

TOMM Kangaroo Island Annual Report 1999

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1 Introduction and Background

1999 has been an instrumental year in the sustainable management of tourism on Kangaroo Island, with the successful appointment of a Project Manager for the Tourism Optimisation Management Model (TOMM).

The Management Committee responsible for the outcomes and funding of the TOMM project consisted of:

- Jackie Kelly – Chairperson – Mayor of Kangaroo Island
- Marc Warren – Tourism Kangaroo Island
- Keith Twyford – National Parks and Wildlife SA
- Andrew Eastick (followed by Allan Jamieson) – Kangaroo Island Development Board
- Barry Hurst – Kangaroo Island Council
- David Crinion – South Australian Tourism Commission
- Craig Wickham – Kangaroo Island Tourism Operator
- Office of National Tourism – no representative on the Management Committee

Liz Jack of Complete Marketing Solutions was appointed for three days a week, pro-rated over a five day a week period to implement the TOMM concept, after funding was received from the Office of National Tourism and the core management agencies on Kangaroo Island. She commenced employment on the 1st August 1999.

The TOMM concept is based upon the Limits of Acceptable Change model, however TOMM takes a broader approach aimed at monitoring sustainable optimal performance within a range of sectors and across a broad stakeholder base. These sectors include economic, environmental, socio-cultural, experiential and market opportunities and as such was considered more suitable for the multi-faceted nature of tourism on Kangaroo Island.

The TOMM concept is organic in its approach, given its focus on working with the community of Kangaroo Island to develop a sustainable monitoring and management response system. A long-term commitment to the outcomes of the project is critical to its success, along with its ability to track developments within the tourism industry and enrol the local community in its implementation.

This annual report outlines the achievement to date and highlights issues that will impact upon the success of the TOMM project into the future. A business plan has also been developed to address these issues for the next two years – 2000 – 2001.

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2 Situation Analysis – Tourism on Kangaroo Island

In order to understand the outcomes of the TOMM project during the later half of 1999 and the opportunities that exist for the project into the year 2000, it is critical to provide a brief overview of the TOMM project to date.

2.1 Data Collection

Data collection on tourism to Kangaroo Island has to date been sporadic and uncoordinated. Whilst information has been presented on supply and demand patterns to the Island, it has tended to be specific to individual years and does not provide reliable trend information due to changes in methodology and frequency of the data collection.

Specific agencies have undertaken research relevant to the TOMM project but not specifically designed to feed appropriate data to the TOMM indicators. These include:

- Tourism profiles – undertaken by the South Australian Tourism Commission, focusing on data from the Australian Bureau of Statistics (ABS), International Visitor Survey (IVS) and the National Visitor Survey (NVS).
- Exit Survey – initiated by the Kangaroo Island Development Board (KIDB) initially in 1997 and again 1998.
- Exit Survey – funded by the South Australian Tourism Commission 1998.
- Resident Survey - initiated by the Kangaroo Island Development Board in 1998. Some of these questions were relevant to the TOMM indicators however many were for other aspects of the KIDB projects.
- National Park Site Figures – this data is collected monthly and has relevance to the TOMM indicators.
- Visitor Surveys – a number of private operators undertake their own visitor surveys, National Parks and Sealink being the most comprehensive.
- Visitor Survey - undertaken by Tourism Kangaroo Island and Sealink of residents in the Adelaide region.
- Various data collection processes associated with consultant reports or research opportunities focusing on Kangaroo Island including:
 - Tourism and Wildlife – survey of visitors – James Cook University – 1999
 - Kangaroo Island Tourist Association Visitor Survey Results – 1996
 - Regional Strategy for Longer Stay Eco-tourism – Kangaroo Island – 1996
 - Kangaroo Island Sustainable Development Strategy – 1995/96
 - Coordinated Marketing Strategy for Kangaroo Island – 1995
 - Eco-tourism and its impacts on Kangaroo Island – 1995
 - Kangaroo Island Tourism Road Evaluation - 1991
 - Tourism Development and Management on Kangaroo Island – 1984
 - Kangaroo Island Tourism Industry – Draft Discussion Paper – 1983

Whilst this would appear to be an excellent range of information, these strategies are now dated and resources to maintain the flow of information to allow tracking opportunities is not easily accessible amongst the key management / change agencies on the Island.

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2.2 Existing Data Overview

Despite the lack of a consistent data collection, a picture of tourism to Kangaroo Island can be pieced together from existing research, however the reliability of this information given changing methodologies and sample sizes must be taken into consideration and will not reflect a 'true and accurate' representation of tourism to the Island.

Issues regarding long-term data collection for both the TOMM project and the wider Kangaroo Island community include:

1. Establishment of a sustainable and funded exit and resident survey ideally implemented annually. The funding initially earmarked for these survey processes by the KI Development Board is no longer available and alternate funding sources are required;
2. Commitment by all key agencies to provide ongoing funding as a yearly budgetary item for the above survey processes;
3. Identification of additional funding opportunities – a paper has been developed to begin discussion on these issues;
4. Provision of human resources and time to implement the surveys, input and analyse data for the TOMM surveys and others being undertaken on the Island – ie. Seal Bay data;
5. Development of tracking questions within the methodology to ensure continuity of data;
6. Co-ordination and identification of external consultancy's and research projects undertaken on the Island to ensure information is returned for use by the Island;
7. Development of a policy regarding the use of Kangaroo Island as a research tool for individuals and academic institutions, ensuring that the research undertaken is in line with the needs of the Island and data / return on investment is provided at the end of the project. This may take the form of an Island Tourism Research Plan;
8. Standardisation of survey methodology to ensure tracking questions and continuity of data collection.

Without the development of consistent data collection techniques, the Island will continue to have ad hoc information on the trends and performances within the tourism industry, and reporting for the TOMM project will be at best, unpredictable.

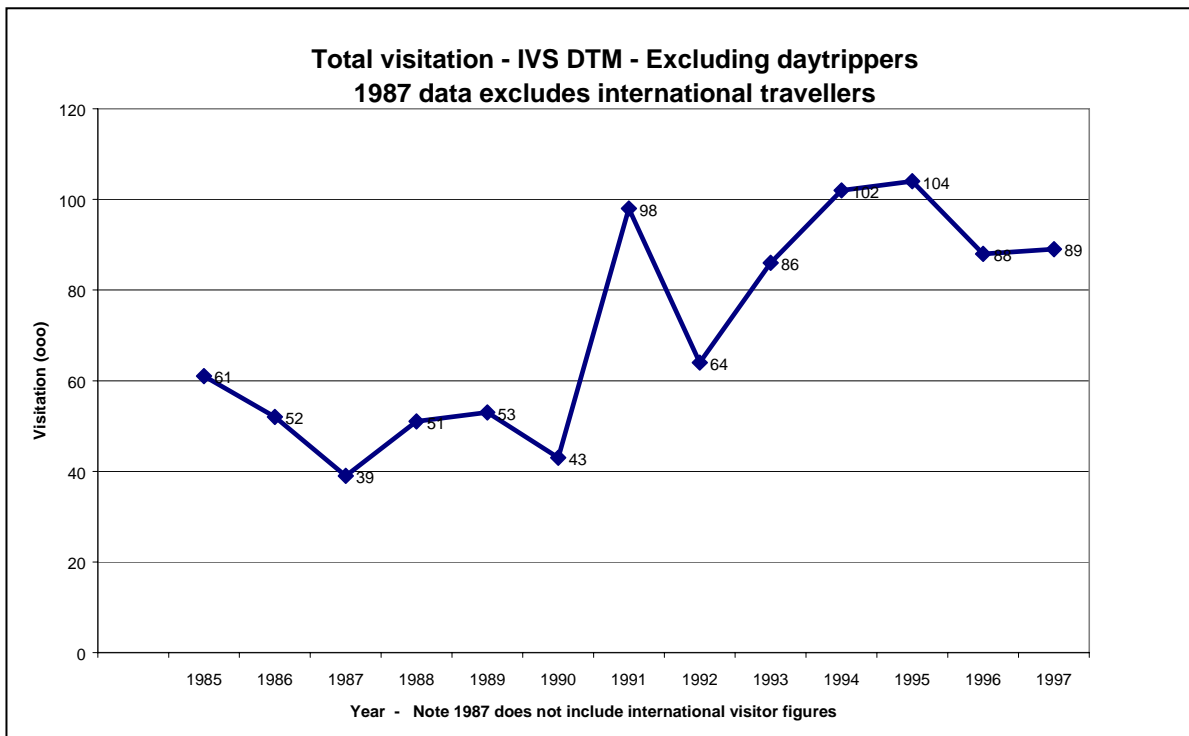
Should the managing agencies and funding bodies of the TOMM project deem the data collection processes are not high priorities in departmental project plans and budgets, a revision of the TOMM project would be required and additional funding sources will be required, as these are core pillars of the project outcomes.

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2.2.1 Visitor numbers

Visitor numbers to Kangaroo Island has long been the focus of debate, particularly in reference to the long-term management of tourism. Estimates put total visitation at around 150,000 people in 1995.¹

Total visitor numbers to the Island have todate been calculated, based upon visitation to the key Island icon of Seal Bay (it is estimated that between 72-86% of visitors go to Seal Bay²), data gathered through the International Visitor and National Visitor Surveys and independent research.



¹ Centre for Tourism and Hotel Management Research, 1996

² Centre for Tourism and Hotel Management Research, 1996

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However, estimates based on total passenger numbers through the carriers and an estimated annual resident departure from the Island of 8 times per year³ for each individual places total visitation closer to 174,000.

The question of 'when do we reach the limit of visitation' is often asked and the TOMM project is looked to, to identify this figure. The TOMM concept, rather than identifying a specific figure of visitation, monitors the results of tourism to Kangaroo Island and the attitudes of both residents and visitors to gauge when and if, this 'limit' is being approached and what management actions are required.

In consultation with both operators and the community, a sentiment exists that the Island can accommodate a greater number of visitors, spread more evenly throughout the year, rather than the current strong seasonal influences surrounding school and public holidays.

This view is always prefaced with the knowledge that monitoring has to take place in order to avoid the Island being overrun with visitors and losing its essential integrity.

Constraints to determining total visitation to date include:

- Lack of differentiation between residents and visitors on the airlines.
- Commercial confidentiality of information available through the Kangaroo Island Sealink ferry.
- The absence of off-island home owners being recorded in the Seal Bay data – given that these visitors may not visit high profile sites such as these on a regular basis.

Opportunities do exist to build relationships with Kangaroo Island Sealink and access a percentage growth of visitation on the Ferry in the initial instance with the aim of accessing total visitor numbers in the future. Determining an average figure for resident departure from the Island over the year to improve the initial estimate outlined above is also required to determine total visitor numbers to the Island.

Domestic Visitation Numbers

Domestic visitation numbers have been sourced from the National visitor survey for the 1998 period.

	Visitors	Nights	Av Stay
Intrastate	46,000	182,000	4
Interstate	16,000	49,000	3
Total Domestic	63,000	231,000	4

Origin of domestic visitors

74% Adelaide	13% NSW	13% Victoria
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³ In 1991, the KI Roads Evaluation Strategy estimated that residents (children and adults) left the Island 6.9 times per year

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International – via International visitor survey 1998

Visitors	Nights	Av Stay
26,500	79,000	3

Origin of International overnight visitors

17% North America	17% Germany	10% UK
41% Other Europe	3% Asia	3% Japan
1% NZ	8% Other countries	

Day Trips ~ International

A separate question in the IVS asks did you visit (list of 10 places). The difference between the results from this question and the stopover over night stay question (see above estimates) can be inferred to be the number of day trips. ie In 1998 an estimated 52,600 international visitors said they visited KI. Therefore (52,600 minus 26,500) we infer around 26,100 day trips.

The origin of the 52,600 visitors was

19% North America	11% Germany	14% UK	29% Other Europe
10% Asia	8% Japan	2% NZ	7% Other countries

In terms total international visitors to South Australia

21% North American	11% UK	19% German	22% Other Europe
27% Japanese	18% Asian	5% NZ	

visitors said they visited KI (includes day trips).

Domestic

The NVS asks about day trip behaviour. The estimated number of day trips to KI in 1998 was 25,000 – all SA residents.

We **do not** know how many interstate residents staying overnight in SA undertake a day trip to KI.⁴

⁴ Source: National Visitor Survey (NVS). International Visitor Survey (IVS)

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2.2.2 Exit survey

The 1998 Exit survey, conducted by Tan Research for the Kangaroo Island Development Board provided an initial overview of tourism to the Island.

Two distinct methodologies were used with the visitor exit survey – an exit card which experienced difficulties in distribution through tour operators; and a face to face survey undertaken over four waves during 1998.

Problems were experienced with the survey process in relation to distribution of exit cards and sufficient response rates and as such, the results of the face to face survey have been used as the initial benchmark for visitor data to the Island, despite the sample size being relatively small - only 400 people.

Future exit surveys will streamline questions to represent the TOMM optimal conditions more appropriately and will endeavour to increase the sample size. Tourism operators will be asked to simply refer and encourage clients to complete the exit card as they depart on the ferry and the airlines, rather than distributing these during an already hectic schedule.

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Visitor Profile from Face to Face Survey 1998

Survey Areas	TOMM Acceptable Range	1998 Results	Met TOMM Condition?
Travel Composition	Not listed as a requirement	Predominantly travelled with a partner Travel alone and with a family was significantly less represented	N/A
First Time Visit vs Repeats	Not listed as a requirement	First time visitors dominated amongst the international and interstate visitors	N/A
		Most backpackers were first time visitors and overseas visitors	
		First time visitation is seasonal, with greater repeat business during the winter months and greater first time visits during the summer periods	
		Day-trippers comprised 24% of surveyed visitors; international visitors dominated these.	
Average length of stay	2-7 nights	2-6 nights - Intrastate and Interstate visitors	Yes
		International visitors comprised the largest percentage of day trip and over night stays with no responses for visitation over six nights	Yes
Transport on Island	Not listed as a requirement	The most common form of transport for international visitors were coach tours and hire cars, South Australian visitors the private car dominated and interstate visitors used a mix of coach tour and private vehicle.	N/A

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Reason for visiting	70-100% thought wildlife was important part of experience to KI	64% of all visitors mentioned wildlife as their main reason for visiting KI comprising: 85% international 58% interstate 42% intrastate	No overall Yes for international visitation												
Travel motivation	60-80% total visitors to KI from the cultural / environmental sector	Of all visitors, core travel motivation focused on the environment of KI including: 64% wildlife 49.5% see spectacular scenery 33.8% experience unspoilt Australia	Yes												
Visitor Expectation	90-100% visitors leave satisfied with interpretation on guided tour	Experience measured up to expectation for each market included: <table style="margin-left: auto; margin-right: auto;"> <tr> <td></td> <td style="text-align: center;">Very Well</td> <td style="text-align: center;">Well</td> </tr> <tr> <td>Intrastate</td> <td style="text-align: center;">71.9%</td> <td style="text-align: center;">19.6%</td> </tr> <tr> <td>Interstate</td> <td style="text-align: center;">77.9%</td> <td style="text-align: center;">12.1%</td> </tr> <tr> <td>International</td> <td style="text-align: center;">83.2%</td> <td style="text-align: center;">10.9%</td> </tr> </table>		Very Well	Well	Intrastate	71.9%	19.6%	Interstate	77.9%	12.1%	International	83.2%	10.9%	Yes
	Very Well	Well													
Intrastate	71.9%	19.6%													
Interstate	77.9%	12.1%													
International	83.2%	10.9%													
Lasting Impressions	Not listed as requirement	Lasting impressions for each segment included: Intrastate Great Place Interstate Great Place, Natural Environment International Wildlife	N/A												
Suggestions for Improving Experience	Not listed as requirement	All visitors: 24.1% Improve road surfaces 12.3 Improve services in shops 11.1% Leave the environment 10.8% Improve camping facilities Intrastate: Road Surfaces Interstate: Improve camping facilities International: Information on size of Island and transport.	N/A												

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Profile from Tourism Commission - Visitor Survey 1998

Survey Areas	TOMM Acceptable Range	1998 Results	Met TOMM Condition?
Travel Composition	Not listed as a requirement	Predominantly travelled with a partner Travel alone and with a family was significantly less represented	N/A
First Time Visit vs Repeats	Not listed as a requirement	First time visitors dominated amongst the international and interstate visitors Most backpackers were first time visitors and overseas visitors First time visitation is seasonal, with greater repeat business during the winter months and greater first time visits during the summer periods	N/A
Average length of stay	2- 7 nights	Day-trippers comprised 24% of surveyed visitors; international visitors dominated these. 43.7% stayed 2-6 nights 28.1% stayed for the day 20.6% stayed for one day 7.5% stayed for more than 6 nights	Yes
Places Visited	Not listed as a requirement	Seal Bay – 81% Flinders Chase – 73% Kelly Hill Caves – 43% North Coast – 34% Antechamber Bay – 27% Eucalyptus distillery – 10% Clifford's Honey Farm – 9% Sheep Dairy/ Marron – 8% Overseas visitors less likely to have visited north coast of antechamber bay	N/A
Kingscote	Not listed as a requirement	66.5% visited Kingscote 33.5% did not visit Kingscote Around half of internationals did visit Kingscote (50.4%) however just under half did not (49.6%)	
Activities Undertaken in Kingscote	Not listed as a requirement	39.8% walked on the jetty 35.3% visited Reeves Point	

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		<p>32.7% sat on the foreshore 32.3% went on a penguin tour 27.4% fed pelicans 12.8% Hope cottage Museum</p> <p>Reinforced that lack of spending undertaken in Kingscote and need to generate income earners from these 'free' activities.</p>	
Expenditure	Annual Average growth in total tourism expenditure on KI per number of visitors - 4-10% aag	<p>Expenditure per visitor = International - \$665 pp Interstate - \$413 pp Local SA - \$270 pp</p> <p>Average per person = \$419.00</p>	Does not meet indicator as a result of wording – this will be changed in new conditions
		A greater amount was spent before the trip than during it – only about \$100- 130 spent during the trip to KI Opportunity to value add and ensure greater spending by visitors.	
Usual Residence	Not listed as a requirement	<p>Overseas – 28.8% Interstate – 25.5% Country SA – 9.5% Adelaide – 36.3%</p> <p>Origin Markets International: - Japan – 21% - USA - 21% - Germany – 17% - Switzerland – 10% - Italy – 9%</p> <p>Interstate - Victoria - New South Wales</p>	
Staying in Adelaide	Not listed as a requirement	<p>77% of respondents had spent a night in Adelaide – 90% - international 76% - interstate 42% - regional SA</p>	

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How does KI compare to other well known destinations	Not listed specifically as a requirement	50% said KI was as good or better than other major icons 32% unable to say	
Willingness to recommend to others	Listed as a new condition	65% very likely to recommend 25% likely to recommend 5% possibly 2% not likely to recommend	This will be used as a benchmark for the new condition

2.2.3 Resident survey

The April 1998 and March 1999 Resident surveys, conducted by Tan Research for the Kangaroo Island Development Board provided an initial overview of resident perceptions to tourism on the Island. The resident survey involved telephone calls to 10% of the Kangaroo Island community and interviewed the person who's birthday was closest to the day of the call.

The survey questions were not designed to solely meet the TOMM optimal conditions, however some of the questions do have relevance to the TOMM project.

Future resident surveys will streamline questions to represent the TOMM optimal conditions more appropriately and will involve a reply paid survey form sent to all householders. A telephone survey will be considered pending budget allocations.

Outcomes of Resident Survey 1998

Survey Areas	TOMM Acceptable Range	1998 Results	Met TOMM Condition?
Perceptions of economic activity	Not listed requirement	89% indicated tourism was 'good' or 'very good' followed by: 88% marron and yabby farming 66% aquaculture 57% pinus radiata plantation	

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Outcomes of Resident Survey 1999

Survey Areas	TOMM Acceptable Range	1999 Results	Met TOMM Condition?
Income derived from tourism	1-3% annual average growth in tourism employment	5% of people surveyed derive all their income from tourism.	
		29% population surveyed, derived part of or all of their income from tourism, compared to 41% derived income from agriculture	
		33% of agricultural income (41%) also had part time tourism income	
Diversification of farm activities	Not listed as requirement	Diversified into: 13% marron 13% cattle 7% farm tourism 4% vineyards 4% beekeeping 3% olives	
Perception of economic activities	Not listed as a specific requirement	Tourism was mentioned as the most well received activity for Kangaroo Island	
Residents feel they can influence tourism	70-100%	60% indicated they could influence tourism-related decisions. 22% felt they couldn't 18% were neutral	No
Visitor numbers	Not listed as a specific requirement	52% of residents guessed that visitor arrivals was around 115,000	
Heard of TOMM	Not listed as specific requirement	88% no 12% yes	

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2.2.4 Accommodation survey

The Kangaroo Island Development Board undertook the accommodation survey for the month of June 1999, as a pilot study and received a response rate of 26.

Given the small sample size, the results from this survey were considered not reliable and data was not published to the Kangaroo Island tourism industry.

In order to boost the response rate, the TOMM position took over coordination of the project and distributed a second accommodation survey for the month of October.

A total of 113 operators were sent a survey and 54 responses were received – a 46% response rate. This response is broken down into industry types of:

Bed and Breakfast	7%
Caravan Parks	6%
Hostel	2%
Hotel / Motel	9%
Self Contained House	59%
Self Contained Units	17%

The data from this second survey is marginally more reliable however, opportunities to improve the survey are being considered particularly in assisting operators to correctly complete the section on bed nights, visitor nights and guest arrivals.

The accommodation survey will be initiated for the months of October 1998 as an initial test run. During the year 2000, the survey will be organised for January, April, July, and October, which will provide the Island with a full year of data.

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Results from the survey for the initial October 1998 test run include:

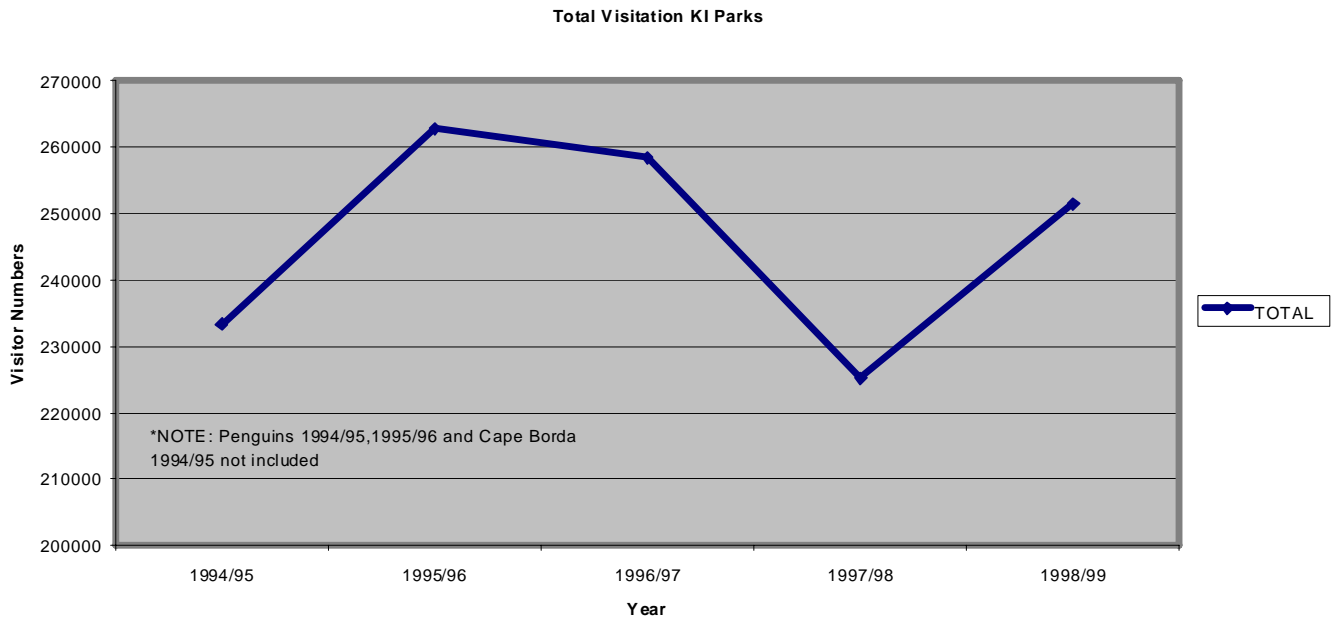
Item	Result	Comment
Total Lettable Units/Rooms	332	
Single Beds	534	A large number of single beds particularly given the trend for visitors to want at least double beds even for a single room night
Double Beds	238	
Total capacity- beds	1010	
Room Nights	4398	
Guest Nights	8800	
Guest Arrivals	4143	
Occupancy % - average	44.2%	Much higher than ABS figures for Hotels, Motels, Guesthouses – 42%
Length of Stay nights	2.1 nights	Much lower than ABS figures of 4 nights Exit survey 1998 length of stay for: International visitors – 2.4 nights Interstate visitors - 4.9 nights Intrastate visitors - 5.7 nights
Employment		
Working Proprietors	43	Reinforces the very strong casual employment of the industry. This will be an interesting statistics to consider against other times of the year as it could easily fluctuate.
F/T Employees	24	
P/T Employees	15	
Casual Employees	125	
Self Employed managers	19	
Salaried director	0	
Employees absent on paid / sick leave	1	
Total Employment	227	
Source of Staff (no's)		
Kangaroo Island	189	
South Australia	10	
Interstate	6	
Overseas	0	
Undertaken Staff Training		
Yes	14	Reflects the huge opportunity for training within the industry
No	38	
Type of Staff Training		
Customer Service	5	
Tour Guiding	5	
Marketing	3	
Financial Planning	14	
Information Technology	2	
Other	27	
Issues affecting business		GST, Cost of travel to the Island More off peak promotions, Greater geographic promotions, Cost to enter attractions, Accessing quality Staff , Competition, Restrictions on development

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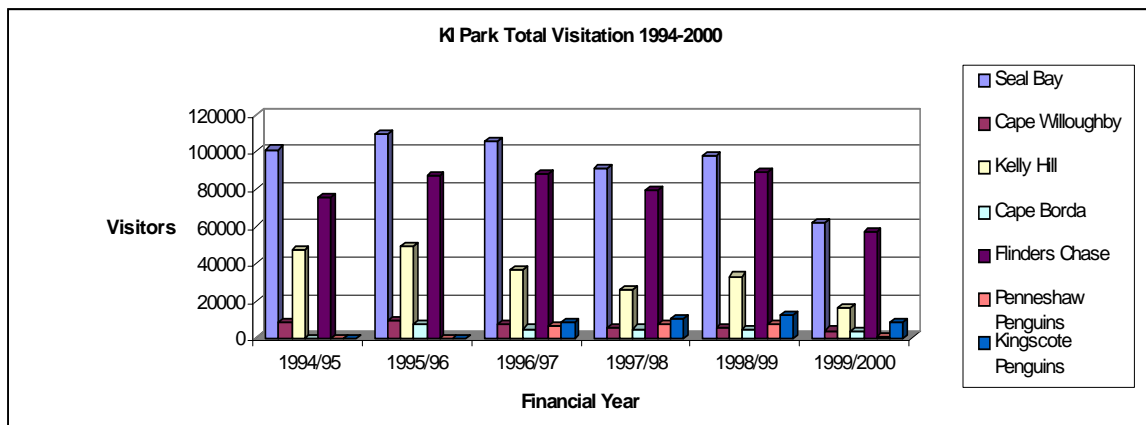
2.2.5 National Parks and Wildlife data

National Parks and Wildlife collect excellent monthly figures on visitation to the managed park sites.

Visitation to Park sites in total is beginning to reach the same volume as when the fast ferries were in operation, as can be seen in the attached graph.

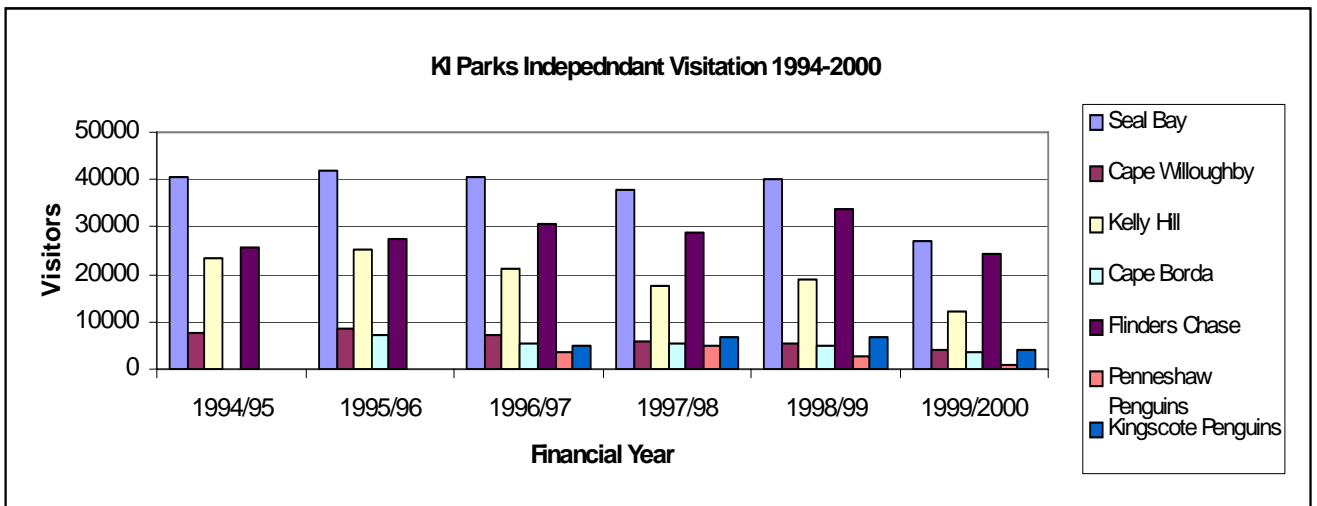
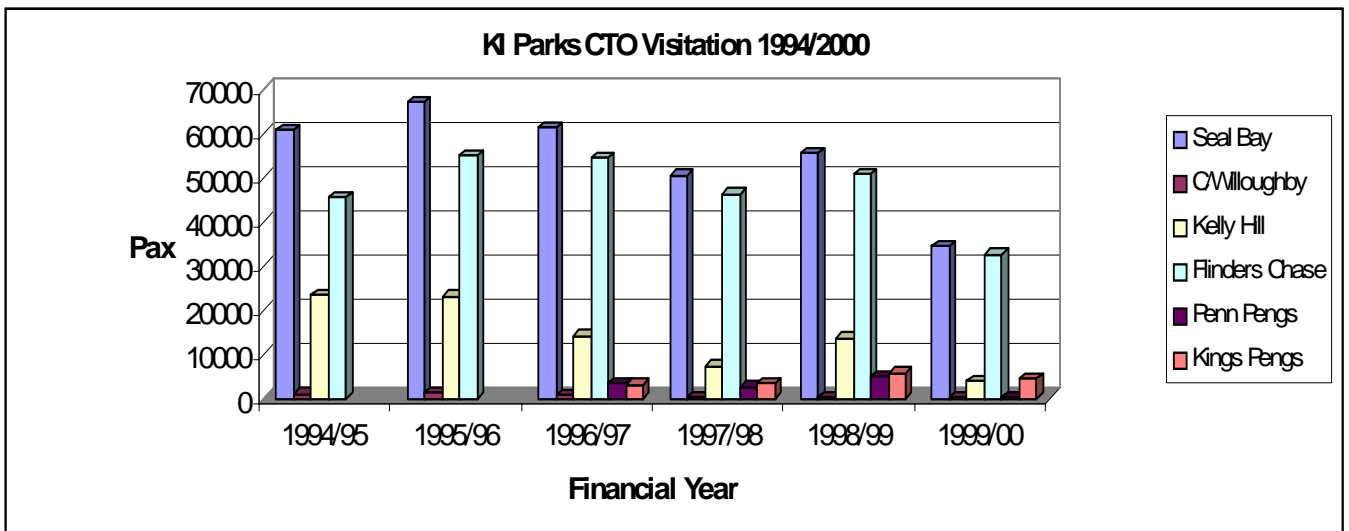


Of this total visitation, it is clear that the key National Park icons on the Island are Flinders Chase and Seal Bay. With the redevelopment of Flinders Chase, it will be of interest to note the visitation to this site and how it impacts upon visitation to Seal Bay. For the months of December / January 1999/2000 visitation to Flinders Chase was marginally up, whilst visitation to Seal Bay had decreased. With an anticipated entry fee increase at Seal Bay, visitation will need monitoring.



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Of interest, is the variance between the number of commercial tour operators using National Park sites and the number of record independent travellers. Whilst visitation by both these groups is increasing, commercial tour operators are bringing much greater volume to these managed sites and as such, offer the potential for effective management solutions.



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2.2.6 Visitation to South Australia

During 1998, visitation to South Australia, 67% of visitors were intrastate and 33% interstate. Victoria was the dominant domestic origin market, followed by New South Wales with other states following. This trend reflects domestic visitation to Kangaroo Island.

Holiday and pleasure was the main reason for visiting South Australia amongst the intrastate market, however visiting friends and relatives, business and holidays were more equally represented amongst the interstate market.

Nationally, the most popular choice of accommodation for overnight visitors in 1998 was a friend or relative's property, with 44% of visitors choosing this mode at some stage of their trip. This trend similarly, is considered to be reflected in Kangaroo Island statistics, particularly given the increasing number of off-island holiday homes being developed.

In South Australia 40% of visitors stayed at a friend's or relative's property and 30% in hotels, resorts, motels, motor inn. Caravan parks and commercial camping grounds were the next most popular with 9% of visitors. These results are more or less in line with the national figures.

The top six activities amongst domestic visitors to South Australia during 1998 included:

- Visit friends or relatives
- Just walk around/taking in the sights/general sightseeing
- Go shopping (pleasure)
- Eat out/restaurant
- Go to the beach (including swimming, surfing, diving)
- Visit national parks/bushwalking/rainforest walks

Fishing is more strongly associated with intrastate than interstate visitors both in SA and nationally.

Visiting wineries was a more favoured activity in South Australia, where 7% of visitors to SA visited wineries. This compares with 3% nationally. Of all visitors who visited a winery as part of their overnight stay somewhere in Australia, 20% did so in South Australia.

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2.3 Issues

Whilst it is agreed that tourism to Kangaroo Island is increasing, the Island itself is facing a number of factors that collectively pose both opportunities and potential threats to its future growth and which require attention. These issues may form the basis of future monitoring programs and indicators for the TOMM project.

Economic Issues

1. Seasonal nature of employment
2. Access to staff throughout the year
3. Need for greater flexibility and availability of year round activities servicing the tourism industry
4. Limited revenue generating potential amongst rateable base
5. Limited value adding by local businesses within the tourism industry
6. Perception that not much tourism dollars are staying in the community
7. Need to upgrade accommodation but a limited cashflow amongst some businesses to do so

Market Issues

8. Influx of significant number of day trippers and associated 'issues' including:
 - Perception of this type of tourism as being out of character with the island
 - Limited economic benefits back into the wider community
9. Seasonal fluctuation in visitation
10. Increasing reliance on one day international markets
11. Market positioning vs visitor experience / expectation – particularly in reference to wildlife siting

Environmental Issues

12. Continual accessing of remote locations by tour operators in order to maintain the edge within their itineraries
13. Island as a research base and access to this research once it is completed
14. Limited or in some cases a lack of monitoring of visitor numbers at non park sites
15. Use of conservation practices amongst tourism operators – if sell ourselves as green what are we doing to live up to this reputation?

Infrastructure Issues

16. Need for environmental and social controls so development is designed with nature
17. Differing perception of what tourism development is
18. Preservation and use of the Island's heritage resources
19. Increasing interest in the Island for development
20. Current Council policy in relation to development
21. Increasing number of off island home owners
22. Quality and range of facilities and services
23. Impact of the ferry pricing
24. Limited capacity of existing water supply
25. Ability of emergency services to cope with increasing number of visitors
26. Cost of fuel
27. Availability of hidden picnic sites on key tourist roads for tour operators to use

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Community Issues

28. Lack of capital – people have ideas/ opportunities but limited cash flow to finance these
29. Low land values and currently low demand for land - if could sell their land they would
30. Breakdown of broad acre farming – land is being sold into smaller lots and bought by absentee owners, raises issues regarding fire and weed management
31. People moving into town and therefore a question regarding future of ‘community’ within rural areas
32. Presentation and perception of a negative image regarding rural life on KI
33. Freight costs
34. Lack of value adding – need to move away from low value products to high yield, low volume
35. Increasing population amongst retirees, unemployed – particularly sole parent and disability. KI is attractive because it is a small community, it’s safe and sometimes isolated which can be an advantage and it’s a nice place to live⁵

⁵ Kangaroo Island Tourism Industry Report- Draft discussion paper for the Departments of Tourism and Environment and Planning, Touche Ross Services 1983
Observation of TOMM manager and Rural Counsellor

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2.4 SWOT Analysis

The SWOT analysis provides an internal and external review of the TOMM concept and enables identification of strategies to ensure its ongoing development in line with the needs and issues of the Kangaroo Island community.

Strengths

- First of its kind in the world
- Catalyst for similar projects elsewhere
- A leading edge tourism management program
- Increasing interest in sustainable tourism – both from government and commercial sector
- Actively involves the community
- Works with community development individuals to value add the work they undertake
- Is being driven from a community level in partnership with government
- Has attracted strong funding for two years
- The community and industry operators support concept
- Has an independent project manager for a two-year period
- Is known globally and has already developed a global network
- Directly links with work of the World Tourism Organisation
- Has industry partners within the tourism industry
- Cooperatively funded and managed by key agencies and their CEO's
- Provides a long term view of tourism growth / decline
- Interest within the community to link in to the project
- Can be used as another form of value adding for local operators

Weaknesses

- Still lack some awareness amongst community
- Short term view /approach of the community
- Limited access to long term funding
- Methodology of surveys has changed each year
- Lack of suitable research agency to implement key monitoring programs
- Seen as panacea to tourism ills
- Possibility of Manager becoming tied up in small projects and losing long term vision
- Limited budgets amongst industry partners
- No immediate results given long term focus
- Requires a 'driver' to ensure ongoing enthusiasm and linkages
- Possibly seen as duplication to existing committees
- Time of management committee to devote to the development of the concept
- Conflicting projects in terms of funding
- No core data on visitor arrival numbers to the island – therefore no baseline data

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Opportunities

Growing interest in sustainable community development and tourism around the world
The Island is becoming more reliant upon successful tourism growth and therefore more interested in its development
Greater awareness of the need to share resources and ideas
Access to long term funding via a renewable resource fee from visitors
Access to a contribution from industry via a 'product insurance' fee – paid voluntarily at first
Interest from Universities and research centres to work with the TOMM concept to access student research

Threats

Short term view of community and agencies
Short time frames
No immediate results so a drop in enthusiasm for the project
Agencies unable to support the project financially
Overwhelm in terms of the number of projects / indicators requiring monitoring – ie need to monitor impact of cruise ships, price of land, number of developments etc
Lack of a project manager without appropriate communication skills
Unwillingness of tourism and transport operators to share their visitor and passenger trends
Reluctance / unwillingness to collaborate

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3 Project Review

The following information outlines the current status of other aspects of the TOMM project.

The TOMM project is evolving. As a model its success will lie in its ability to respond to the issues and needs arising within the tourism and broader community of Kangaroo Island.

Vision:

To achieve World's Best Practice in the management of Kangaroo Island as a tourism destination for the benefit of both residents and visitors within an ecologically sustainable framework.

Project mission

TOMM is funded cooperatively by a range of stakeholders, the Kangaroo Island community and benevolent industry partners who are committed to monitoring, researching and developing a sustainable, self empowered tourism industry on Kangaroo Island, which in turn provides inspiration and motivation to community destinations world-wide

Goals:

1. Establish a set of relevant optimum conditions and indicators for the KI community
2. Consult with the community regarding TOMM and the future optimisation of tourism
3. Undertake and identify appropriate research opportunities for accessing indicator data
4. Identify and create a network of communication to ensure effective provision of data for the TOMM process
5. Identify and generate communication links regarding the TOMM process through global and local promotion
6. Maintain an operational budget to cover expenses of monitoring, communication, administration and employment of a three day a week project manager.

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3.1 Indicators

The indicators developed for the original TOMM concept have undergone a review in light of their applicability to current issues within the tourism industry on Kangaroo Island and the ongoing access to data.

The preferred indicators to be used in the TOMM project are outlined below and will require review and modification by the TOMM Management Committee and industry stakeholders.

Optimal Conditions / Issues	Indicator	Acceptable Range	Agency responsible	Monitoring Method	Timeframe required
ECONOMIC					
Majority of visitors to KI stay longer than two nights	Annual Average number of nights	2 to 7 nights	KIDB	Exit survey	Annually
Tourist expenditure contributes significantly to the economy of Kangaroo Island	Expenditure per visitor	0- 5% annual increase	KIDB	Exit survey	Annually
Tourism provides employment for local residents	Percentage of total employment on Island in tourism / tourism related jobs	To be determined	KIDB	Accommodation survey Resident survey	Annually
Minimal seasonal fluctuation in number of visit to KI	Annual variation in: room nights sold b/t peak and low season air arrivals b/t peak and low season	30-45% variation	SATC	Accommodation survey Arrivals airlines	Quarterly
Accommodation Island Occupancy	Average Increase in Occupancy of island accommodation	Average annual occupancy rate of 60-70%	KIDB / TKI	Accommodation survey ABS figures SATC Index	Quarterly Annually

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MARKET OPPS	Indicator	Acceptable Range	Agency responsible	Monitoring Method	Timeframe required
Growing proportion visitors come from cultural / environmental sector	Proportion of visitors that match ATC cultural / environmental segmentation profile. The number of visits to Kangaroo Island	60-80% of visitors to KI from cultural / environmental sector Total no. visitors 0-7% growth	KIDB	Exit survey question	Annually
Tourism leads to development of new nature based products	Number of new products developed annually to cater for tourism	?? (Please assist with indicator range)	KIDB		
Tourism leads to a demand for local products	Percentage of total production of local products sold to the tourism industry	?? (Please assist with indicator range) For products including: Honey Sheep diary Chickens	KIDB		
ENVIRONMENTAL	Indicator	Acceptable Range	Agency responsible	Monitoring Method	Timeframe required
The majority of visits to the islands natural areas occurs in visitor service zones	The proportion of KI visitors to the island's natural areas who visit managed sites / areas NB – Managed sites range from fully serviced sites, to those with only a carpark and toilet, down to hardened sites with no facilities.	85-100% of total visitors go to specifically managed sites.	Council NPWS	Exit survey NPWSA data	Annually
Biodiversity is maintained and enhanced at tourism activity zones	Net overall cover of native vegetation at specific sites	No loss of native vegetation at the following visitor sites: Pennington Antechamber Cape Du Couedic Stokes Bay Vivonne Bay	NPWS	Specific site monitoring in association with NPWSA and local schools including photo points	Six monthly or annually

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ENVIRONMENTAL	Indicator	Acceptable Range	Agency responsible	Monitoring Method	Timeframe required
Major wildlife populations attracting visitors are maintained / enhanced in tourism activity zones	Seals at Seal Bay, Hooded Plover - Emu Bay, Osprey – D’Estress Bay Penguins – Penneshaw	0-5% annual increase	NPWS	NPWSA data Seal counts Hood plover Osprey numbers	Monthly-Seals Yearly Hooded plover
Tourism industry implements conservation practices	Accommodation operators implement some form of conservation practices such as recycling, water conservation, power generation	50% of accommodation operators	TOMM KIDB	KI Operator survey	Yearly
EXPERIENTIAL	Indicator	Acceptable Range	Agency responsible	Monitoring Method	Timeframe required
Tourism promotion of visitor experience reflects that actually experienced by most visitors	Proportion of visitors who believe their experience reflected that which was suggested in the promotion	85 –100% visitors	KIDB / TKI	Exit survey Q: “How did the experience measure up to expectation” or On a scale of 1-10 please indicate if your experience reflected the images presented to you prior to arriving on KI	Annually
Kangaroo Island provides visitors with a memorable tourism experience	Visitors can clearly identify a distinct tourism experience from visiting Kangaroo Island	85 – 100% visitors	KIDB	Exit survey “What three words describe the experience offered on Kangaroo Island?”	Annually
Majority of visitors leave having gained greater knowledge of Kangaroo Island	Proportion of visitors who leave Kangaroo Island knowing more about the Australian natural and cultural environment	85-100%	KIDB	Exit survey “Please indicate if your experience on KI has changed your attitude about the Australian natural and cultural environment.”	Annually
Visitors recommend Kangaroo Island to their family, associates and friends	Proportion of visitors who would recommend Kangaroo Island	85-100%		Exit survey	Annually

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SOCIOCULTURAL	Indicator	Acceptable Range	Agency responsible	Monitoring Method	Timeframe required
Residents feel they can influence direction of tourism development	Proportion of residents who feel that the local community is capable of influencing the type of tourism on KI	70-100% of respondents	KIDB	Resident survey Qa "On a scale of 1-10 how happy are you with the way tourism is developing on KI - WHY" Qb "Do you have avenues to influence the development of tourism?"	Annually
Residents feel comfortable that tourism contributes to a peaceful, secure, attractive lifestyle	Proportion of residents see positive benefit from tourism	70-100%	KIDB	Resident Survey question Q: "On a scale of 1-10 how important do you see tourism to the health of Kangaroo Island" WHY	Annually
	Total number of crimes reported by non-residents / residents	0-5% increase	TOMM / KI Police	Annual police records	Annually
	Number of trespass incidents reported by residents	0-5% increase	Council / TOMM	Annual number of reported incidences from Council Ranger	Monthly
Residents able to access nature-based recreational opportunities away from tourists	Proportion of residents who feel they can access places away from tourists	80-100%	KIDB	Question in Resident survey - Q: "On a scale of 1-10 indicate how easy it is to access recreational opportunities away from tourists." Q: "Please indicate locations you visit"	Annually

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INFRASTRUCTURE AND DEVELOPMENT	Indicator	Acceptable Range	Agency responsible	Monitoring Method	Timeframe required
Tourism development appropriately reflects the character of the Island	Increase in the type of tourism related developments	Tourism development adheres to the Tourism Policy outline	Council	Council development records	Monthly
Eco -tourism development is viable on Kangaroo Island	Number of developments which proceed after gaining development approval	0-5% increase		Council development records	Monthly
Visitors are satisfied with accommodation on Kangaroo Island	Proportion of visitors who are satisfied with the type and quality of accommodation on KI	80-100%	All key agencies	Exit Survey	Monthly
INDUSTRY DEVELOPMENT					
The tourism industry adheres to recognised quality systems	Number of tourism businesses adhering to a quality program	30-50%	TKI / KIDB	Number of businesses in recognised quality programs	
The tourism industry recognises training as a important component of product quality and development	Proportion of operators training staff Number of tourism related traineeships offered on the Island	50% of respondents 3-5 per annum	TOMM SATC	Accommodation survey SATC Index	Quarterly

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3.2 Publicity

Publicity of the TOMM project has been steady since the commencement in August 1999.

Articles have been included in the Islander Newspaper, Eco Tourism Association Newsletter, National Parks and Wildlife newsletter – Warbler, Landcare Newsletter, Eco Tourism News Spring Edition.

The World Eco Tourism conference has asked that a presentation of TOMM be given at this forum, the organisers are paying for airfares and conference registration fees. Additional conferences will be targeted in 2000 as a means of presenting the concepts and successes behind the TOMM concept

3.3 Community consultation

Community consultation and presentations have been welcomed throughout the Island.

The 1998 resident survey indicated that 88% of Islanders did not know or understand the TOMM model, this question will be asked again in the 2000 resident survey and it is anticipated that this number will be reduced.

Power point and overhead presentations have been developed for future use by any member of the Management Committee and to date have been presented to:

- Eco Tourism Conference - Queensland
- Tourism Kangaroo Island – two presentations providing an initial overview and update
- Kangaroo Island Council
- National Parks and Wildlife staff
- South Australian Tourism Commission executive
- Kangaroo Island Development Board Economic Forum
- Advance Kingscote
- American River tourism operators
- KI Rotary
- Eco Action
- Stokes bay operators
- TKI
- Bee Keepers Association
- Fisherman's Association
- Commercial Tour Operators
- Kangaroo Island Rural Counselling
- Soil Conservation Board – 17th April 2000
- KI Natural Resource Committee – 10th May 2000
- Penneshaw Progress Association – 1st March 2000
- Bridgetown community – Western Australia

A mobile display has not yet been developed, as it is believed that a personal approach allows greater understanding of the TOMM concept, given its intangible nature. A display will be considered as part of the exit survey process at the airport.

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3.4 Human resources

One project manager manages the TOMM project for three days a week. The initial stage of the project has been to:

- Build relationships with key stakeholders
- Refine the indicators and model to suit the current state of tourism development on the Island
- Promote the concept to the local community and key stakeholders thus enrolling them in the process
- Develop data collection systems and interpret data when it is available
- Develop systems to ensure the project has a long-term future, including ongoing financial security.

Depending upon the progression of the TOMM project, the marketing and community consultation role will potentially diminish and the need will arise for greater skills in the area of research, survey design and analysis, which could continue on a three day a week basis.

Projected budgets outlined within the TOMM business plan, suggest that a person appointed at a salary range of up to \$35,000 would ensure appropriate skills in the areas of research, marketing and communication. This individual would require housing with a fully equipped office, however this could also be undertaken from a home office.

3.5 Funding

Funding for the TOMM project of \$127,000 has been sourced from

- Tourism Kangaroo Island
- National Parks and Wildlife SA
- Kangaroo Island Development Board
- Kangaroo Island Council
- South Australian Tourism Commission
- Kangaroo Island Tourism Operator
- Office of National Tourism

This funding has provided for the contracting of the Project Manager and payment of office space within National Parks and Wildlife.

Additional funds (\$20,000) have been sourced from the South Australian Tourism Commission and Tourism Kangaroo Island to initiate the visitor exit survey in 2000.

However there is no scope within the above-mentioned budget for the development or implementation of additional data collection systems to monitor tourism development against the desired optimum conditions, over the long term. A budget and paper discussing funding options has been developed. The securing of such long term funding will be a core role of the TOMM position during 2000.

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4 Summary

The TOMM project over the next year will test the commitment and willingness of all Island agencies to pursue and find ways to make this project succeed.

The road will not be an easy one and there will be times when the TOMM project is at risk due to limited resources both financial and human.

However, the rewards both from a management and publicity point of view are immense.

Success will be reliant upon a collaborative approach and willingness by all agencies to financially contribute to the long-term sustainability of the tourism industry and in the long run, the Island itself.

The future of TOMM and the exciting opportunities it presents for further positioning Kangaroo Island as a world leader in community driven, sustainable tourism management is highlighted most effectively by the e-mail responses from individuals across the world, who are also involved in managing tourism in sensitive areas

*"Liz,
Good to hear from you. I have not come across other communities conducting a broad scale tourism model such as yours, but then I have been focussing primarily on park planning endeavours." Associate Professor Michael Tarrant*

Liz,

Thank you very much for your note and draft article. It's great to hear from you, as I've often wished I could speak to the person managing the project for Kangaroo Island. I would really value the opportunity to keep in touch and to compare notes about the TOMM process and how it is working for you and I both.

Simon is correct... we have started TOMM-inspired planning and management processes in two places: Gwaii Haanas and Aulavik. We are not nearly as far along as you, as I am trying to integrate into a well-established monitoring system, I find some internal resistance to tourism planning (and the alternative is...?), and shrinking resources.

We are looking at applying the model in a few other situations: the Yukon and Baffin Region are fairly certain, and Gros Morne (Newfoundland) and Banff (Alberta) are possibilities. Each of these include World Heritage Sites and operate on a larger scale than my current examples.

Has anyone else been using the model? I'd love to know -- we could have a support group! Thanks again for your note, and I look forward to keeping in touch. Please contact me as I suspect we can be quite helpful for each other.

*Cheers,
Dave McVetty - Canada*

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Very interesting. I would be happy to keep in touch with you re progress. You may be aware that we are heavily involved in the indicators work of the World Tourism Organization where we do risk-driven case studies of impacted destinations. The most recent work was in Cozumel Mexico and in Lake Balaton Hungary. I attach the draft reports for your possible interest. I also attach a couple of publications with regard to tourism management indicators and regarding destination management.

Your approach is of considerable interest. It seems very data dependent but as you say, Kangaroo island is very rich in data. We have focused more on decision-driven demand for key information. In both cases, the mobilization of the key actors to address tourism and sustainability issues may be the most important product. Good luck.

Cheers,

Ted Manning