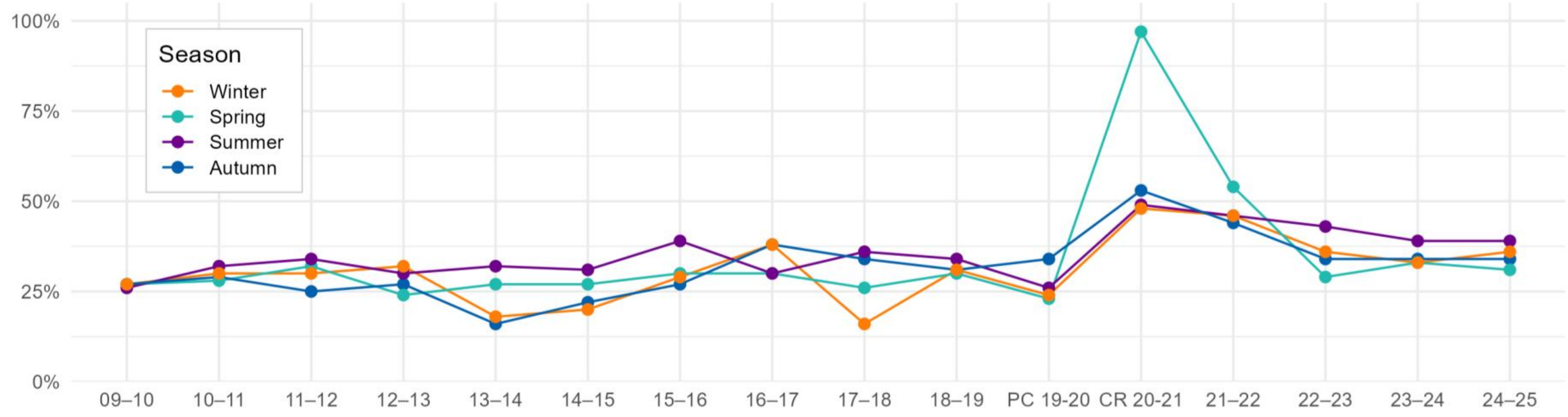
Season	09–10	10–11	11–12	12–13	13–14	14–15	15–16	16–17	17–18	18–19	PC 19-20	CR 20-21	21–22	22–23	23–24	24–25
Winter	35%	35%	38%	39%	42%	35%	51%↑	50%	44%	50%	48%	97%↑	60%↓	55%	57%	54%
Spring	36%	36%	32%	33%	37%	36%	44%	42%	48%	50%	47%	73%	60%	59%	58%	57%
Summer	29%	36%	34%	36%	36%	44%↑	37%	41%	49%↑	43%	46%	49%	60%	56%	56%	56%
Autumn	43%	34%↓	33%	36%	38%	38%	48%↑	44%	45%	43%	58%	51%	56%	57%	54%	57%

Q19.6 *Please indicate how satisfied you were with....*
Base: Visitors who experienced it, (24/25 n=1878)
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 has not changed significantly since the previous wave.

Figure 62: Repeat visitors by season



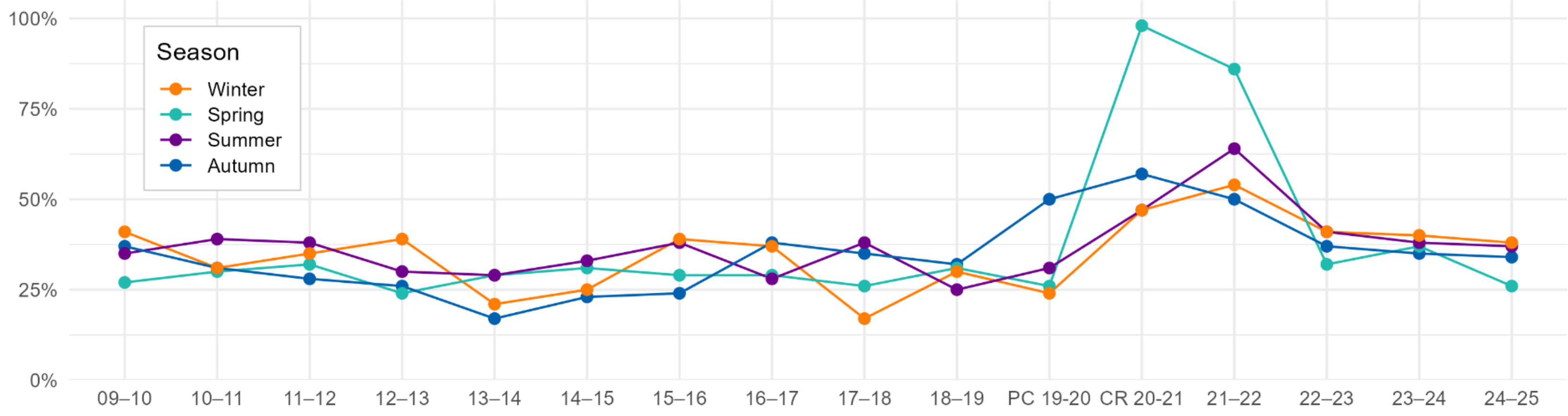
Season	09–10	10–11	11–12	12–13	13–14	14–15	15–16	16–17	17–18	18–19	PC 19-20	CR 20-21	21–22	22–23	23–24	24–25
Winter	27%	30%	30%	32%	18%↓	20%	29%	38%	16%↓	31%↑	24%	48%	46%	36%↓	33%	36%
Spring	27%	28%	32%	24%↓	27%	27%	30%	30%	26%	30%	23%↓	97%↑	54%↓	29%↓	33%	31%
Summer	26%	32%	34%	30%	32%	31%	39%↑	30%↓	36%	34%	26%	49%	46%	43%	39%↓	39%
Autumn	27%	29%	25%	27%	16%↓	22%↑	27%	38%↑	34%	31%	34%	53%	44%	34%↓	34%	34%

Q3 *Have you ever visited Kangaroo Island before this trip?*
Base: Visitors responding (24/25 n=2176)
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

Since the previous wave, the proportion of intrastate spring visitors has decreased, and the proportion of international spring and summer visitors has increased.

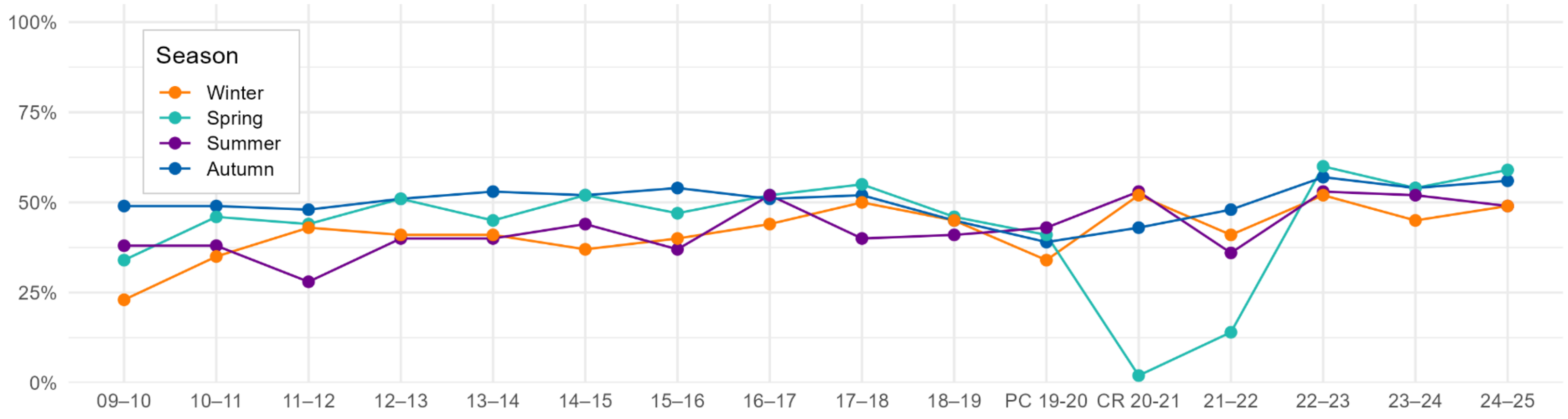
Figure 63: Intrastate visitors by season



Season	09–10	10–11	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	23–24	24–25
Winter	41%	31%	35%	39%	21%↓	25%	39%↑	37%	17%↓	30%↑	24%	47%	54%	41%↓	40%	38%
Spring	27%	30%	32%	24%↓	29%	31%	29%	29%	26%	31%	26%	98%↑	86%↓	32%↓	37%	26%↓
Summer	35%	39%	38%	30%	29%	33%	38%	28%↓	38%↑	25%↓	31%	47%	64%	41%↓	38%	37%
Autumn	37%	31%	28%	26%	17%↓	23%↑	24%	38%↑	35%	32%	50%	57%	50%	37%↓	35%	34%

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

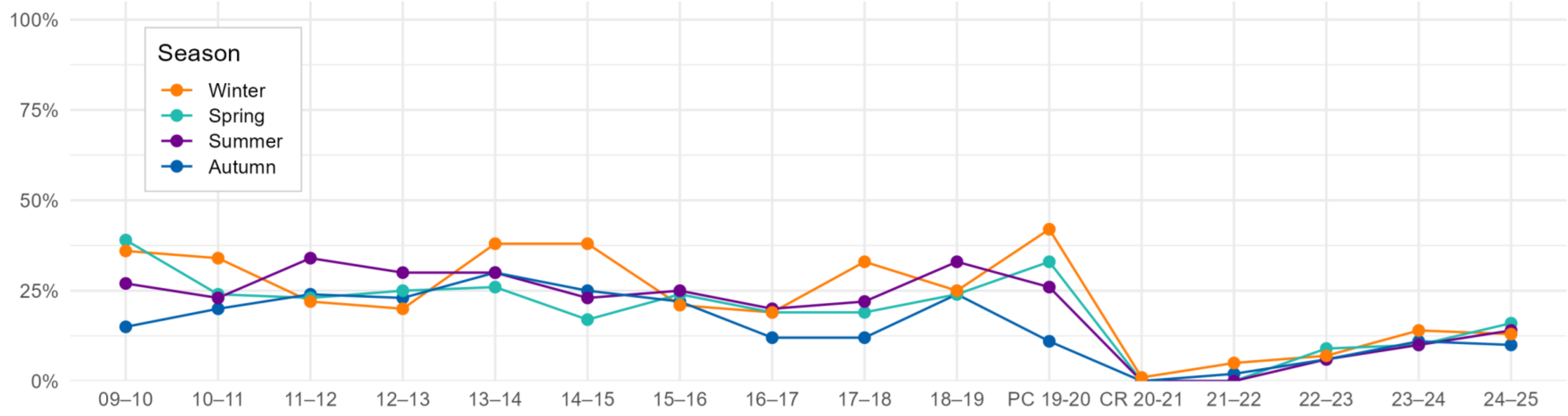
Figure 64: Interstate visitors by season



Season	09–10	10–11	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	23–24	24–25
Winter	23%	35%↑	43%	41%	41%	37%	40%	44%	50%	45%	34%↓	52%	41%	52%↑	45%↓	49%
Spring	34%	46%↑	44%	51%	45%	52%	47%	52%	55%	46%	41%	2%↓	14%↑	60%↑	54%↓	59%
Summer	38%	38%	28%↓	40%↑	40%	44%	37%	52%↑	40%↓	41%	43%	53%	36%	53%↑	52%	49%
Autumn	49%	49%	48%	51%	53%	52%	54%	51%	52%	45%↓	39%	43%	48%	57%↑	54%	56%

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

Figure 65: International visitors by season



Season	09–10	10–11	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	23–24	24–25
Winter	36%	34%	22%↓	20%	38%↑	38%	21%↓	19%	33%	25%	42%↑	1%↓	5%↑	7%	14%↑	13%
Spring	39%	24%↓	23%	25%	26%	17%↓	24%↑	19%	19%	24%	33%↑	0%↓	0%	9%↑	10%	16%↑
Summer	27%	23%	34%↑	30%	30%	23%↓	25%	20%	22%	33%↑	26%	0%↓	0%	6%↑	10%↑	14%↑
Autumn	15%	20%↑	24%	23%	30%↑	25%	22%	12%↓	12%	24%↑	11%	0%	2%↑	6%↑	11%↑	10%

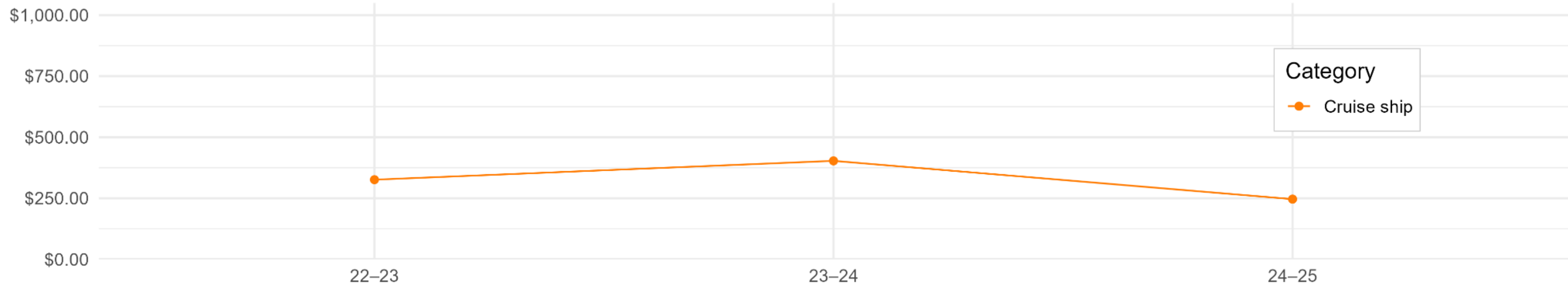
Q4 *Where do you live?*
Note: Missing cases excluded

Cruise ship arrivals

In 2023/24, a QR code was provided to cruise ship arrivals to specifically track this cohort. Additionally, the survey that this QR code directs to excludes several questions from the general survey (e.g., means of arriving on the island, length of stay). The current findings are based on respondents who have completed the survey through this channel. In 2024/25, a total of n=101 surveys were completed by this cohort of visitors.

Data was captured via other collection channels where respondents indicated cruise ship arrival, however some of these indicated they stayed overnight on the island. To avoid conflating respondents who may have mistaken the ferry for a cruise ship in their responses and given the challenge of verifying whether they were 'true' cruise ship arrivals, any cases that are not specifically from the cruise ship QR code have been omitted from this analysis to ensure a true representation. This method has been used again in 2024/25.

Figure 66: Average expenditure per cruise ship visitor



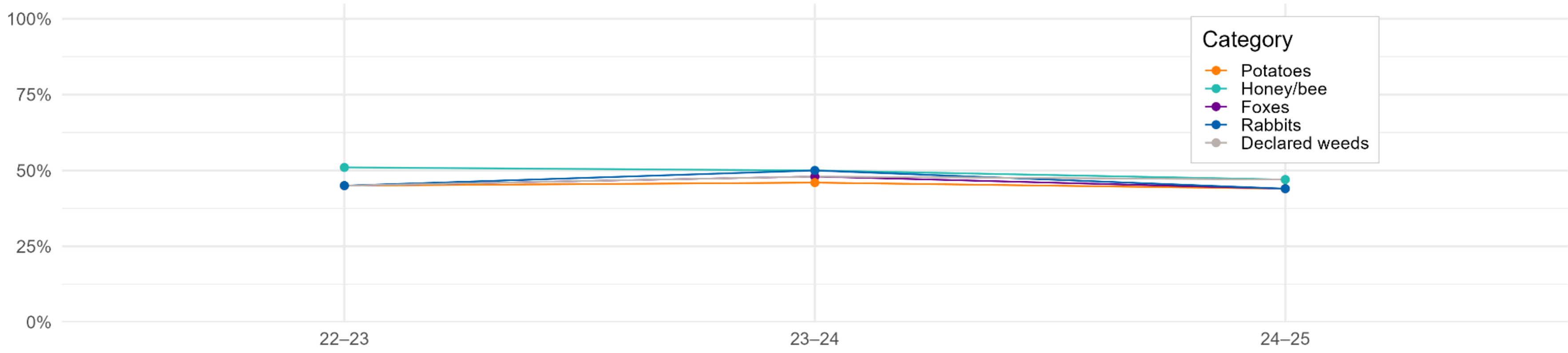
Category	22–23	23–24	24–25
Cruise ship	$325.99	$403.1	$246.33↓

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?*
Base: Cruise visitors (24/25 n=101)

Q15 *How many people did these costs cover?*
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 more aware of quarantine regulations prior to visiting when compared with cruise ship arrivals. Knowledge of quarantine regulations before their visit for cruise visitors has remained consistent since the previous wave.

Figure 67: Awareness of quarantine regulations prior to visitation

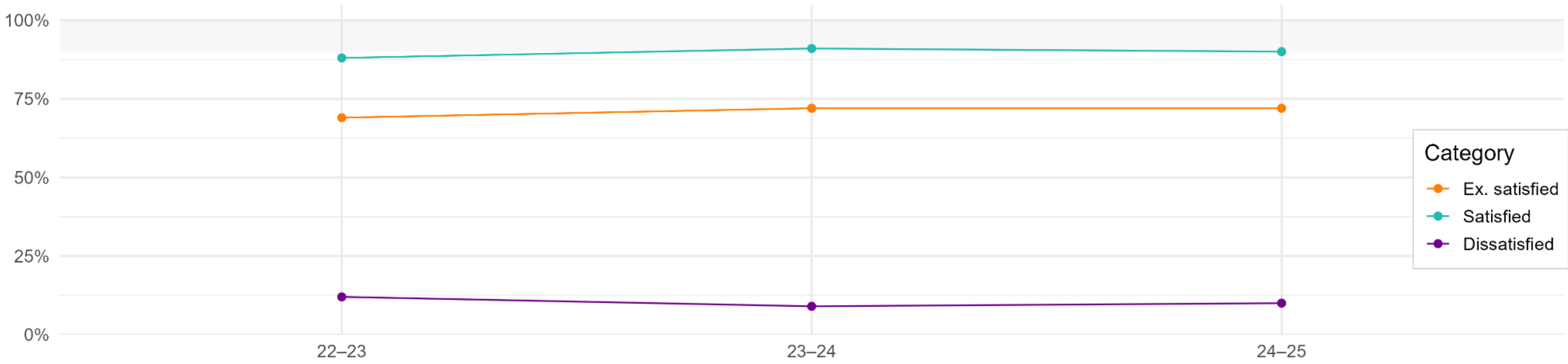


Category	22–23	23–24	24–25
Potatoes	45%	46%	44%
Honey/bee	51%	50%	47%
Foxes	45%	48%	44%
Rabbits	45%	50%	44%
Declared weeds	45%	48%	47%

Q16a *Were you aware of all Kangaroo Island's quarantine regulations*
Q16b *If yes, when did you find out this information*
Base: Cruise visitors (24/25 n=101)

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.

Figure 68: Visitors who were very satisfied with their overall experience on Kangaroo Island**



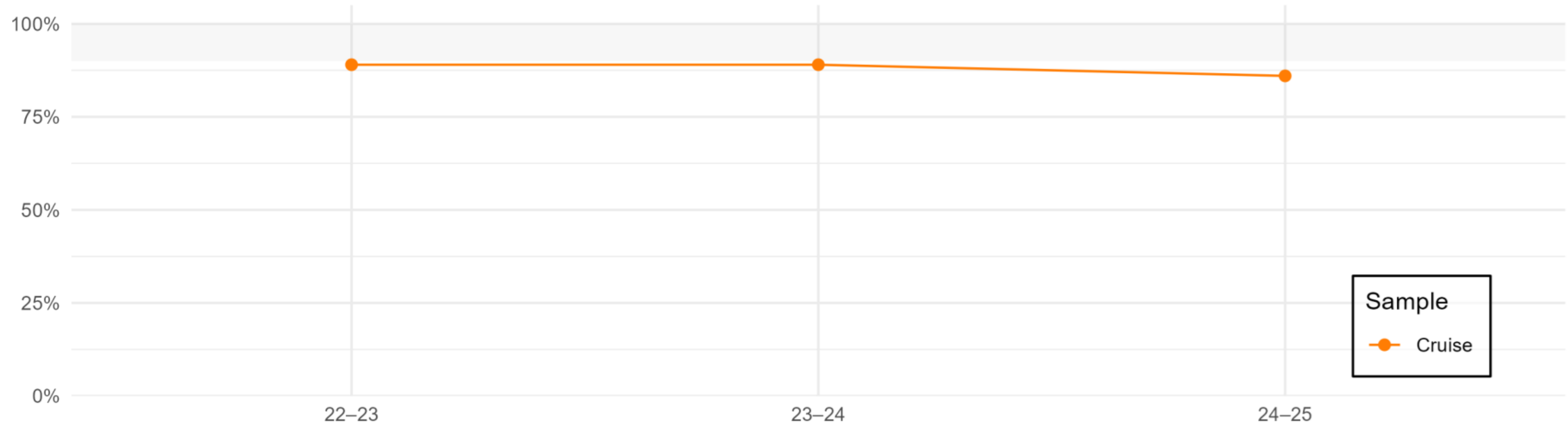
Category	22–23	23–24	24–25
Ex. satisfied	69%	72%	72%
Satisfied	88%	91%	90%
Dissatisfied	12%	9%	10%

Q22 *Taking into account all aspects of your visit to Kangaroo Island, how would you rate your overall satisfaction?*
Note: Missing cases excluded.
Base: Cruise visitors (24/25 n=101)

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

Cruise ship arrivals fell just outside of the acceptable range for willingness to recommend (86%).

Figure 69: Willingness to recommend

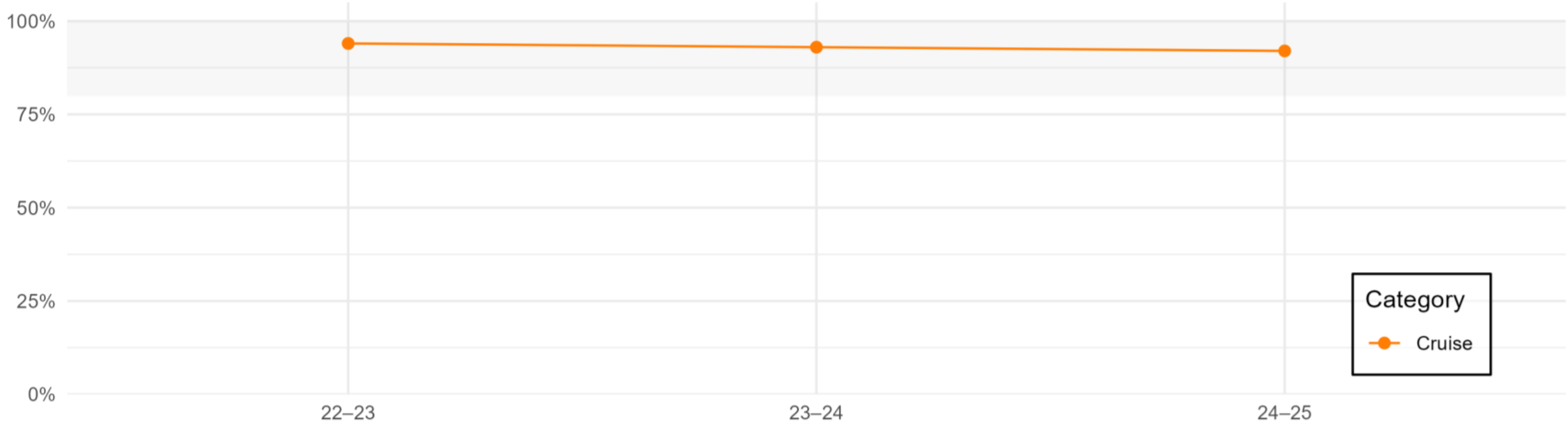


Sample	22–23	23–24	24–25
Cruise	89%	89%	86%

Q23 *Would you recommend Kangaroo Island as a holiday destination to others based on this trip?*
Note: Missing cases excluded.
Base: Cruise visitors (24/25 n=101)

As with the previous wave, 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 is the same and in the acceptable range.

Figure 70: Visitors that experienced a friendly local community on Kangaroo Island



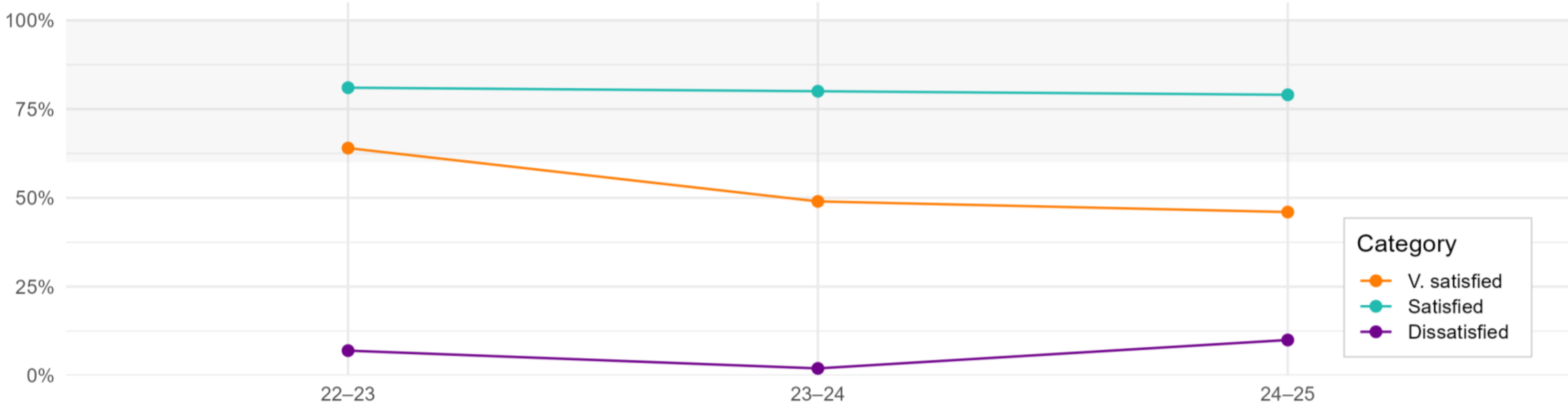
Category	22–23	23–24	24–25
Cruise	94%	93%	92%

Q18.10 *For each of the following please indicate whether you experienced this while on Kangaroo Island?*
Note: Missing cases excluded.
Base: Cruise visitors (24/25 n=101)

* *Figure reflects response to the question "please indicate whether you believe that Kangaroo Island provides you this while on Kangaroo Island.*

Cruise ship arrivals and those who arrived by other methods of transport were equally satisfied with the quality of interpretive and educational signage. While both cohorts fell into the target range for overall satisfaction, the proportion of those **very** satisfied sits outside the target range.

Figure 71: Satisfaction with the quality of interpretive & educational signage

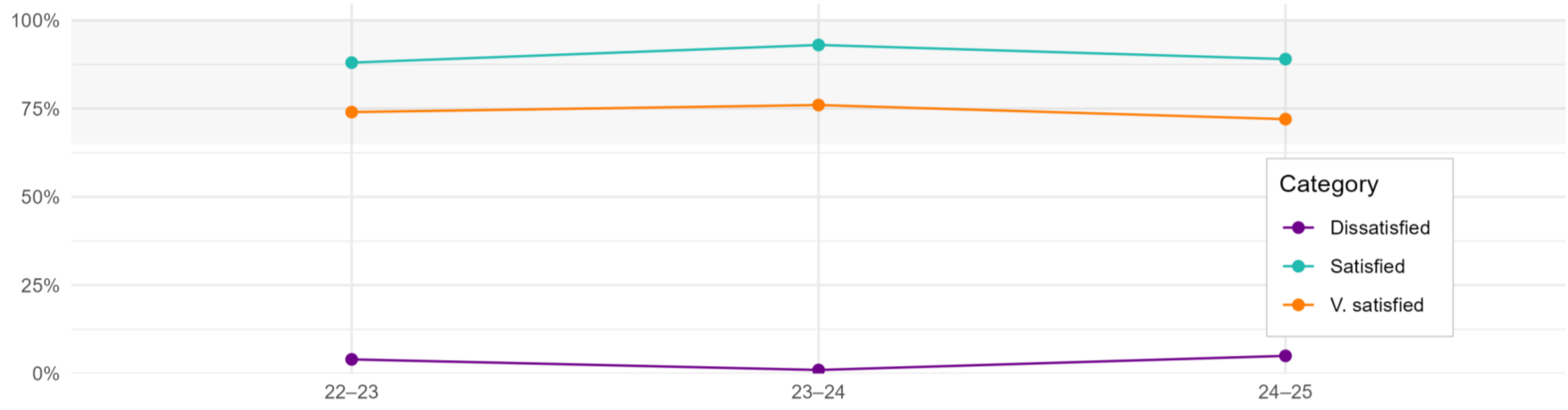


Category	22–23	23–24	24–25
V. satisfied	64%	49%	46%
Satisfied	81%	80%	79%
Dissatisfied	7%	2%	10%↑

Q19.17 *Please indicate how satisfied you were with....* Base: Cruise visitors (24/25 n=101)
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. Satisfaction was consistent for cruise visitors and other travel modes which demonstrates the high quality of service the island provides to all visitors.

Figure 72: Satisfaction with customer service received



Category	22–23	23–24	24–25
V. satisfied	74%	76%	72%
Satisfied	88%	93%	89%
Dissatisfied	4%	1%	5%

Q19.7 *Please indicate how satisfied you were with the level of customer service you received.*
Note: Don't know, didn't experience and missing cases excluded.
Base: Cruise visitors (24/25 n=101)

** 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%.

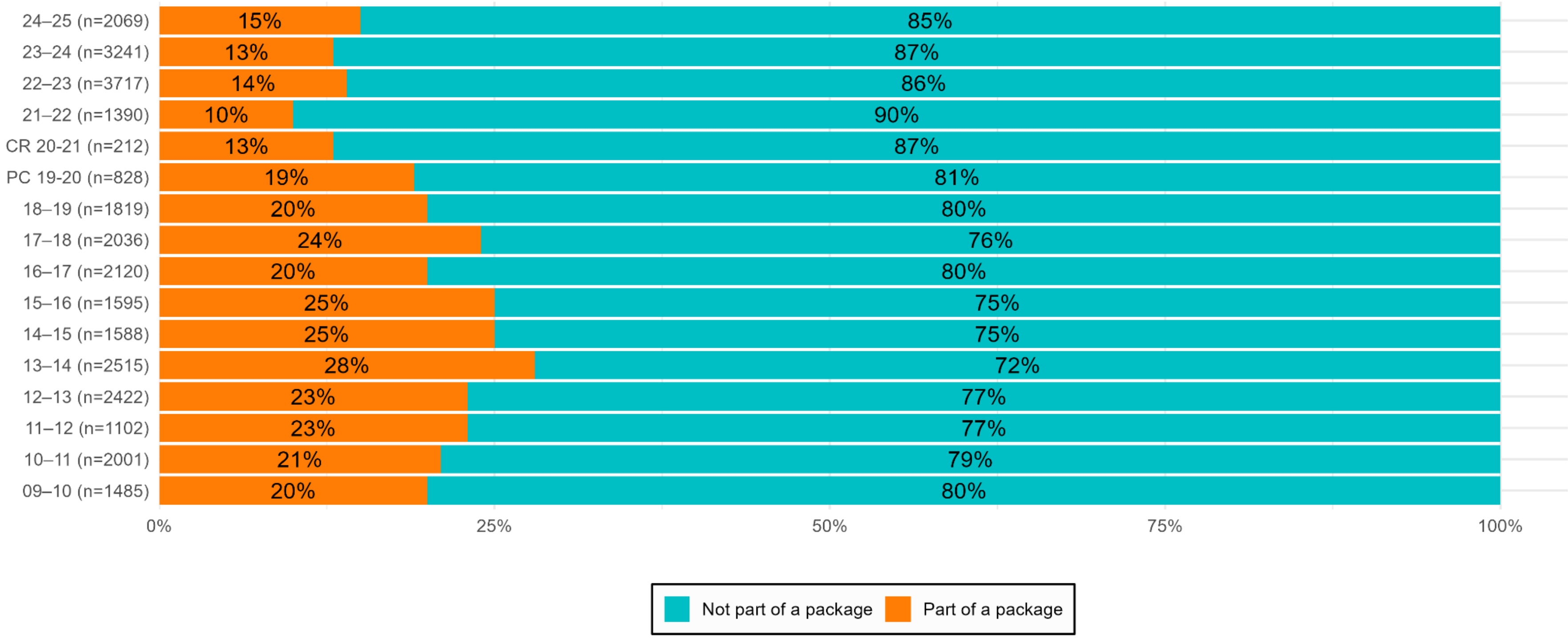
Appendix A: Visitor expenditure

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. In 2024/25 the expenditure question was simplified in an attempt to improve the completeness and quality of data.

Incidence of Package Bookings

In 2024/25, the proportion of visitors whose trip to Kangaroo Island formed part of a travel package has remained relatively stable since last wave.

Figure 73: 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 consistent for all visitor types when compared with the previous wave.

Table 21: 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)	23/24 (n=1197)	24/25 (n=733)
Trip part of a package	19%	22%	19%	20%	24%	15%	15%	11%	11%	14%	8%	9%	6%↓	6%
Not part of a package	81%	78%	81%	80%	76%	85%	85%	89%	89%	86%	92%	91%	94%↑	94%

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)	23/24 (n=1654)	24/25 (n=1069)
Trip part of a package	20%	19%	27%	19%	20%	18%	23%	19%	11%	12%	13%	15%	14%	14%
Not part of a package	80%	81%	73%	81%	80%	82%	77%	81%	89%	88%	87%	85%	86%	86%

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)	23/24 (n=385)	24/25 (n=266)
Trip part of a package	33%	31%	36%	40%	34%	36%	40%	33%	36%	67%	24%	39%	39%	45%
Not part of a package	67%	69%	64%	60%	66%	64%	60%	67%	64%	33%	76%	61%	61%	55%

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 remained constant for visitor types.

Table 22: 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)	23/24 (n=3325)	24/25 (n=1,958)
Average	$609.52	$601.92	$726.90	$770.06	$779.59	$722.70	$679.29	$638.15	$897.18	$873.31	$828.66	$845.67	$822.66
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	$1,067.95	$523.29
Median^	$487.50	$400.00	$500.00	$550.00	$600.00	$575.00	$500.00	$500.00	$769.00	$700.00	$650.00	$625.0	$733.33
Mode≠	$500.00	$500.00	$500.00	$500.00	$500.00	$500.00	$500.00	$500	$1,000.00	$1000.00	$500.00	$1,000.00	$1,000.00
Min.	$0.00	$1.00	$0.00	$10.00	$0.00	$2.50	$0.50	$0.00	$0.05	$0.00	$0.00	$0.00	$50.00
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	$30,000	$2,415.00

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)	23/24 (n=1210)	24/25 (n=718)
Average	$478.95	$493.64	$642.38	$658.82	$643.23	$650.79	$606.25	$576.48	$894.22	$773.83	$751.05	$777.8	$746.91
SD*	$398.06	$395.30	$521.39	$563.21	$433.69	$537.12	$969.87	$426.64	$713.92	$539.11	$994.56	$1,081.70	$474.28
Median^	$400.00	$400.00	$500.00	$550.00	$550.00	$500.00	$500.00	$500.00	$800.00	$666.7	$600.00	$600.00	$662.50
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	$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	$0.00	$70.00
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	$25,000	$2400.00

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)	23/24 (n=1754)	24/25 (n=1,023)
Average	$691.97	$665.17	$819.43	$923.88	$894.75	$813.58	$834.00	$717.09	$900.70	$1,047.97	$892.15	$889.62	$914.32
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	$774.43	$554.82
Median^	$500.00	$500.00	$650.00	$650.00	$712.00	$685.00	$600.00	$500.00	$750.00	$750.00	$718.00	$712.50	$809.00
Mode≠	$500.00	$500.00	$500.00	$500.00	$500.00	$1,000.00	$500.00	$500.00	$750.00	$500.00	$500.00	$1,000.00	$1,000.00
Min.	$0.00	$2.00	$10.00	$12.50	$0.00	$2.50	$0.50	$0.00	$0.05	$0.00	$0.00	$0.00	$50.00
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	$10,000.3	$2415.00

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)	23/24 (n=356)	24/25 (n=216)
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	$868.77	$642.22
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	$1,964.74	$431.66
Median^	$400.00	$328.00	$350.00	$450.00	$490.00	$400.00	$350.00	$350.00		$387.5	$450.00	$450.00	$525.00
Mode≠	$500.00	$250.00	$500.00	$500.00	$500.00	$500.00	$500.00	$500.00		$285.7	$300.00	$500.00	$300.00
Min.	$0.00	$1.00	$0.00	$10.00	$0.00	$7.50	$0.50	$0.00		$186.50	$0.00	$3.33	$50.00
Max	$24,000	$50,000	$16,400	$42,500	$10,150	$6250	$9,120	$20,150		$2,666.67	$8,600.0	$30,000.0	$2,001.50

* 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 $209.95 to $225.89) which reflected an increase in average daily spend for interstate visitors from $228.00 to $248.16 and intrastate visitors from $165.79 to $181.47.

Table 23: 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)	23/24 (n=2766)	24/25 (n=1,958)
Average	$126.22	$276.81	$157.58	$178.14	$170.80	$175.03	$166.81	$157.32	$186.36	$176.31	$188.54	$209.95↑	$225.89↑
Standard Deviation*	$142.18	$650.05	$209.36	$266.72	$168.60	$154.44	$250.24	$307.68	$120.13	$144.56	$170.35	$341.72	$147.54
Median^	$100.00	$175.00	$125.00	$131.70	$133.30	$130.00	$125.00	$125.00	$178.60	$150.00	$150.00	$166.67	$200.00
Mode≠	$125.00	$250.00	$125.00	$125.00	$125.00	$125.00	$125.00	$125.00	$200.00	$250.00	$250.00	$250.00	$100.00
Min.	$0.00	$1.25	$0.00	$7.14	$0.00	$0.36	$0.02	$0.00	$0.44	$0.00	$0.00	$0.00	$5.25
Max	$4,800	$45,000	$5,216	$9500	$3,500	$2000	$6,000	$6,716.67	$750.00	$2,583.33	$5,000.00	$15,000.00	$2,060.00

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)	23/24 (n=1106)	24/25 (n=718)
Average	$93.28	$189.39	$124.02	$132.52	$136.25	$130.92	$126.57	$126.16	$173.67	$159.36	$156.21	$165.79	$181.47↑
Standard Deviation*	$75.30	$180.01	$87.87	$109.27	$115.98	$109.21	$135.45	$104.92	$110.01	$107.16	$111.58	$158.18	$126.89
Median^	$74.80	$125.00	$100.00	$111.10	$114.70	$107.10	$104.20	$111.10	$150.00	$140.60	$131.30	$135.00	$153.13
Mode≠	125.00	$100.00	$166.67	$125.00	$125.00	$125.00	$125.00	$120.00	$200.00	$250.00	$250.00	$250.00	$100.00
Min.	$4.17	$6.32	$15.00	$7.14	$2.00	$4.35	$0.08	$0.00	$4.44	$0.00	$0.05	$0.00	$5.25
Max	$917	$2,500	$1,000	$917	$3,000	$1,200	$3,500	$1,100.00	$500.00	$666.67	$1,062.50	$2,857.14	$950.00

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)	23/24 (n=1408)	24/25 (n=1023)
Average	$129.55	$263.73	$159.49	$199.86↑	$178.43	$191.83	$187.92	$145.19	$203.17	$203.91	$207.75	$228.00↑	$248.16↑
Standard Deviation*	$112.47	$315.82	$123.94	$314.08	$153.56	$158.08	$316.75	$121.32	$131.23	$188.46	$193.24	$190.06	$156.82
Median^	$100.00	$178.60	$133.30	$140.00	$150.00	$150.00	$125.00	$125.00	$187.50	$166.7	$166.70	$187.50	$225.00
Mode≠	$125.00	$250.00	$125.00	$125.00	$125.00	$250.00	$125.00	$125.00	$125.00	$250.0	$250.00	$250.00	$225.00
Min.	$0.00	$1.25	$10.00	$12.50	$0.00	$0.36	$0.02	$0.00	$0.44	$0.07	$0.00	$0.00	$9.11
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	$2,500.06	$2,060.00

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)	23/24 (n=247)	24/25 (n=221)
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	$329.65	$264.96
Standard Deviation*	$226.81	$1,213.54	$422.75	$315.63	$271.33	$196.01	$220.23	$550.79		$183.99	$223.27	$1,043.08	$129.53
Median^	$123.50	$270.00	$125.00	$150.00	$150.00	$166.70	$133.30	$125.00		$158.30	$166.70	$200.00	$252.50
Mode≠	$150.00	$250.00	$125.00	$150.00	$125.00	$125.00	$100.00	$83.30		$650.00	$250.00	$250.00	$300.00
Min.	$0.83	$3.33	$0.00	$8.33	$0.00	$6.67	$0.17	$125.00		$8.24	$0.00	$0.83	$12.50
Max	$4,800.00	$45,000.0	$5,216.67	$9,500.00	$3,383.33	$2,000.00	$3040.00	$6,716.67		$650.00	$2,150.00	$15,000.0	$633.33

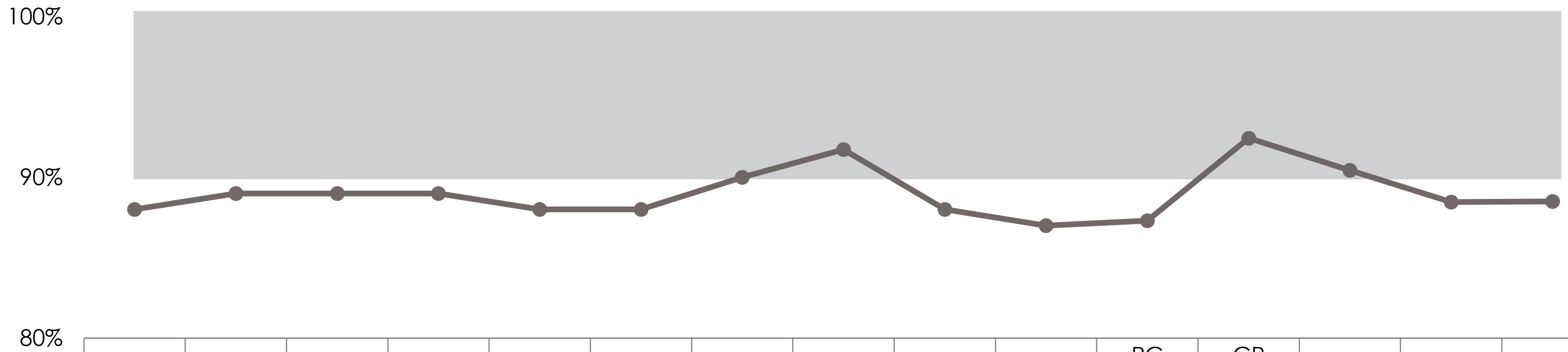
* Standard Deviation provides an indication of the accuracy of the average.
^ Median is the point at which half the respondents spent more, and half spent less.
≠ Mode is the value that occurs the most frequently in a data set.
Q6 Did you stay one or more nights or was it a way trip?
Q9 What was the 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: Old survey questions

Experienced farming and rural landscapes (EX1g)

Optimal Conditions	Indicator	Acceptable Range	24/25 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors that experienced farming and rural landscapes	90% - 100%	NA

Figure 74: Visitors that experienced farming and rural landscapes



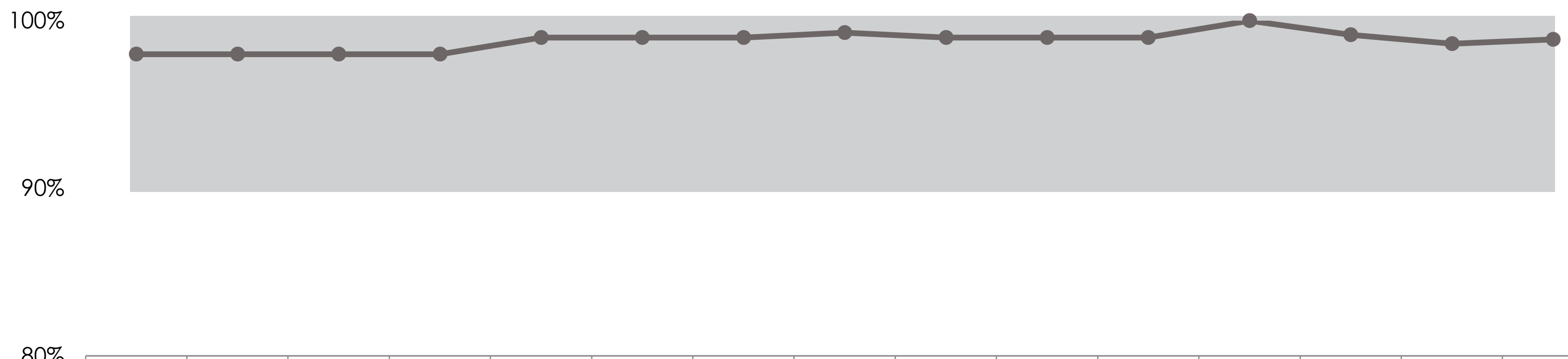
	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	PC 19/20	CR 20/21	21/22	22/23	23/24
% of visitors	88%	89%	89%	89%	88%	88%	90%	92%	88%	87%	87%	92%	90%	88%	89%

Q18.7 *For each of the following please indicate whether you experienced this while on Kangaroo Island?*
Base: Visitors responding, (24/25 n=X)
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.*

Experienced spectacular scenery and coastal landscapes (EX1e)

Optimal Conditions	Indicator	Acceptable Range	24/25 Result
Kangaroo Island delivers authentic and credible experiences consistent with its positioning	Proportion of visitors that experienced spectacular scenery and coastal landscapes	90% - 100%	NA

Figure 75: Visitors that experienced spectacular scenery and coastal landscapes



	09/10	10/11	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	23/24
% of visitors	98%	98%	98%	98%	99%	99%	99%	99%	99%	99%	99%	100%	99%	99%	99%

Q18.5 *For each of the following please indicate whether you experienced this while on Kangaroo Island?*
Base: NA
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.*

Appendix C: VES 2024/25 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: Verian
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)?

☐☐ 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

....

Tourism Optimisation Management Model

vibrant community, sound economy, healthy environment, satisfied visitors, better decisions….

verian

Q8: **Was your trip to Kangaroo Island paid for as part of a travel package?**

Yes 1
No 2

Q14: **Please estimate how much you spent on each part of your trip to Kangaroo Island?**

(Please breakdown what you spent on air and/or ferry fares from Adelaide to the Island and on return, 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)

Getting to/from the Island ....$ ☐☐,☐☐☐.00

Transport while on the Island ...$ ☐☐,☐☐☐.00

Accommodation ....$ ☐☐,☐☐☐.00

Food and drinks ....$ ☐☐,☐☐☐.00

Experiences ....$ ☐☐,☐☐☐.00

Tours ....$ ☐☐,☐☐☐.00

Total amount.....$ ☐☐,☐☐☐.00

Q15: **How many people did these costs cover?**

☐☐☐

Q28: **When did you book the following parts of your trip to Kangaroo Island?**

(circle one answer for each item)

	Before arriving	While on Kangaroo Island	Unsure/Did not book this
Accommodation	1	2	3
Car hire	1	2	3
Experiences	1	2	3
Tours	1	2	3
National Park visit	1	2	3

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 you selected yes to any of the options at Q16a, 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
Lathami Conservation Park 14
Little Sahara 15
Murray Lagoon 16
Parndana 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
.....

Q29: **Which of activities did you undertake while on Kangaroo Island?**

(circle the number for each activity you did):

Fishing or boat charter 1
Walking or hiking 2
Visiting farm gates 3
Visiting cellar doors or distilleries 4
Cycling or mountain biking 5
Volunteering or citizen science activities 6
Visiting museums 7
Picnicking or BBQing 8
Visiting art galleries 9
Marine tours 10
Other *(please circle and specify below):* 11
.....
.....

General version 2024/25

Q30: For each of the following, please indicate whether:
A) This was one of the three most important things you wanted to experience... *(enter 1 to 3 next to the most important)*
B) You experienced this while on Kangaroo Island... *(circle one number for each item)*

		Q30a: Most important experiences?	Q30b: Did you experience this?	
		Top 3 most important *(enter 1 to 3)*	Yes	No
30.1	Viewing Australia's wildlife in natural surroundings		1	2
30.2	Sealion colony		1	2
30.3	Rare and threatened species		1	2
30.4	A large abundance of species		1	2
30.5	General diversity of wildlife		1	2
30.6	Animals in their natural habitat		1	2
30.7	Close experience with wildlife		1	2
30.8	Marine life		1	2
30.9	Land animals		1	2
30.10	Birdlife		1	2

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
18.2	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
18.5	Areas of untouched natural beauty	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
19.1	Seeing wildlife in the natural environment	1	2	3	4	5	99	98
19.2	Your opportunity to learn more about the Island's natural environment	1	2	3	4	5	99	98
19.3	The quality of accommodation	1	2	3	4	5	99	98
19.4	The range of Island produce (food & wine)	1	2	3	4	5	99	98
19.5	The quality of Island produce (food & wine)	1	2	3	4	5	99	98
19.6	The availability of Island produce (food & wine)	1	2	3	4	5	99	98
19.7	The level of customer service you received	1	2	3	4	5	99	98
19.8	Your opportunity to learn more about the Island's history	1	2	3	4	5	99	98
19.9	The range of activities available	1	2	3	4	5	99	98
19.10	The quality of activities available	1	2	3	4	5	99	98
19.11	The availability of activities	1	2	3	4	5	99	98
19.12	The professionalism of tourism businesses	1	2	3	4	5	99	98
19.13	The quality of public toilets	1	2	3	4	5	99	98
19.14	The quality of roads	1	2	3	4	5	99	98
19.15	The quality of campgrounds	1	2	3	4	5	99	98
19.16	The quality of road signage	1	2	3	4	5	99	98
19.17	The quality of interpretive/ educational signage	1	2	3	4	5	99	98
19.18	The quality of picnic/ day use areas	1	2	3	4	5	99	98
19.19	Your national parks experience	1	2	3	4	5	99	98

Q20: **For any item you were dissatisfied with in the previous question (Q19), please explain why:**

....

....

....

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...**

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				
15-24 years				
25-44 years				
45-64 years				
65 plus years				

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 verian

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