



Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

CONTENTS

SUMMARY 2

INTRODUCTION 3

 STRUCTURE..... ERROR! BOOKMARK NOT DEFINED.

 MISSION 3

 VALUES..... 3

 CORE BUSINESS 5

 GUIDING PRINCIPLES..... 5

 VISION..... 5

 OUTPUT 6

ACHIEVEMENTS AND HIGHLIGHTS IN 2000 - 2001 7

 MESSAGE FROM THE CHAIR 8

 PROJECT MANAGER' OVERVIEW 10

OPERATIONAL REPORT 14

 OUTPUT 1 ~ MODEL EVOLUTION 14

 OUTPUT 2 ~ MONITORING PROGRAMS..... 14

 OUTPUT 3 ~ MANAGEMENT RESPONSE 16

 OUTPUT 4 ~ AWARENESS BUILDING..... 18

KEY PERFORMANCE INDICATORS..... 21

TOMM MANAGEMENT COMMITTEE 30

FINANCIAL REPORT 32



Annual Report

Tourism Optimisation Management Model – TOMM

Kangaroo Island, South Australia ~ 2000

Summary

The Kangaroo Island Tourism Optimisation Management Model (TOMM) has been operating since 1999 after a report was written in 1997, devising a new management model for sustainable tourism.

During this time, the TOMM has initiated a series of research programs to track identified indicators of the tourism industry's sustainability, as well as assisting in creating an environment through which Island agencies can consider how they integrate their strategic planning processes.

sustainability of Kangaroo Island and its tourism industry has to be considered in light of the Island's natural resource, economy and community. A range of issues has been raised, aided by the TOMM data that require ongoing agency attention to ensure we do not compromise the future of the Island.

Some of these issues include:

- ↓ Effluent disposal
- ↓ Environmental procedures of tourism operators – are we as green as we say?
- ↓ Access – including the provision of local internal transport services and cost to access the Island
- ↓ Community resourcing – including the funding of ongoing community based projects of which tourism is substantial
- ↓ Camping – including facilities, access and the formation of an island-wide permits
- ↓ Roadkill – including the number of roadkill, local black spot areas and the impact on the experience of visitors
- ↓ Wildlife marketing – how our image of abundant wildlife is actually being delivered and if we are meeting visitor expectations
- ↓ Visitor spending in urban areas – the Kangaroo Island Development Board is initiating a business network to consider the data generated by TOMM and how to maximise the tourist dollar.
- ↓ Inter-agency collaboration – do all agencies and corporations have a similar vision for the Island and how are we working together to achieve this?
- ↓ Indicators / research – what core research is required to address major issues such as salinity, vegetation loss, water quality, community sustainability.

Whilst TOMM currently focuses on tourism, it provides a vehicle by which to consider a State of the Island Health Reporting system, if Island agencies are willing to invest time and energy into evolving the initial concept to its broadest application. This annual report provides an overview of the TOMM activities during 2000.



Annual Report

Tourism Optimisation Management Model - TOMM

Kangaroo Island, South Australia ~ 2000

Introduction

Kangaroo Island is the third largest island off the coast of Australia. Situated approximately 100 km south west of Adelaide, South Australia, it is 155 km long, up to 55km wide, and covers an area of 4,500 square km. It is one of the major nature-based tourism destinations within South Australia and currently attracts 160,000 visitors, with a growth rate of 10%.

In 1996, as a result of a dramatic rise in visitors with the introduction of a fast ferry service, Kangaroo Island established a sustainable tourism management model called TOMM - Tourism Optimisation Management Mode. This innovative process aimed at monitoring and communicating the health of island tourism on the Island quantitatively and qualitatively to community and management agencies.

Mission

To achieve a balanced level of sustainable tourism to the advantage of all interests on Kangaroo Island. This process will be achieved by managing the acquisition and dissemination of statistical information and by a collaborative framework of monitoring and management systems.

Values

Within the original TOMM report it clearly stated that recognising and working within community values is essential to ensuring tourism activity is viable, sustainable and supported by the local community.

The incorporation of these values as guiding principles in the strategic decision making process of all Island agencies is considered to be a critical step in the overall achievement of a sustainable industry. This integration has yet to be fully achieved and will form the basis of the TOMM activities in subsequent years.

Without these principles underpinning management and development issues, the Island risks destroying the very things they appreciate and consider important.

The community values identified from previous planning and incorporated into the TOMM strategy include:

- expansive and relatively unchanged rural and natural landscapes (particularly coastline)
- abundant and highly visible wildlife

TOMM

Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

- a safe, clean and healthy environment
- relative solitude through a small and sparsely spread population
- unpretentious and relaxed lifestyle; and
- strong sense of community and common bond with the land and its heritage.

As part of the implementation of TOMM, a final value has been included – a viable and healthy economy.



Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

Core Business

To raise the awareness of and support for sustainable development.

To enable success for the community, economy and environment and for the stakeholders of today and tomorrow.

These are achieved by:

- management and maintenance of TOMM monitoring programs, TOMM partners and the wider community: ie
 - by increasing awareness and promoting the use of the monitoring tools to assist tourism planning and management.
- identification, collation, and analysis of data relating to the impact of tourism and also the TOMM optimum conditions.
- maintenance of a high level of communication, awareness and the use of TOMM information within the strategic planning process.
- identification of and support for joint venture partner and community based tourism planning and initiatives that facilitate sustainable development.

Guiding Principles

- A partnership to enable a collaborative approach towards the issue of a sustainable community on Kangaroo Island.
- To be responsive to the changing requirements of the project's partners, the wider community and the environment.
- To evolve and be responsive to the needs of these parties.

Vision

The TOMM will be used by its partners and the wider community to ensure the sustainable development of Kangaroo Island. In doing so, it will provide a 'best practice' model for other destinations globally and achieve for its stakeholders considerable success.



Annual Report

Tourism Optimisation Management Model – TOMM

Kangaroo Island, South Australia ~ 2000

Output

This vision is achieved through the following:

1. Model Evolution

The TOMM Management Committee is involved in the constant review and evolution of the tourism optimisation management model as part of its contribution. The TOMM represents a new approach to sustainable tourism development, focusing on integrated management across all sectors – community, economy, environment and visitor experience.

2. Monitoring Program

The TOMM Management Committee oversees the implementation of monitoring designed to track the impact of tourism against a set of optimum conditions. These programs generate considerable market information that is used to assist long-term strategic planning by island agencies and business operators.

3. Management Response

A critical component of the model, this process enables the joint partners of the TOMM to integrate and act upon specific issues or trends that emanate from the monitoring programs. This pro-active approach to threats and opportunities ensures that the future of tourism is addressed strategically by all island agencies.

4. Awareness building

Long-term attitudinal changes amongst stakeholders on Kangaroo Island and those charged with the development of tourism globally. The TOMM implements a comprehensive system of awareness building both locally and globally to highlight the benefits of integrated tourism management and to show the TOMM as one option for sustainable tourism management.

TOMM

Annual Report

Tourism Optimisation Management Model - TOMM

Kangaroo Island, South Australia ~ 2000

Achievements and Highlights in 2000 - 2001

2000 - 2001 has been a milestone for the TOMM project, indicating the importance this model can play in the future of Kangaroo Island and its application to tourism management in other destinations.

Specific achievements include:

- Commencement of the Kangaroo Island Visitor Exit Survey resulting in specific and up to date market information on visitation to the Island
- Implementation of the Kangaroo Island Resident Survey, enabling local residents with a vehicle to express their views on issues relating to Kangaroo Island's development
- Island agency commitment to support the TOMM project as a long-term, integral component of Kangaroo Island's management practices
- The TOMM was awarded \$80,000 by the Department of Workplace Relations and Small Business. This grant is being used to maintain the survey processes and assist small businesses to capitalise upon the growth of tourism to the Island
- Funding from the South Australian Tourism Commission to develop a TOMM website
- Incorporation of the TOMM into educational programs of local schools and some tertiary institution throughout Australia
- Presentation of the TOMM concept to visiting delegates from Taiwan and Oman
- Special commendation in the SA Great Awards for work generated
- Financial participation of commercial operators in the TOMM project and its monitoring programs
- Sponsorship from the Brazillian Government Office to present the TOMM at the World Eco Tourism Conference in Salvador, Brazil
- Invitation to present the TOMM and its processes at the World Marketing Congress 2001 in England
- Workshop with all tourism management agencies on the Island to discuss the future of the TOMM





Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

Message from the Chair

Since the presentation of the final TOMM report in 1997, by Manidis Roberts Consultants, the community of Kangaroo Island have attempted to take hold of the recommendations that it contained and implement them to ensure a healthy tourism industry both now and in the future, but also to minimise the impacts the tourism industry might have on the natural assets and the infrastructure that supports our community.

Key stakeholders, including, Local Government, Tourism Kangaroo Island, National Parks and Wildlife SA, the Kangaroo Island Development Board and the South Australian Tourism Commission all came together to manage the project and try to implement the recommendations.

The above local agencies all made a financial commitment to the project but this was not adequate to employ a project manager to undertake the work required.

An application was submitted to the Office of National Tourism to seek funding for the employment of a project officer and this resulting in funding being granted to ensure the project could continue for the next two years.

With immediate funding secure and with the National Parks and Wildlife SA able to provide office accommodation and financial management support for a project officer, the next most important step was to appoint someone with the capacity to understand the project but who also had the ability and the enthusiasm to take the necessary steps to make it all happen.

The decision to employ Liz Jack as our Project Officer has proven to be of great importance in seeing TOMM change from a concept to a reality.

Liz was immediately able to continue and improve the exit and resident surveys that had been undertaken by the Kangaroo Island Development Board during the previous twelve months.

By far the most difficult task was making the community aware of TOMM as a management tool and by demonstrating in a practical sense, how we could all benefit by playing an active role in the process. Much of her time was devoted to speaking to tourism operators, students of Kangaroo Island schools, community groups and local agencies.



Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

The result of this very extensive consultation has meant that not only is there a greater understanding of TOMM and its role but individuals have actively supported the project by entering into sponsorship agreements or by assisting in a voluntary capacity to help in the continued task of broadening the understanding of TOMM.

This awareness and understanding is best demonstrated through the resident survey results. In 1998, only 22% of respondents indicated they had heard of TOMM. In the same survey during 2000, this figure had risen to 65%.

Recognition for TOMM as a management tool has spread far beyond Kangaroo Island and request for our office to make presentations at conferences have come from Interstate as well as overseas, and as a community we must not lose sight of the fact that we are developing a process that is unique and has much value for future management of resources in other areas.

As the contract with our project officer nears the end and we look to find a replacement for the next twelve months, we are entering a period of vital importance as to whether the project can be assured of secure funding to enable it to continue in the long term. A challenge faced by so many communities these days.

As with all projects TOMM will only be as successful as the effort that is put into it.

There is a challenge for the local agencies to make TOMM a useful tool for them to plan and carry out functions that are both productive and give a strategic management direction for the preservation and the enhancement of Kangaroo Island both as a prime tourist destination and as a great place to live.

We have the power to determine the future.

Janice Kelly

Chair

Tourism Optimisation Management Model

2000



Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

Project Manager' Overview

During this year, the Tourism Optimisation Management Model has continued to demonstrate its application to the development of sustainable tourism within the community of Kangaroo Island and its relevance to other communities throughout the world.

The implementation of our monitoring programs, including the visitor exit survey and Island resident survey, has provided the basis for the ongoing tracking of the visitor and resident experience and tourism's impact. Whilst the Island is still working with commercial operators to gauge exact numbers of visitors, the information generated by these processes is providing vital information that is increasingly being used by new and existing operators to aid them in their planning.

The island continues to generate a 90% satisfaction rating with the experience delivered. Wildlife is still the main motivator to visit the island.

Issues, such as the amount of money being spent by visitors on the island, the sustainability and appropriateness of our day to day operations in terms of 'green' tourism will continue to challenge the industry. Hopefully this will lead us towards greater collaboration on factors, such as opening hours, service delivery and the use of our primary produce as an additional motivator to visit.

Satisfying our growing international market for a clean, green, destination will require a long-term change of attitude amongst all the operators and management agencies on the Island. Action on critical issues, in particular effluent that may destroy our image as a clean, green destination will help to overcome such threats.

Environmental monitoring will continue with the TOMM indicators being reviewed in line with activities of other environmental monitoring groups on the Island such as the Kangaroo Island Natural Resource Management Strategy.

Management of the TOMM project has undergone considerable review after this, its first year of implementation. 2001 will see the vision for the project expanded as a core monitoring program for a broader range of Island agencies and positioned under the custodianship of the Kangaroo Island Council, thereby helping to ensure its own sustainability.



Annual Report

Tourism Optimisation Management Model - TOMM

Kangaroo Island, South Australia ~ 2000

Awareness building regarding the TOMM project and its value to Kangaroo Island and as a model for other destinations continues. Links have been established with the local education sector and many teachers are enthusiastically using the TOMM data and its local relevance. This has also expanded to some mainland schools, with great enthusiasm coming from Unley Senior High School and their tourism programs.

The TOMM continues to be included in conference and speaking engagements within Australia and overseas. Its relevance and application to other tourism destinations is being considered by a number of agencies in Canada, Scotland and the England.

Financial Management

Commitment continues from the core Island agencies, including the Kangaroo Island Council, Tourism Kangaroo Island, Kangaroo Island Development Board South Australian Tourism Commission and National Parks and Wildlife SA.

The introduction of new funding partners from the commercial sector signifies a shift in attitude towards the role of the private sector. *Kangaroo Island Wilderness Tours, The Islander Newspaper* and *Adventure Charters Kangaroo Island* contributed to the TOMM monitoring and awareness programs this year.

Planned Initiatives 2001

- Resolution of the long-term future of the TOMM project and its sustainable funding source. Options being considered include a community trust.
- Signed commitment from all TOMM partners to their continued involvement in the model.
- Continuation of the visitor exit and island resident surveys with detailed analysis being presented to Island management agencies.
- Review of the environmental indicators to reflect the sustainability indicators being considered by the Kangaroo Island Natural Resource Board.
- Incorporation of the TOMM processes in the strategies and performance measures of the TOMM partners.
- Establishment of a TOMM web presence.
- Implementation of a TOMM / KI Development Board CEO forum on sustainability, to discuss issues arising from the monitoring programs and involving all Island management agencies.
- Ongoing awareness building of the TOMM project throughout Australia and internationally.



Annual Report

Tourism Optimisation Management Model - TOMM

Kangaroo Island, South Australia ~ 2000

Throughout 2001, the aim of the TOMM project will be to facilitate the collection and dissemination of information so as to enable the sustainable development of Kangaroo Island. 2001 will also see the appointment of a new TOMM manager in line with our policy of introducing new expertise to build on the work already initiated.

It is intended that this position will focus on existing research and analysis, whilst still maintaining a community presence. I wish the Management Committee and this person all the best for the future and hope to stay actively interested in the progression of the TOMM as a model for sustained community development.

A Vision for TOMM

In two years, the TOMM has been taken as a concept from a consultant's report to implementation within the Kangaroo Island community. During my implementation of the project, its potential to evolve into a whole of Island reporting mechanism has become quite evident.

Communities are increasingly seeking a vehicle to voice their needs, expectations and requirements to and of government and the corporate sector. Kangaroo Island is no different, however this community does have the beginnings of a 'community voice' through the TOMM project.

It is my vision, that the community of Kangaroo Island takes the initial TOMM concept and recognises that it has gained an established position and respect within the local and global community and has the potential to be tailored to suit a range of community needs.

These would include Island-wide sustainability reporting, a communication process between government and the community and more importantly, a method of local community empowerment and lobbying. Through the provision of these services it would be possible to provide a picture of the health and issues that affect Kangaroo Island and facilitate an environment of community collaboration.

Achievement of this vision will require the combined will of the community and partner agencies. The formation of a community trust and management structure through which to house the TOMM will be one opportunity to progress with this concept, as will the appointment of advisors to ensure the strategic evolution of the model.



Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

The community trust model will not replace existing methods of governance through Local Government. The vision of this model is rather as an opportunity to initiate a range of entrepreneurial activities that would enable the TOMM capacity and services to be continued and thereby facilitate sustainable community development on the Island.

These could include:

- The introduction of a community membership structure, providing ongoing funding and encouraging on and off island stakeholders to have a say in the future of their Island through the Trust.
- The establishment of a 'knowledge base, that enables the Island to generate revenue from the existing research that is being undertaken and which is currently being accessed by off island agencies and consulting firms at no charge.
- The introduction of a visitor levy or should this not be acceptable, a visitor passport or donation system that would enable a sustainable funding source to be accessed from the increasing number of visitors coming to Kangaroo Island.

One thing is for sure, change is a given and without vision or the will to control their own future, Kangaroo Island faces the full force of globalisation and internationalisation, both of which will have major ramifications for the future of this community, its economy and environment.



Annual Report

Tourism Optimisation Management Model - TOMM

Kangaroo Island, South Australia - 2000

Operational Report

Output 1 - Model Evolution

The TOMM project was established as a model with a wider application than simply Kangaroo Island. Evolution of the model is ongoing.

≈ Ownership of TOMM

Throughout the first stage of the TOMM's implementation, issues regarding ownership of the model were raised. During 2000, the Management Agencies agreed that the TOMM should be placed under the custodianship of the Kangaroo Island Council.

With ongoing support from the various Island agencies, the TOMM will remain as an independent entity reporting to the Management Committee and as a sub-committee to the Kangaroo Island Council. This will take effect during 2001.

It is intended that this will bring the project closer to the community, whilst maintaining the independence of the TOMM and allowing issues to be raised and discussed.

≈ Optimal Conditions

During 2000, the TOMM Management Committee has undertaken a number of changes to the model, making it more relevant to the community and issues present on Kangaroo Island.

In particular, the optimum conditions established to track the impact of tourism have been refined to enable more quantifiable monitoring to take place and of greater relevance to the information needs of its stakeholders.

These will be continually reviewed in the light of feedback from the community and agencies on the Island.

During 2001, it is intended to investigate the alignment of TOMM indicators to the Natural Resource Management Strategy for the Island and in doing so, broaden them to form a 'state of the Island' reporting system.

Output 2 - Monitoring Programs



Annual Report

Tourism Optimisation Management Model - TOMM

Kangaroo Island, South Australia ~ 2000

The monitoring programs of the TOMM project are based upon the optimum conditions for tourism development. During 2000, the focus has been on establishing the Visitor Exit and Kangaroo Island Resident Survey, thereby covering the majority of the indicators in the Visitor Experience, Social, Economic and Market Opportunity sectors.

Environmental monitoring is the area in which the least monitoring is being undertaken. This is due in part to the indicators themselves being marginally relevant to the core issues facing the Island. Indicators will be reviewed in this sector during 2001 and streamlined with the activities of the Kangaroo Island Natural Resources Board and National Parks and Wildlife SA programs.

Results of the monitoring programs and achievement of the identified TOMM optimum conditions are dealt with in the attached Optimum Conditions Report.

≈ Visitor Exit Survey

The Visitor Exit Survey has been undertaken throughout 2000 by the research firm, Market Equity Pty Ltd. Self-completion surveys were available at the Sealink ferry, airport and through some accommodation operators.

The survey was undertaken on a quarterly basis in April, June, November and January, with an average of 1600 responses over the year. In 2001, it is proposed that the survey be undertaken at three stages during the year, allowing for an annual analysis of the results and a better reflection of both high and low periods of visitor activity.

≈ Resident Survey

The Kangaroo Island resident survey was undertaken in November and consisted of a random telephone survey of 10% of the Islands' residents. This was supported by a newspaper survey sponsored by *The Islander Newspapers* in the week preceding and after the telephone survey.

The newspaper survey aimed at giving residents a chance to put their views forward on a number of issues, including tourism. This survey only generated a response rate of 75 and its continuation will be reviewed in 2001.



Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

≈ Accommodation survey

The accommodation survey, commenced by the Kangaroo Island Development Board, was picked up by the TOMM project. The survey has undergone a review after one year of operation and will require considerable revamping to ensure data is reflective of the accommodation sector on the Island. At this point, fewer than 50% of island operators completed the survey. It is proposed that the accommodation survey be reinstated in 2002.

≈ Environmental monitoring

Environmental monitoring is being undertaken by a number of agencies on Kangaroo Island and the indicators identified for the TOMM project require review to ensure they are achievable and relevant.

To date, monitoring is taking place in regards to:

- ↓ the population numbers of Australian Sealions. However these figures do not indicate direct visitor impact alone and
- ↓ the number of visits to natural areas that are managed for visitors.

Output 3 ~ Management Response

The management response of the TOMM project is fundamental to the success of the model in assisting the future management of tourism on Kangaroo Island.

If the community or the TOMM identifies issues that may potentially impact on the future sustainability of the community and these issues are not actively pursued and addressed, over time, problems will compound and impact increase.

2000 –2001 has been a year of awareness building amongst both agencies and the general public regarding the role of TOMM in the community's future. Also how TOMM is to be incorporated into the operational procedures of management bodies. Regular agency forums are required to address these issues and to seek collaborative solutions.



Annual Report

Tourism Optimisation Management Model - TOMM

Kangaroo Island, South Australia ~ 2000

General Issues

To date, a number of core issues have been raised, aided by the TOMM data, and will require ongoing one agency to take up the issue. Tourism specific issues as well as island-wide problems include:

- ↓ Effluent disposal
- ↓ Environmental procedures of tourism operators – are we as green as we say?
- ↓ Access – including the provision of local internal transport services and cost to access the Island
- ↓ Community resourcing – including the funding of ongoing community based projects of which tourism is substantial
- ↓ Camping – including facilities, access and the formation of an island-wide permits
- ↓ Roadkill – including the number of roadkill, local black spot areas and the impact on the experience of visitors
- ↓ Wildlife marketing – how our image of abundant wildlife is actually being delivered and if we are meeting visitor expectations
- ↓ Visitor spending in urban areas – the Kangaroo Island Development Board is initiating a business network to consider the data generated by TOMM and how to maximise the tourist dollar.
- ↓ Inter-agency collaboration – do all agencies and corporations have a similar vision for the Island and how are we working together to achieve this?
- ↓ Indicators / research – what core research is required to address major issues such as salinity, vegetation loss, water quality, community sustainability.



Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

Agency Issues

The management partners to the TOMM project have yet to fully internalise the TOMM into their operational procedures – an issue that requires immediate attention if the Island is to fully integrate the community values identified earlier.

The Kangaroo Island Development Board uses the TOMM data as performance measures for their own projects. All agencies use the TOMM data on an adhoc, as needs basis. However, for the TOMM to achieve its intended purpose, the issues and information generated by the project require greater application in the strategic planning process of each agency.

It is proposed that the agencies review their strategic plans and position the TOMM within their planning, so that it complements their activities and guides their strategic planning processes. This will take the form of performance indicators for the agency and their specific projects. A key component of this inter-agency collaboration will be the formation of communication links, so the information / research generated by the TOMM and agencies is fed through agency departments.

The success of TOMM will be seen in the action generated by the partners within the wider community. To aid this, the third stage of TOMM will be focus on a greater analysis of data and its incorporation into the management agencies – both private and public.

Output 4 ~ Awareness building

The TOMM project has undergone two core stages to date. It's formation and initial consultation in 1996/97 was followed by a two year absence, whilst funding was being sought to appoint a project manager to initiate stage two. This absence resulted in a cynical view of the project from within the community and required the project to be re-introduced.

Stage two – August 1999 until July 2001 – has focused on rebuilding the awareness and support for the vision of the TOMM project both within the community and the wider tourism industry, nationally and internationally.

This supply and demand approach has ensured international interest and demand translates into local pride and a desire to ensure the continuation of the project.



Annual Report

Tourism Optimisation Management Model – TOMM

Kangaroo Island, South Australia ~ 2000

Stage three, will capitalise upon the success of this awareness campaign and centre on greater analysis of the research, implementation of additional monitoring programs and integration of the TOMM information into the strategic actions of Island tourism agencies. Concurrent with this day to day operation, strategic planning will be undertaken to determine the viability of community-based ownership of the TOMM through a foundation or community trust structure.

Building awareness of the TOMM project has focused on a number of platforms:

≈ Presentations

Fifty five presentations / consultations have been undertaken during 2000 at a multitude of local, national and international forums – all of which have centred on a number of core themes, these being the uniqueness of the model, its application to other regions and the role it is playing in empowering the local community of Kangaroo Island. Key presentations during 2000 have included:

- ≈ World Eco Tourism Conference – Salvador Brazil
- ≈ National Eco Tourism Conference – Lorne Victoria
- ≈ Future of Australian Country Towns Conference – Bendigo Victoria
- ≈ Kangaroo Island Development Board Economic Forum – Kingscote Kangaroo Island
- ≈ Regional Managers' Forum – National Parks SA and SA Tourism Commission – Murray Bridge South Australia
- ≈ Kingscote and Parndana Area Schools, Kangaroo Island. The TOMM is being integrated into tourism and science and the environment classes in both these schools.

≈ Publications

A range of publications has been produced during 2000 as a way of communicating the results of the TOMM research and generating awareness regarding the Project's objective. Publications include:

- | | |
|--------------------------------|----------------------------------|
| ≈ Annual reports 1999 and 2000 | ≈ TOMM brochure and newsletters |
| ≈ 2000 Visitor Exit Survey | ≈ TOMM business plan 1999 – 2002 |
| ≈ 2000 Resident Survey | |

TOMM

Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

These publications are available to interested parties.

≈ Publicity

Publicity has been strongly supported throughout the year by *The Islander Newspapers*. As partners to the TOMM project, *The Islander* provided free of charge, editorial space to the TOMM in an effort to promote survey results and generate debate regarding the issues of sustainable tourism. The support of Rob Ellson and *The Islander* is of significant value.

Twenty articles have been printed in the local papers throughout 2000, generating local interest and discussion.

Posters have been developed to increase the exposure of TOMM. Inquiries regarding the Model have come from government agencies, educational institutions and local government / tourism destinations from the United Kingdom, Scotland, America, Taiwan, Oman and Australia.



Parndana Area School
Parndana Agricultural Show



TOMM display
Posters on the future of Kangaroo Island



Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

Key Performance Indicators

As part of its central monitoring and management, the TOMM has a series of optimal conditions and indicators designed to track the acceptable development of tourism on the Island.

Optimal conditions cover the areas of the economy, environment, society, market opportunity and visitor experience. Monitoring programs have begun to be established to track a series of indicators within an acceptable range to highlight areas requiring action by management agencies.

Not all of the optimum conditions are currently being monitored due to the availability of resources and the need to review the relevance of the condition and its meaning for the local community. These are still reported below but carry a N/I (not implemented) symbol.

Economic Indicators

Issues	KPI	Acceptable range	Score
Economic ♦ Visitors to KI stay longer than 2 nights ♦ Tourist expenditure as contribution to KI economy	♦ Annual average number of nights ♦ Expenditure per visitor	♦ 2 – 7 nights ♦ 0 – 5% annual increase	♦ 3.9 nights Result ✓ ♦ Average spend \$195 ♦ Wave 1 - \$195 ♦ Wave 2 - \$173 ♦ Wave 3 - \$189 ♦ Wave 4 - \$216 Cannot test until 2 nd year of research Result = 0 (Benchmark)



Annual Report

Tourism Optimisation Management Model - TOMM

Kangaroo Island, South Australia - 2000

Market Opportunity Indicators

Issues	KPI	Acceptable range	Score
Market Opportunities <ul style="list-style-type: none"> ◆ Growth in proportion of visitors from cultural/environmental sector 	<ul style="list-style-type: none"> ◆ % of visitors matching the cultural / environmental profile. ◆ % growth of the number of visits by that segment. 	<ul style="list-style-type: none"> ◆ 60-80% of all visitors match ATC profile. ◆ 0 - 7% annual growth 	<ul style="list-style-type: none"> ◆ Mean of importance exceeds 4 ◆ Main activity = 81% of sample Result ✓ <p>Cannot test until 2nd year of research Result = 0 (Benchmark)</p>

TOMM Indicators- Environmental

Issues	KPI	Acceptable range	Score Wave 2
Environmental <ul style="list-style-type: none"> ◆ Majority of visits to Island's natural areas occurs in visitor service zones 	<ul style="list-style-type: none"> ◆ Proportion of visitors to natural areas who visit managed sites/areas (Managed sites range from fully serviced areas down to hardened sites with no facilities) 	<ul style="list-style-type: none"> ◆ 85 – 100% of all visitors go to specifically managed sites 	<ul style="list-style-type: none"> ◆ Visitors going to at least 1 managed site = 85% Result = ✓

TOMM Indicators- Experiential

Issues	KPI	Acceptable range	Score
Experiential <ul style="list-style-type: none"> ◆ Promotional activity reflects actual visitor experience ◆ KI visitors have a memorable experience 	<ul style="list-style-type: none"> ◆ Proportion of visitors who believe that their experience reflected that which was suggested in the promotion ◆ Proportion of visitors that identify a "tourist" experience" 	<ul style="list-style-type: none"> ◆ 85 – 100% of all visitors ◆ 85 – 100% of all visitors 	<ul style="list-style-type: none"> ◆ Mean of satisfaction 4.45 ◆ Number 89% of sample Result ✓ ◆ Proportion state this = 96% Result ✓



Annual Report

Tourism Optimisation Management Model - TOMM

Kangaroo Island, South Australia - 2000

<ul style="list-style-type: none"> Majority of visitors state that they wish to gain more knowledge about Australian natural and cultural environment Visitors recommend KI to others 	<ul style="list-style-type: none"> Proportion of visitors that state that they wish to gain more knowledge about Australian natural and cultural environment Proportion of visitors who would recommend KI to others 	<ul style="list-style-type: none"> 85 – 100% of all visitors 85 – 100% of all visitors 	<ul style="list-style-type: none"> Number stating that this is important = 65%* Result ✗ 99% of visitors would recommend KI Result ✓
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TOMM Indicators– Infrastructure / Development

Issues	KPI	Acceptable range	Score
Infrastructure / Development <ul style="list-style-type: none"> Visitors are satisfied with accommodation on KI 	<ul style="list-style-type: none"> Proportion of visitors satisfied with type and quality of accommodation 	85 – 100% of all visitors	<ul style="list-style-type: none"> Mean of satisfaction 4.15 Number in sample 75% Result ✗

TOMM Indicators– Socio-Cultural Conditions

Issues	Key Performance Indicator (KPI)	Acceptable range	Score
Socio-Cultural <ul style="list-style-type: none"> Growth of local employment is consistent 	<ul style="list-style-type: none"> % increase in number of people who derive all or some of their income from tourism % increase in number of people who think work in tourism will increase compared to farming 	<ul style="list-style-type: none"> Increase from KIDB data 1996 Benchmark 2000 	The Kangaroo Island Residents Survey Report found that most businesses on Kangaroo Island over the past 12 months have shown a positive comparison to the previous year in terms of performance.



Annual Report

Tourism Optimisation Management Model - TOMM

Kangaroo Island, South Australia ~ 2000

<ul style="list-style-type: none"> ◆ Residents feel they can influence tourism related decisions 	<ul style="list-style-type: none"> ◆ % increase in residents saying that they can influence tourism decisions 	<ul style="list-style-type: none"> ◆ 70 - 100% of respondents 	<p>39% of residents felt that they had the ability to influence tourism decisions. Result ✗</p> <p>Considering that 85% of residents perceive that they have a personal responsibility to ensure the Kangaroo Island thrives, this issue is an important one.</p>
<ul style="list-style-type: none"> ◆ Residents feel comfortable that tourism contributes to a peaceful, secure and attractive lifestyle 	<ul style="list-style-type: none"> ◆ Number of petty crime reports committed by non-residents per annum ◆ Number of traffic accidents involving non-residents per annum ◆ Proportion of the community who perceive positive benefits from tourism 	<ul style="list-style-type: none"> ◆ 10 to 25 crime reports per annum by non-residents ◆ 50 to 80 vehicle accident reports per annum ◆ 70 to 100% of respondents 	<p>N/I – needs reviewing</p> <p>N/I – needs reviewing</p> <p>91% residents agreed tourism had a positive impact on KI economy Result ✓</p>
<ul style="list-style-type: none"> ◆ Residents are able to access nature-based recreational opportunities that are not frequented by tourists 	<ul style="list-style-type: none"> ◆ Proportion of residents who feel they can visit a natural area of their choice with very few tourists present 	<ul style="list-style-type: none"> ◆ 80 - 100% of respondents 	<p>66% of residents agreed to the statement "It's easy to access recreational places where there are no tourists". Result ✗</p>



Annual Report

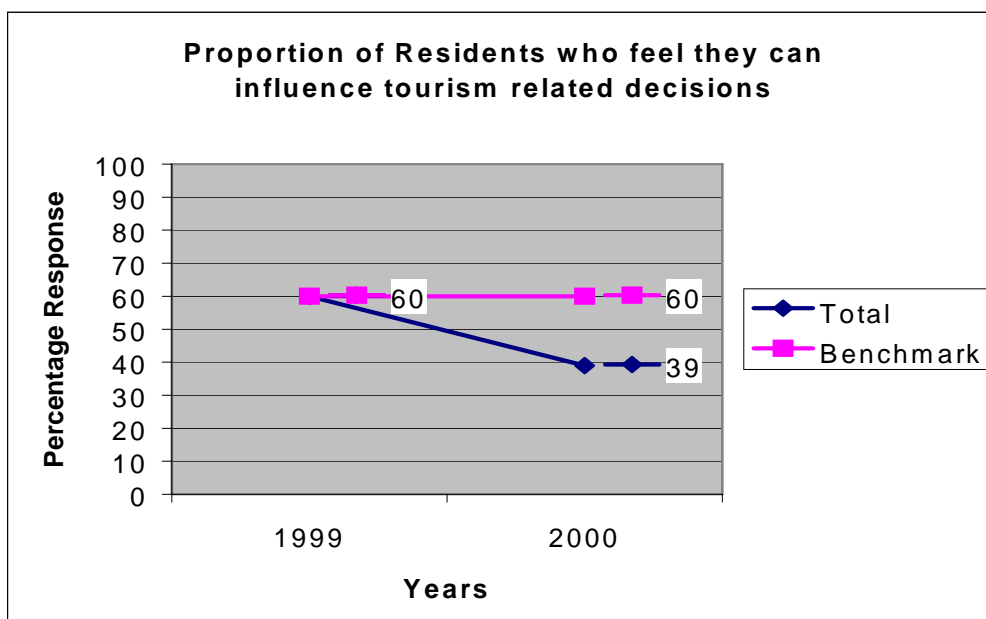
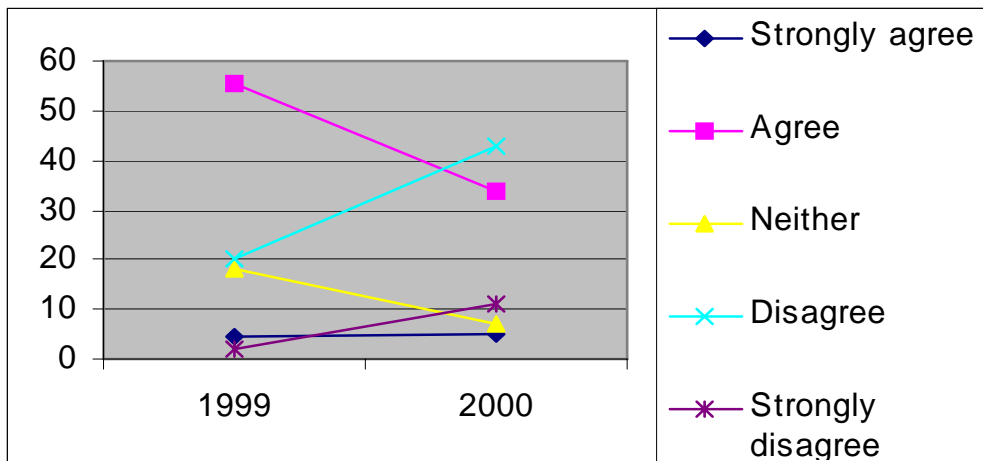
Tourism Optimisation Management Model - TOMM

Kangaroo Island, South Australia - 2000

Indicators Requiring Attention:

Optimum Condition 15 - Residents feel they can influence direction of tourism development

In 1996, the benchmark established for this optimum condition was 60% of respondents felt they could influence tourism-related decisions. In the 1999 resident survey, this figure had not changed, however in 2000, there is a dramatic decline in the percentage of respondents who felt they could influence tourism related decisions and a corresponding increase in the number of people who feel they do not have any influence on this decision making. These factors are clearly seen in the two graphs below:





Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

The impact of this decline is discussed in the following scenario.

- Sc. 1 As Kangaroo Island becomes increasingly attractive as a development site and the number of off – island investors increase, profits from tourism leave the Island and this sense of inability to influence decisions may increase. Increasing criticism of the local tourism management agencies and offshore investors creates a climate of negativity and social disharmony.

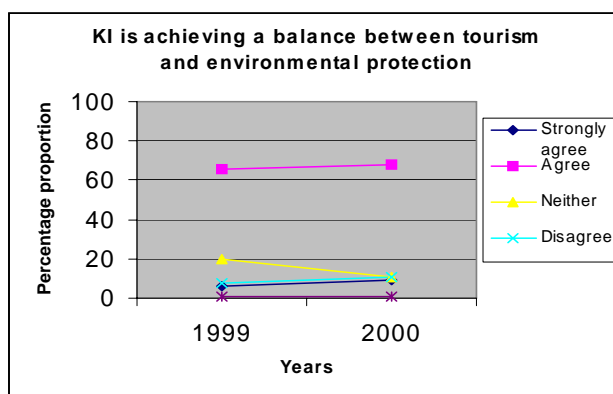
In 2000, 63% of respondents in the Island resident telephone survey felt that tourism was developing in line with community values, 25% did not. However, if we consider the resident survey undertaken through the Islander newspaper – and one must realise that this survey was not representative and tended to attract respondents with a particular view – the number of people that felt tourism was being developed in line with community values fell to 20% whilst 41% disagreed with the statement and an alarming number of respondents (39%) were unsure.

Optimum Condition 16 - Residents feel comfortable that tourism contributes to a peaceful, secure, attractive lifestyle.

This indicator is monitored through a number of statements within the Kangaroo Island resident telephone survey. It is proposed that this indicator be modified to read: Residents feel that tourism contributes positively to their lifestyle. Four statements are used within the survey mechanisms to monitor this indicator. These include:

1. **Kangaroo Island is achieving a balance between economic gains from tourism and protection of the environment;**

Agreement with this statement was within the acceptable range of 70-100% during the 1999 and 2000 Island resident surveys although there is still a low strongly agree element within the responses.





Annual Report

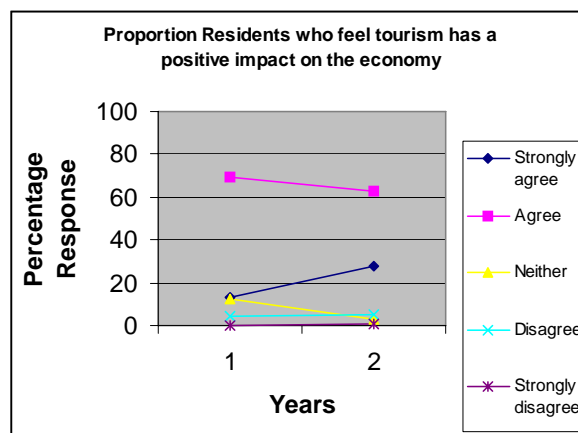
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Kangaroo Island, South Australia ~ 2000

2. Tourism has a positive impact upon the Kangaroo Island economy;

91% of residents agreed (agreed and strongly agreed) with this statement in 2000 compared to 82.6% in 1999, however when we compare the figures it is interesting to note that those who strongly agree have increased considerably, whilst those respondents who simply agree has decreased.

Both these figures are within the acceptable range of between 70-100% of respondents feeling that tourism contributes to their secure lifestyle.



3. Tourism results in better infrastructure and services for Kangaroo Island;

This statement has only been asked within the 2000 resident survey and therefore provides a benchmark from which to monitor future responses. Whilst 73% of respondents agreed or strongly agreed with this statement, it is only just within the acceptable range identified by the TOMM.

4. Tourism has a positive impact upon the Kangaroo Island environment; and

72% of respondents indicated they agreed with this statement in the 2000 resident survey. Whilst this question was reversed in the 1999 resident survey (tourism has a negative impact upon the environment) 56.9% disagreed or strongly disagreed with this statement and 24.7% were neutral. This would suggest that since 1999, a significant proportion of the Kangaroo Island community sense that tourism does have positive impact upon the environment of the Island.



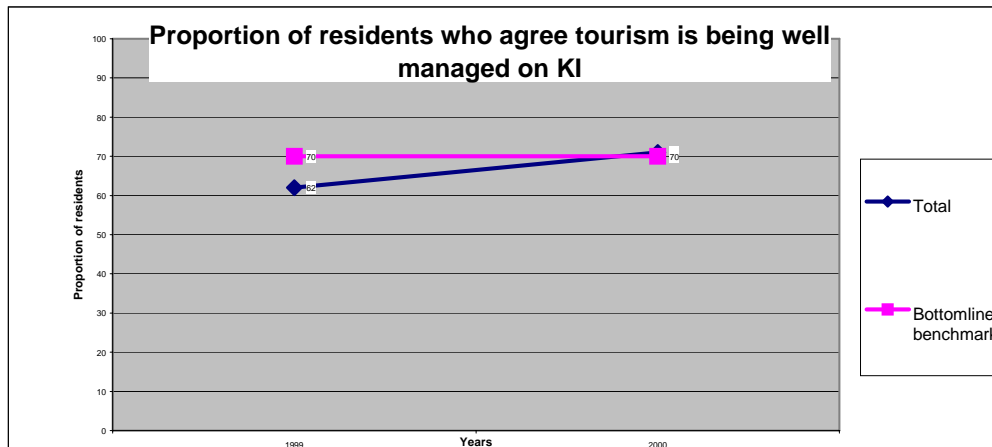
Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

5. Tourism is well managed on the Island.

The proportion of residents who feel tourism is being managed well on Kangaroo Island has increased since 1999 to 71% from 62%, however this is still only marginally inside the acceptable range of the main indicator as outlined in the TOMM process seen in the graph below.



This comparatively low response rate compared to the acceptable range is similarly reflected in the fact that 63% of respondents indicated they felt tourism was developing in line with community values and an even lower response rate from those who completed the newspaper survey, with only 33% agreeing or strongly agreeing with this statement.

In considering the responses regarding performance of tourism management agencies, only 50% of respondents felt they were working together as a team. Lack of teamwork was consistently raised in written responses on all the agencies.

From the statements and data collected through the 2000 resident survey, it would appear that residents do agree that tourism contributes to their lifestyles. However, the monitoring processes do not provide an insight into resident's feeling that tourism contributes to a peaceful, secure and attractive lifestyle.

Whilst there is agreement that tourism has positive impacts for both the environment and the economy, these are only just within the acceptable range as set by the TOMM indicators and therefore require some form of action from management. This is reinforced in relation to the perception of residents that tourism management agencies are not working well together as a team for the betterment of tourism on the Island.



Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

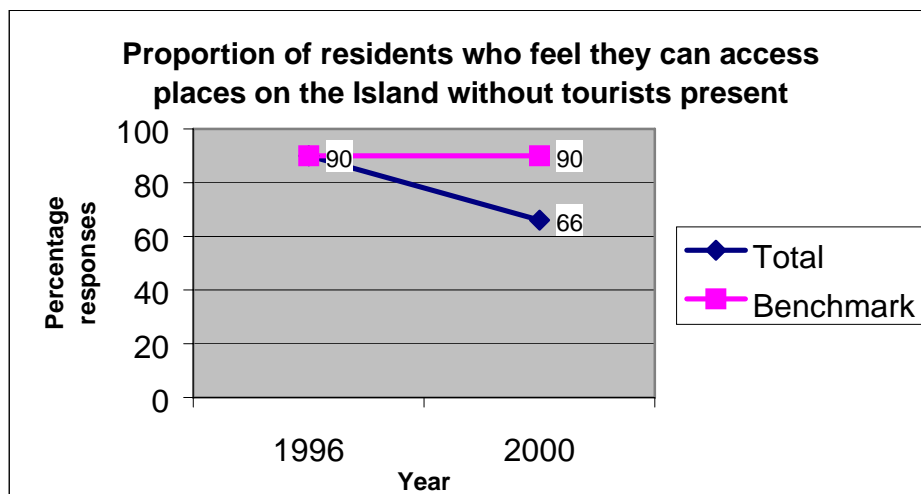
Optimum Condition 17 - Residents able to access nature-based recreational opportunities away from tourists

In 1996, the benchmark for this optimum condition researched and set at 90%.

As is evident in the graph below – the percentage of people who felt they could access places on the Island away from visitors has decreased significantly from this identified benchmark. In the resident survey undertaken in the newspaper, this percentage figure was even lower, with only 52% of respondents indicating they felt they could access places on the island away from visitors.

Scenarios

1. As access throughout the island improves and operators seek to create more competitive experiential programs for visitors, an increasing number of public areas are made known to visitors to Kangaroo Island and therefore increase tourist numbers at these locations.
2. As visitor numbers to the island increases, there is an associated increase in trespassing on private lands, resulting in private sector landholders closing off access to their properties thereby reducing the number of locations accessible by local residents.





Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

TOMM Management Committee

The Tourism Optimisation Management Committee is managed by representatives from all the joint project partners and the Kangaroo Island tourism industry.

The Committee meets on a quarterly basis with day –to-day communication between the Project Manager and the committee members. All Management Committee members act as ambassadors for the project.

The Committee members include:

Janice Kelly.

Mayor of Kangaroo Island Council and chair of the Management Committee, Janice provides an island-wide focus to the TOMM project.

Barry Hurst.

As CEO of the Kangaroo Island Council, Barry is an important link between the activities of TOMM and their application and relevance to the strategic planning process of the Council.

Keith Twyford.

Keith is the Regional Manager of National Parks and Wildlife on Kangaroo Island and the Executive Officer for the TOMM Project Manager. Keith plays a pivotal role in the environmental monitoring of the TOMM project.

Craig Wickham.

CEO of Adventure Charters Kangaroo Island and a Kangaroo Island Councillor, Craig is responsible for representing the views of both the community and the tourism industry.

Marc Warren.

Marketing manager of Tourism Kangaroo Island, the regional marketing board for the island, Marc is responsible for the generic promotion of Kangaroo Island and the TOMM project through his industry network.



Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

David Crinion.

David is Manager of Strategic Planning with the South Australian Tourism Commission. He is one of the original coordinators of the TOMM project and continues to provide strategic advice to the TOMM project.

Ian Hill.

Ian was appointed to the TOMM Management Committee in late 2000. As Manager of Policy and Planning at the South Australian Tourism Commission, Ian liaises between TOMM and the Tourism Commission and guides on policy issues.

David Furniss.

David is CEO of the Kangaroo Island Development Board and along with Jeanette Gellard, Business Development Adviser, is responsible for the Regional Assistance Project Funds secured by the TOMM Project in 2000.

Future Management Representatives:

To ensure a project such as TOMM evolves, it is critical to have active, innovative and enterprising input from the Management Committee. During 2001, this issue will be addressed through:

- Expanding the Committee to include a representative from the health and agriculture sectors
- Encouraging agencies to consider succession planning to ensure continuity of input and action
- Adoption of a formal commitment to be signed by all agencies involved with the TOMM process.

Financial viability of TOMM is a major issue currently being investigated by the Management Committee through a proposed ticket levy on all visitors, should this not be acceptable, donations, sponsorship and external grant funding will be targeted through the formation of a community trust.

Without financial security, the work of TOMM and the information it generates will simply not be feasible.



Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

Financial Report

The TOMM project has been operating under budget for the past two years, enabling a carry over of funds into future years.

Management of the TOMM finances is currently under the guidance of National Parks and Wildlife SA. Thanks go to Pauline Steiner for the work she has done with the TOMM budgets.

Major expenditure items included consultancy fees for both the Project Manager and Market Equity Pty Ltd for coordination of the visitor and resident surveys.

TOURISM OPTIMISATION MANAGEMENT MODEL						
PROJECT						
<i>INCOME AND EXPENDITURE STATEMENT</i>						
<i>1999-2000</i>						
Income						1999-2000
SA Tourism Commission Grant						\$ 10,000
SA Tourism Commission Exit Survey Grant						\$ 10,000
Tourism Kangaroo Island Grant						\$ 5,000
Kangaroo Island Council Grant						\$ 6,500
Kangaroo Island Development Board Grant						\$ 25,000*
D. Fraser - Grant						\$ 1,000
Income sub-total						\$ 57,500
Department of Environment & Heritage Grant						\$ 10,000
TOTAL FUNDS AVAILABLE 1999-2000						\$ 67,500

*NB: Notionally provided \$10,000.00 (\$5,000 for 1998/99 – 1999/2000)

TOMM

Annual Report

Tourism Optimisation Management Model ~ TOMM

Kangaroo Island, South Australia ~ 2000

Expenditure						1999- 2000
Consultants' Fees						\$ 71,505
Advertisi ng						\$ 104
Printing						\$ 136
Administration (Sundries)						\$ 62
Administration (Accommodation)						\$ 2,500
Consultant's Travel - Taxi Fares						\$ 89
Consultant's Travel - Airfares						\$ 1,413
TOTAL EXPENDITURE 1999-2000						\$ 75,809
SUMMARY 1999-2000						
Income 1999-2000						\$ 67,500
Plus funds carried forward from 1998- 1999						<u>\$ 79,188</u>
Total funds available 1999- 2000						<u>\$ 146,688</u>
Less expenditure 1999-2000						\$ 75,809
Balance as at 30th June 2000						\$ 70,879