

KANGAROO ISLAND

TOURISM OPTIMISATION MANAGEMENT MODEL  
(TOMM)

ANNUAL REPORT

2004-2005



TOMM is a partnership between the Kangaroo Island Council, Tourism Kangaroo Island, Kangaroo Island Natural Resource Management Board, Kangaroo Island Development Board, Department for Environment and Heritage, South Australian Tourism Commission, Kangaroo Island Community and Kangaroo Island Tourism Industry.

**Kangaroo Island Tourism Optimisation Management Model**  
**(KI TOMM)**

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**Annual Report**  
**2004-2005**

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**Cover Photos:**

Cape De Couedic, Flinders Chase National Park (Photo: T Duka)  
Completing a Visitor Exit Survey (Photo: T Duka)  
View over American Beach (Photo: E Jack)  
Kingscote Foreshore (Photo: T Duka)

# 2004-2005 Annual Report

## Kangaroo Island TOMM

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## 1. Executive Summary

TOMM has been operating for approximately nine years, and during this time, has evolved in scope, and grown in performance and awareness. TOMM has attracted great international interest from organisations seeking to manage tourism in a sustainable manner. This has positioned Kangaroo Island and South Australia as leaders in the field of destination management.

TOMM has maintained the vision developed in 2003-2004: 'to be a centre of excellence and inspirational leader in destination management', realising that for tourism to be successful and sustainable it must not degrade the resources upon which it depends, including the environment and the community.

One of the reasons for the stability of TOMM over the past nine years is the ongoing commitment of its stakeholders and partners. All of these partners have maintained membership of TOMM, and whilst there have been a number of new representatives on the Management Committee this year, this provided an opportunity for new ideas and a greater awareness of TOMM. A number of people have continued to provide ongoing stability to the Management Committee, which is important for "corporate memory" and ensuring the process moves forward with a good understanding of previous decisions.

At the core of TOMM is a set of indicators that monitor the status of tourism on Kangaroo Island. TOMM is now able to present five years of data for most of the indicators, which provides a much clearer picture of the trends associated with each of them (Section 8). Consistent with previous years, the Management Committee reviewed the indicators to ensure they maintain their relevance and provide TOMM with appropriate information to measure the optimal conditions. Twelve indicators are now presented and measured on a consistent basis. The strengthening of the environmental indicators is a key goal for TOMM and work will continue on this over the next two years.

Awareness building activities continue to be a core function of all of the stakeholders involved in TOMM. The TOMM Project Manager, Stakeholder Agency Representatives, Ambassadors and industry representatives continue to promote TOMM in a variety of manners, from speaking engagements at international conferences, meetings with government agencies, to visitors to the Island. TOMM is also a core component of curriculum in several tourism based studies in at least two South Australian Universities, as well as being utilised as a case study in many other across the world. One of the most notable publicity opportunities for 2004-2005 was the inclusion of TOMM as a case study in World Tourism Organisations publication "Indicators of Sustainable Development for Tourism Destinations – A Guidebook". Twenty case studies from across the globe were highlighted in the publication, all showing best-practice use of indicators in tourism planning. This publication will certainly further the exposure of TOMM in the international field of sustainable tourism and destination management.

For the first time this year TOMM developed a series of Fact Sheets covering the most frequent requests received for TOMM data, namely; visitor numbers to Kangaroo Island; visitor origin; length of stay and visitation to Kangaroo Island Beaches. The Fact Sheets provide this information in an easy to use manner and are easily accessible via the TOMM website ([www.tomm.info](http://www.tomm.info)).

The re-development of the TOMM logo to incorporate a more environmental flavour has also been an exciting outcome. The new logo can be utilised in two formats and will be incorporated into other material progressively.



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The monitoring of Kangaroo Island's tourism industry, with regard to its impact on the Island's natural resources, ecology, economy and community, provides a clearer picture of the industry's sustainability. A range of issues have been raised, some of which can be tracked by the TOMM data, whilst others require development of relevant indicators and further monitoring.

The Visitor and Resident Survey continue to be the major focus for TOMM's monitoring efforts. Although the sample size of the Visitor Survey was less than previously, the data provided was reasonably consistent (the 2005-06 results will clarify this).

One of TOMM's challenges is relating the information and outcomes of monitoring to the community and general public. This may be reflected in the low response to the socio-cultural indicator "Residents feel that they are able to influence tourism related decisions". There is a need for TOMM to continue to increase its profile within the community and ensure that key information is freely accessible and widely distributed, including communicating the outcomes of monitoring programs and associated management actions.

The development of a new project that will focus on the development of environmental indicators that are easily measured and resourced is an exciting step in the evolution of TOMM and the results of the funding proposal will be known in early 2005-2006. Links to the newly established Kangaroo Island Long-term Ecological Research (KILTER) project will also ensure that collaboration on environmental monitoring and links to tourism impacts is fruitful.

Other achievements for the year include:

- the application of the Tourism Impact Model (TIM) for the Kangaroo Island Council, which aims to measure the financial impact of tourism on Council resources, as well as the overall Island economy.
- the development of a comprehensive Waste Management Strategy for the Island, which will incorporate several waste management and recycling indicators for TOMM.
- the Integrated Strategic Tourism Plan for Kangaroo Island, which looks at ensuring the Council's Development Plan has appropriate provisions for tourism in sites that are likely to be subject to tourism interest.

Whilst TOMM still faces significant challenges, particularly in terms of establishing sustainable funding, the past year has been productive, especially in terms of laying some significant foundations for the journey ahead.

## 2. Message from the Retiring Chair

During the last 12 months there have been some significant achievements for the TOMM project: the most notable of which was the inclusion in the new World Tourism Organisation (WTO) Guidebook, *Indicators of Sustainable Development for Tourism Destinations*. The principal author, Dr Ted Manning, considers the Kangaroo Island TOMM to be 'one of the most advanced applications of participatory processes and one where indicators have begun to make a difference on the path to sustainability'. Of the twenty case studies from around the world, the Kangaroo Island TOMM was considered to be one of the most productive, as indicators were clearly an integral part of the overall planning process towards sustainability, not just for tourism but for the whole destination.

The Management Committee have continued to address the issue of establishing a sustainable funding mechanism so that TOMM can focus on outcomes, rather than survival. The South Australian Tourism Commission have continued to offer support in identifying options, with one option - Tax Deductible Gift Recipient Status – seen as critical in achieving this goal. In short, this requires Environment Australia to register TOMM as an environmental organisation, which will require the strengthening of the environmental indicators, establishment of the monitoring framework and regular reporting against the indicators.

Beyond the establishment of a sustainable funding mechanism, the challenge for the Management Committee and the community is to maintain active participation of the TOMM Project and to utilise it for not only the benefit of Kangaroo Island's tourism industry but also the community.

Finally, it is with a degree of sadness that I have retired from the Management Committee, to take up the role of Chair of the Kangaroo Island Natural Resources Management Board. I have found the nine years involved in the project to be at times challenging, however most rewarding. I believe that TOMM is one of the most significant programs to ensure the sustainability of not only the tourism industry but also the management of our natural resources. I will continue to keep a keen interest in the progression and evolution of TOMM and wish the Committee well in pursuing their objectives.

**Janice Kelly OAM**  
**Retiring Chair**  
**TOMM Management Committee**

### 3. Project Manager Report

During this year, the Tourism Optimisation Management Model has concentrated on core tasks, including completion of the Annual Visitor and Resident Survey, maintenance of the TOMM website, awareness raising and convening of the TOMM Management Committee.

Awareness building regarding the TOMM project continues, both in its value to Kangaroo Island and as a model for other destinations. The TOMM Management Committee has remained in contact with Elizabeth Jack as an ambassador for the project. The ambassadors' role is to promote the TOMM concept and Kangaroo Island application of TOMM across professional networks.

Links have been strengthened with the education sector, both on Kangaroo Island and in Adelaide, through presentations and provision of TOMM data for assignments and tourism related programs. TOMM continues to be included in conference and speaking engagements within Australia and overseas. Its relevance and application to other tourism destinations is still being considered by a number of agencies and interest continues to remain high. It is important that TOMM continues to maintain a profile through presentations at tourism related conferences.

Issues such as higher fuel prices, increased international travel by Australians and cheap air fares between capital cities have all impacted on visitation to Kangaroo Island over the year, with a decrease (of -0.7%) in total visitation. To overcome this, the Island's tourism industry will need to collaborate on factors, such as advertising campaigns, service delivery and the management of the destination, to remain a premium visitor destination.

One of the years great achievements was the development of the *Leave Only Footprints* program and the submission of this program for funding through the Kangaroo Island Natural Resource Management Boards Investment Strategy. This project is critical to the environmental components of TOMM, and if successful will be a key step forward in the evolution of TOMM.

TOMM Stakeholders still continue to provide financial support and a commitment to overseeing the TOMM process. Agencies continue to incorporate TOMM data into their operations, and the presentation of this years Visitor Exit Survey results has facilitated this, with the best report presented to date. The report included five year trends for some indicators, as well as comparisons, where possible to the national and International Visitor Surveys, providing a benchmark for Kangaroo Island and the ability to see how the region compares to Australia as a whole. The provision of trend information will continue to add value and confidence to the TOMM data.

One of TOMM's challenges is to keep the model evolving and progressing under some of the tightest budget constraints the project has ever faced. However I believe 2004-2005 has laid some solid foundations for the year ahead, and towards our goal of establishing a sustainable funding base. There are some exciting opportunities on the horizon for TOMM and I look forward to being involved in the process as it continues to evolve and reach its potential.

#### 4. Introduction

Kangaroo Island, South Australia, is the third largest island off the coast of Australia (Fig. 1), approximately 155 kilometres long and 55 kilometres wide, with an area greater than 4,500 square kilometres. The island is internationally renowned for its stunning natural landscapes and abundance of native wildlife.

In 1996, in response to rising visitation, the Kangaroo Island community initiated the Tourism Optimisation Management Model (TOMM), with strong support from key agencies who have an active and important role in the future of Kangaroo Island. This innovative model is aimed at monitoring and communicating the health of tourism on the Island quantitatively and qualitatively to the community, industry and management agencies.

This working model was developed using a strategic tourism management framework based on four key areas, including environment, economy, community (socio-cultural) and visitor (market). TOMM monitoring is based around a series of indicators, from social and economic indicators, such as visitor experience and the value of tourism, to environmental and cultural indicators, such as the resident perception of tourism. This iterative process assists agencies, industry and the community to make better-informed decisions relating to the management and direction of tourism on Kangaroo Island.

TOMM is both a model that can be applied and tailored to manage tourism in any destination as well as a recognised case study highlighting collaborative tourism management in action and the challenges this process poses for local communities worldwide.

TOMM is more than just a project, it is a committed partnership between core agencies chartered with the responsibility of sustaining the growth of Kangaroo Island. Partners include Department for Environment and Heritage, South Australian Tourism Commission, Tourism Kangaroo Island, Kangaroo Island Development Board, Kangaroo Island Council, Kangaroo Island Natural Resources Board, community and tourism industry representatives. These stakeholders also form a committee of management overseeing the TOMM process.

At the heart of TOMM are core aims that provide a summary of the values and directions underpinning TOMM, these include:

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

**Figure 1.** Kangaroo Island, South Australia, the third largest island off the coast of Australia is located approximately 14 kilometres of the coast of Australia.



## 5. Vision

The Kangaroo Island TOMM Management Committee has maintained the vision developed in 2003-2004 as a clear statement of the desired outcome for the Model, and the Island:

**To be a centre of excellence and inspirational leader in destination management.** *Kangaroo Island will be Australia's number one responsible nature-based tourism destination. We will achieve this through our commitment to a collaborative monitoring and management system, which will lead to sound decision-making based on relevant information and knowledge.*

*TOMM will be a long-term process working for the people and environment of Kangaroo Island. It will bring about a cultural shift in the way people think about and manage tourism, taking into account environmental, social and economic factors. As a result of its success, TOMM will continue to attract the resources it needs to create and ensure a healthy destination.*

Kangaroo Island TOMM recognises that for tourism to be successful it must not put at risk the resources on which it depends, namely the environment and the host community. TOMM will seek to establish monitoring indicators that are robust enough to determine whether tourism is impacting on key areas of the environment, and if so, to what extent, this will be a focus for 2005-2006. Furthermore, community engagement is vital for industry to gain an understanding of community perception of tourism as well as to ensure residents understand the rationale for selected management techniques. This is especially true where visitor numbers are relatively high compared to the residential population, as is the case on Kangaroo Island (approximately 33 times greater), as without this understanding and support, the appeal of the destination can be compromised.

## 6. Values and Guiding Principles

At the core of TOMM, is the recognition that working within community values is essential to ensuring that tourism activity is viable, sustainable and supported by the local community.

Previous to the development of TOMM some work had been carried out to identify the key values held by the Island's community. Utilising these values, in addition to some of the consultation involved in developing TOMM, the following community values form the basis of the TOMM strategy:

- expansive and relatively unchanged rural and natural landscapes (particularly coastline)
- abundant and highly visible wildlife
- a safe, clean and healthy environment
- relative solitude through a small and sparsely spread population
- an unpretentious and relaxed lifestyle
- a strong sense of community and common bond with the land and its heritage
- a viable and healthy economy

From these values a set of principles that underpin TOMM were developed and include: Sustainability, Leadership, Innovation, Partnership, Teamwork, Persistence, Integrity, Passion and Commitment and Continuous Improvement.

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These values have informed the development of two key Guiding Principles for TOMM:

- A partnership to enable a collaborative approach that results in a sustainable environment and sustainable community on Kangaroo Island.
- To be responsive to the changing requirements of stakeholders, the community, visitors and the Island's environment.

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

Without these principles underpinning decisions on management and development issues, there is a risk of diminishing the very things appreciated by both residents and visitors alike. This encapsulates why TOMM was established – to ensure tourism does not diminish the quality of the environment or social fabric, whilst contributing to the Island's prosperity.

### 7. TOMM Management Committee Representation

TOMM has maintained existing partnerships that provide a significant contribution to the project, both through a financial contribution and the promotion of TOMM through their networks. Each of these partners are entitled to have representation on the Management Committee. The TOMM Management Committee has experienced significant turnover this year, which is a reflection of turnover within each of the stakeholder organisations. The number of representatives each stakeholder is entitled to have on the Management Committee is indicated in brackets. A summary of the skills each member brings to the Management Committee is provided in Appendix 1.

#### Community (2)

Janice Kelly (July – January)  
Dianne Morris (November – June)  
1 vacancy to be advertised

#### Industry (1)

Craig Wickham (Industry)

#### Kangaroo Island Council (3)

Michael Pengilly, Mayor (July – June)  
Marc Dilena, CEO (July – June)  
Scott McDonald, Councillor (July – June)

#### Tourism Kangaroo Island (2)

Marc Warren, Marketing Manager (July – September)  
Dianne Morris, Board Member (July – November)  
Replaced by:  
David Honner, Marketing Manager (November – June)  
Geoff Christiansen, Board Member (November – June)

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### South Australian Tourism Commission (1)

David Crinion, Manager Policy and Planning (July – December)

Herman Rademeyer (proxy)

Ben Clark, Senior Policy Officer (December – June)

### Kangaroo Island Natural Resource Management Board (1)

Jo Davidson, Board Member (July – June)

Sabina Dougals-Hill (proxy)

### Kangaroo Island Development Board (1)

David Honner, Business Advisor (July – October)

David Furniss, CEO (proxy: November – February)

Replaced by:

Helen Berden, Business Advisor (March – June)

### Department for Environment and Heritage (1)

Jeanette Gellard, Commercial Operations Manager (July – September)

Jackie Wright, Acting Commercial Operations Manager (proxy: October – April)

Replaced by:

Christine Wrench, Commercial Operations Manager (May – June)

In March 2005 Geoff Christiansen (Tourism Kangaroo Island Board member) was elected as Chair of the Management Committee following the resignation of Janice Kelly in January due to new commitments as Presiding Member of the Natural Resource Management Board for Kangaroo Island.

## 8. Achievements and Outcomes

### Key Indicators Report


The Management Committee has chief responsibility for the review and evolution of TOMM. To date, the TOMM approach to tourism management has focused on four areas where the tourism industry potentially has the greatest impact, namely community, economy, environment, and visitor experience.

At the core of TOMM is a practical set of indicators that monitor the status of tourism on Kangaroo Island. The TOMM indicators were developed through a series of workshops with Government, industry and community. Over time the indicators have been refined as more knowledge and market data is gathered and monitoring opportunities arise. The indicator program will continue to be refined as the TOMM knowledge base increases and new monitoring programs and data collection techniques become available. Whilst some questions relating to indicators in the Visitor and Resident Surveys were reviewed, consistency of data continues to be a high priority for TOMM. Where questions have been reviewed and altered, this information has been provided in footnotes. In the instance that data is no longer comparable due to question changes, this data has not been presented.

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Each indicator has an identified acceptable range, and is reported on as data becomes available. Trends generated through the indicators are reported to the TOMM Management Committee and then any action taken by management agencies is reported as the outcome. Data has now been collected for five years, providing reliable trends for most indicators.

### Economic

Optimal Condition	Indicator	Acceptable Range	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
<b>The majority of visitors to KI stay longer than 3 nights</b>	Annual average number of nights stayed on KI	3 to 5 nights	✓ average 3.9 nights	✓ average 4.0 nights	✓ average 4.2 nights	✓ average 4.6 nights	✓  average 4.2 nights
<b>Tourism provides employment for local residents</b>	Percentage of residents deriving most of their income from tourism	0-5% annual increase	Benchmark 10% <sup>+</sup>	✓ 20%	✓ 16% <sup>#</sup>	✗ 17% <sup>*</sup>	✗ 14% <sup>^</sup>

<sup>+</sup> Measured business activity providing most income (agriculture, tourism, retail, other business activity, no business activity)

<sup>#</sup> Measured business activity providing most income (agriculture, tourism, retail)

<sup>\*</sup> Only measured what business activity do you derive most of your income (agriculture, tourism, retail, aquaculture/fishing, other)


<sup>^</sup> Measured business activity providing most income (agriculture, education/health, tourism, trade eg. Plumber, electrician, carpenter, retail, aquaculture/fishing, other)

### Market

Optimal Condition	Indicator	Acceptable Range	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
<b>A growing proportion of visitors come from the cultural / environmental segments of the domestic and international segments</b>	Proportion of visitors that match the cultural / environmental profile <sup>@</sup>	60 to 80% of total visitors to KI	✗ 51%	✗ 54%	✓ 8.4/10	✓ 67%	✓ 71%
	The number of visitors to Kangaroo Island	0 to 7% annual growth in the number of visits (financial year)	No data available	Benchmark 148,074 visitors	✓ 2.3% 151,509 visitors	✓ 2.4% 155,205 visitors	✗ -1.7% 152,509 visitors
<b>The KI visitor experience is distinctly different from other coastal destinations in Australia</b>	Proportion of visitors who believe they had an intimate experience with wildlife in a natural area <sup>**</sup>	70 to 100% thought it was very important	NM	NM	✓ 8.5/10 <sup>^</sup>	✓ 79% <sup>#</sup>	✓ 82%

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### Market, continued

Optimal Condition	Indicator	Acceptable Range	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
<b>Tourism promotion of visitor experiences at Kangaroo Island's natural areas is realistic and truthful to that actually experienced by most visitors.</b>	Proportion of visitors who believe their experience was similar to that suggested in advertisements and brochures	85 to 100% of total visitors to KI	✓ 87% <sup>\$</sup>	✓ 86% <sup>\$</sup>	NM	✗ 73%	✗ 74%
<b>The majority of KI visitors leave the Island highly satisfied with their experience.</b>	Proportion of visitors who were very satisfied with their overall visit.	90 to 100% of respondents.	✓ 96% <sup>*</sup>	✓ 95% <sup>*</sup>	✓ 97%	✓ 95%	✓  93%

@ % of people who indicate "To see native wildlife, nature and nature in their natural environment" as very important as a reason to visit KI

\*\* The survey does not ask if the experience was intimate, just how satisfied were they "To see native wildlife, nature and nature in their natural environment"

^ In 02/03 satisfaction was measured with a score out of 10

# Measured satisfaction with attributes (general interest in native wildlife, nature and the natural environment)

\$ Question was worded as 'your expectation of your trip against the actual experience you had while on KI'

\* This indicator measured the proportion of visitors that identified a "tourist experience"

NM – not measured in this period

### Environmental

Optimal Condition	Indicator	Acceptable Range	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
<b>Major wildlife populations attracting visitors are maintained and/or improved in areas where tourism activity occurs</b>	Number of Hooded Plovers	0 to 5% annual increase in numbers sighted	benchmark	NM	✗ 130 birds (9% decline)	✗ 110 birds (18% decline)	✗ 110 birds (0% increase or decline)
			142 birds		✗ 44 pairs (16% decline)	✓ 45 pairs (2% increase)	✓ 47 pairs (4% increase)
			51 breeding pairs				

NM – not measured in this period

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### Socio Cultural

Optimal Condition	Indicator	Acceptable Range	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
<b>Residents feel they can influence tourism related decisions</b>	% Increase in residents stating that they can influence tourism related decisions	70 to 100% of residents	✗ 39%	✗ 39%	NM	NM	✗ 55.8%
<b>Residents are able to access nature-based recreational opportunities that are not frequented by tourists</b>	Proportion of residents who feel they can visit a natural area of their choice with very few tourists present	80 to 100% of respondents	✗ 66%	✗ 65%	NM	NM	✗ 68%
<b>Growth of local employment is consistent</b>	% Increase in number of people who derive all or some of their income from tourism	1 to 3% average annual growth	Benchmark 16%	✓ 4% growth (20%)	✓ 8% growth (28%)	✗ 6% decline (22%)	✗ stable 22%

*NM – not measured in this period*

### Management Response

The responses by the joint partners of TOMM to act upon specific issues or trends identified from the monitoring programs is critical to the success of the model. This responsive approach to threats and opportunities enables Island agencies and industry operators to strategically plan for future tourism demand, and any associated impacts that may be reported. This is the first year in many that TOMM has now established and reported on trends for each of the indicators, this provides the Management Committee with a much better understanding of the information that has now been collected for five years.

Whilst the integration of this information into management has taken time, TOMM data is now included in the following strategic planning processes:

- Kangaroo Island Integrated Strategic Tourism Plan (various agencies)
- Kangaroo Island Development Plan (Kangaroo Island Council, Planning SA)
- South Australian Tourism Plan 2003-2008 (South Australian Tourism Commission)
- Department for Environment and Heritage Strategic Plan
- Tourism Kangaroo Island Strategic Plan
- Responsible Nature-based Tourism Strategy 2004-2009 (South Australian Tourism Commission and Department for Environment and Heritage South Australia).
- Kangaroo Island Development Board Strategic Plan.
- Kangaroo Island Council Strategic Plan.
- Kangaroo Island Natural Resource Management Plan and Investment Strategy.

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The management partners of the TOMM project have yet to fully internalise TOMM, not only through strategic planning procedures but in areas such as quarterly reviews and guiding better decisions for operational procedures and direction – an issue that requires immediate attention if the Island is to fully integrate the community values identified earlier. However the evolution of this continues, and has required particular focus as new representatives become involved in TOMM.

Tourism Kangaroo Island use TOMM data as a performance measure for their own projects. All agencies use TOMM data on an *ad hoc*, as needs basis. However, for 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.

This should be done as part of the review process that agencies undertake when updating their strategic plans. This could form part of the performance indicators for the agency and their specific projects. 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 a focus on a greater incorporation into the management agencies – both private and public.

If the community, industry or the TOMM Management Committee identifies issues that may impact on the sustainability of the community or the industry and these issues are not addressed, over time, their impact may increase. Therefore, the TOMM Management Committee has a vital role in issue identification, and in seeking collaborative solutions.

### **Awareness building and publications**

Over the nine years that TOMM has been operational the Management Committee has sought to achieve attitudinal changes regarding tourism amongst industry stakeholders on Kangaroo Island. This has been undertaken through a variety of means, including articles in the local media and public workshops. To a large extent these efforts have been fruitful, with the recognition of TOMM remaining stable at the level of recognition recorded in 2000 of 65% of surveyed residents. Highest levels of recognition were achieved in 2001 and 2002 at around 80% which coincided with the employment of an officer nearly full time (0.8 FTE). That said, a question regarding the perception of TOMM as an effective management technique has not been asked, and might be considered as part of future surveys. In addition to this, the Project Manager and project partners have been active in promoting TOMM at state, national and international levels. This has drawn considerable interest to date and even though the model has not been fully replicated elsewhere, components have been utilised/implemented, including:

- Sydney Quarantine Station
- Samoa Sustainable Tourism Indicator Project
- Ningaloo Reef, Wildlife TOMM

Other regions that are considering or have enquired about or mentioned the implementation of TOMM (or its components) in their regions, include:

- The Outback Region of South Australia (Northern Regional Development Board)
- Flinders Island (Tasmanian Northern Regional Development Board)
- Milang and Clayton Traders Association (Alexandrina Council)
- Great Barrier Reef Marine Park Authority

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TOMM has also received a multitude of enquiries from across the world from students who are completing major or minor studies on the process. Several of the larger studies included the following organisations:

- Birmingham College of Food, Tourism and Creative Studies in the United Kingdom,
- Department Anthropology & Archaeology, co-ordinator of the 'Community-based Heritage and Culture Tourism Programme' (CHCTP), Blouberg (Limpopo Province) in South Africa
- School of Environmental Science, Murdoch University, Western Australia
- School of Natural and Built Environments, University of South Australia
- School of Tourism Management, Adelaide and Noarlunga TAFE
- Listed as a web based tourism resource for Stage 1 and 2 tourism studies for SABSA

The Flinders University (Bachelor of Ecotourism and Bachelor of Cultural Tourism), the University of South Australia (Bachelor of Tourism and Hospitality, Bachelor Applied Science (Biodiversity, Environmental and Park Management)) and the Advanced Tourism Diploma at TAFE incorporate elements of destination management in their courses, with TOMM forming part of the curriculum. In addition to the above, there are numerous secondary schools from across Australia, including several on Kangaroo Island, that have used TOMM as part of their studies in tourism, as well as high school students studying TOMM as part of their major project.

Past and present TOMM Project Managers Elizabeth Jack and Toni Duka have contributed to two sustainable tourism publications featuring TOMM as a case study this year. The World Tourism Organisation publication titled ***“Indicators of Sustainable Development for Tourism Destinations – A Guidebook”*** (WTO 2004) has highlighted TOMM as one of twenty case studies in best-practice use of indicators of planning for tourism. A similar publication titled ***“Monitoring for a Sustainable Tourism Transition”*** authored by Dr Louise Twining-Ward (IN PRESS) selected only four case studies on destination management from around the world, of which TOMM is considered to be amongst the best, this is due for publication in late 2005.

These two publications will further the interest and exposure of TOMM in the international field of sustainable tourism and destination management. It will also hopefully provide the opportunity to develop a network of like-minded people who are willing to share and learn from each others experiences.

Ms Jack has also been involved in two further projects promoting the use of TOMM in Western Australia. The first for the City of Mandurah, in particular the recommendation that they develop a TOMM style monitoring system, and the second for the Shire of Denmark suggesting they develop research components and monitoring systems based on TOMM principles. Further information on these project is available at [www.sustainabletourism.com.au](http://www.sustainabletourism.com.au).

There have been several new initiatives produced by TOMM including the development and publication (via [www.tomm.info](http://www.tomm.info)) of four TOMM Fact Sheets, including:

- Visitor Numbers to Kangaroo Island
- Visitor Origin
- Length of stay for visitors to Kangaroo Island
- Visitation to Kangaroo Island beaches

These Fact Sheets (Appendix 4) were also presented to the Kangaroo Island tourism industry via a Tourism Kangaroo Island general meeting, several agency newsletters and two Islander Newspaper articles.

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The TOMM website has continued to be updated and publications added as they become available. In particular the following alterations/additions have occurred: update of agency information, including Management Committee information, TOMM Fact Sheets and recent Visitor Exit and Resident Survey Results. A new page outlining visitation by month was added to the results section, as this is one of the most common enquiries received by TOMM.

The redevelopment of TOMM branding (Figure 2) has also been an exciting achievement for 2004-2005. The new logo more accurately reflects a focus on environmental sustainability (with other material to be progressively updated).



**Figure 2.** The original TOMM logo (left) has been redeveloped to incorporate more of an environmental flavour, reflecting the core intent of TOMM. Two alternate designs (middle and right) are now utilised.

One of the issues TOMM faces in terms of publicity is keeping track of the numbers of enquiries and uses or references to TOMM. Outlined in Appendix 3 are the results of a web search for TOMM, including sites that have referred to TOMM as tool for sustainable tourism management or have utilised components of it in other regions. This list indicates the exposure the internet has been able to generate for TOMM.

An ongoing challenge for TOMM has been the ability to relate the vast amount of information collected to the community, in an easily digestible and interesting format. This may be reflected in the low response to the socio-cultural indicator “Residents feel that they are able to influence tourism related decisions”. This may be improved by the further development of management actions in response to data collection and indicator reporting, and the filtering of this information to the community. Data collected now indicates that the local newspaper is the preferred medium for reporting such results, and that there is an increasing number of residents on the Island who have access to a computer and the internet. TOMM will continue to increase its profile within the community and ensure that key information is freely accessible and widely distributed, including communicating the outcomes of monitoring programs and associated management actions in a variety of formats.

## Monitoring Programs

The monitoring programs of TOMM are based upon measuring key indicators, (Section 8). Whilst monitoring still focuses on the successful completion of the Visitor Exit Survey, Resident Survey and Visitor Numbers, during 2004-2005 a project was developed to establish a series of environmental indicators, to better understand the impacts of tourism on the Island's ecosystems. Additionally, for TOMM to gain recognition as an environmental organisation it will need to provide results for this area. The TOMM Management Committee has submitted a funding proposal as part of the Kangaroo Island Natural Resource Board Investment Strategy for a program titled *Leave Only Footprints*. This program is aimed at establishing some solid environmental indicators that will provide consistent information, better informing industry and community of the impact tourism is having on the Island's environment.

This will be aided by the establishment of the Kangaroo Island Long-term Ecological Research (KILTER) Project ([www.kilter.org.au](http://www.kilter.org.au)), which aims to establish baseline data for a range of ecological parameters and monitor them over the next 50 years. This is part of a worldwide program, with Kangaroo Island being the fifth (and largest) Australian site and the first of the LTER sites in Australia outside of the eastern states.

## Visitor Exit Survey

Market Research Company, Colmar Brunton, undertook this year's Visitor Exit Survey, which was the third they have conducted, and the sixth undertaken overall. Despite the survey being conducted year-round, with forms available on board the ferry and at the Kingscote airport, the response rate this year was below average, with approximately 300 responses received, compared with an average of 1,800. Actions have been taken by both Colmar Brunton and the Management Committee to address this for 2005-2006. In response to changing priorities, some questions were changed, however the majority remain unchanged, to allow for annual analysis of the results. A full report on the survey results is available online at [www.tomm.info](http://www.tomm.info).

- The average number of nights stayed on Kangaroo Island was 4.2 nights in 2004-2005. This decreased significantly compared to 2003-2004 where 4.6 nights was the average. Despite this year's decrease, the indicator is still within the acceptable range of 3-5 nights.
- The number of visitors to Kangaroo Island decreased by 1.7% to 152,509, representing the first decrease in visitor numbers since the inception of this indicator in 2001-2002. With the exception of March, notable decreases were evident in visitor numbers from January to June .
- There was a slight increase in the proportion of visitors who felt their 'general interest in native wildlife, nature and the natural environment' was satisfied during their visit to Kangaroo Island in 2004-2005.
- Three quarters of visitors felt their experience was similar to that suggested in advertisements and brochures in 2004-2005. This represented a very slight increase compared to the previous year. Despite this increase, performance has been well below the acceptable range over the last two financial years.
- Since 2002-2003, there has been a slight decrease in the proportion of visitors that have been satisfied with their overall visit experience (93% in 2004-2005 compared with 97% in 2002-2003). This result is just above the minimum acceptable range of 90% of visitors.

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The following section summarises the key movements and differences across the intrastate, interstate and international visitor origin segments for 2004-2005.

#### *Intrastate Market*

- The proportion of intrastate visitors has significantly decreased since last year (35% for 2004-2005 compared with 42% in 2003-2004). According to National Visitor Survey (NVS) statistics, SA recorded a notable fall in both intrastate visitors and nights in the March quarter 2005, compared with March quarter 2004. For the year ending March 2005, the amount of intrastate visitors was unchanged compared to a 0.7% increase nationally.
- Over 60% of intrastate visitors mentioned travelling with family and friends on their visit to the island (significantly higher than interstate at 43% and international at 31%).
- Intrastate visitors gave a significantly lower overall satisfaction rating compared to international visitors (8.0 intrastate compared with 8.6 international).
- According to the regression analysis, the top three key drivers of satisfaction amongst intrastate visitors were general sightseeing/driving, retail trading hours and the personal service you receive as a visitor.

#### *Interstate Market*

- The proportion of interstate visitors slightly increased compared to last year (30% 2004-2005 compared with 25% in 2003-2004). Conversely however, according to NVS statistics, SA recorded a notable fall in both interstate visitors and nights in the March quarter 2005, compared with March quarter 2004.
- Interstate visitors had the lowest agreement with the Island's positioning statement (7.7), with international visitors having the highest agreement (8.1).
- Interstate visitors had the highest mention of general sightseeing/driving as a very important attribute (71%). Like intrastate travellers, this segment was more concerned with the condition of roads and experiencing locally produced food and wine compared with international travellers.
- Interstate visitors gave a significantly lower overall satisfaction rating compared to international visitors (8.0 interstate compared with 8.6 international). The top three key drivers of satisfaction according to the regression analysis were general sightseeing/driving, see & buy locally produced art & craft and quality of accommodation.

#### *International Market*

- The proportion of international visitors slightly increased compared to last year (35% 2004-2005 compared with 33% in 2003-2004). According to International Visitor Survey (IVS) data, international visitors to SA increased 13% in the March quarter 2005, with all states recording a positive performance in terms of visitor numbers in this time.
- There was a significant drop in the mean number of nights that international visitors stayed on the island this year (2.7 compared with 3.7 in 2003-2004).
- There was a significantly higher proportion of international visitors who were extremely satisfied in the areas of general interest in native wildlife, personal service you receive as a visitor, compared to other visitors.
- International visitors gave a significantly higher global satisfaction mean rating compared to intrastate and interstate visitors (8.6). The top three drivers of satisfaction according to the regression analysis were general interest in native wildlife, nature and the natural environment, to learn more about Kangaroo Island's culture and history and quality of accommodation.

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### *General Points of Interest*

The following section summarises the key movements and points of interest with respect to general visitor behaviour and satisfaction over time.

- There has been a notable decrease in the number of visitors from January to June 2005 (except March), compared to figures posted last year.
- There was a significant decrease in the proportion of repeat visitors in 2004-2005 compared to the previous year (29% in 2004-2005 compared with 37% in 2003-2004).
- 'Personal service you receive as a visitor' increased in importance for visitors (pre-visit) in 2004-2005 (40% mentioned very important compared to 28% in 2003-2004).
- In comparison to last year, there have been considerable increases in the proportion of extremely satisfied visitors in the areas of weather/season chosen for activities, experiencing locally produced food and wine and learning more about the Islands culture and history.
- There were fewer extremely satisfied customers in the areas of relaxation, roads/conditions of roads and retail trading hours, compared to last year.
- There were a number of common themes and drivers of dissatisfaction identified across the sample. The main areas of dissatisfaction were:
  - ⇒ Quality of Road infrastructure
  - ⇒ Limited trading hours and variety of retail/food/convenience outlets
  - ⇒ Amount of road kill
  - ⇒ Poor customer service and information provision
  - ⇒ High price and standard of accommodation and attractions
  - ⇒ Amount and quality of local produce and arts/crafts

### **Resident Survey**

The Kangaroo Island resident survey was undertaken in late December 2004 and consisted of a random telephone survey of 10% of the Island's residents, approximately 400.

To maintain consistency across surveys, the majority of questions remained unmodified, however each stakeholder organisation was entitled to have two questions included that relate specifically to their area of interest. This year the following stakeholder's questions were included in the Resident Survey:

Kangaroo Island Council:

- Given that Council has significant budget constraints what do you believe should be the top three priorities for Council?
- Given that Council needs to consult with the Kangaroo Island community on a variety of issues that affect the future of the Island, what would be the best way for Council to achieve maximum input from a variety of residents?

Kangaroo Island Development Board:

- Should Kingscote Wharf remain a commercial port for freight handling?
- Should Kangaroo Island have alternative energy as part of its standby power supply?

Department for Environment and Heritage:

- Have you personally visited any of Kangaroo Islands National Parks sites during the last 12 months, if yes, which ones and was that with visitors?
- Are you aware that Kangaroo Island residents receive 50% discount off an Island Parks Pass?

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Kangaroo Island Natural Resources Board:

- Do you think the health of the environment on Kangaroo Island is Improving/Declining/Staying the same?
- What do you think is improving?
- What do you think is declining?
- Should the community have the ultimate say in tourism visitation numbers and access to sites on the Island?

Tourism Kangaroo Island and the South Australian Tourism Commission did not ask any questions given that information relating to resident opinions concerning tourism is already obtained.

The Resident and Visitor Survey results are available online at [www.tomm.info](http://www.tomm.info) under Results. Some interesting points from the key findings include:

- Most respondents claimed to live on Kangaroo Island due to lifestyle, job or family commitments.
- Agreement scores suggest that residents felt that the Island is a great place for kids to grow up, is a friendly place to live, that they buy locally when what they need is available and that they have a personal responsibility to help ensure that Kangaroo Island thrives in the future.
- Agreement scores also suggest that Kangaroo Island residents are less likely to accept some environmental cost in exchange for economic and population growth on the Island, that most do not feel that they have sufficient opportunity to have input into local tourism related decisions and that tourism development is not fully occurring in line with community values for the Island.
- 38% of respondents indicated that they would prefer the population to increase by less than 5% per annum, while another 29% wanted it to remain the same.

### **Visitor Numbers**

Given that the island is internationally renowned for its stunning natural landscapes and abundance of native wildlife, it is considered the pre-eminent nature-based tourism destination within South Australia and for the 2004-05 year attracted 152,509 visitors, which is reasonably consistent with visitation for the previous year, showing a slight decline (1.7%) compared to the previous financial year<sup>1</sup>.

Based on results from the National Visitor Survey (NVS) and International Visitor Survey (IVS) (Tourism Research Australia, 2004), Kangaroo Island attracted an estimated 139,000 overnight visitors in 2004 that stayed 573,000 nights in the region. Relative to other SA regions, Kangaroo Island attracts a higher proportion of its visitors from overseas than any other region with more than one quarter of overnight visits to the region being international visitors, 52% intrastate visitors and 23% from interstate. This indicates significant growth in the interstate segment of 8% and a decline of 9% in the intrastate visitation, based on NVS data. This is corroborated by TOMM data, which reports a 7% decline in intrastate and 5% increase in interstate visitation, whereas the international market has remained steady reporting a 2% increase. Each of these three segments now show an equal share of the market compared to previous years where intrastate visitors have dominated at around 40%.

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<sup>1</sup> Based on actual passenger data from transport providers – air and sea

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TOMM also continues to present Visitor Number data which is used widely by industry, community and agencies. Data is now available for visitation to the Island since 2001, and is attached in Appendix 2.

Further information is also available online at [www.tomm.info](http://www.tomm.info) under Results.

#### **Environmental Monitoring**

Environmental monitoring on Kangaroo Island is being undertaken by a number of agencies, primarily the Department for Environment and Heritage and the Kangaroo Island Natural Resource Management Board, however those that specifically relate to TOMM indicators include:

- the population numbers of Australian Sea lions and
- hooded plovers, and
- the number of visits to natural areas that are managed for visitors.

As noted previously, the area of environmental monitoring has been the most challenging for TOMM, for a number of reasons:

- Selecting indicators that tourism has a direct and quantifiable impact on i.e. population numbers may be affected by numerous factors such as climate and predation, therefore wherever possible tourism impacts needs to be separated the from other impacts
- Avoiding a sole focus on Department for Environment and Heritage managed land, which would recognise that some key tourism sites are outside the Departments control, and therefore may be more susceptible to impacts through lack of ongoing scheduled maintenance;
- Selecting indicators that will be relatively easy (and low-cost) to monitor, whilst still providing meaningful data – in recognition that TOMM is working from a limited budget.

The Management Committee are working to boost the environmental monitoring components of TOMM through the development of the *Leave Only Footprints* program. The primary outcome of this project will be an environmental reporting program that allows TOMM to form a picture of how tourism is *actually* impacting on the environment. Through TOMM, the tourism industry and natural resource managers, management responses will be developed to ensure any adverse impacts attributable to tourism, are sustainably managed .

The *Leave Only Footprints* project is important in boosting the knowledge and participation of the tourism industry in managing the impacts they may have on the environment. This can be readily achieved through the existing TOMM framework that will collate information, which is currently being collected through a variety of mechanisms. This will maximise the knowledge base, ensuring optimal use of TOMM resources, and will also report on all of the information to provide a bigger picture of tourism impacts in an understandable and actionable format. The ultimate outcome of this project will be the active participation of tourism operators in the management and care of the environment. The results of the submission will be known early in 2005-2006.

### **Application of the Tourism Impact Model**

With a resident population of approximately 4,300, the Kangaroo Island Council has a limited rate base from which to fund infrastructure for tourism, which has created a perception, amongst some residents, that tourism is a burden on Council resources. In this context the Kangaroo Island Council has undertaken the full application of the Tourism Impact Model, which will be important in establishing an accurate indication of where Council expenditure on tourism is directed, the benefit received, the impact on Council's budget and the overall net economic impact of tourism to the Island. The application of this model was assisted by the South Australian Tourism Commission through the TOMM process. Copies of the final report can be obtained from the Kangaroo Island Council website [www.kangarooisland.sa.gov.au](http://www.kangarooisland.sa.gov.au).

### **Sustainable development**

In 2004-2005 Kangaroo Island commenced the development of an Integrated Strategic Tourism Plan for Kangaroo Island, guided by a Steering Committee including representatives from stakeholder agencies and TOMM. The aim of this Plan is to enable the tourism industry to enhance visitor experience through best practice development. The State's current Development Plan (which contains the criteria against which all new developments are assessed) is not currently aligned with the State's Tourism Strategy, making it difficult for the tourism industry to achieve its vision. The Integrated Strategic Tourism Plan aims to provide positive strategic and planning policy framework that will help attract tourism investment to the Island and ensure the conservation of its natural and cultural resources. The major outcomes for the project include a plan that will: position the Island as a leader in sustainable tourism development and management; provide direction on how to improve the Island's appeal as an eco-tourism destination; and will direct changes to the Island's Development Plan to ensure a more effective and efficient way of dealing with development proposals.

The commencement of the Integrated Strategic Tourism Plan for Kangaroo Island is part of the South Australian Tourism Commission's *Sustainable Tourism Package*, and is jointly funded by the Kangaroo Island Council, Kangaroo Island Development Board, Kangaroo Island Natural Resource Management Board and Department for Environment and Heritage. TOMM has provided much information towards the Issues Paper, including market and social analysis. It is envisaged that the plan will be completed in 2005-2006.

### **Waste management**

This year saw the development of an innovative Waste Management Strategy for Kangaroo Island, with TOMM being represented on the Steering Committee by Ben Clark (South Australian Tourism Commission). The final strategy set a goal for 70 percent of the Island's waste to be diverted from landfill. As part of the research a Waste Characterisation Study was undertaken, which identified waste inputs from separate sources. This provided an indication of the impact of tourism on the Island's waste stream, by looking at public place bins and the National Parks collection. This study was conducted in a manner that can be repeated, enabling TOMM to incorporate specific waste management and recycling indicators as part of the environmental dataset.

## 9. Financial Management

Financial commitment continues from core Island agencies, including Kangaroo Island Council, Tourism Kangaroo Island, Kangaroo Island Development Board, South Australian Tourism Commission, Department for Environment and Heritage and the Kangaroo Island Natural Resource Management Board.

The TOMM Management Committee feel strongly about ensuring the future of TOMM, by reducing the current reliance TOMM has on its stakeholders and evolving into a model shared more equally by industry and community. The Management Committee recognise that tourism impacts on Kangaroo Island in both positive and negative forms, across a variety of aspects including the economy, environment and our community. Accordingly they believe it is a corporate responsibility of the stakeholders of Kangaroo Island that this impact is monitored and managed. Agencies will not always get a “visible” dollar return on investment but by contributing to TOMM stakeholders contribute to the well-being of the industry, environment and community. Each stakeholder has in the past made a commitment to fund TOMM each financial year, many of these commitments have remained consistent over the past four years.

Since late 2001 the Kangaroo Island Council has been responsible for the day-to-day financial management of the TOMM project, and completes this on top of the annual contributions it already makes. Council are certainly a key stakeholder in the TOMM process, representing a community base for TOMM to be housed.

Detail on expenditure and income for 2004-2005 is provided further in the report (Section 12).

## 10. Ownership of TOMM

Whilst Kangaroo Island Council is the custodian of TOMM, with the Project Manager being shared equally with the role of Community Development, all partner agencies are considered to be owners of the Model, and in the broader sense, the Island community. The intent of initially moving TOMM from the custodianship of the Department for Environment and Heritage to the Kangaroo Island Council was to ensure the community retained a sense of ownership over the process, and that the perception did not develop that the Department or another tourism based agency would be influencing the outcomes that TOMM reported on.

## 11. Ongoing Management Challenges

### Community ownership & relevance

Following the 2003-2004 financial year, it was intended to slightly amend the structure of the TOMM Management Committee to increase the level of community representation, from 1 to 2 positions. This was considered necessary to ensure that TOMM strengthened its community ownership, and currently one of these positions is vacant and due to be advertised. Another option, which is still under consideration, is to establish an indicator liaison committee, to meet on a quarterly basis, which would specifically analyse indicator reporting for each sector and provision of recommended management responses. Foremost amongst these is developing an agreed set of environmental indicators.

## **Financial viability**

As previously noted, TOMM has had continued difficulty in developing a sustainable funding basis. At the time of writing this report, there are two options under serious consideration:

1. Applying for 'environmental organisation' status with Environment Australia, thereby receiving Tax Deductibility Gift Recipient Status. Realistically, it is at least 18 months before the Management Committee would feel comfortable putting an application forward and only then if there has been significant progress in developing a set of environmental indicators, with monitoring underway.
2. Seeking to recover costs associated with market research, through limiting the information available on the TOMM website (to the basic reports), so that those seeking more detailed information pay an appropriate fee or have data tailored to offer packages to businesses who are wishing to undertake more detailed market research.

The other potential funding option, which has been the subject of recent media coverage, is that of a proposed visitor levy. Current State legislation does not currently allow for such a levy to be imposed at the point of arrival (airport or wharf), however the possibility of it being implemented in other ways may be achievable. Such a levy would be similar in nature to the Environmental Management Charge applied to the Great Barrier Reef Marine Park, except that this would apply equally to visitors travelling both privately and with commercial operators. Funds raised through the levy need not necessarily all be directed to TOMM, as it is realised there are pressing demands for funding for infrastructure maintenance, and within other agencies.

The TOMM Management Committee understands there is a need to think innovatively regarding the long-term financial position of TOMM. However there is also a need to press forward and continue the evolution of the model despite these challenges (that will potentially always be faced).

## **12. Financial Report**

Management of the TOMM finances is currently under the guidance of Kangaroo Island Council. Major expenditure items for 2004-2005 included:

- Project Manager wages and on costs
- Consultancy fees to Colmar Brunton Pty Ltd for coordination of the Visitor and Resident surveys
- Website hosting by IT & E

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		<i>as at 30 June 2005</i>
<b>Income</b>		
Kangaroo Island Council		\$29,650
Tourism Kangaroo Island		\$15,000
Kangaroo Island Development Board		\$5,000
Department for Environment & Heritage		\$5,000
Kangaroo Island Natural Resources Board		\$5,000
South Australian Tourism Commission		\$5,750
<b>Total Income</b>		<b>\$65,400</b>
<b>Expenditure</b>		
Project Manager - wages		\$23,098
Travel, Training & Conferences		\$76
Market Research - Visitor and Resident Surveys		\$38,500
Website Hosting		\$3,113
Office Expenses- Telephones		\$403
Office Materials		\$210
<b>Total Expenditure</b>		<b>\$65,400</b>
<b>Net Profit/Loss</b>		<b>\$0</b>

This financial year saw TOMM operate on the smallest budget since its inception. It is hoped that the activities and demonstrated success will allow TOMM to attract further funds for the next two years allowing it to reach its goals.

### 13. Planned Initiatives for 2005-2006

The Management Committee and project Manager look forward to a prosperous year in 2005-2006 and hope to see further development of those initiatives that began this year, including:

- Agreement on a set of indicators for environmental monitoring through the *Leave Only Footprints* program (linking with the Kangaroo Island Long-term Ecological Research Program, existing Department for Environment and Heritage and Kangaroo Island Natural Resource Management Board programs).
- Incorporation of TOMM processes in the strategies and performance measures of TOMM partners.
- Ongoing awareness-building of the TOMM project throughout Australia and internationally.
- Continuation of the Visitor and Resident Surveys with detailed analysis, and continued update of Fact Sheets and the TOMM website.
- Resolution of the long-term future of the TOMM project and its sustainable funding source.
- Continued evolution of the formalised management response system through TOMM.

TOMM is currently in an exciting position now being able to present five years of data, and show some strong trends for industry making the data much more valuable. The development of a new reporting structure that is easier to utilise and interpret will also increase the uptake of the wide variety of information produced by TOMM.

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### 14. References

South Australian Tourism Commission (2004) *Kangaroo Island Regional Tourism Profile 2004*. South Australian Tourism Commission, Adelaide.

Tourism Research Australia (2004) *National Visitor Survey and International Visitor Survey* accessed via <http://www.tra.australia.com/>

Twining-Ward, L. (IN PRESS) *Monitoring for a Sustainable Tourism Transition*

World Tourism Organisation (2004) *Indicators of Sustainable Development for Tourism Destinations: A Guidebook*, World Tourism Organisation, Madrid, Spain.

## 15. Appendices

## Appendix 1

### TOMM Management Committee member profile

The TOMM Management Committee members in 2004-2005 included a variety of people, the list and profiles provided are divided into two categories, those that currently serve on the Management Committee, and those that have since resigned.

#### **Current Management Committee members include:**

##### *Tourism Kangaroo Island - Geoff Christianson (Current Chair)*

Geoff is the newest member of the Committee representing the Tourism Kangaroo Island Board, who are responsible for the marketing and promotion of Kangaroo Island. Geoff owns and operates a tourism business on the Island and provides important links back to operators, the Board and the community. Geoff took on the role of Chair following the departure of Janice Kelly, and provides a good link to the operator sector of the tourism industry.

##### *Community - Dianne Morris*

Dianne is a community representative and provides a voice for community members on the Committee. Dianne is also a member of Tourism Kangaroo Island and owns and operates a tourism business on the Island, providing an important view about what information is relevant to small tourism businesses.

##### *Kangaroo Island Council - Michael Pengilly*

Mayor of Kangaroo Island Council and long-term resident of Kangaroo Island, Michael provides an island-wide focus to the TOMM project. Michael also works in the tourism industry and is a member of the Tourism Kangaroo Island Board; he therefore has good links to the operators on Kangaroo Island.

##### *Kangaroo Island Council - Marc Dilena*

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

##### *Kangaroo Island Council - Scott McDonald*

Scott is a Councillor on the Kangaroo Island Council, he is also a member of Kangaroo Islands Eco-action group and the Australian Marine Conservation Society. Scott brings a strong community-based environmental view to the group.

##### *Department for Environment and Heritage, Kangaroo Island Region – Christine Wrench*

Christine is the Commercial Operations Manager of the Department for Environment and Heritage, Kangaroo Island Region. Christine has a background in tourism and has been working in the industry in a variety of roles for many years. Christine provides an important link between the tourism industry and protected area management, as well as managing many of the key tourism sites on Kangaroo Island.

##### *Tourism Industry - Craig Wickham*

Craig is the Managing Director of "Exceptional Kangaroo Island", which specialise in nature-based tours, as well as being a Board Director with the South Australian Tourism Commission and Kangaroo Island Councillor. Craig's role on the TOMM Committee is to represent the views of both the community and the tourism industry. Linkages to the South Australian Tourism Commission at

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the Board level assists in maintaining the profile of TOMM at a State level. Craig has provided a consistent input to the TOMM Committee having been involved from the outset.

### *Tourism Kangaroo Island - David Honner*

Marketing manager of Tourism Kangaroo Island, the regional marketing board for the island, David is responsible, in partnership with the South Australian Tourism Commission, for the marketing and promotion of Kangaroo Island. David is also involved in promoting the value of the TOMM project, and the data it has aggregated, to the Kangaroo Island tourism industry so that they can target their marketing efforts and grow their business. He also utilises the data to measure the success and impact of tourism on Kangaroo Island, particularly strategic marketing campaigns.

### *South Australian Tourism Commission – Ben Clark*

Ben is a Senior Policy Officer within the South Australian Tourism Commission, and is working on a variety of projects with a particular focus on the building tourism capacity of local government, in partnership with the Local Government Association. Ben's background in the private sector, where he worked primarily as an environmental planner, included a number of tourism-related projects. In his spare time, Ben has travelled extensively within Australia and abroad, expanding his understanding of tourism-related issues, such as visitor use of (and impacts on) conservation areas.

### *Kangaroo Island Natural Resource Management Board - Jo Davidson*

Jo is a member of the Kangaroo Island Natural Resources Board, has a background in natural resource management, runs a farming property on the Island and also owns a tourist accommodation business. Her links to the environmental sector are important to the TOMM process. Sabina Douglas-Hill was the KINRB proxy.

### *Kangaroo Island Development Board – Helen Berden*

Helen is Business Advisor at the Kangaroo Island Development Board. She provides a vital link to new and existing businesses on the Island and promotes the awareness of TOMM through encouraging the use of TOMM data for business planning purposes, maintaining triple bottom line principles.

## **Management Committee members that served during 2004-2005, but are no longer on the Committee include:**

### *Community - Janice Kelly*

Chair of the Management Committee, and with previous experience as Kangaroo Island Council Mayor, Janice provided an island-wide focus to the TOMM project. Janice has taken up the role of Chair for the newly formed Kangaroo Island Natural Resource Management Board.

### *Kangaroo Island Development Board - David Furniss*

David was the Chief Executive Officer at the Kangaroo Island Development Board, and through this role he encourages the use of TOMM data for business planning purposes, maintaining triple bottom line principles.

### *South Australian Tourism Commission - David Crinion*

David is the Manager of Policy and Planning within the South Australian Tourism Commission. He was one of the original coordinators of the TOMM project and continues to provide strategic advice to the TOMM project. The role of agency representative has also been shared with Hermann Rademeyer.

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### *Department for Environment and Heritage, Kangaroo Island Region - Jeanette Gellard*

Jeanette was the Commercial Operations Manager of the Department for Environment and Heritage, Kangaroo Island Region. She had a variety of experience in the rural and natural resource management sectors, as well as experience working with small business.

### *Department for Environment and Heritage, Kangaroo Island Region - Jacqui Wright*

Jacqui was the Acting Commercial Operations Manager of the Department for Environment and Heritage, Kangaroo Island Region. As well as managing many of the key tourism sites on Kangaroo Island, Jacqui provided an important link between the tourism industry and protected area management.

### *Tourism Kangaroo Island – Marc Warren*

Marc was Marketing Manager of Tourism Kangaroo island for many years, bringing expertise in marketing and more specifically links to the Kangaroo Island tourism operators, which was vital for the TOMM project.

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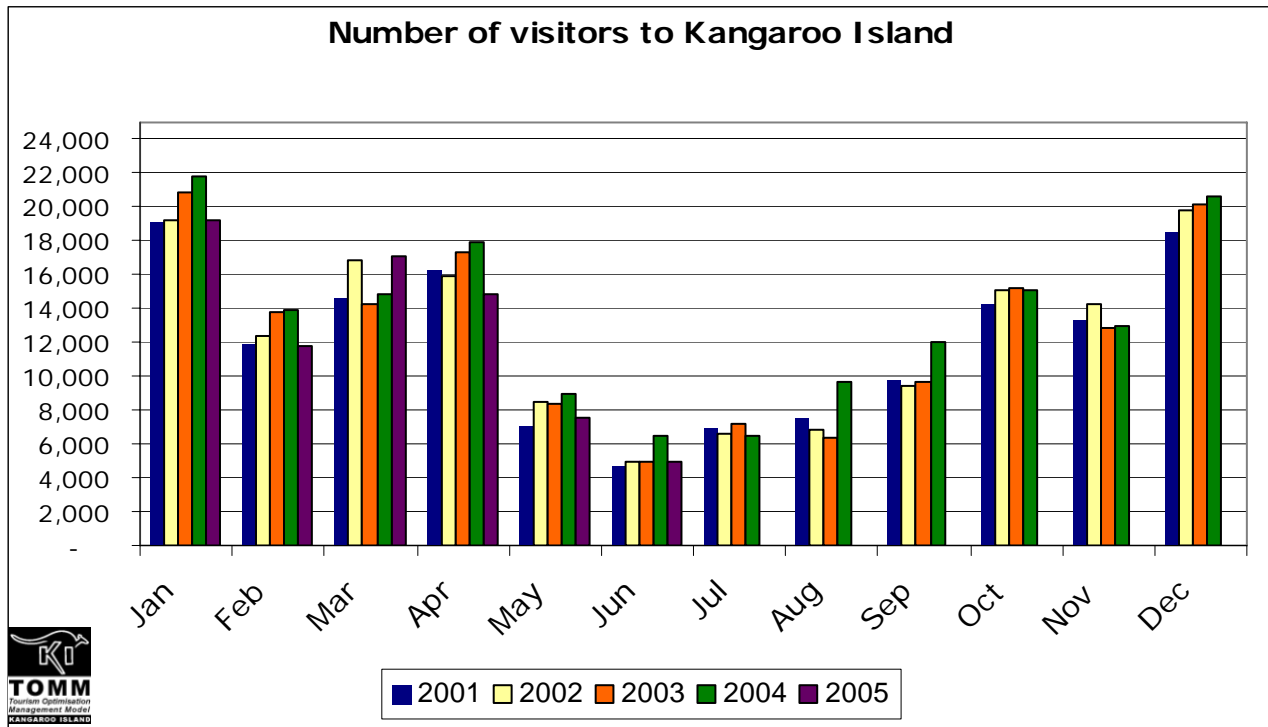
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### Appendix 2 Visitor Numbers to Kangaroo Island

**Table: Number of Visitors to Kangaroo Island 2001-2005.**

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD
<b>2001-2002</b>	6,928	7,544	9,776	14,254	13,304	18,540	19,183	12,334	16,866	15,888	8,490	4,967	148,074
<b>2002-2003</b>	6,632	6,842	9,402	15,125	14,211	19,765	20,817	13,749	14,280	17,386	8,384	4,917	151,509
<b>2003-2004</b>	7,180	6,339	9,686	15,154	12,855	20,170	21,795	13,861	14,875	17,891	8,971	6,429	155,205
<b>2004-2005</b>	6,490	9,713	12,084	15,129	12,991	20,588	19,203	11,760	17,142	14,904	7,574	4,929	152,509
<b>Varnce 01/02-02/03</b>	-4.3%	-9.3%	-3.8%	6.1%	6.8%	6.6%	8.5%	11.5%	-15.3%	9.4%	-1.3%	-1.0%	2.3%
<b>Varnce 02/03-03/04</b>	8.3%	-7.4%	3.0%	0.2%	-9.5%	2.0%	4.7%	0.8%	4.2%	2.9%	7.0%	30.7%	2.4%
<b>Varnce 03/04-04/05</b>	-9.6%	53.2%	24.8%	-0.2%	1.1%	2.1%	-11.9%	-15.2%	15.2%	-16.7%	-15.6%	-23.3%	-1.7%

**Figure: Number of Visitors to Kangaroo Island 2001-2005**



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## Kangaroo Island TOMM

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### Appendix 3

#### List of web pages containing TOMM

[www.google.com.au](http://www.google.com.au) was utilised on the 15<sup>th</sup> August 2005 to conduct a search for Australian web pages containing reference to TOMM. The following is a list of the results:

[http://www.in-business.com.au/issue\\_6/feature/kangaroo\\_island\\_tourism\\_intelligence\\_system.php](http://www.in-business.com.au/issue_6/feature/kangaroo_island_tourism_intelligence_system.php)

[http://www.environment.sa.gov.au/parks/kangaroo\\_is.html](http://www.environment.sa.gov.au/parks/kangaroo_is.html)

<http://www.ecotourism.org.au/IYE2002/pdfs/SA%20IYE%202002%20Report.pdf>

<http://www.ecotourism.org.au/IYE2002/pdfs/IYE%20Events%20program.pdf>

<http://www.regional.org.au/au/countrytowns/options/jack.htm>

[http://www.lga.sa.gov.au/webdata/resources/Files/Session\\_M\\_Kangaroo\\_Island\\_pdf1.pdf](http://www.lga.sa.gov.au/webdata/resources/Files/Session_M_Kangaroo_Island_pdf1.pdf)

[http://twinshare.crctourism.com.au/environmental\\_indicators.htm](http://twinshare.crctourism.com.au/environmental_indicators.htm)

<http://www.kangarooisland.org/region/>

[http://www.gbrmpa.gov.au/corp\\_site/info\\_services/publications/research\\_publications/rp79/rp79\\_full.pdf](http://www.gbrmpa.gov.au/corp_site/info_services/publications/research_publications/rp79/rp79_full.pdf)

[http://www.pacifichydro.com.au/articles/files/VoIC\\_SET\\_Pt5\\_1.pdf](http://www.pacifichydro.com.au/articles/files/VoIC_SET_Pt5_1.pdf)

[http://210.193.176.101/service/confproc/ecotourism98/Section\\_4.pdf](http://210.193.176.101/service/confproc/ecotourism98/Section_4.pdf)

[http://210.193.176.101/service/confproc/ecotourism98/Section\\_1.pdf](http://210.193.176.101/service/confproc/ecotourism98/Section_1.pdf)

[http://www.frd.org.au/publications/library/macta\\_report.pdf](http://www.frd.org.au/publications/library/macta_report.pdf)

<http://www.ssabsa.sa.edu.au/support/society/tosm/tosm-rs-web.htm>

[http://iye2002.ironclad.net.au/initiatives.taf?\\_fn=detail&id=46](http://iye2002.ironclad.net.au/initiatives.taf?_fn=detail&id=46)

[http://www.ccsa.asn.au/campaigns/arid/Pastoral\\_Access.htm](http://www.ccsa.asn.au/campaigns/arid/Pastoral_Access.htm)

[http://www.parliament.sa.gov.au/committees/documents/EnviroResDev/public\\_documents/Completed%20Inquiries/43%20and%2044%20Report%20-%20Ecotourism/Hansard/Hansard%202000-04-19%20Crinion.pdf](http://www.parliament.sa.gov.au/committees/documents/EnviroResDev/public_documents/Completed%20Inquiries/43%20and%2044%20Report%20-%20Ecotourism/Hansard/Hansard%202000-04-19%20Crinion.pdf)

[http://www.sustainabletourism.com.au/touro\\_advice.htm](http://www.sustainabletourism.com.au/touro_advice.htm)

[http://www.sustainabletourism.com.au/strategic\\_planning.htm](http://www.sustainabletourism.com.au/strategic_planning.htm)

<http://www.kangarooisland.org/projects/>

<http://www.environment.sa.gov.au/parks/sealbay/links.html>

<http://www.outdoorcouncil.asn.au/Documents/Conference/National%20Conference%20Presentation/s3%20-%20Yu-Fai%20Leung%20&%20Jessica%20Robinson.pdf>

<http://www.crctourism.com.au/documents/headlines/INDUSTRY%20ISSUES%20PAPER%20-%20Final.pdf>

[http://www.tourism.sa.gov.au/tourism/plan/TourismPlan2003\\_2008.pdf](http://www.tourism.sa.gov.au/tourism/plan/TourismPlan2003_2008.pdf)

[http://www.ephc.gov.au/pdf/EPHC/goingplaces\\_issues.pdf](http://www.ephc.gov.au/pdf/EPHC/goingplaces_issues.pdf)

<http://www.facet.asn.au/pdf/FACETBusinessPlan.pdf>

<http://www.sustainability.dpc.wa.gov.au/conferences/speakers.htm>

<http://www.sustainability.dpc.wa.gov.au/conferences/presentations%20and%20papers/Jack,E%20-%20presentation.pdf>

<http://www.sustainability.dpc.wa.gov.au/conferences/presentations%20and%20papers/Jack,E%20-%20abstract.pdf>

[http://www.wwf.org.au/News\\_and\\_information/Publications/PDF/Speech\\_presentation/ningaloo\\_conference\\_2003.pdf](http://www.wwf.org.au/News_and_information/Publications/PDF/Speech_presentation/ningaloo_conference_2003.pdf)

[http://www.crctourism.com.au/CRCBookshop/page.aspx?page\\_id=2&productID=368](http://www.crctourism.com.au/CRCBookshop/page.aspx?page_id=2&productID=368)

[http://www.nrdp.com.au/downloads/Annual\\_Report\\_03-04.pdf](http://www.nrdp.com.au/downloads/Annual_Report_03-04.pdf)

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### List of web pages containing TOMM - *continued...*

<http://www.aph.gov.au/hansard/reps/commttee/R6333.pdf>

<http://www.imaginecruises.com.au/dolphin-research/wildlife-tourism.html>

<http://www.ausemade.com.au/sa/destination/k/kangaroo-island-links.htm>

<http://www.tourism.sa.gov.au/tourism/plan/SNBTS.pdf>

[http://www.nationalparks.nsw.gov.au/PDFs/quarantine\\_station\\_pas.pdf](http://www.nationalparks.nsw.gov.au/PDFs/quarantine_station_pas.pdf)

[http://www.parliament.sa.gov.au/committees/documents/EnviroResDev/public\\_documents/Completed%20Inquiries/43%20and%2044%20Report%20-%20Ecotourism/Hansard/Hansard%202001-02-07%20Kirby,%20Robertson,%20Wells,%20Ellis,%20Smith.pdf](http://www.parliament.sa.gov.au/committees/documents/EnviroResDev/public_documents/Completed%20Inquiries/43%20and%2044%20Report%20-%20Ecotourism/Hansard/Hansard%202001-02-07%20Kirby,%20Robertson,%20Wells,%20Ellis,%20Smith.pdf)

[http://www.industry.gov.au/assets/documents/itrinternet/PursuingCommonGoals20030905154532.pdf?CFID=93371&CF\\_TOKEN=53423257](http://www.industry.gov.au/assets/documents/itrinternet/PursuingCommonGoals20030905154532.pdf?CFID=93371&CF_TOKEN=53423257)

<http://www.dwlbc.sa.gov.au/files/KIISReport.pdf>

[http://www.wildlifetourism.org.au/downloads/2001\\_swtc\\_proceedings\\_full.pdf](http://www.wildlifetourism.org.au/downloads/2001_swtc_proceedings_full.pdf)

<http://www.ttf.org.au/pdf/report/nationalparks/ProjectPaper1.pdf> \*\*

<http://www.planning.sa.gov.au/edp/pdf/KI.PDF>

<http://www.rainforest-crc.jcu.edu.au/publications/research%20reports/ReportPDFs/bioRegional/Bioregional.pdf>

<http://www.regionaltourism.com.au/documents/2003handbook.pdf>

<http://www.deh.gov.au/commitments/uncsd/publications/pubs/csd1999.pdf>

## Appendix 4

### TOMM Fact Sheets

The following four fact sheets were produced in 2004-2005 to provide TOMM data in an easy to utilise format:

- Visitor Numbers to Kangaroo Island
- Origin of Visitors to Kangaroo Island
- Length of Stay for Visitors to Kangaroo Island
- Visitation to beaches of Kangaroo Island