



TOMM Kangaroo Island Resident Survey Report

November 2023 | REF 12193

MCGREGOR **TAN**
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About this project

The research was conducted from the 25th of October to the 14th of November 2023.



Background

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

The survey has been tracked against previous results where possible (2005/06 - 2021).



Sample

The survey was conducted using a multi-modal approach, achieving a total of n=420. The majority was achieved via online methods (55%) which included a client link and invitation to those on the McGregor Tan Panel. The remainder were achieved via CATI (phone interview, 45%) which involved calling residents of Kangaroo Island who were listed on a phone directory.



Guide to reading the report

This report centers on graphing the entire population, with any groups that were identified as being statistically significant being mentioned in the commentary. The key subgroups include, location of residence, park visitors (73%) and those aware of TOMM (70%).

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



Rounding

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

Executive Summary

Evaluating residents' attitudes towards tourism and related activities is crucial for comprehending sentiment and monitoring shifts in the perception of how tourism contributes positively to the local community.

You can find the primary insights from the core indicators and associated stakeholder questions in the following graphs and tables, with a detailed examination provided in the report.



- Lifestyle choice (71%) is the main reason for living on Kangaroo Island.
- 58% of businesses have some revenue related to tourism.
- Almost half (49%) of businesses providing tourism services or products aimed at tourists indicated better financial performance than the previous year.
- 58% take the opportunity to have input into the direction of tourism and commonly (70%) consider themselves as ambassadors for the island.



- Perception of positive effects of tourism is declining and seen to be moving away from community values.
- Majority report that tourism has no effect on their personal quality of life.
- Partnerships between conservations and tourism are perceived to be weakening.
- Tourism and development is thought to be eroding lifestyle quality over time.



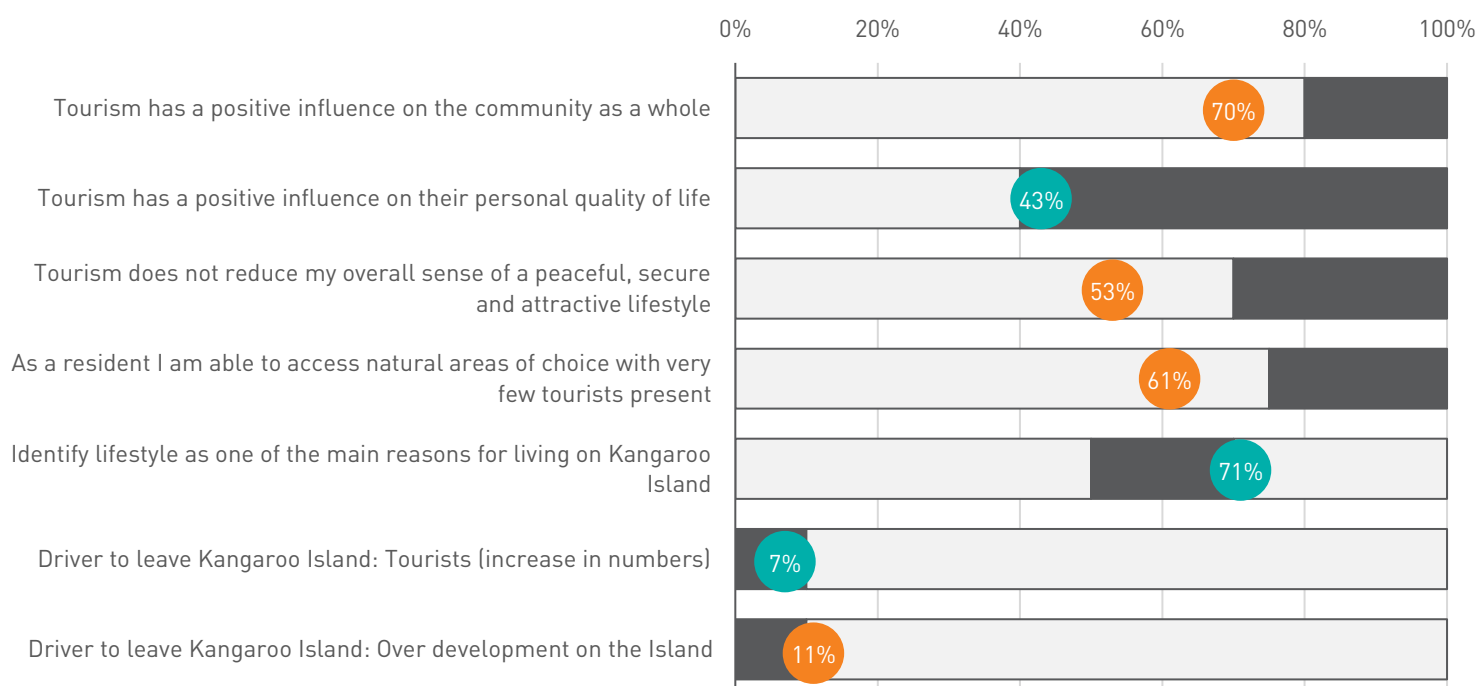
Summary of social indicators



Personal quality of life increased to acceptable ranges, after a low in the 2021 wave, while tourism having a positive impact on the community as a whole slightly decreased, continuing to be below the acceptable range.

Increased tourists as a reason to leave the island remains within the acceptable range while over development on the island has exceeded the acceptable limit for the first time (11%).

Lifestyle is the primary reason for choosing to live on Kangaroo Island



Summary of social indicators

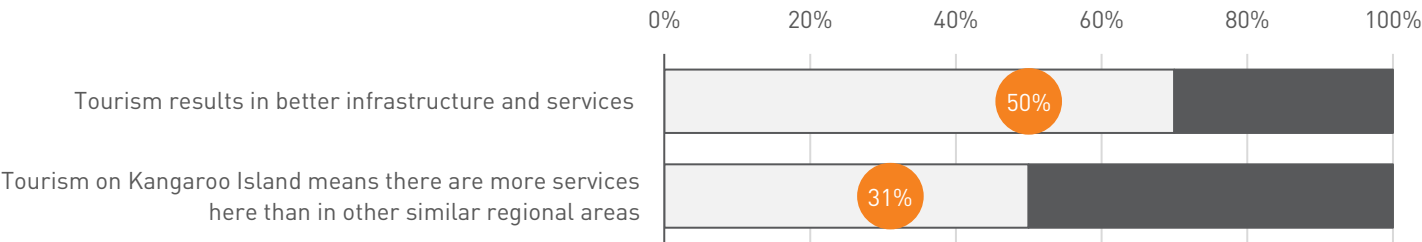


Agreement that tourism on the island enhances infrastructure and services yielded moderate results at 50%. However, when residents compared these outcomes to other regional areas, the agreement dropped to 31%. Both measures have experienced a decline over the past few waves.

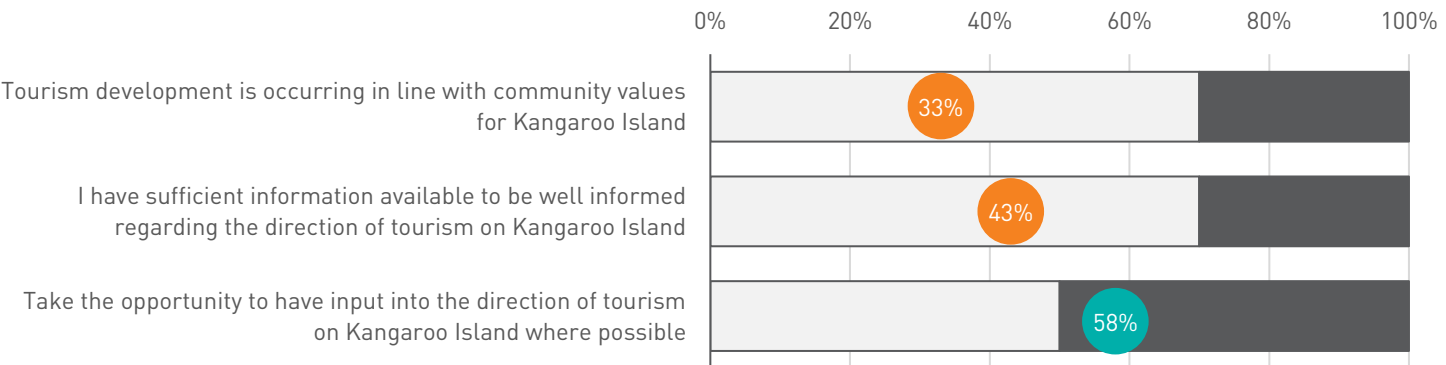
Tourism developments aligning with community values are currently well below the acceptable range, reaching the lowest point since measurement began.

The opportunity for community input has increased and is now within an acceptable range, marking the highest level since the measurements commenced.

Tourism has a positive impact on the available services in the region



Residents have the opportunity for input into tourism decisions

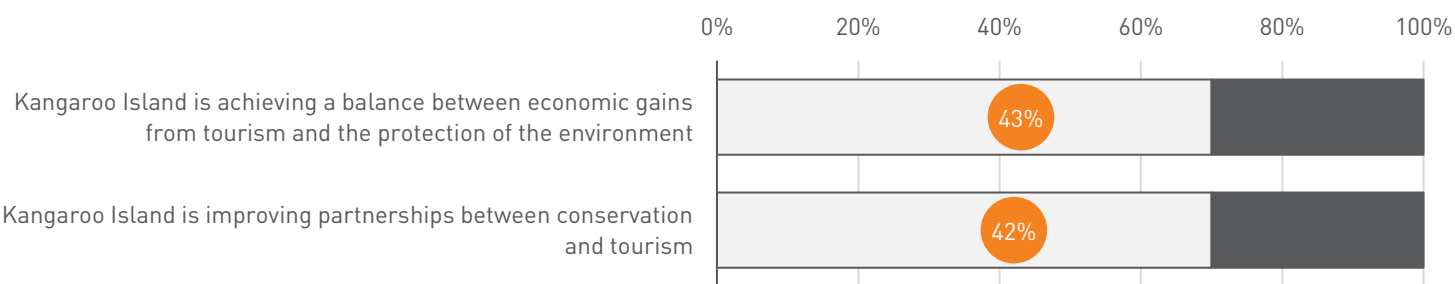


Summary of economic indicators

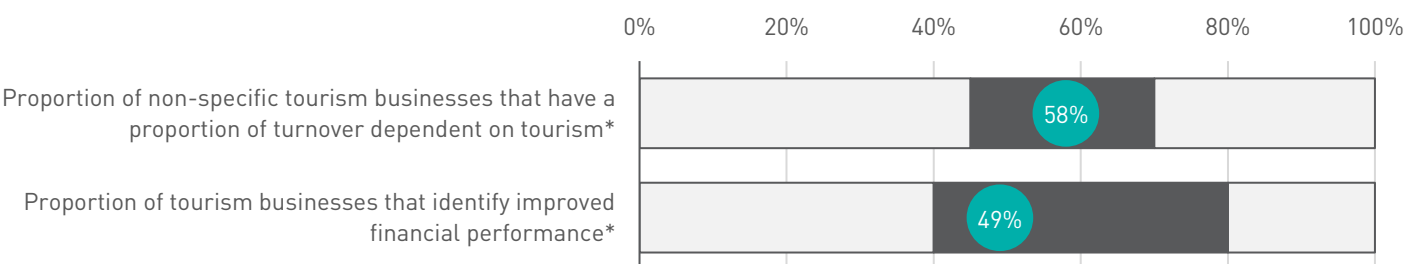


The belief that Kangaroo Island is striking a balance between tourism and conservation is below the acceptable range. While the benefits of tourism for business growth and profit are well within the acceptable range.

Belief of balance between tourism gains and environmental protection



Tourism improves economic benefits for Kangaroo Island

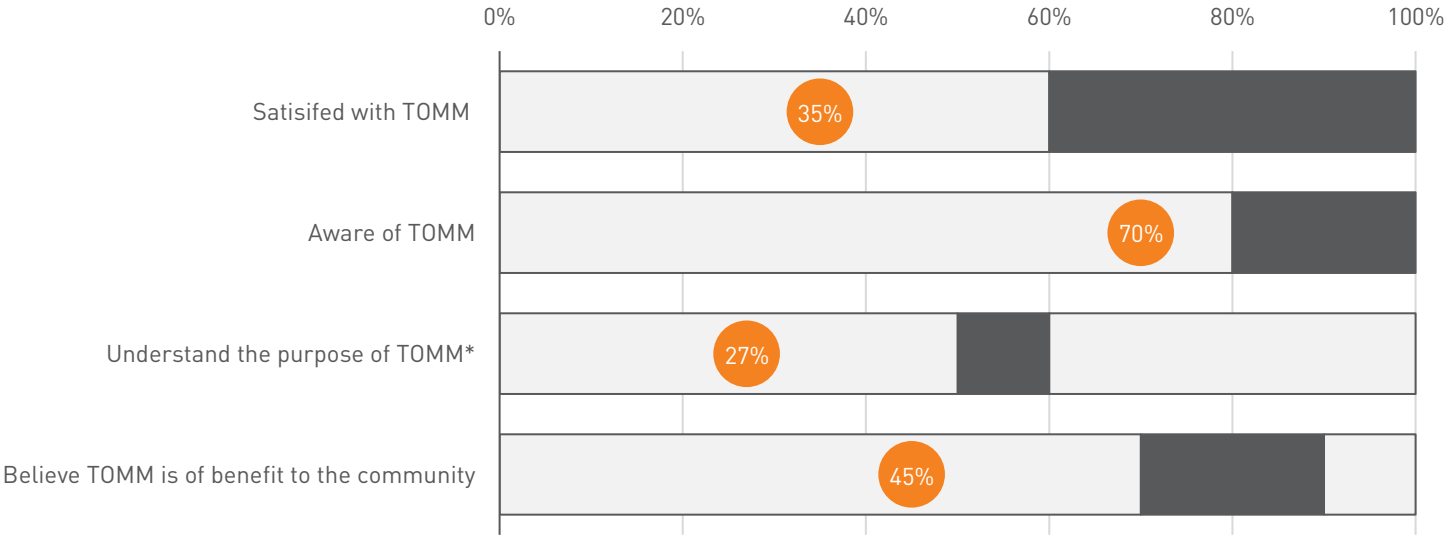


Summary of performance indicators



The TOMM measures currently fall below the acceptable range. Notably, the understanding of the purpose of TOMM is also below the acceptable range, although it has reached its highest level since measurement began. While awareness of TOMM is approaching the acceptable range, it has not been within range since 2014/2015, with just a 1pp increase since the 2021 wave.

Awareness of TOMM, purpose and benefits



*Purpose of TOMM: A model to monitor impact / health of tourism.

Summary of stakeholder findings

Department of Environment and Water



73%
Visited a Park



55%
Visited Flinders
Chase National Park



72%
Enjoy experiencing
nature and scenery



83%
Agree that parks
provide protections for
plants and animals

Kangaroo Island Council



35%
Satisfied with
the Sealink
ferry service



6%
Satisfied with
the new
coach service



70%
Agree that the
Dudley Trail is
an asset for all

South Australian Tourism Commission



85%
Feel tourism supporting
community is important



80%
Feel that tourism supporting
economic health is important

Kangaroo Island Tourism Alliance



15%
Agree that cruise
ships positively
impact lifestyle



45%
Support communication
with the community to
support partnerships



58%
Aware of KITA's
initiatives

Recommendations



Tourism Perceptions

There's a perceived decline in tourism aligning with community values. Prioritising community involvement could help improve these perceptions to ensure locals feel tourism is beneficial to the community.



Conservation Partnerships

Residents highly value conservation efforts, but partnerships between conservation and tourism are declining. Giving prominence to these collaborations may enhance perceptions and align with the local emphasis on environmental upkeep.



Lifestyle and Community

Locals highly value lifestyle and community, yet certain indicators suggest a decline in the positive lifestyle impact of the tourism industry. A key step is to implement tourism measures that safeguard the local lifestyle.



Benefits of TOMM

Although awareness and understanding of TOMM's purpose are gradually increasing over time, locals are not witnessing the corresponding results, shown by a decline in perceived benefits and satisfaction with TOMM. To address this, highlight successes to elevate community awareness and emphasise the program's benefits.



Local Ambassadors

Residents consider themselves advocates for Kangaroo Island. Investing in building partnerships and fostering relationships within the local community is likely to result in residents being more inclined to actively promote Kangaroo Island.

A woman with brown hair tied back, wearing a teal jacket, is smiling and pointing her right hand towards a scenic coastal landscape. The landscape features a bay with light blue water, a sandy beach, and steep, green cliffs. The sky is overcast with grey clouds. In the foreground, there are large, dark grey rocks on the left and a light-colored, textured ground surface. A dark semi-transparent banner is overlaid across the middle of the image, containing the text "Social Indicators" in white.

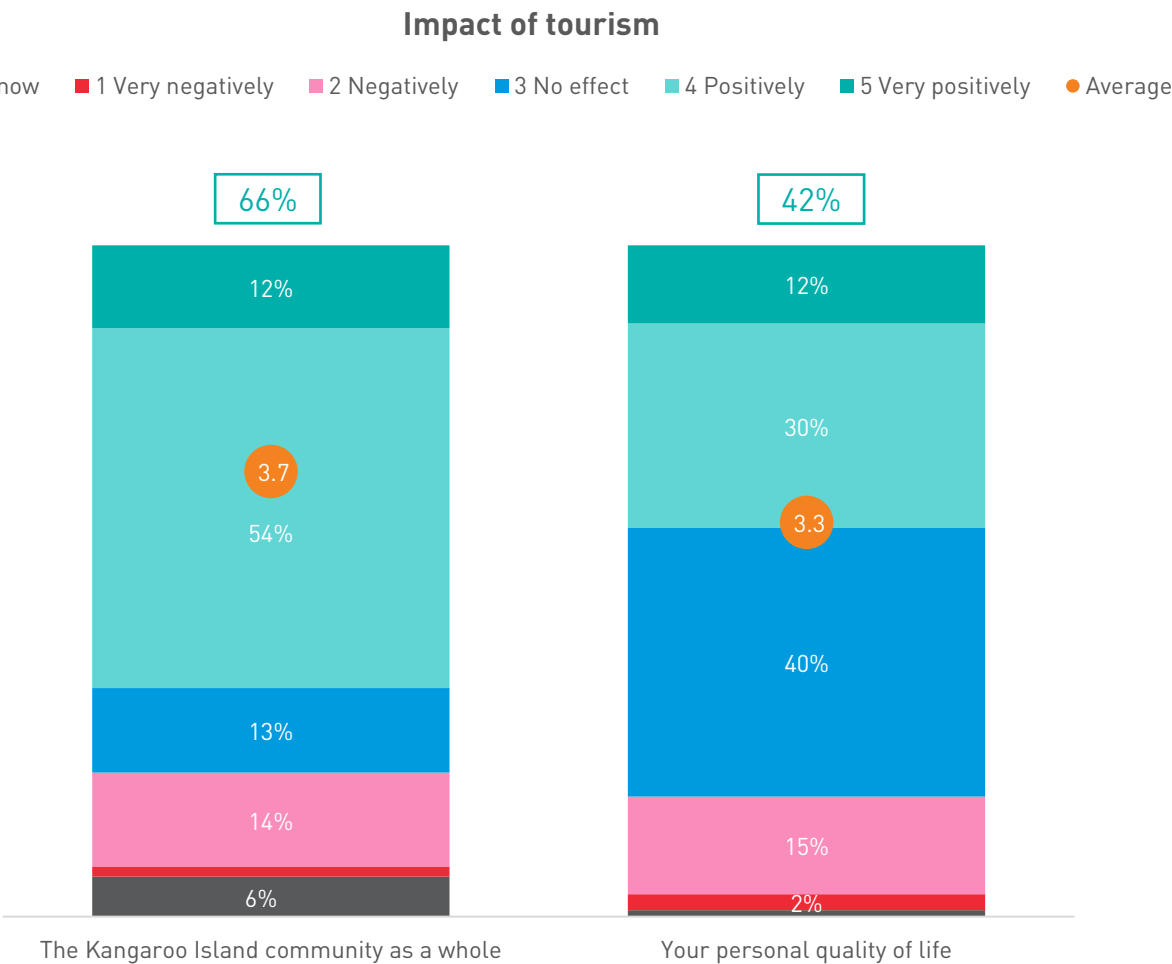
Social Indicators

Impact of tourism

Overall, 66% felt there was a positive impact on the community as a whole as a direct result of the tourism on Kangaroo Island. This positive perception shifted down to 42% in relation to the impact of tourism on residents’ own quality of life.

Over two in five (45%) who were aware of TOMM had a positive perception of the impact of tourism on their own quality of life, compared to 35% who were unaware of TOMM.

Positive perceptions across both measures were slightly higher among those who had visited a park, possibly attributable to higher levels of exposure to tourists in these areas.

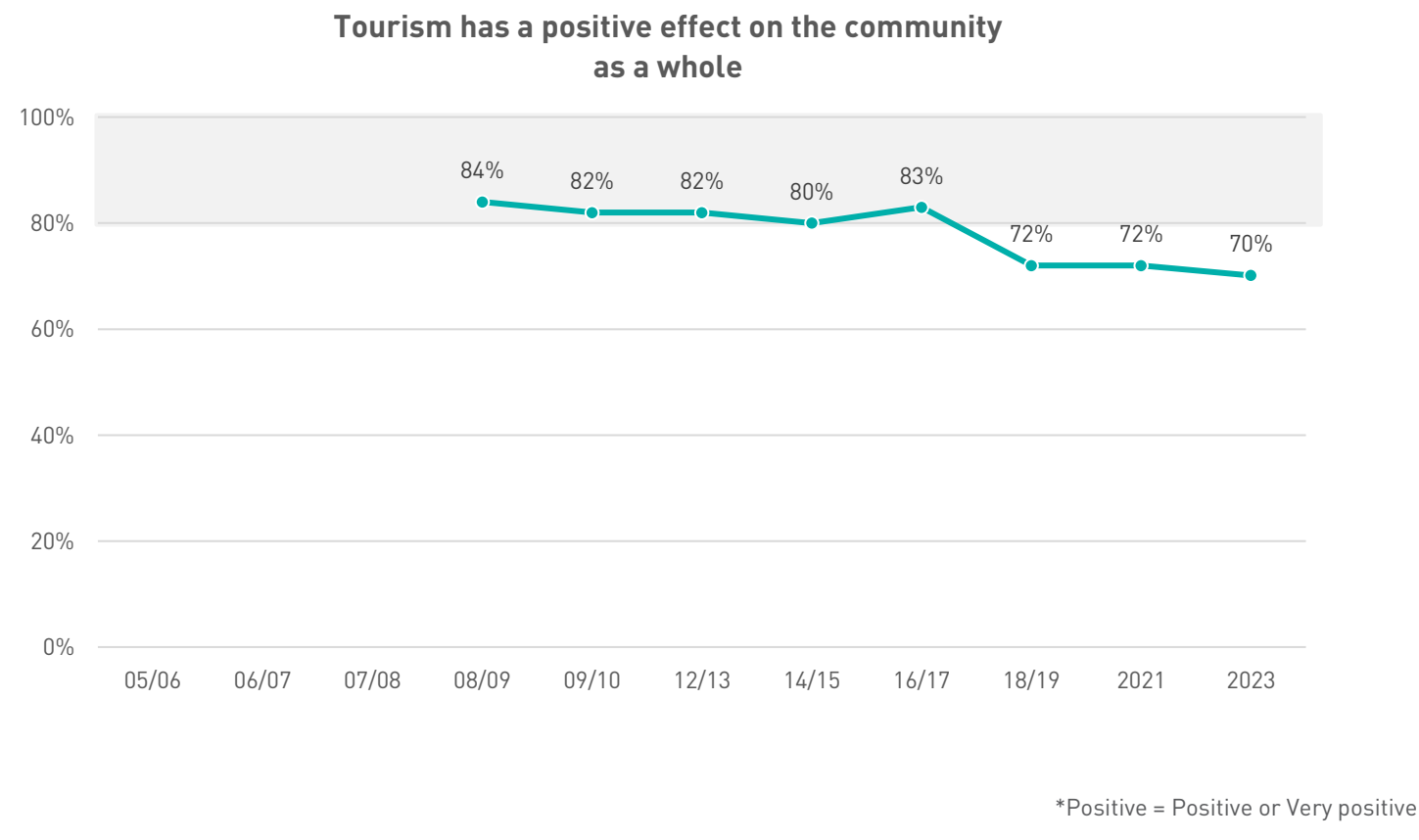


Effect of tourism on community

Perceptions about tourism having a positive effect on the KI community as a whole have remained relatively similar to 2021 levels, with a 2pp decrease over the two-year period.

This result remains outside of the acceptable range, indicating that a greater awareness of the benefits to the community resulting from tourism may be warranted to increase future results.

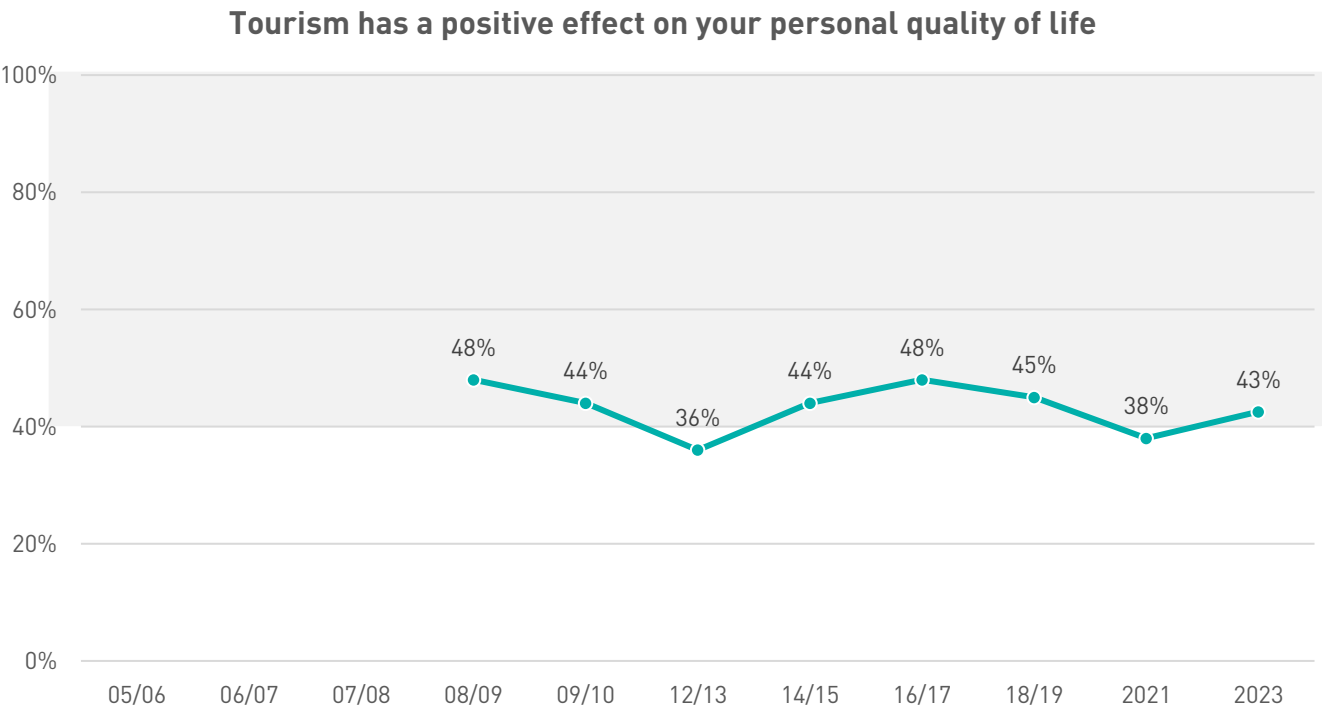
Optimal condition	Indicator	Acceptable Range	2023 Result	Result
Residents perceive that tourism has a positive influence on their quality of life	Proportion of residents who perceive that tourism has a positive effect on the community as a whole	80% - 100%	70%	✗



Effect of tourism on quality of life

Tourism was seen to have a positive effect on KI residents’ quality of life by 43%. This is a 5pp increase from 2021 levels, now reaching within the acceptable range and meeting the optimal condition for this measure.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
Residents perceive that tourism has a positive influence on their quality of life	Proportion of residents who perceive that tourism has a positive effect on their personal quality of life	40% - 100%	43%	✓



*Positive = Positive or Very positive

Agreement with tourism impact

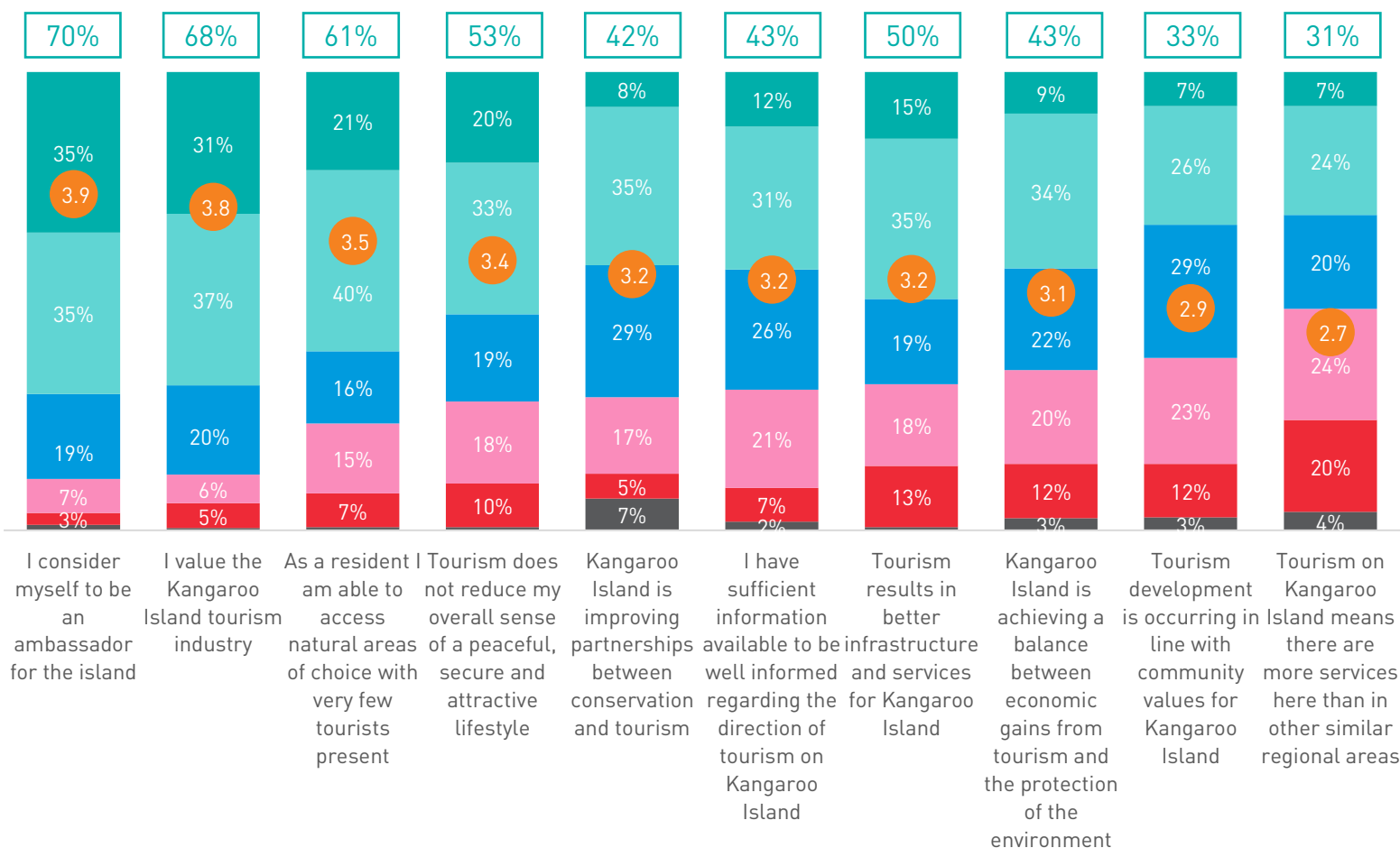
Residents were most aligned in feeling like ambassadors for the island, reflecting their openness and positive promotion of the island to others. Additionally, agreement on the value of the tourism industry (68%) and ease of access to natural areas without tourists was notably strong (61%).

Areas with lower agreement included tourism development aligning with community values (33%) and the perception of increased local services due to the tourism industry on Kangaroo Island (31%).

Those aware of TOMM were more likely to feel like ambassadors for the island (76%) compared to those unaware (57%).

Agreement level

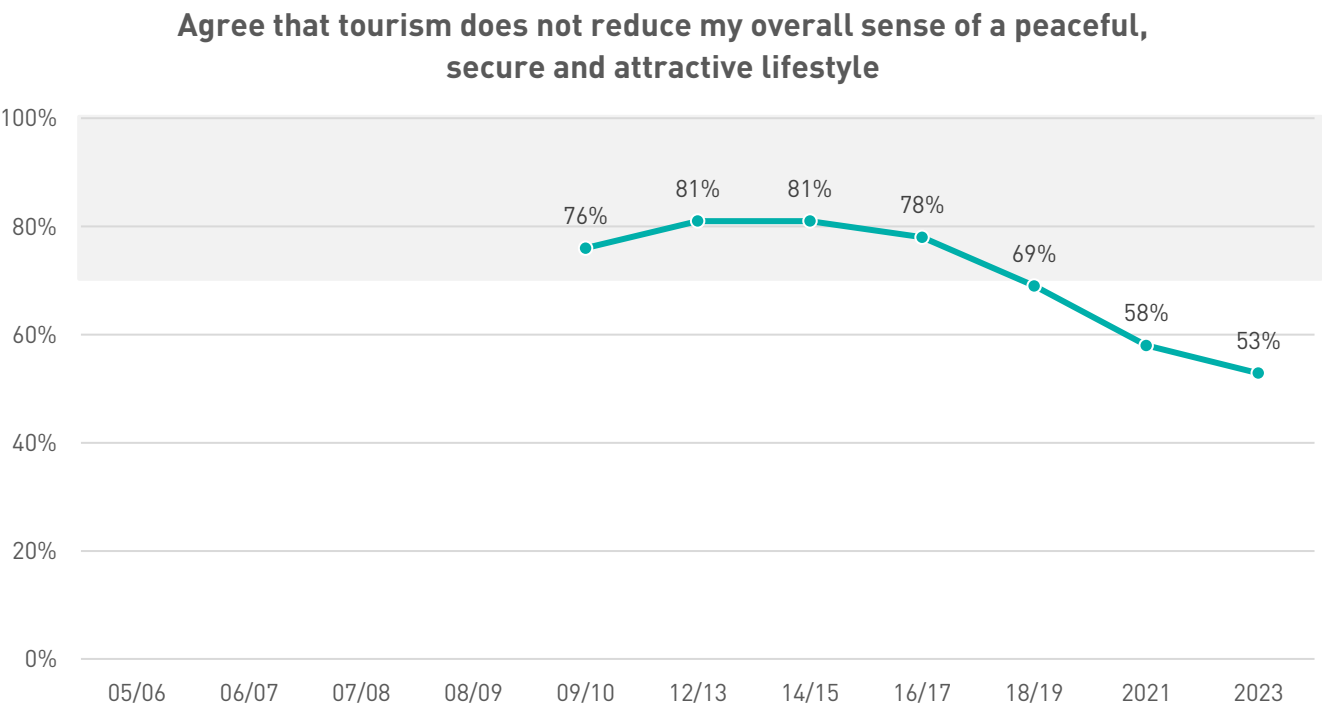
■ Don't know ■ 1 Strongly disagree ■ 2 Disagree ■ 3 Neither agree nor disagree ■ 4 Agree ■ 5 Strongly agree ● Average



Effect on lifestyle

There continues to be a steady decline in the perception that tourism does not reduce the overall sense of a peaceful, secure and attractive lifestyle. Just over half (53%) agreed that tourism does not impact their lifestyle, representing a 5pp decline compared to 2021.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
Residents perceive that tourism has a positive influence on their quality of life	Proportion of residents who perceive that tourism does not reduce their overall sense of a peaceful, secure and attractive lifestyle	70% - 100%	53%	✗



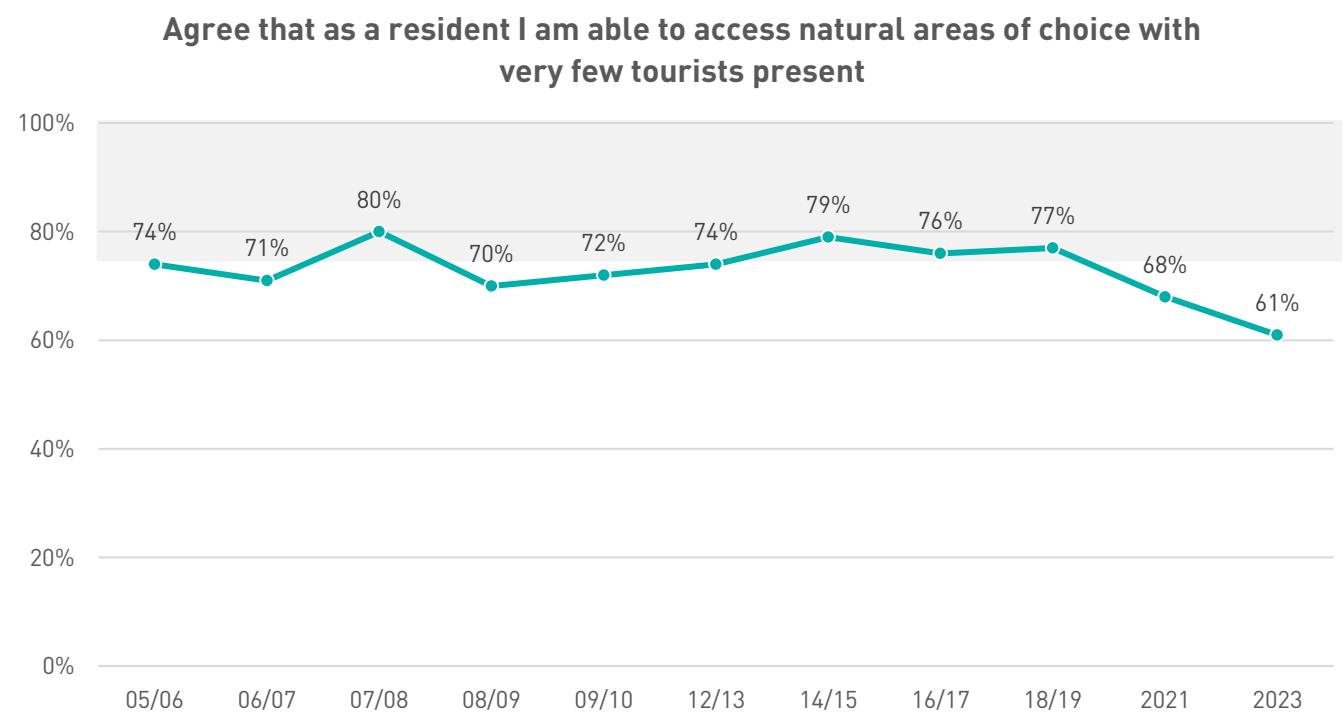
*Agree = Agree or Strongly agree; Disagree = Disagree or Strongly disagree, unless otherwise stated

Presence of tourists

The perception that it is possible for residents to access natural areas of choice with very few tourists present is declining, with 61% agreeing with the statement (compared to 68% in 2021).

However, the proportion of residents disagreeing with the statement remained relatively steady, with 23% disagreeing compared to 22% in 2021.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
Residents perceive that tourism has a positive influence on their quality of life	Proportion of residents who feel that they can visit a natural area of their choice on the Island with very few tourists present	75% - 100%	61%	✗

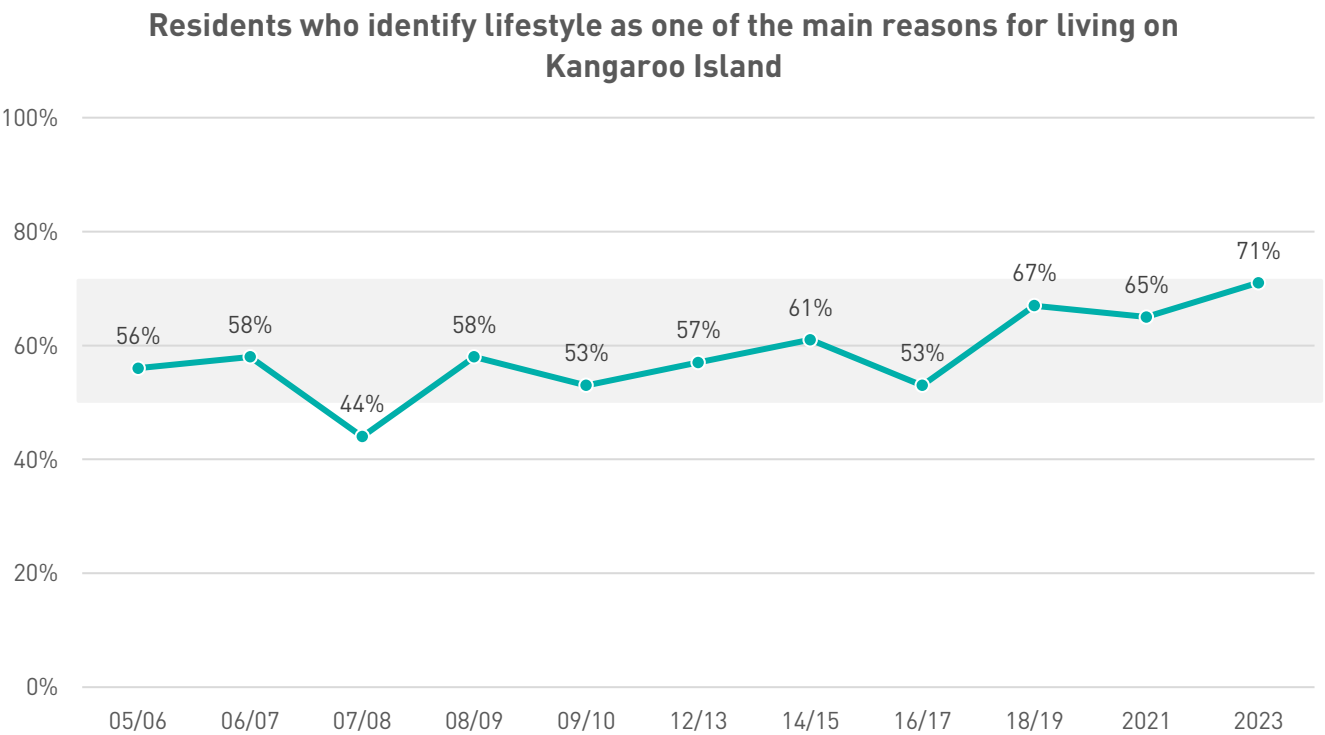


*Agree = Agree or Strongly agree; Disagree = Disagree or Strongly disagree, unless otherwise stated

Lifestyle as a reason to live on KI

Seven in ten (71%) agree that lifestyle is one of the main reasons for living in Kangaroo Island. This represents a 6pp increase compared to the 2021 wave, with levels now exceeding the acceptable range for the first time.

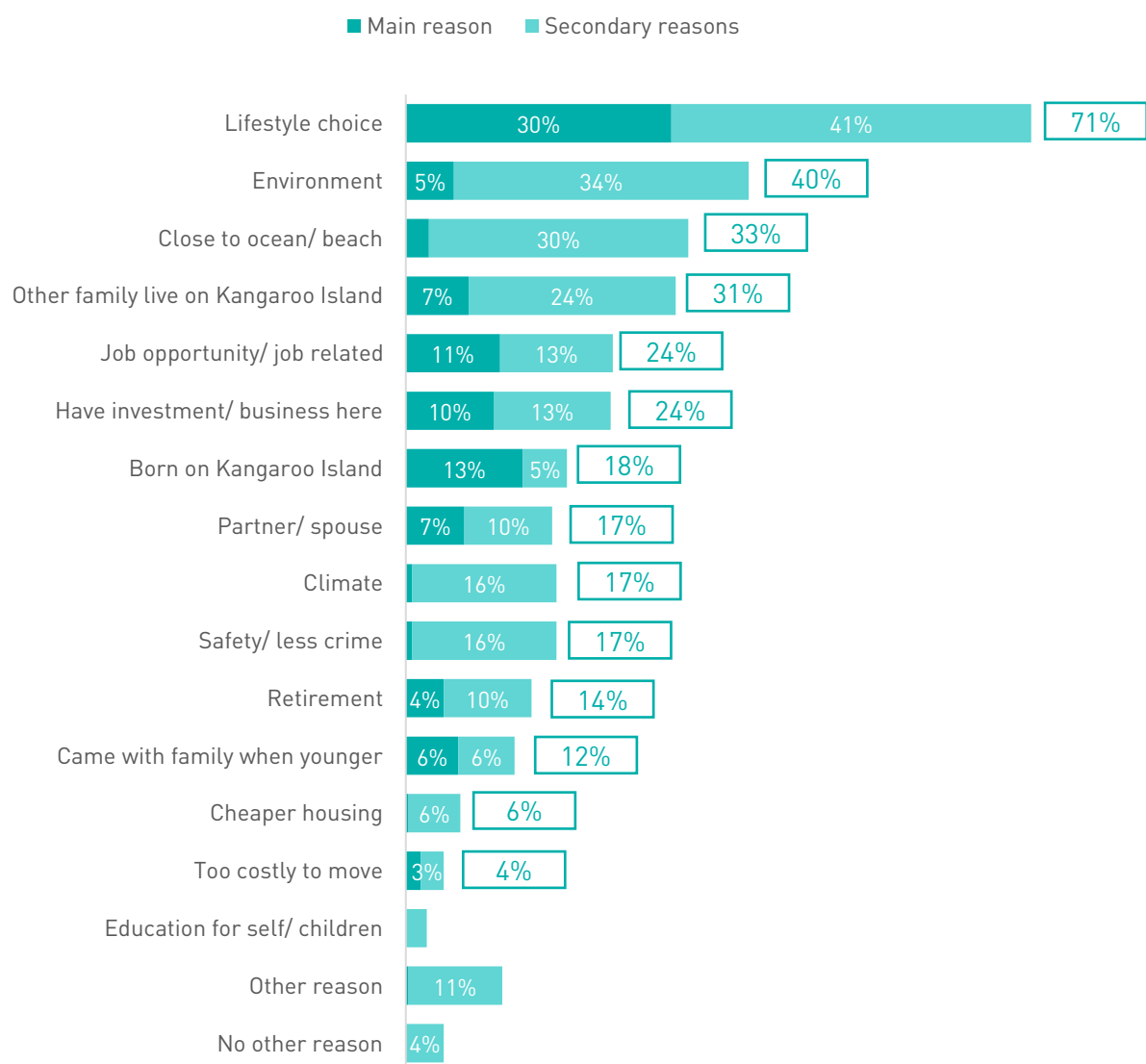
Optimal condition	Indicator	Acceptable Range	2023 Result	Result
Residents perceive that tourism has a positive influence on their quality of life	Proportion of residents who identify lifestyle as one of the main reasons for living on Kangaroo Island	50% - 70%	71%	✓



Reasons for living on KI

Kangaroo Island provides a certain lifestyle for residents that both attracts people to live on the Island and also makes them stay residing there, as this is the leading reason why residents choose to live on Kangaroo Island (71%).

Reason to live on Kangaroo Island



Main reason for living on KI over time

When asked about the main reason for living on Kangaroo Island, lifestyle preference continues to be the primary factor for 30%.

While the choice to reside on the island for job opportunities has been gradually declining as a main reason in recent years, it still stands as a prominent reason for 11%.

Interestingly, while the environment's influence on living on Kangaroo Island reached its peak as a main motivator at 10% in 2021, this has since decreased to 5% in 2023.

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

All reasons for living on KI over time

When looking at all reasons, lifestyle preference continues to be a prominent influencing factor for living on the island, with 71% stating this as a factor, which is the highest since reporting began.

Being close to the ocean and beach has become a key reason (33%), up from 8% in 2021.

Business investments also reached a high, with 24% reporting this as a reason, up 9pp since 2021.

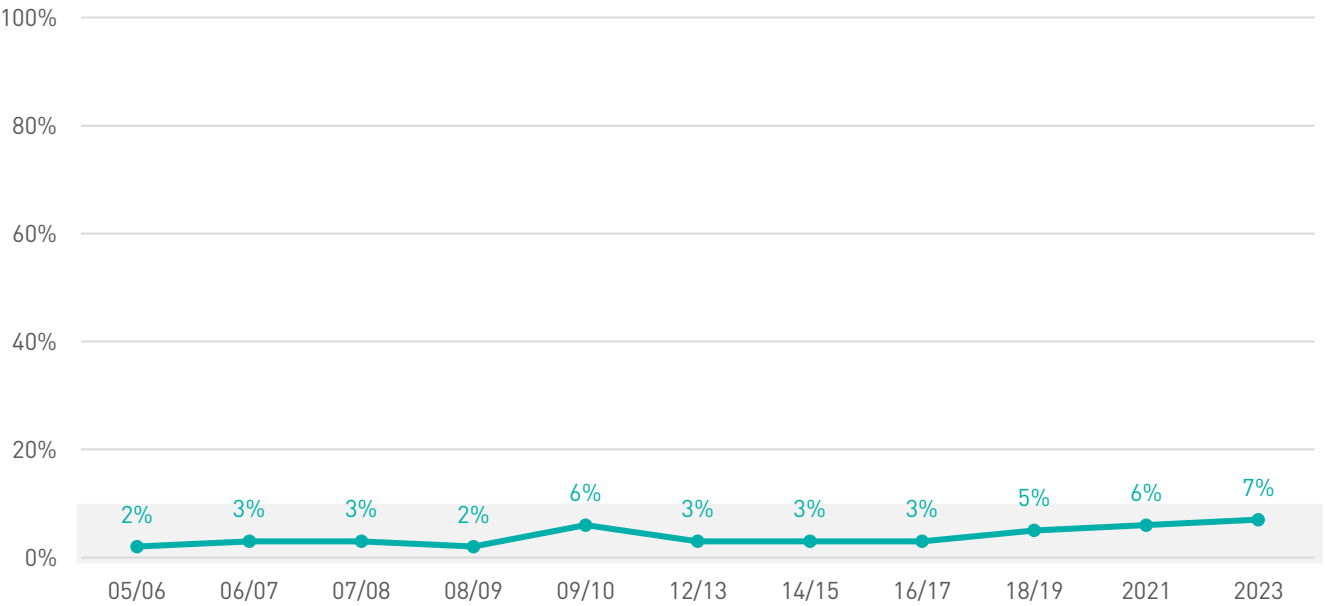
All reasons for living on Kangaroo Island	05/06	06/07	07/08	08/09	09/10	12/13	14/15	16/17	18/19	2021	2023
Lifestyle choice	56%	58%	44%	58%	53%	57%	61%	53%	67%	65%	71%
Job opportunity / job related	36%	44%	39%	36%	35%	29%	31%	32%	29%	26%	24%
Environment	14%	19%	15%	16%	21%	15%	25%	28%	20%	31%	40%
Close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

Tourism as a reason to leave

Citing the increase in tourism as a motive for leaving and relocating from Kangaroo Island has slightly risen, showing a growing negative sentiment towards tourism. Despite this, the 2023 figure remains within an acceptable range, albeit experiencing a marginal increase over the past four years.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
Residents perceive that tourism has a positive influence on their quality of life	Proportion of residents who indicate a driver to leave Kangaroo Island would be an increase in tourists	0% - 10%	7%	✓

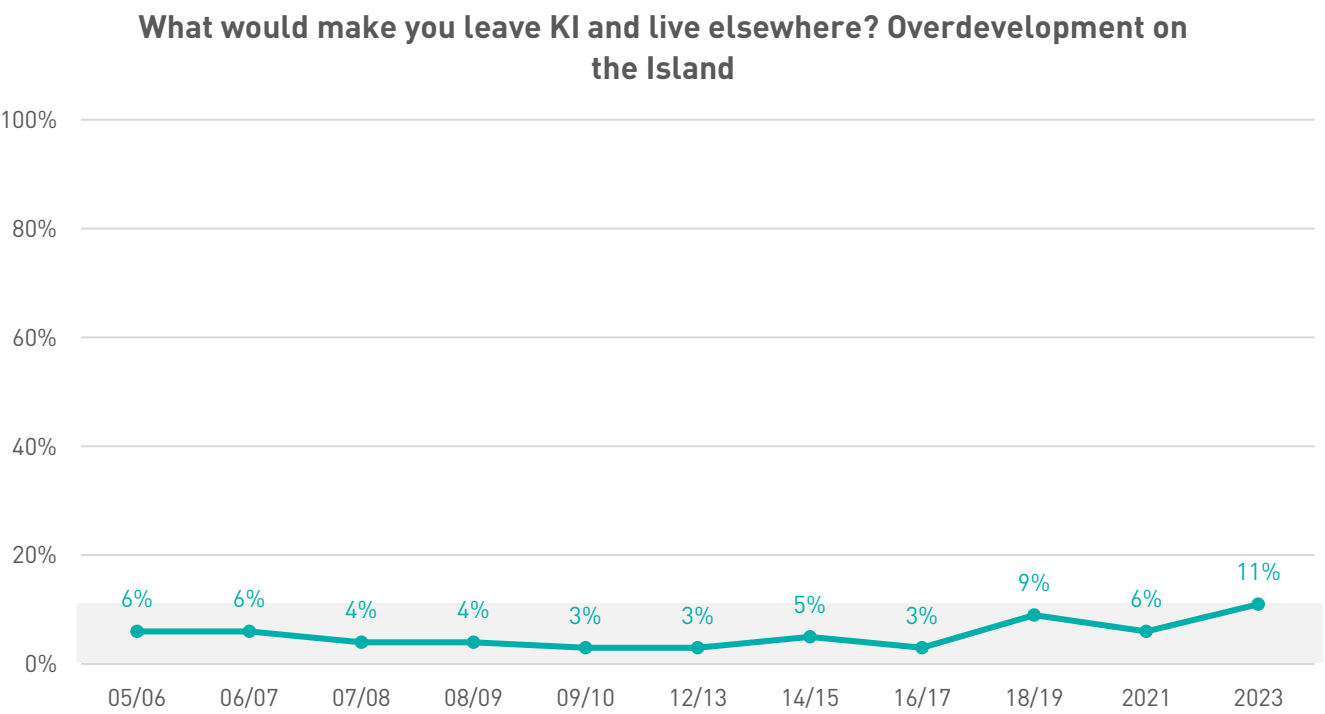
What would make you leave KI and live elsewhere?
Tourists (increase in numbers)



Overdevelopment as a reason to leave

Following a decline in 2021, the impact of overdevelopment has increased, with 11% now citing it as a motive to leave Kangaroo Island. This has pushed the 2023 result outside of the acceptable range, signifying a noteworthy shift in perspectives.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
Residents perceive that tourism has a positive influence on their quality of life	Proportion of residents who indicate a driver to leave Kangaroo Island would be development	0% - 10%	11%	✗



All reasons to leave

Similar to 2021, the most cited reason for wanting to leave Kangaroo Island remains health-related, accounting for 36% of responses—an increase of 13pp since 2021. This category encompasses departures due to personal health issues and concerns about limited or inadequate health support on the island.

Following closely is the concern over freight costs and travel on the island, cited by 17%, marking a threefold increase since 2021. These heightened expenses for travel and freight may also be linked to the recent upsurge in the cost of living.

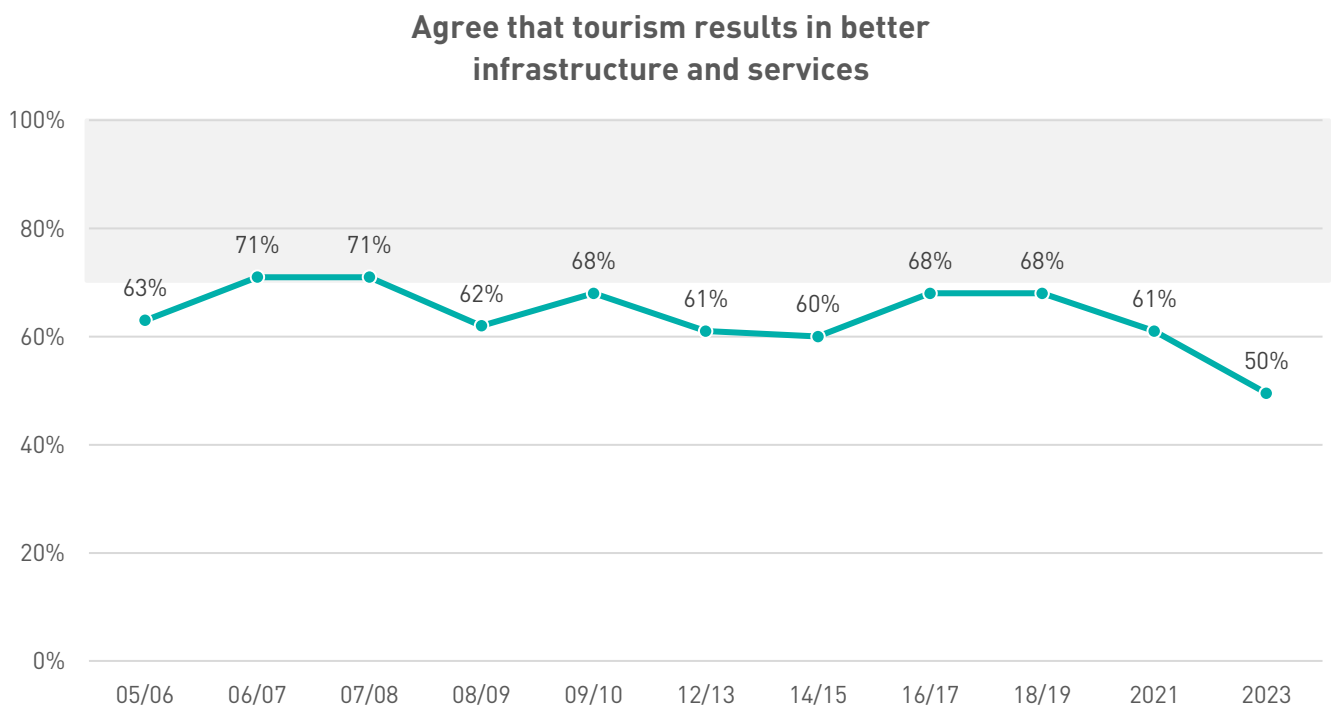
A quarter (25%) stated that there is nothing that could make them leave Kangaroo Island, at a level similar to previous years.

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

Tourism's impact on infrastructure

The agreeance that tourism leads to improved infrastructure has hit its lowest point since data collection began in 2006, as only 50% of respondents now agree with this notion, falling below the acceptable range. Notably, 15% strongly agreed, while a substantial 31% disagreed.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
Residents perceive that tourism has a positive impact on the level of service for the region	Proportion of residents who believe that tourism results in better infrastructure and services	70% - 100%	50%	✗



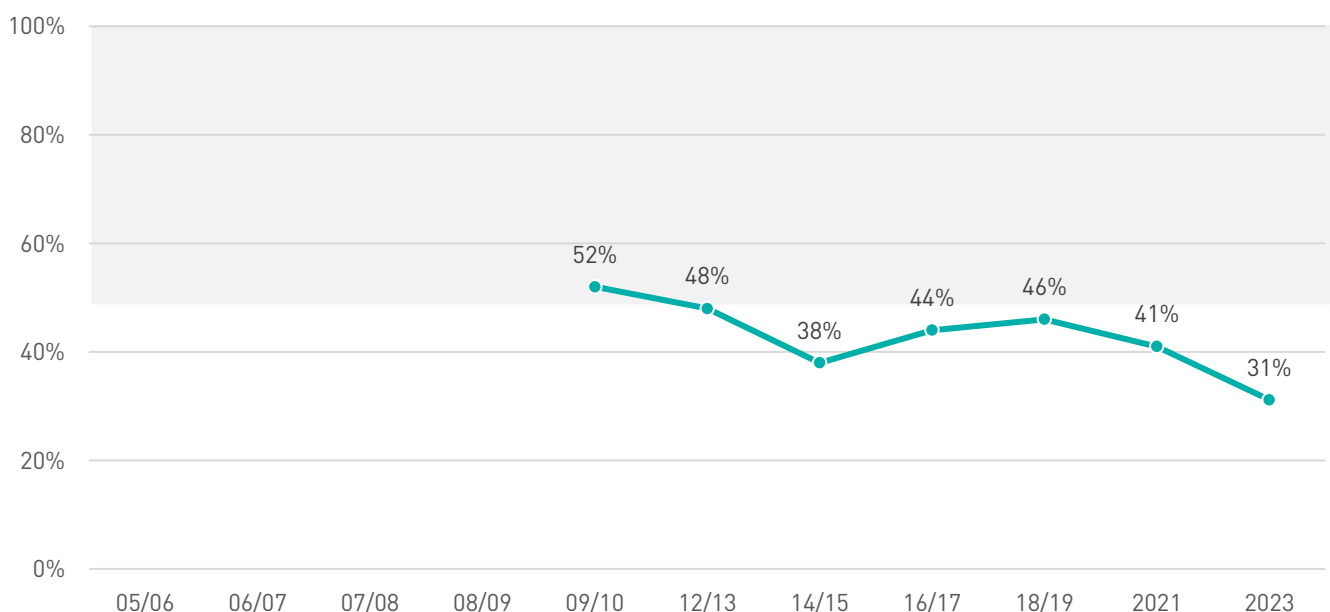
*Agree = Agree or Strongly agree; Disagree = Disagree or Strongly disagree, unless otherwise stated

Tourism's impact on services

The agreeance that tourism leads to increased services in the region has continued to fall in this wave. Following the downward trend observed in 2021, agreement with this statement has decreased another 10pp, with only 31% of respondents in agreement.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
Residents perceive that tourism has a positive impact on the level of service for the region	Proportion of residents who believe that because of tourism the Island has more services available than other similar sized regional areas in Australia	50% - 100%	31%	X

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



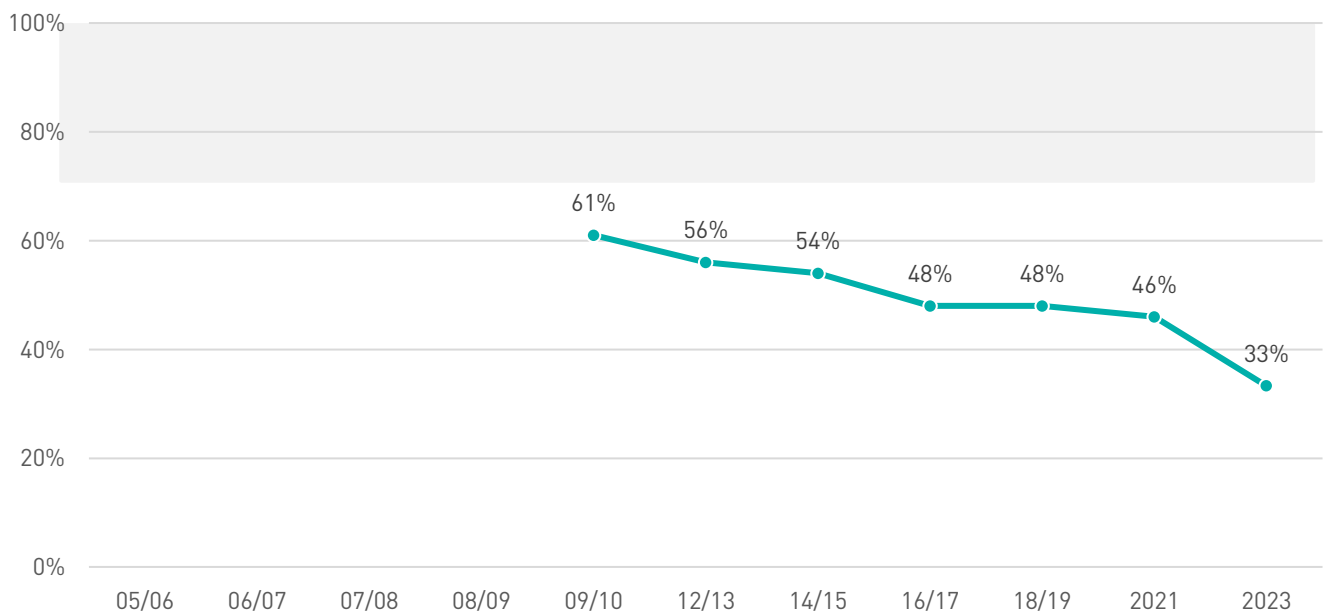
*Agree = Agree or Strongly agree; Disagree = Disagree or Strongly disagree, unless otherwise stated

Tourism's impact on the community

Only 34% of residents believe that tourism development is occurring in line with community values, and this figure is consistently declining. Conversely, 36% expressed disagreement with this statement, indicating that a majority of residents do not perceive that development aligns with community values. This trend suggests a growing concern among residents regarding the alignment of tourism development with community priorities and values.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
Residents feel that they have the opportunity for input into tourism management on Kangaroo Island	Proportion of residents who believe that tourism development is occurring in line with community values	70% - 100%	34%	✗

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

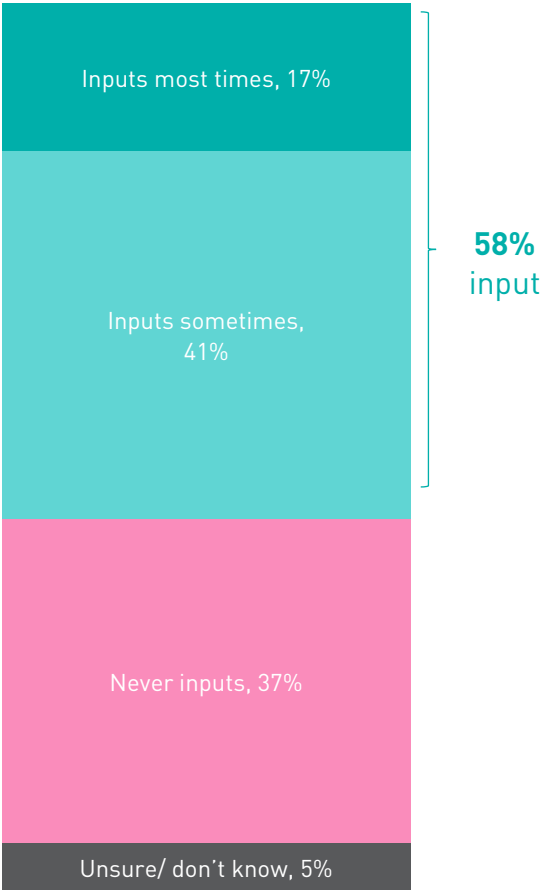


*Agree = Agree or Strongly agree; Disagree = Disagree or Strongly disagree, unless otherwise stated

Resident input into tourism direction

The majority of residents (58%) provide some level of input into the direction of tourism on the island. These are more likely to be those who visit parks (64%) and those aware of TOMM (65%).

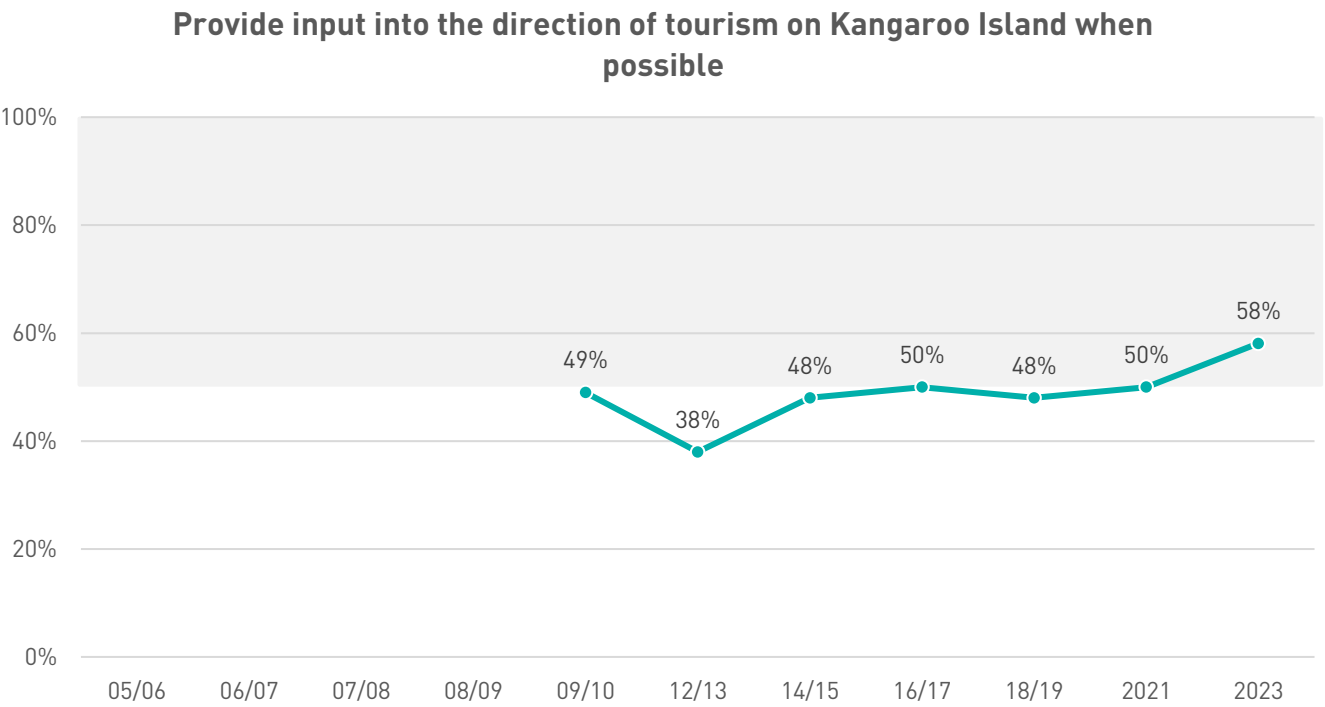
Provided input into the direction of tourism on Kangaroo Island



Resident opportunity for tourism direction

A majority (58%) of residents actively provide input into tourism on Kangaroo Island, signaling a continued upward trend that has now firmly entered the acceptable range. This contrasts with previous years when it hovered near the boundary of the acceptable range. This signifies residents' increased confidence in shaping Kangaroo Island's tourism, indicating a positive shift in engagement and perceived influence.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
Residents feel that they have the opportunity for input into tourism management on Kangaroo island	Proportion of residents who indicate they take the opportunity to have input into the direction of tourism on Kangaroo Island when possible	50% - 100%	58%	✓

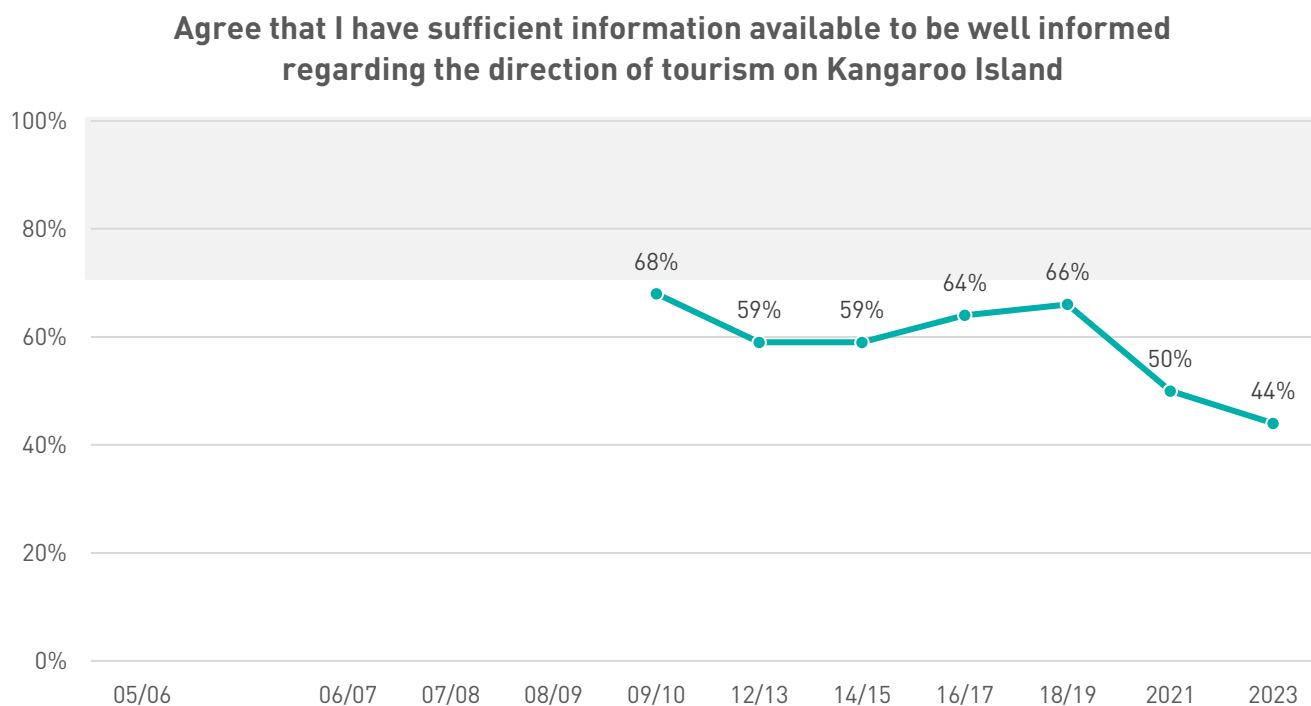


* Yes, most times or sometimes

Tourism information sufficiency

Just over two in five (44%) feel adequately informed about the direction of tourism on Kangaroo Island, falling below the acceptable range. This trend of insufficient information being available has escalated since 2018/2019 when 66% claimed sufficient information. In 2021, this dropped to 50%, and now stands at 44%. These declining figures underscore the need for ongoing improvements in the availability of information to residents.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
Residents feel that they have the opportunity for input into tourism management on Kangaroo Island	Proportion of residents who identify that they have sufficient information available to be well informed regarding the direction of tourism on Kangaroo Island	70% - 100%	44%	X

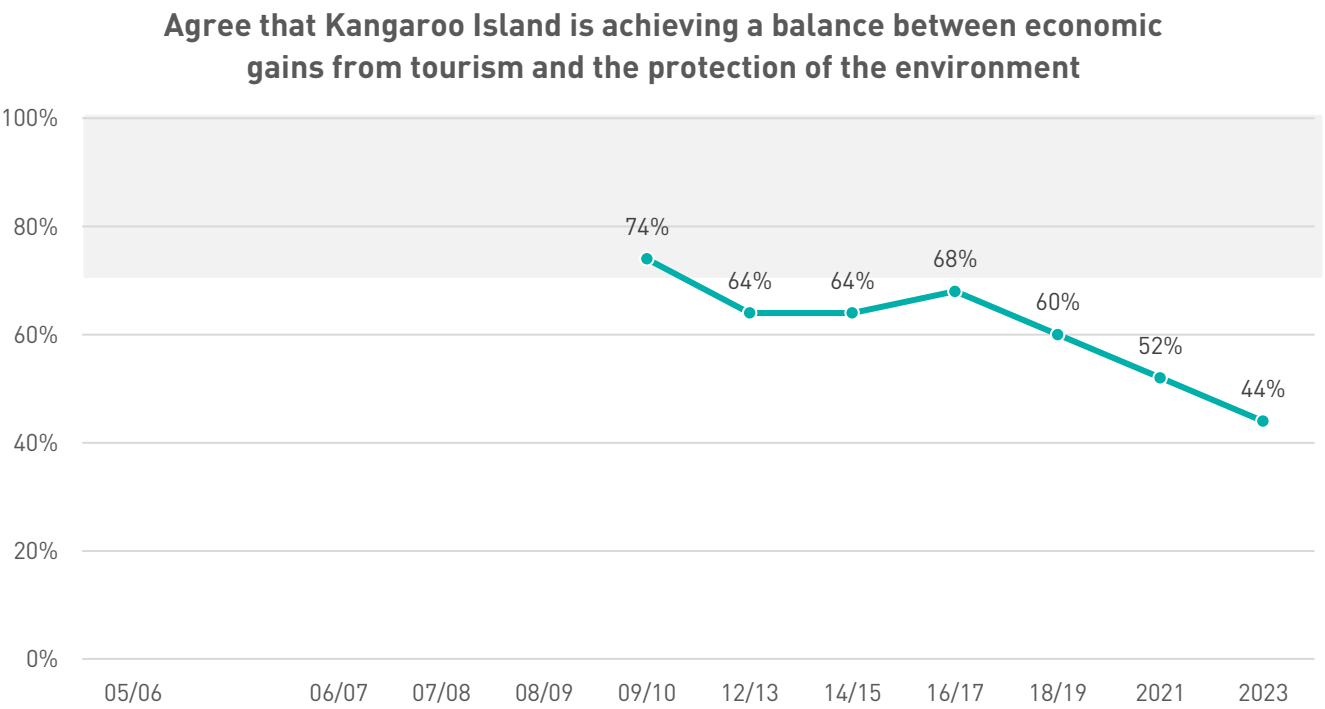


*Agree = Agree or Strongly agree; Disagree = Disagree or Strongly disagree, unless otherwise stated

Economic and environmental balance

The agreeance that Kangaroo Island is achieving a balance between economic gains from tourism and protection of the environment has reached its lowest point of 44%, persistently declining since 2016/2017 and continuing to fall below the acceptable range. This indicates residents' growing perception that the island is not effectively balancing economic benefits and environmental preservation.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
Residents perceive that there is a balance between the gains from tourism and the protection of the environment	Proportion of residents who believe that Kangaroo Island is achieving a balance between economic gains from tourism and protection of the environment	70% - 100%	44%	✗

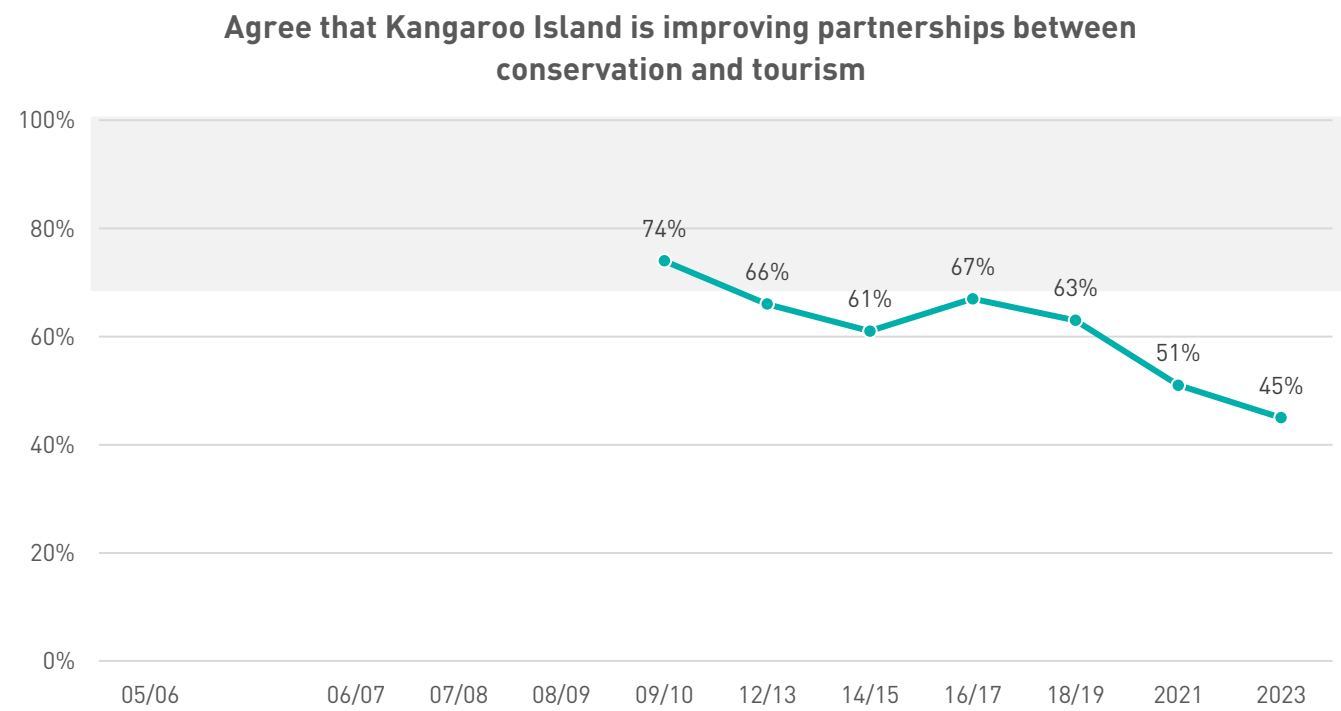


*Agree = Agree or Strongly agree; Disagree = Disagree or Strongly disagree, unless otherwise stated

Conservation and tourism partnerships

The agreement that Kangaroo Island is enhancing its partnerships between conservation and tourism has dropped to its lowest point at 45%, demonstrating a continuous decline since 2016/2017 and further descending below the acceptable range.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
Residents perceive that there is a balance between the gains from tourism and the protection of the environment	Proportion of residents who believe that Kangaroo Island is improving partnerships between conservation and tourism	70% - 100%	45%	✗



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



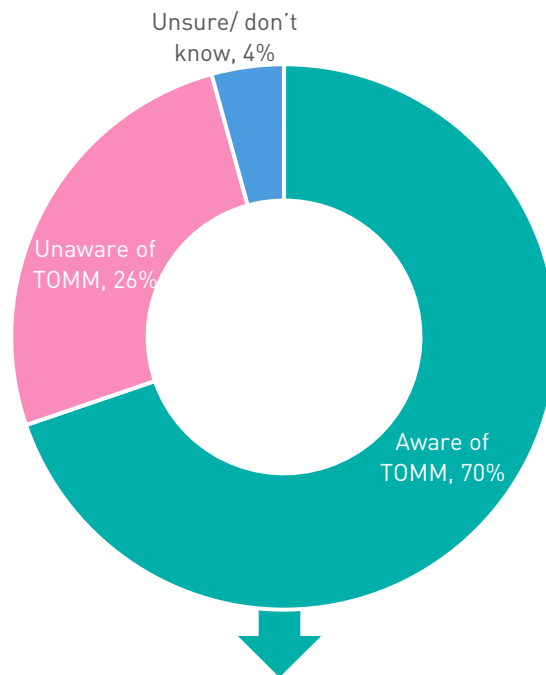
Environmental Indicators

Awareness of Kangaroo Island TOMM

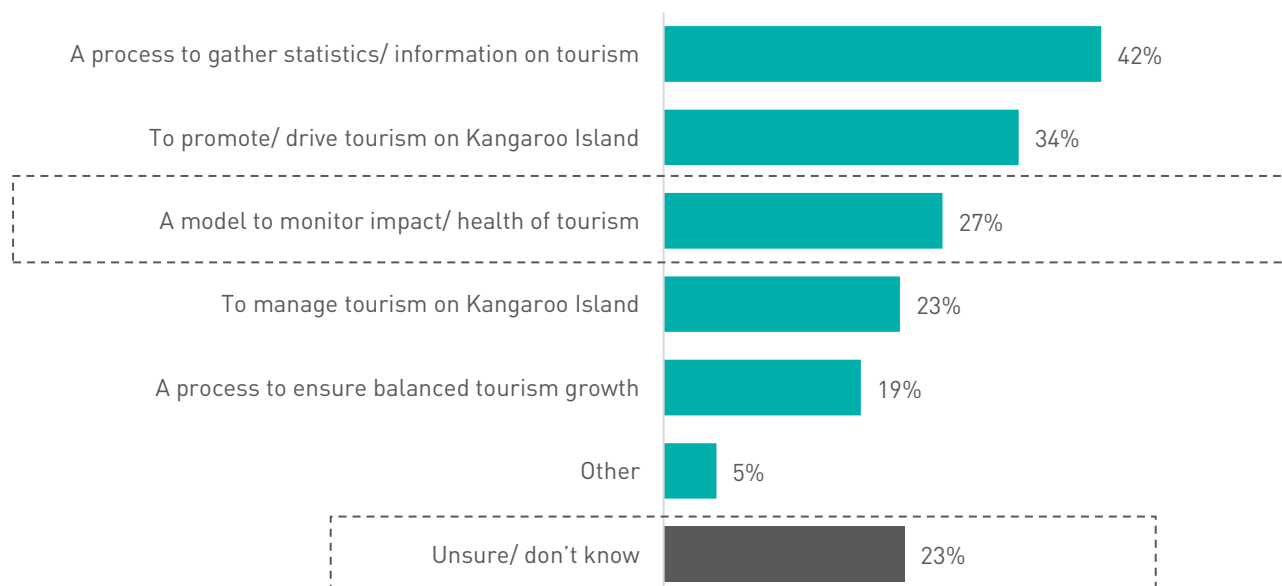
Seven out of ten are aware of Kangaroo Island TOMM (70%), and 27% of them accurately recognised its purpose.

Interestingly, awareness is more pronounced among older respondents, with 76% of those aged 55 or older being familiar with TOMM, compared to only 34% among those under 34. However, respondents under 34 are more likely to correctly identify the purpose of TOMM than those over 55 (34% and 26%, respectively).

Awareness of Kangaroo Island TOMM



Purpose of TOMM



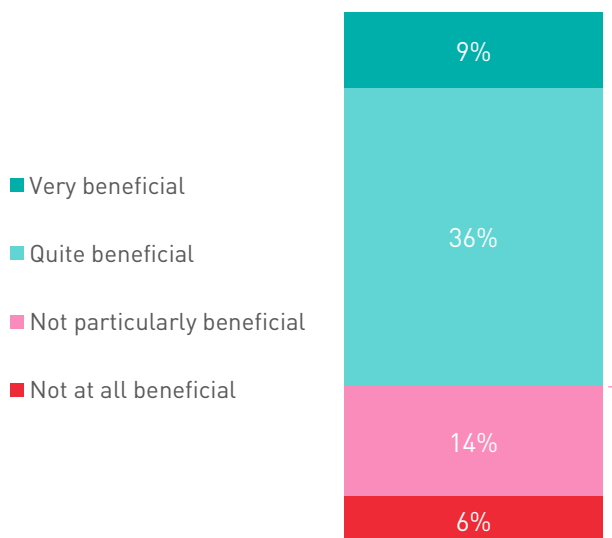
Perceptions of Kangaroo Island TOMM

Most (42%) perceive TOMM as an organisation for 'gathering tourism statistics/ information,' while 34% see it as promoting tourism on the island; both perceptions increased since 2021. Interestingly, the correct understanding of TOMM's purpose, monitoring tourism impact/health, remains at 27%, with no change from 2021. This highlights a need for improved communication to accurately convey TOMM's role.

Of those who correctly identified TOMM's purpose, 63% believe it benefits the community, contributing to the overall 45% of respondents who hold this view. The 19% who do not find it beneficial cite a lack of resident focus as the primary reason.

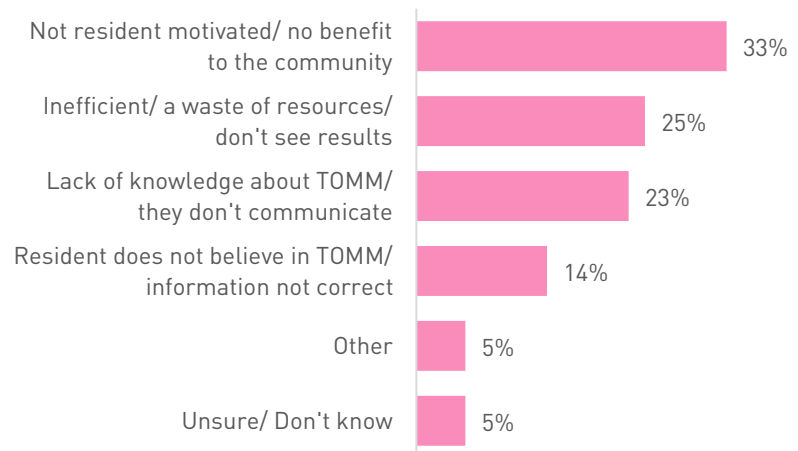
What do you understand the purpose of TOMM to be?	05/06	06/07	07/08	08/09	09/10	12/13	14/15	16/17	18/19	2021	2023
A process to gather statistics/ information on tourism	21%	20%	18%	25%	33%	28%	47%	37%	43%	35%	42%
To promote/ drive tourism on Kangaroo Island	12%	22%	14%	22%	19%	22%	31%	26%	32%	29%	34%
A model to monitor impact/ health of tourism	13%	13%	8%	10%	16%	12%	22%	18%	17%	27%	27%
To manage tourism on Kangaroo Island	0%	4%	0%	4%	24%	15%	24%	15%	29%	14%	23%
A process to ensure balanced tourism growth	16%	19%	11%	6%	11%	7%	19%	9%	11%	8%	19%
Other	6%	20%	22%	9%	4%	4%	7%	0%	3%	9%	5%
Unsure/ don't know	31%	30%	28%	24%	24%	25%	16%	25%	20%	13%	23%

TOMM's benefit to the community



Reasons for feelings of TOMM not being beneficial

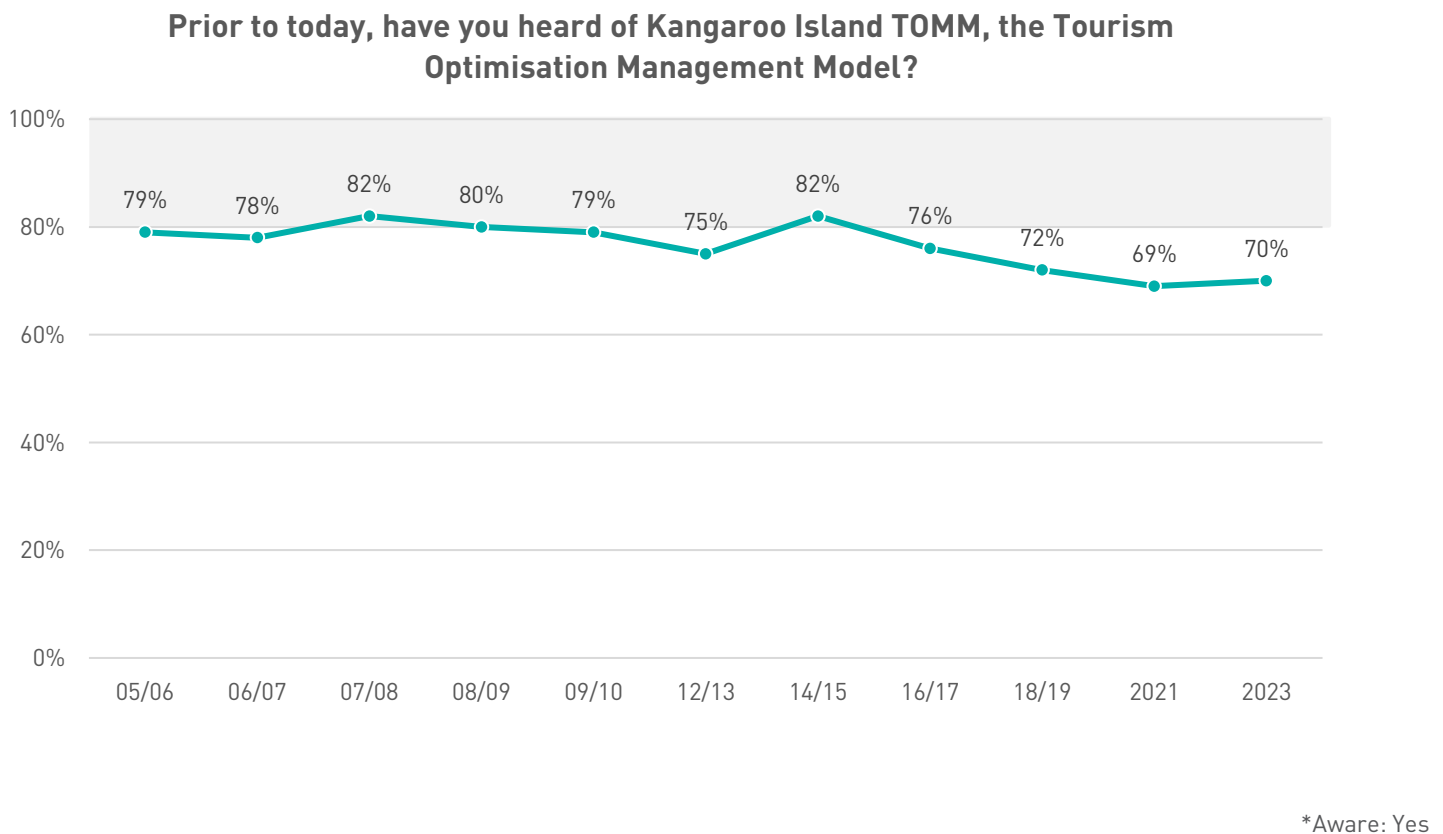
(those who do not find TOMM beneficial)



Awareness of Kangaroo Island TOMM

Although awareness of Kangaroo Island TOMM has increased marginally since 2021, it remains 10% below an acceptable range. However, this awareness score has marked a change in the declining trend seen in previous years.

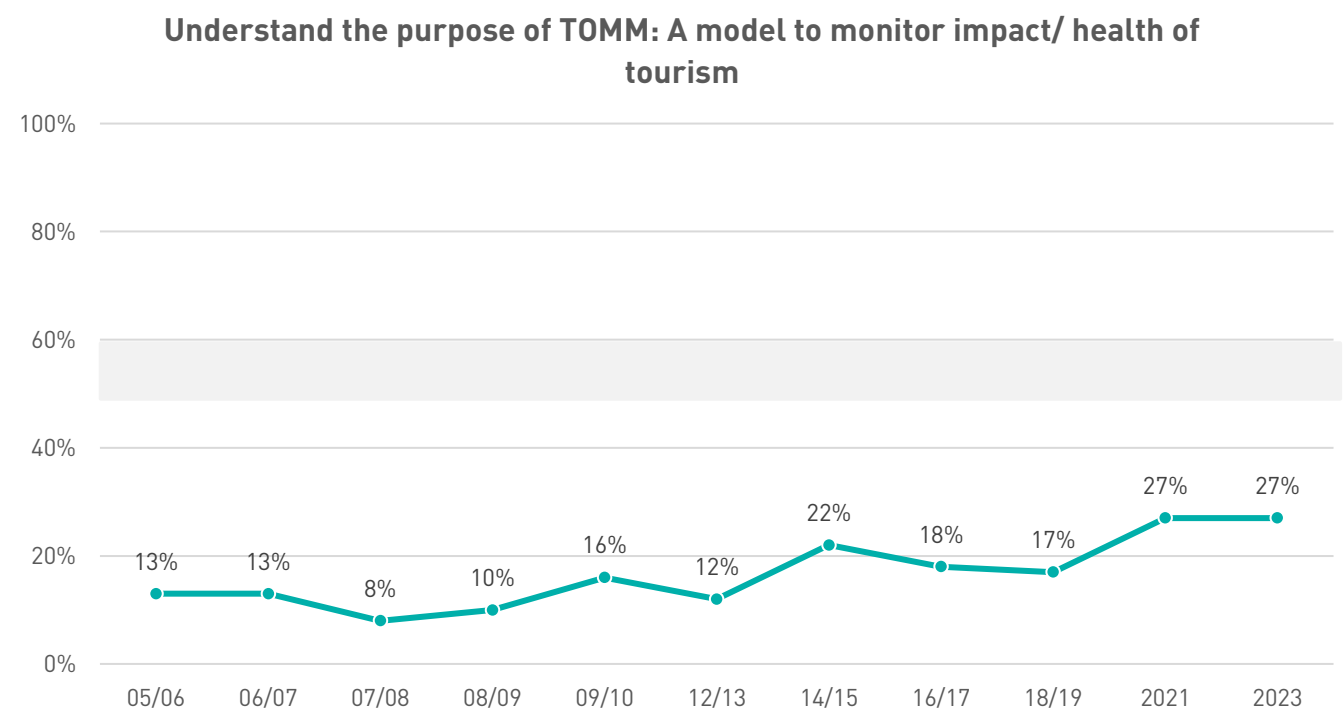
Optimal condition	Indicator	Acceptable Range	2023 Result	Result
TOMM is a well understood and utilised destination management tool for Kangaroo Island	Proportion of residents that are aware of TOMM	80% - 100%	70%	✗



Purpose of Kangaroo Island TOMM

Understanding the purpose of Kangaroo Island TOMM remains at 27%, a figure unchanged since 2021 and still below the acceptable range. Highlighting the need for improved communication to accurately convey TOMM's role.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
TOMM is a well understood and utilised destination management tool for Kangaroo Island	Proportion of residents that understand the purpose of TOMM	50% - 60%	27%	✗

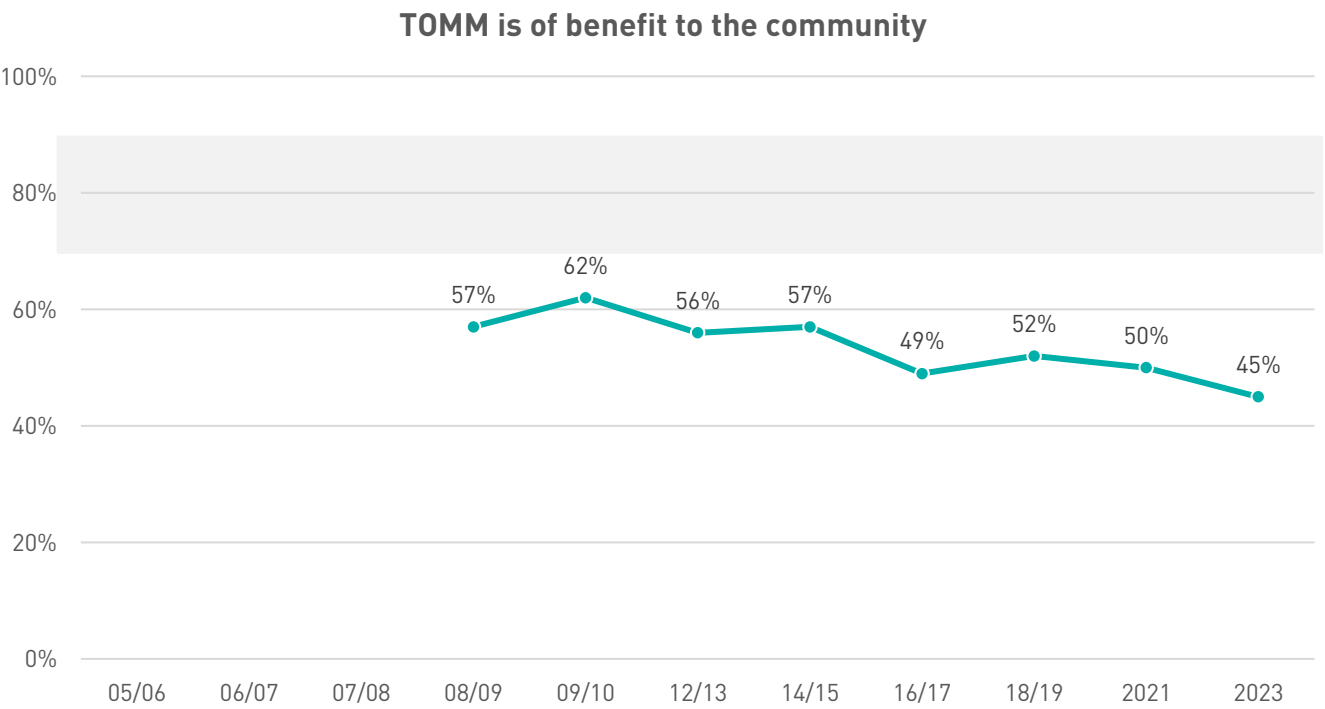


*Correctly understand the purpose.

Community benefit of TOMM

The belief among residents that TOMM benefits the community has been on a declining trend since 2018/2019, with a moderate 45% expressing this view—falling below the acceptable range. However, 35% remain unsure about its benefits to the community, underscoring the necessity for improved communication to convey TOMM's role accurately and demonstrate its positive impact on the community, potentially converting those who are uncertain.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
TOMM is a well understood and utilised destination management tool for Kangaroo Island	Proportion of residents who believe TOMM is of benefit to the community	70% - 90%	45%	✗

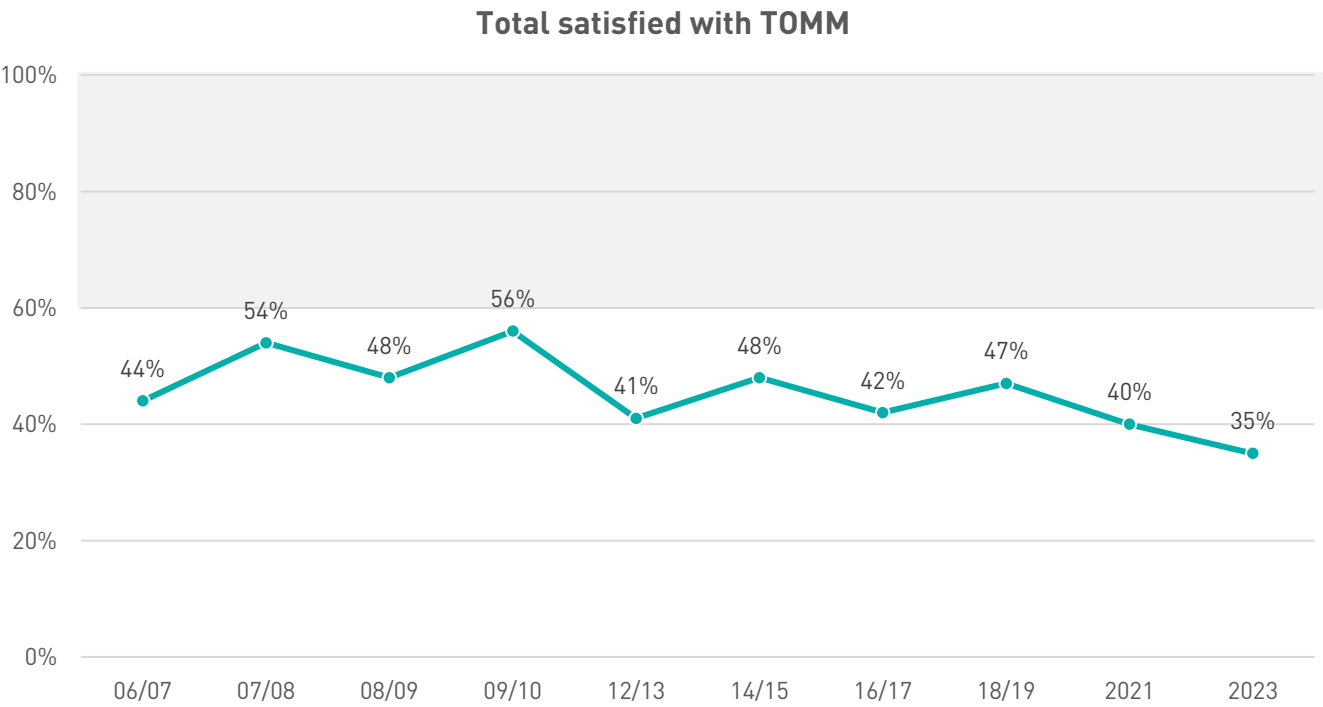


*Beneficial or Very beneficial; Including Don't know.

Satisfaction with TOMM

Satisfaction continues to decrease, with only 35% reporting satisfaction with TOMM in 2023. Notably, 37% are unsure about their satisfaction, potentially stemming from limited awareness of TOMM or its purpose, impeding a clear satisfaction assessment.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
TOMM is a well understood and utilised destination management tool for Kangaroo Island	Proportion of residents who are satisfied with TOMM	60% - 100%	35%	✗



*Proportion Total satisfied is the proportion providing a rating between 7 and 10.

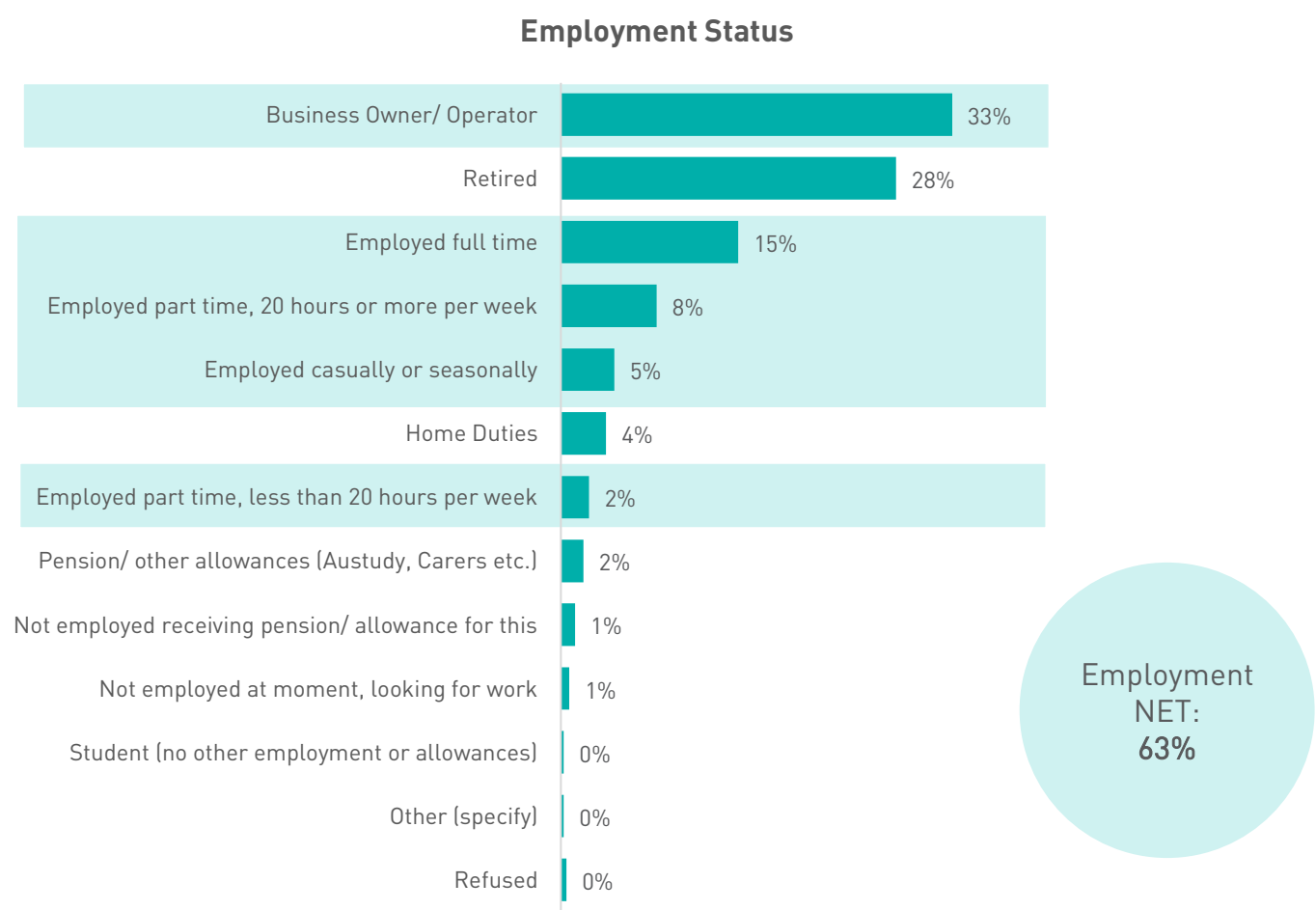


Economic Indicators

Employment status

A third (33%) of respondents identify as business owners or operators. Additionally, 28% fall into the retiree category, while 15% are full-time employees.

Those residing closest to Parndana show the highest incidence of employment, with 82% employed, 53% being business owners.



Employment status over time

Respondents' employment status for this wave has stayed consistent with previous years, with a slight increase in employment totals (63%) compared to the 2021 low of 57%.

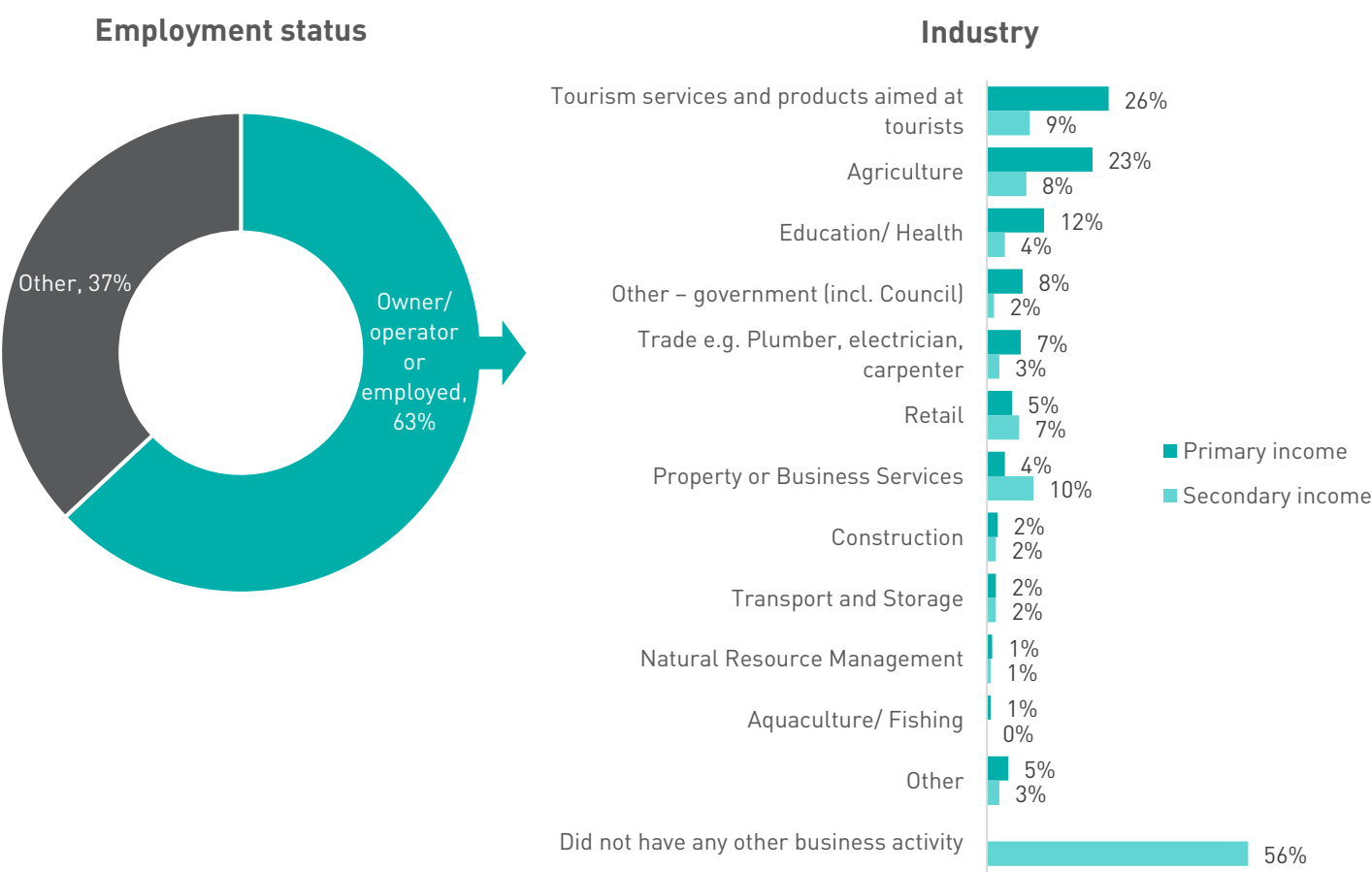
Employment status	05/06	06/07	07/08	08/09	09/10	12/13	14/15	16/17	18/19	2021	2023
Employed (NET)	65%	67%	68%	65%	66%	59%	75%	71%	71%	57%	63%
Employed full time	38%	38%	38%	39%	40%	19%	17%	20%	20%	16%	15%
Employed part time, 20 hours or more per week	16%	12%	10%	10%	12%	10%	13%	8%	11%	7%	8%
Employed casually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

Employment industries

The most common industries of employment and ownership were tourism services (26% primary), followed by agriculture (23% primary).

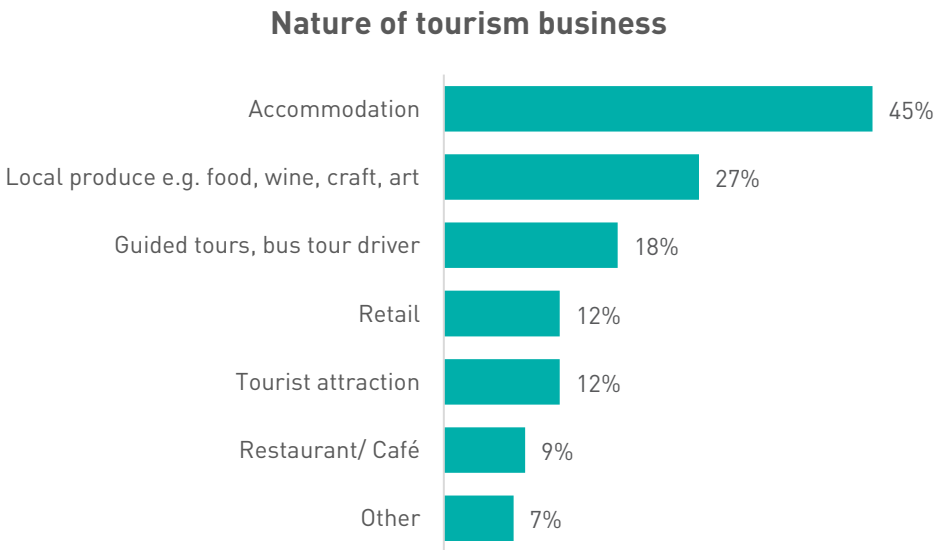
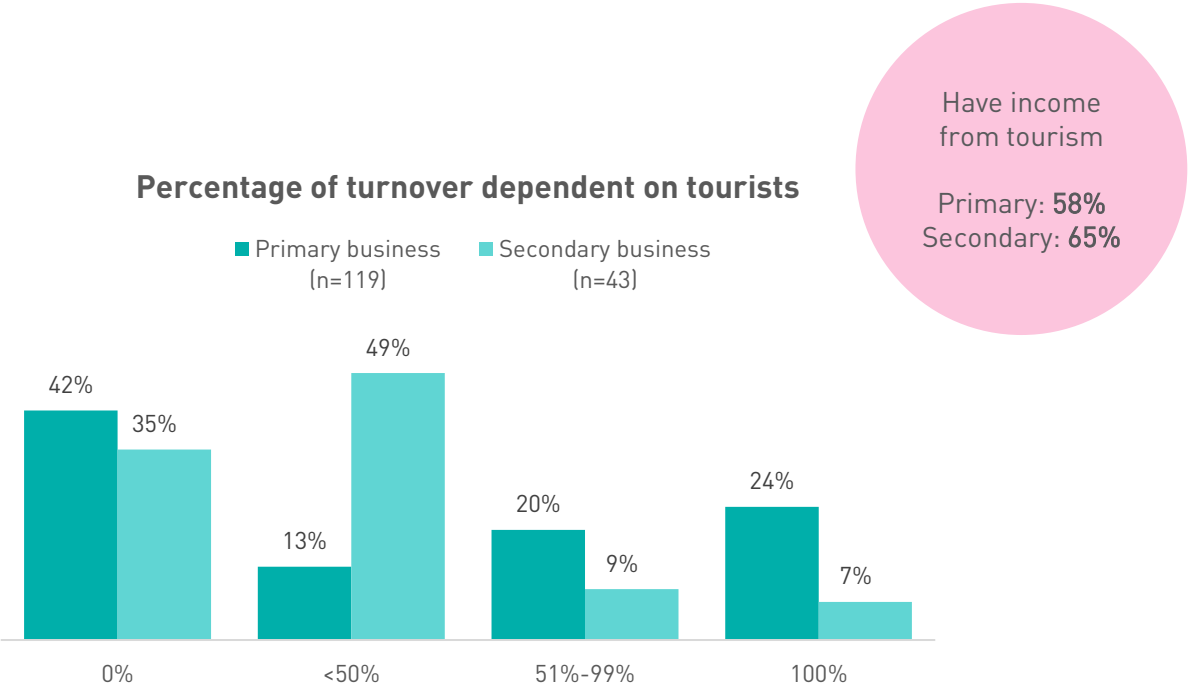
The most reported secondary source of income was in property and business services (10%).

Those in Parndana were more likely to indicate they are involved in agriculture (53%), while American River (48%) and Vivonne Bay residents (62%) had a higher incidence of being in the tourism industry for their main source of income.



Tourism turnover

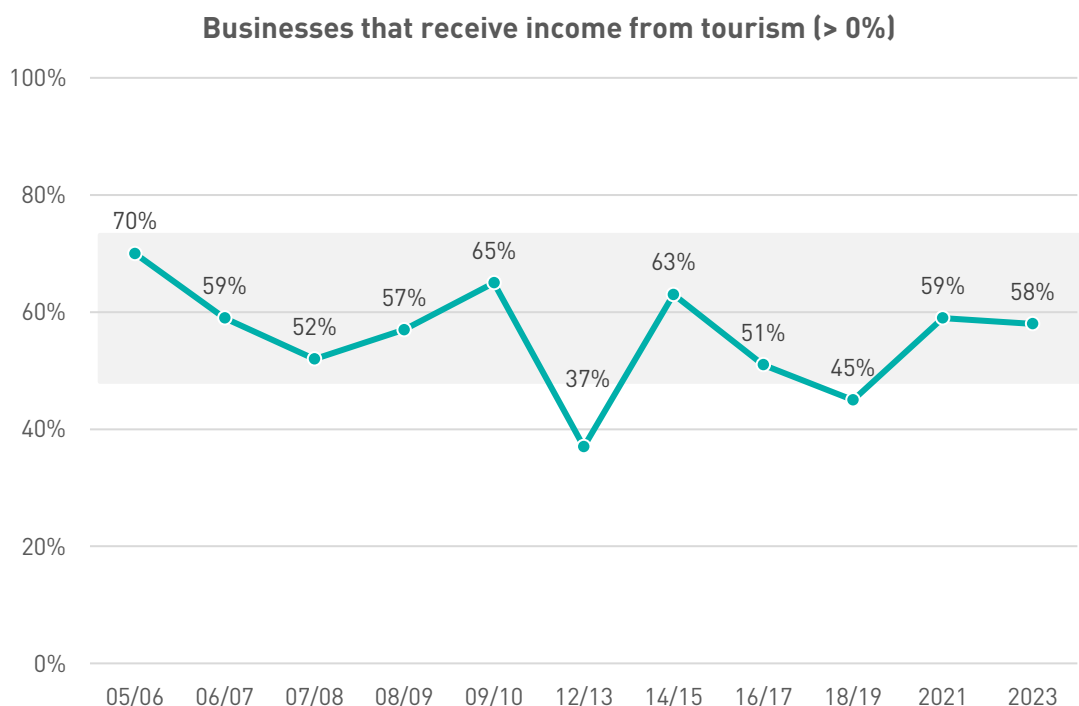
Accommodation stands out as the leading business type, constituting 45% of the prevalent nature of tourism businesses. Following accommodation, local produce emerges as the second most common reason, accounting for 27%.



Tourism turnover over time

Income generated through tourism has rebounded to acceptable levels, aligning with the figures observed in 2021 following a low point in 2018/2019.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
Tourism optimises economic benefits for Kangaroo Island	Proportion of non-specific tourism businesses that have a proportion of turnover dependent on tourism	45% - 70%	58%	✓



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

Tourism turnover

The turnover from tourism continues to remain steady compared to previous waves, especially for those whose primary source of income is derived from tourism-related businesses. Some slight fluctuations are observed among those whose secondary business is linked to tourism. However, due to small sample sizes each year, this figure tends to be more volatile.

In terms of the nature of businesses, there's minimal variance compared to the figures from the previous year, except for a slight uptick in guided tours, which has increased from a low in 2021 (9%).

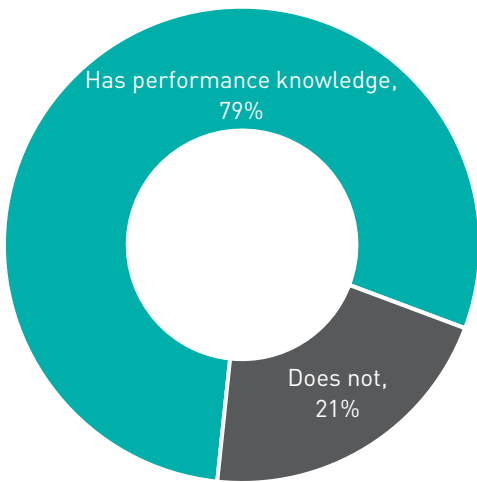
Turnover and nature of total business	05/06	06/07	07/08	08/09	09/10	12/13	14/15	16/17	18/19	2021	2023
Primary Business											
0%	30%	41%	48%	43%	35%	63%	37%	59%	64%	41%	42%
<50%	28%	21%	16%	20%	24%	16%	17%	14%	9%	16%	13%
50-99%	23%	17%	17%	23%	28%	15%	22%	10%	13%	19%	20%
100%	18%	20%	19%	15%	14%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

Financial performance

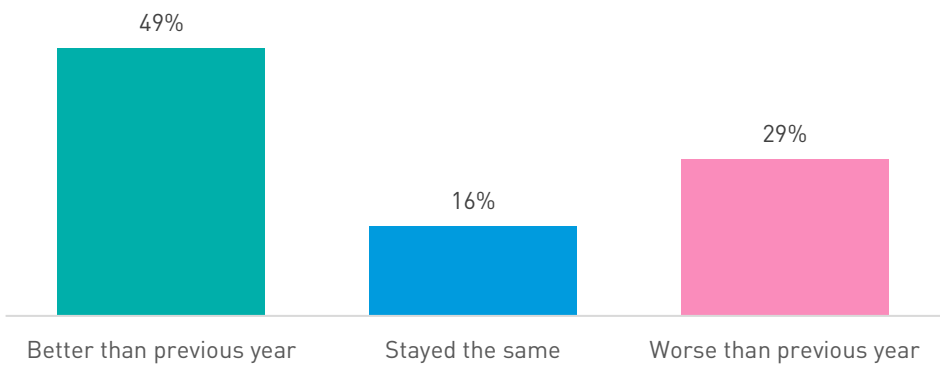
Among those who had knowledge of their work's financial performance (79%), nearly half (49%) reported an improvement in business performance compared to the previous year, while 29% mentioned that they were financially worse off.

There was no significant difference in performance across industries.

Knowledge of the business' financial performance the last 12 months



Financial performance the last 12 months

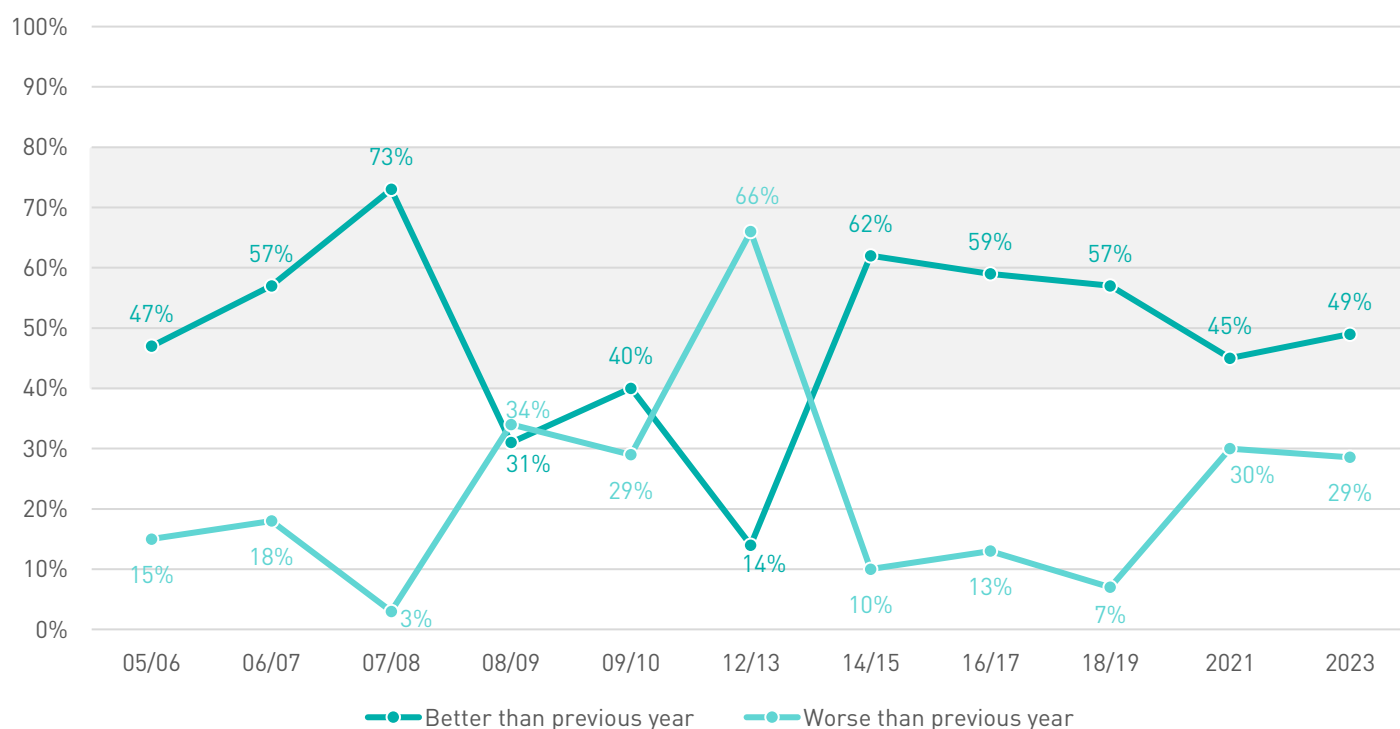


Financial performance

Showing a slight improvement from a low in the 2021 wave (45%), the current wave shows improvement (49%), likely increasing from the impact of the fires, restricted travel and uncertainty during that period.

Optimal condition	Indicator	Acceptable Range	2023 Result	Result
Tourism optimises economic benefits for Kangaroo Island	Proportion of tourism businesses that identify improved financial performance	40% - 80%	49%	✓

Business performance compared to previous year



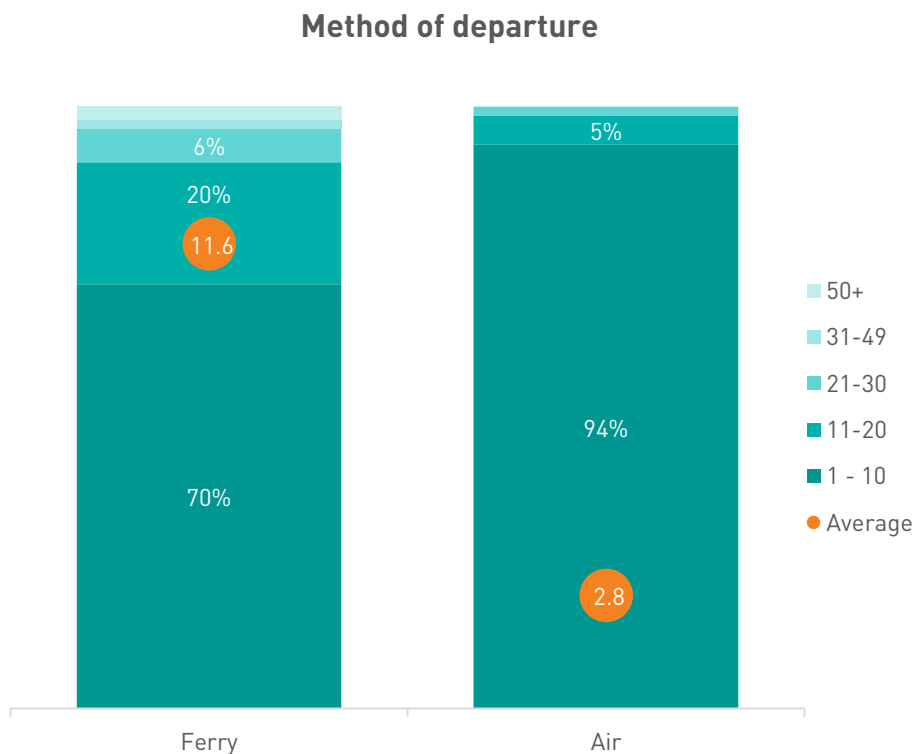
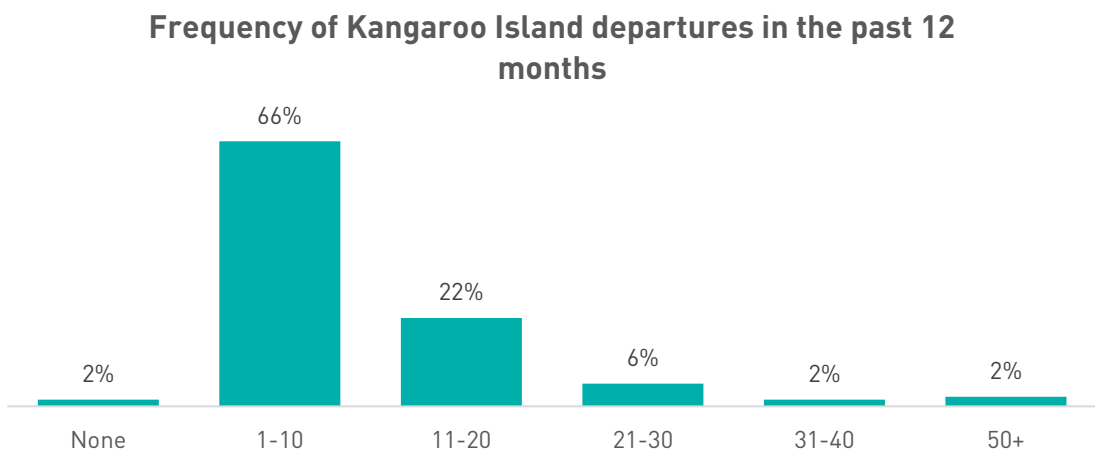


Kangaroo Island Travel

Island departures

Small numbers of trips (1-10) were the most frequent level of departures from Kangaroo Island with two-thirds in the bracket (66%).

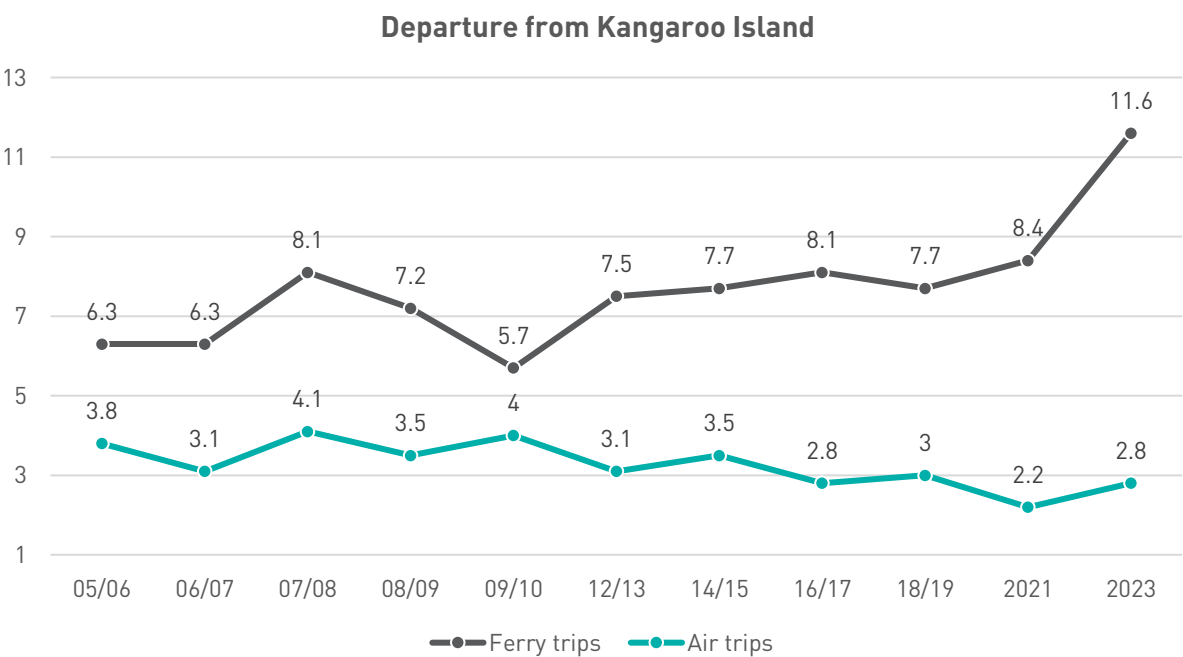
Of those who had departed the island, the most common method was via ferry (11.6 average departures), compared to 2.8 by plane.



Departures over time

Air trips have remained quite consistent since reporting began, all staying within 2.2 to 4.1 departures per annum on average.

Ferry trips show more variability, with this year showing the highest level of trips (11.6). This is up from 8.4 in the last wave of 2021.





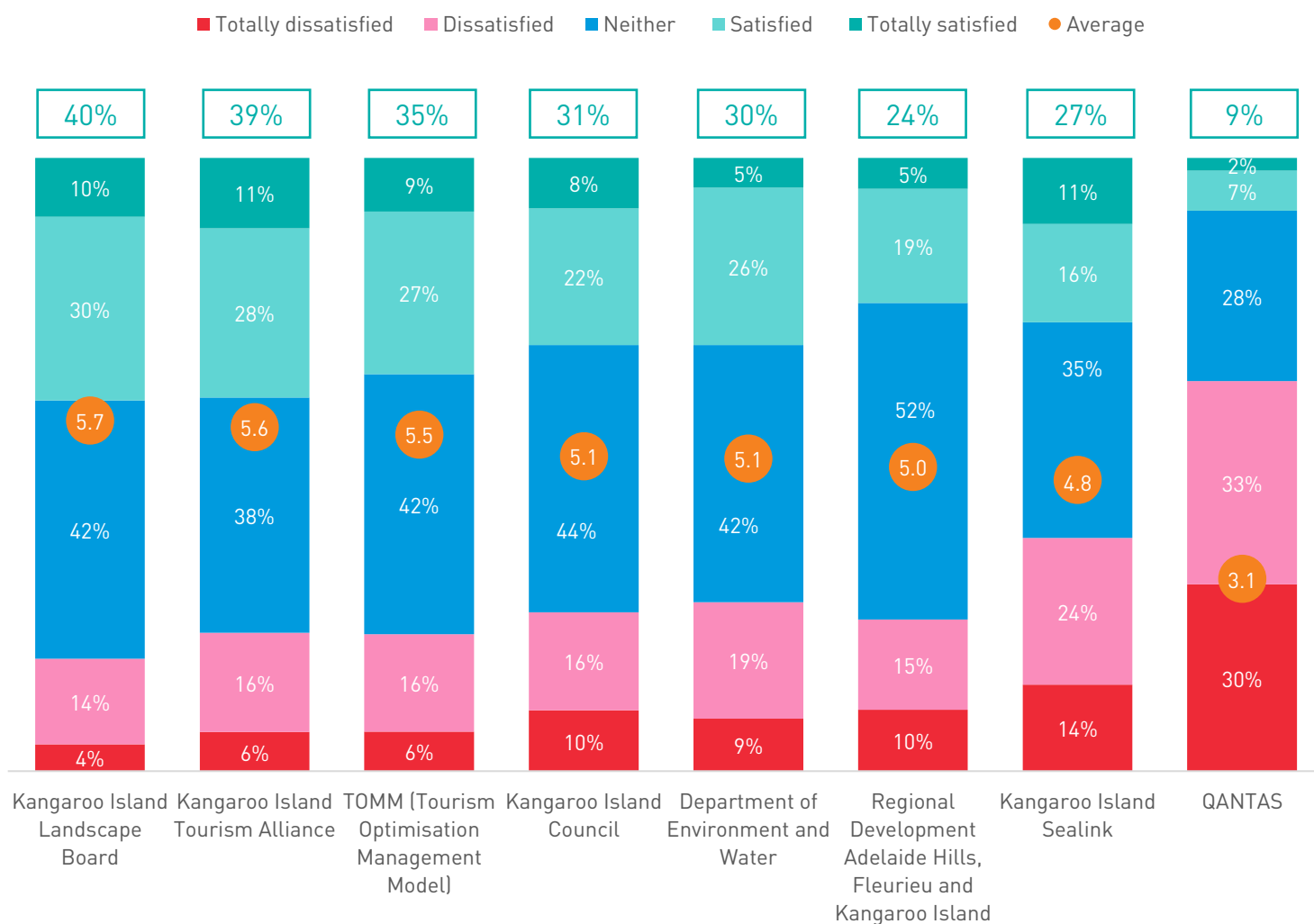
Satisfaction with Agencies

Satisfaction with organisation

Satisfaction with the different organisations involved in the Island is moderate overall, with the Kangaroo Island Landscape Board showing the highest satisfaction levels (40%). Coming shortly after is the Kangaroo Island Tourism Alliance (39%) and TOMM (35%).

Organisations that have room to improve include Sealink (27%), Regional Development (24%) and Qantas (9%). Those who traveled by plane showed a more positive view of Qantas (31% satisfied).

Organisation satisfaction



RATING LEVEL: Extremely High: 9.0 and above High: 7.0–8.9
Moderate: 5.0–6.9 Mixed: 3.0–4.9 Low: 2.9 and below

Satisfaction with organisation

Overall satisfaction with agencies remains consistent with previous years. However, noteworthy shifts were observed in the satisfaction levels for transportation agencies, specifically Qantas and Sealink, both experiencing significant declines. Sealink has notably reached a low of 27%, steadily decreasing over the past decade. In the context of Qantas, evaluating the trend poses a challenge due to the relatively short measurement period. Nonetheless, resident satisfaction with the Qantas has seen a significant reduction from its moderate levels in 2021 (26%).

Satisfaction with Agencies	05/06	06/07	07/08	08/09	09/10	12/13	14/15	16/17	18/19	2021	2023
Kangaroo Island Landscape Board	50%	47%	50%	35%	48%	44%	43%	44%	43%	37%	40%
Kangaroo Island Tourism Alliance (formerly KI Tourism Food Wine and Beverage Association)	61%	55%	64%	58%	59%	52%	51%	55%	54%	46%	39%
TOMM (Tourism Optimisation Management Model)	50%	44%	54%	48%	56%	41%	48%	42%	47%	40%	35%
Kangaroo Island Council	25%	33%	37%	37%	30%	26%	40%	34%	34%	35%	31%
Department of Environment and Water (formerly Dept of Water and Natural Resources)	46%	43%	44%	40%	41%	38%	42%	41%	45%	33%	30%
Kangaroo Island Sealink	71%	65%	72%	67%	65%	57%	52%	49%	48%	59%	27%
Regional Development Adelaide Hills, Fleurieu and Kangaroo Island	41%	34%	42%	32%	39%	37%	21%	28%	29%	27%	24%
QANTAS										26%	9%



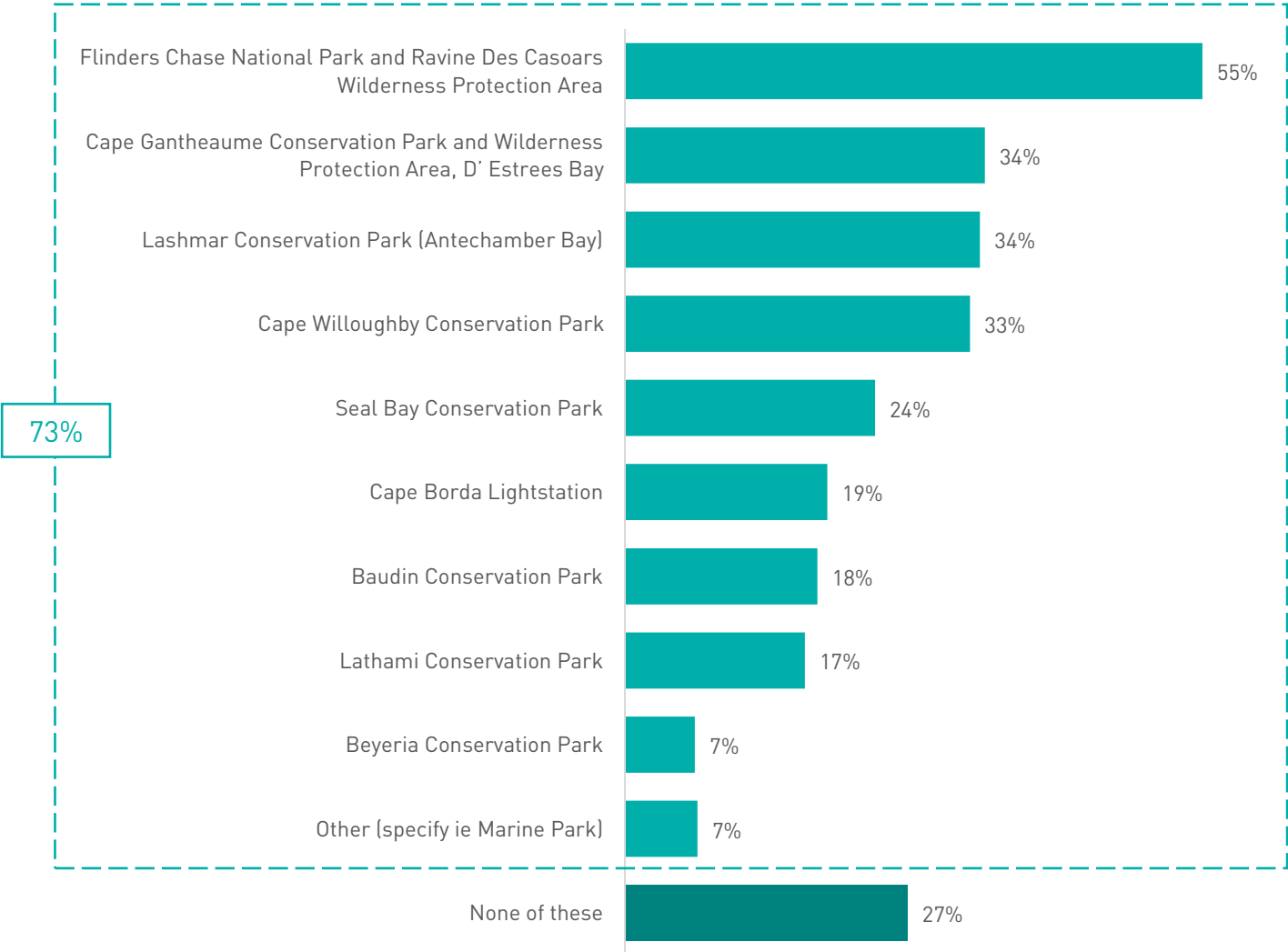
Stakeholder:
Department of
Environment and Water

Park visitation

The majority had visited a park in the past 12 months (73%), with over half (55%) having visited the Flinders Chase National Park. Most visited at least 2.5 parks on average, with park visitors visiting 3.4 on average.

Average amount of parks visited: 2.5

Parks visited in the past 12 months

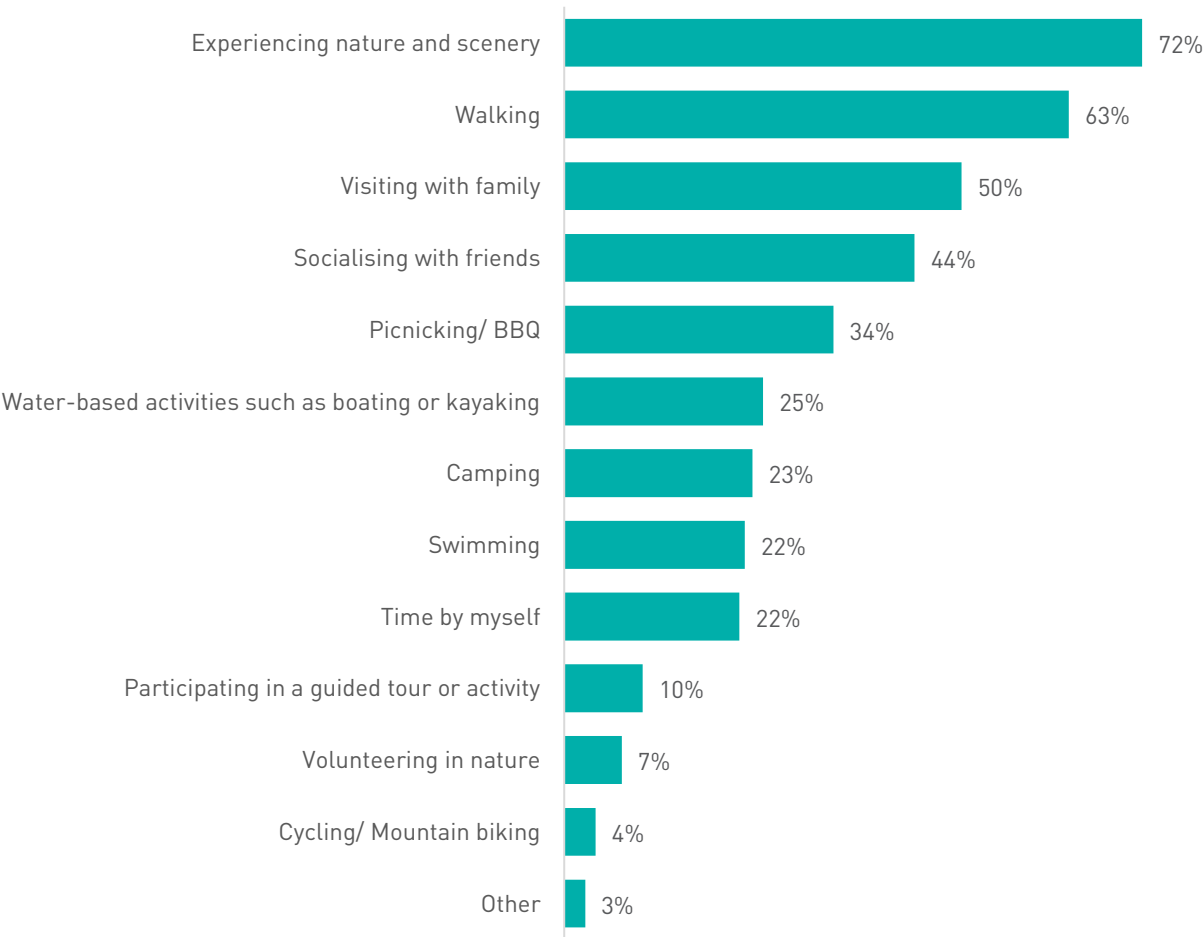


Park activities

Enjoying the general experience of nature is the leading activity conducted in the parks (72%). Those aged 35-54 were more likely to attend multiple parks (3.2) and were also more likely to participate in water-based activities (38%), camping (37%) and swimming (38%).

Average amount of activities undertaken: 3.8

Activities undertaken when visiting parks



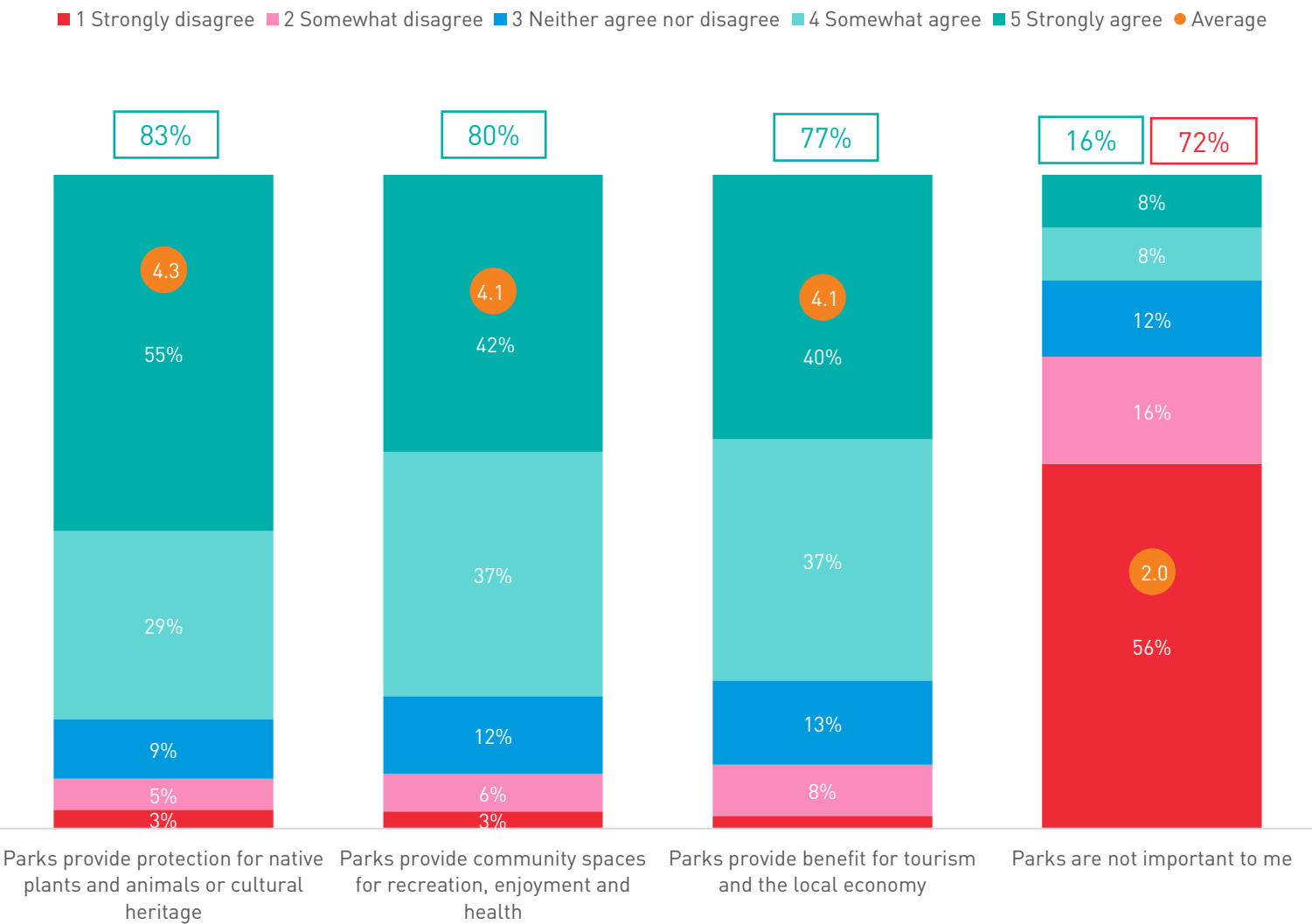
Park perceptions

Agreement that parks provide protection for native plants and animals, or cultural heritage is strong (83%), showing the positive performance of this measure.

There are further high levels of agreement that parks provide community spaces (80%), and benefit tourism and the local economy (77%).

For the reverse scored question, 72% disagreed with the parks not being important to them, which was particularly strong for park visitors (84%).

Value of parks

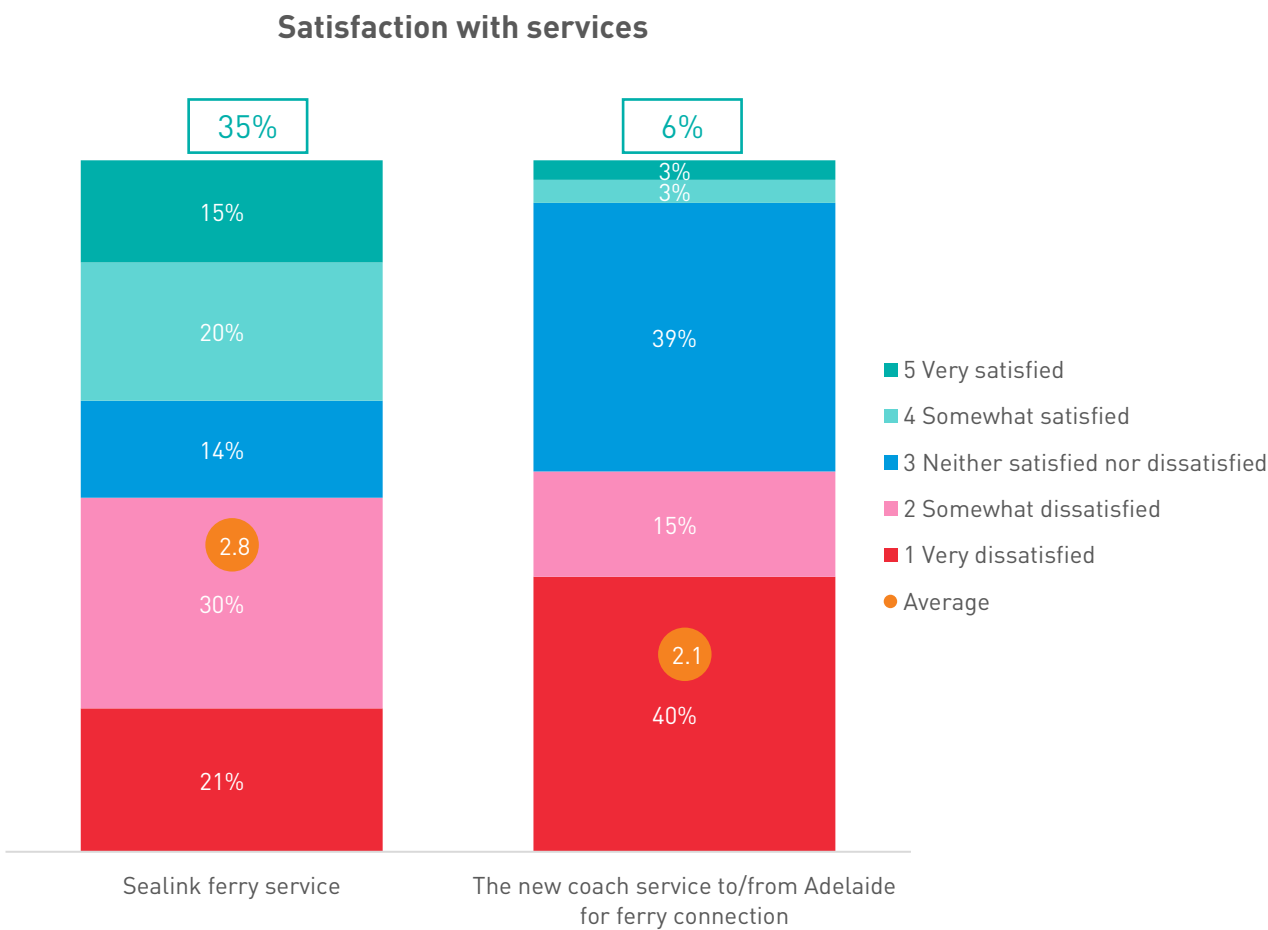


An aerial photograph of a coastal town. In the foreground, there are several large, modern buildings with flat roofs, possibly a hotel or commercial complex. A road runs diagonally through the middle of the image, with several cars and a truck visible. To the left of the road, there are more residential houses and some trees. To the right, there's a green field and more houses. In the background, the ocean is visible under a clear sky. The text "Stakeholder: Kangaroo Island Council" is overlaid in white on a dark semi-transparent background in the center of the image.

Stakeholder: Kangaroo Island Council

Satisfaction with services

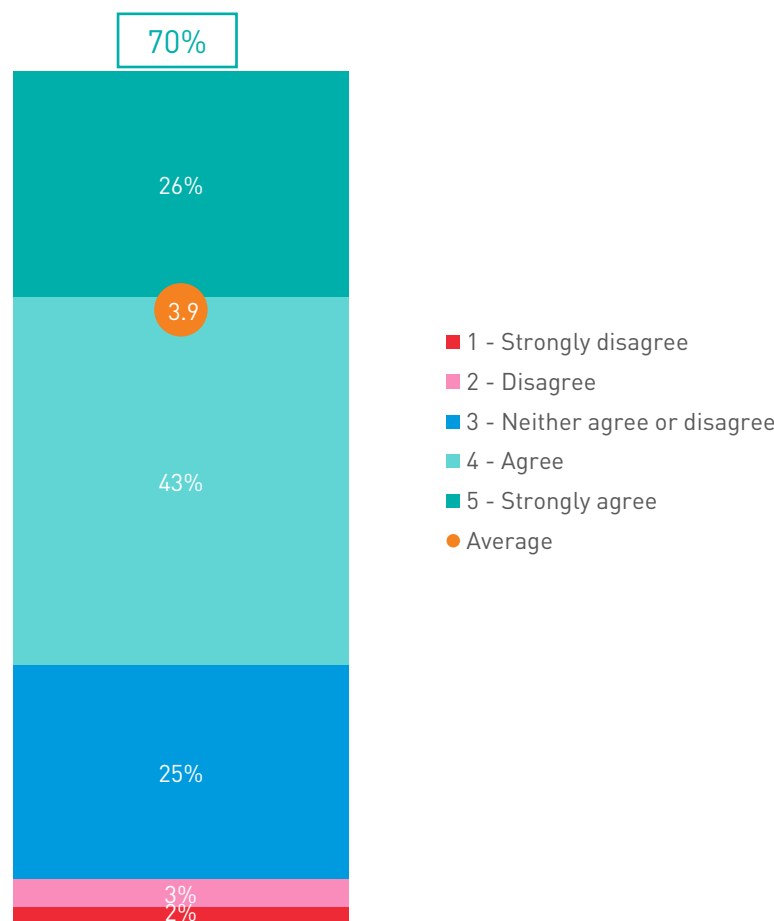
The Sealink ferry service exhibited moderate satisfaction among residents (35%), whereas the new coach service demonstrated lower satisfaction (6%). The limited experience with the coach service may contribute to the high proportion of respondents expressing neutrality (39%). However, dissatisfaction was notable, with 40% expressing being very dissatisfied with the service.



Dudley Trail as an asset

Agreement for the Dudley Trail being an asset to visitors and the community was strong, with 70% agreement. Those who have visited a park recently showed particularly high agreement (74%).

Agreement that 'The Planned Dudley trail between Penneshaw and Cape Willoughby is an asset to both visitors to Kangaroo Island and the broader Kangaroo Island community'





Stakeholder: South Australian Tourism Commission

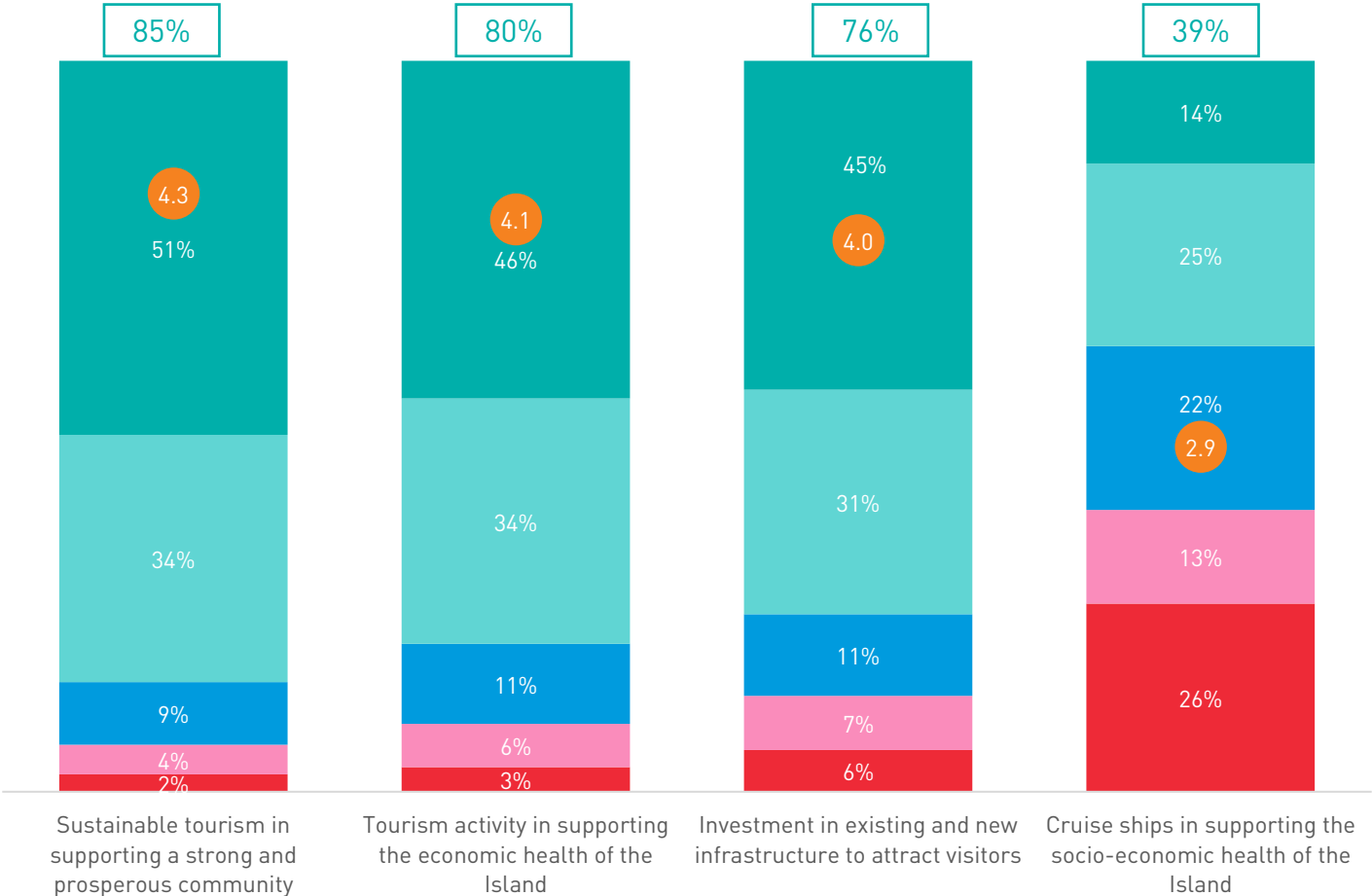
Importance of tourism


Residents prioritise sustainable tourism as the top measure for a thriving and prosperous community (85%). Additionally, 80% of residents see tourism as a crucial element supporting the economic health of the island, and they consider investments important to attract visitors. On the other hand, cruise ships supporting the socio-economic health of the island are seen as less important, with only 39% agreeing on its significance.

Those who have visited a park recently were more likely to agree that sustainable tourism is important for supporting a strong and prosperous community (89%).

Importance of tourism measures

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



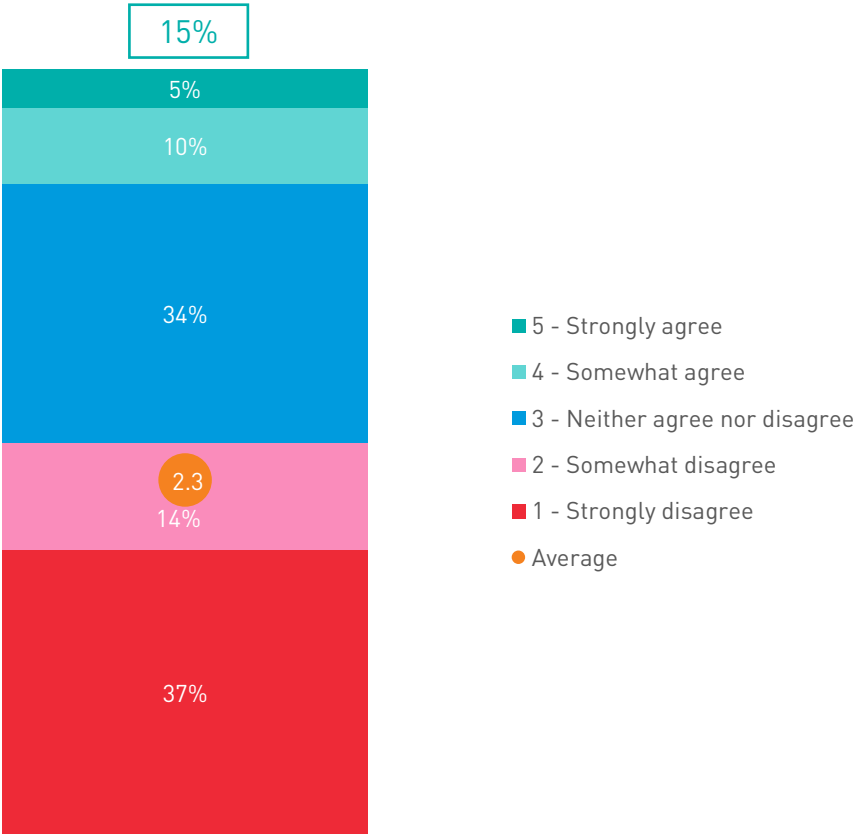


Stakeholder: Kangaroo Island Tourism Alliance

Cruise ships and resident lifestyle

Residents showed a soft agreement towards cruise ships having a positive impact on their lifestyle. Those aged 18-35 were the most likely to endorse this view, with 21% in strong agreement.

Agreement that cruise ship visitation has a positive impact on lifestyle



Conservation and tourism partnerships

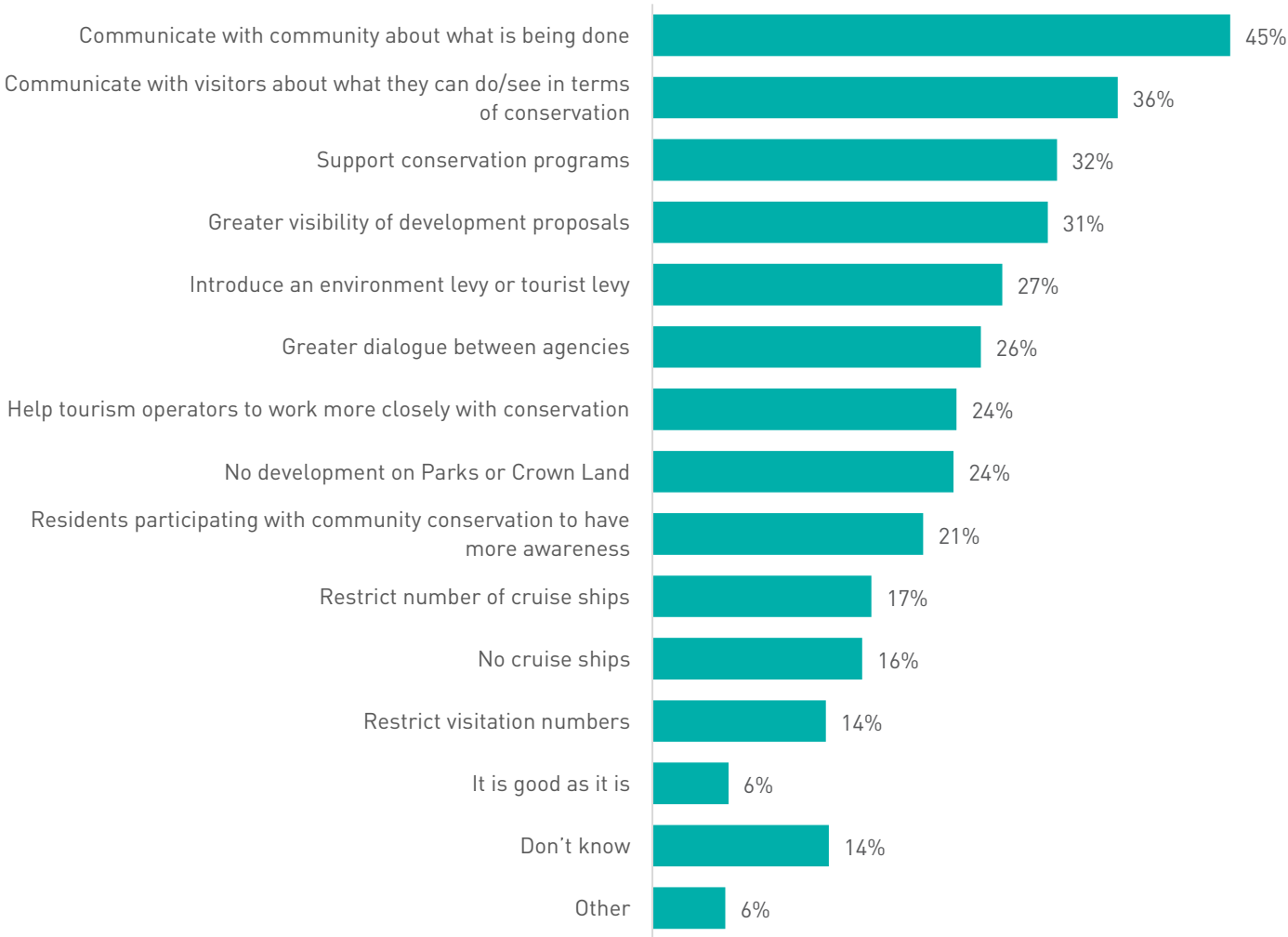
Residents showed a wide interest in a range of measures to improve partnerships between tourism and conservations, with 3.4 measures selected on average. Females and those who had visited a park in the last 12 months were more likely to select a high proportion of measures (3.8 and 3.9 respectively).

The top selected option was communication with the community (45%), which was particularly high for park visitors (52%).

Those who had not visited a park were more likely to state that they were unsure (28%), highlighting their potential disengagement with the topic.

Average number of measures selected: 3.4

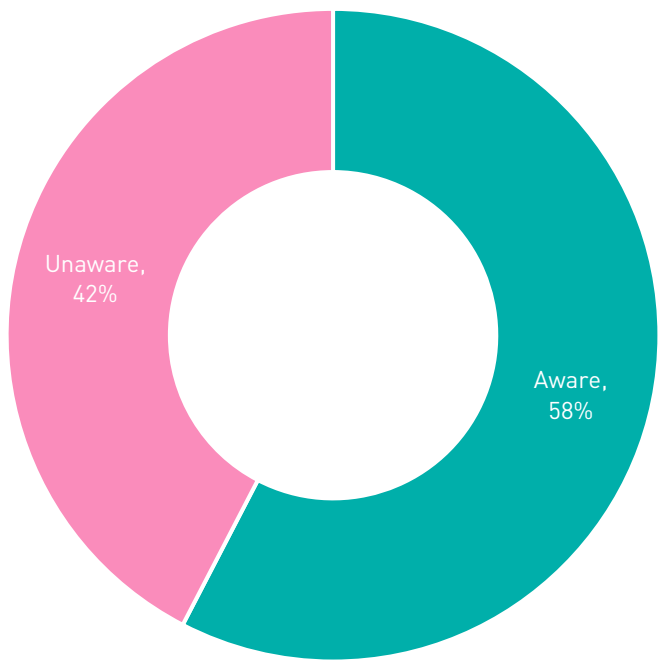
Measures to improve partnerships



Initiatives awareness

Over half (58%) are aware of the initiatives of Kangaroo Island Tourism Alliance.
Those aware of TOMM were also more likely to be aware of these initiatives (64%).

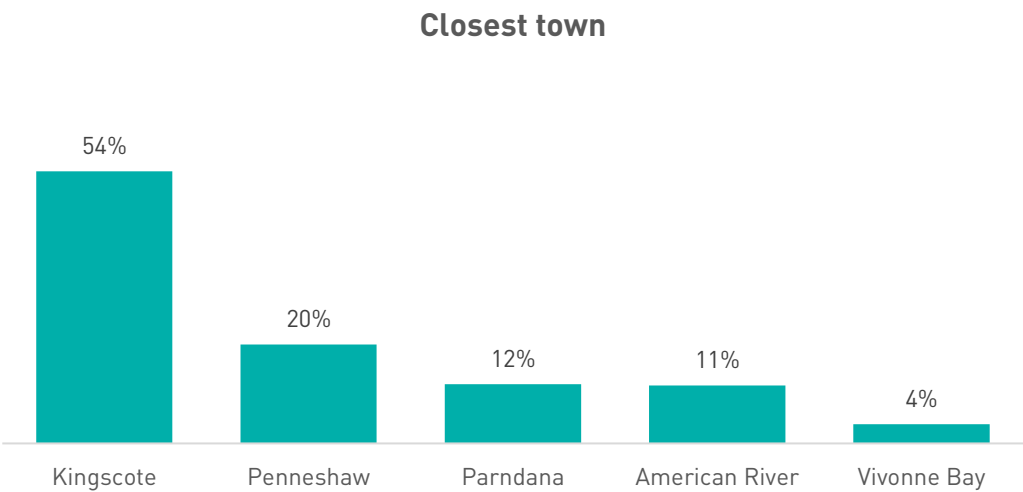
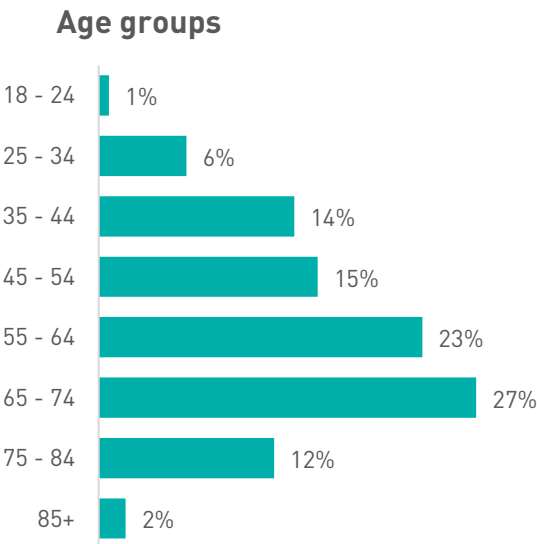
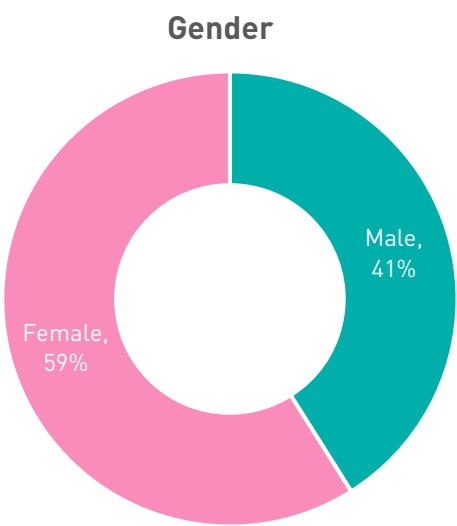
Awareness of Kangaroo Island Tourism Alliance's efforts in enhancing experiences, upgrading infrastructure, addressing access challenges, and promoting Kangaroo Island as a tourist destination





Appendix 1: Respondent Profile

Respondent profile





Appendix 2: Survey Tool

COMMERCIAL IN CONFIDENCE
VERSION 2.

Sample: n=400	Gen. Pop: Kangaroo Island Residents
Mixed methodology	CATI*/ Online *Minimum 300 CATI
Other information	
Representative of Gender and Age 18+	
Approximate length of survey 15 minutes depending on answers	
Number of questions	Survey: 21
Screeners: 3	Demo: 11
Total: 35	

Introduction:

McGregor Tan is conducting a survey on behalf of Kangaroo Island TOMM, the Tourism Optimisation Management Model on the Island. May I speak to the youngest male aged 18 or more residing at this address, who has lived continuously on Kangaroo Island for the past 12 months. If unavailable ask for the youngest female – monitor quotas.

Repeat intro if necessary

We would like your honest opinions and comments as a RESIDENT of Kangaroo Island. Information is used to monitor change in the Kangaroo Island Community over time.

All completed surveys go into a draw for a chance to win \$200 at the end of the month. You will also be entered into our annual McGregor Tan cash draw of \$1,000.

The survey will take about 15 minutes of your time.

Participation in the survey is voluntary. McGregor Tan is an independent social and market research company and complies with the Privacy Act. The concepts and the discussions in this survey represent Confidential Information, by completing the survey you agree to maintain the confidentiality of information disclosed during the survey and not disclose any of the contents to a third party. We can assure you that all information given will remain confidential and we do not sell, promote or endorse any product or service, there are no right or wrong answers. Your details will only be used for research purposes and will not be sold to any third party.

Before I begin, I would just like to make you aware that this call may be recorded or monitored for quality assurance and/ or training purposes.

Are you happy to continue?

1.	Yes
2.	No

02	Have investment/ business here
03	Partner/ spouse
04	Education for self/ children
05	Born on Kangaroo Island
06	Other family live on Kangaroo Island
07	Came with family when younger
08	Retirement
09	Lifestyle choice
10	Cheaper housing
11	Climate
12	Environment
13	Close to ocean/ beach
14	Safety/ less crime
15	Too costly to move
98	Other reason (specify)

Q2b. Ask all (import those not selected at Q2a): And what OTHER reasons are there for you to live on Kangaroo Island? [DO NOT READ OUT. MULTIPLE RESPONSE]

01	Job opportunity/ job related
02	Have investment/ business here
03	Partner/ spouse
04	Education for self/ children
05	Born on Kangaroo Island
06	Other family live on Kangaroo Island
07	Came with family when younger
08	Retirement
09	Lifestyle choice
10	Cheaper housing
11	Climate
12	Environment
13	Close to ocean/ beach
14	Safety/ less crime
15	Too costly to move
98	Other reason (specify)

Q3a. Ask all: How many times in the past 12 months have you departed Kangaroo Island by air or ferry? This may have been for holidays, business or any other reason and for any length of time.

WRITE IN THE NUMBER OF TRIPS, IF NONE, RECORD '0' AND GO TO Q4	Number of trips
--	-----------------

Is there anyone else in your household who may be interested in participating

1.	Yes	Ask to speak to them and repeat introduction.
2.	No	Ask if can send email invitation to online survey

All completed surveys go into a draw for a chance to win \$200 at the end of the month. You will also be entered into our annual McGregor Tan cash draw of \$1,000.

The first few questions are so we can achieve a good demographic spread of respondents.

*Questions in blue align with panel – do not change codes or question numbers

S1 Do you live on Kangaroo Island?

1.	Yes
2.	No
	terminate

Location_KI Which of the following towns do you live closest to?

1.	Kingscote
2.	Penneshaw
3.	Vivonne Bay
4.	Parndana
5.	American River

Gender1 Are you... Select one

6.	Male
7.	Female
8.	Non-binary/ Gender fluid/ Differently identify

YOB What year were you born? Enter a number

Hidden: Automatic recode into the following age groups	
1.	16 years to 24 years
2.	25 years to 34 years
3.	35 years to 44 years
4.	45 years to 54 years
5.	55 years to 64 years
6.	65 years to 74 years
7.	75 years to 84 years
8.	85+

Q2a. Ask all: What is the MAIN reason you live on Kangaroo Island? [DO NOT READ OUT. SINGLE RESPONSE]

01	Job opportunity/ job related
----	------------------------------

Q3b. If departed island (not 0 in Q3a): Of all those departures how many were by ferry? [WRITE IN THE NUMBER OF TRIPS]

And how many by air? [WRITE IN THE NUMBER OF TRIPS]

	Number of trips
Ferry departure	
Air departure	

NB: WE ONLY WANT TO RECORD HOW THEY LEFT THE ISLAND, NOT HOW THEY RETURNED.

THE AIR AND FERRY TRIPS SHOULD ADD UP TO THE NUMBER OF TRIPS RECORDED IN Q3A.

Q4. Ask all: Using a scale of 1 to 5 where 1 is strongly disagree and 5 is strongly agree, to what extent do you agree with the following statements about living on Kangaroo Island?

[READ OUT STATEMENT FIRST. CONTINUE ASKING FOR ALL STATEMENTS, CODE ONE ONLY FOR EACH STATEMENT]

Rotate 4.1 – 4.11		Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
4.1	Tourism does not reduce my overall sense of a peaceful, secure and attractive lifestyle.	1	2	3	4	5	99
4.2	As a resident I am able to access natural areas of choice with very few tourists present.	1	2	3	4	5	99
4.3	Tourism results in better infrastructure and services for Kangaroo Island. e.g., improved camping grounds, public toilets, transport terminals and roads.	1	2	3	4	5	99
4.4	Tourism on Kangaroo Island means there are more services here than in other similar regional areas. e.g., the Sealink shuttle, business services/ training.	1	2	3	4	5	99
4.5	Tourism development is occurring in line with community values for Kangaroo Island.	1	2	3	4	5	99

4.6	Kangaroo Island is achieving a balance between economic gains from tourism and the protection of the environment.	1	2	3	4	5	99
4.7	Kangaroo Island is improving partnerships between conservation and tourism.	1	2	3	4	5	99
4.8	I have sufficient information available to be well informed regarding the direction of tourism on Kangaroo Island.	1	2	3	4	5	99
4.9	I value the Kangaroo Island tourism industry	1	2	3	4	5	99
4.10	I consider myself to be an ambassador for the island	1	2	3	4	5	99

Q5. Ask all: Using a scale of very negatively, negatively, no effect, positively or very positively how does tourism effect....

Rotate 5.1 – 5.2		1 Very negatively	2 Negatively	3 No effect	4 Positively	5 Very positively	Don't know
5.1	Your personal quality of life.	1	2	3	4	5	99
5.2	The Kangaroo Island community as a whole.	1	2	3	4	5	99

Q6. Ask all: What would make you leave Kangaroo Island and live elsewhere?
DO NOT READ OUT, MULTIPLE RESPONSE

01	High cost/ rising living costs on Kangaroo Island
02	Travel/ freight costs of getting things to Kangaroo Island too high
03	Isolation/ lack of people
04	Tourists (increase in numbers)
05	Over development on the Island
06	Environmental issues
07	Employment/ work
08	Health problems/ no health support
09	Family
10	Crime increase
11	Travel/ to see the world
12	Education
13	Religion

01	A model to monitor impact/ health of tourism
02	A process to gather statistics/ information on tourism
03	A process to ensure balanced tourism growth
04	To promote/ drive tourism on Kangaroo Island
06	To manage tourism on Kangaroo Island
05	Other (specify)
99	Unsure/ don't know

IF CODE 1 IN Q8a:

Q8c. Heard of TOMM (Code 1 in Q8a): How do you rate TOMM's benefit to the community?
READ OUT, SINGLE RESPONSE

01	Very beneficial	Go to Q9
02	Quite beneficial	Go to Q9
03	Not particularly beneficial	Continue
04	Not at all beneficial	Continue
99	Unsure/ don't know	Go to Q9

IF 3-4 IN Q 8c

Q8d. If NOT beneficial (codes 3 or 4 in Q8c): Why is that? RECORD RESPONSE
VERBATIM

Q9. Ask all: Have you taken the opportunity to have input into the direction of tourism on Kangaroo Island when possible? READ OUT, SINGLE RESPONSE

01	Yes – most times
02	Yes – sometimes
03	No
99	Unsure/ don't know

[STAKEHOLDER QUESTIONS] ASK ALL:

SECTION A: DEPT OF ENVIRONMENT AND WATER

DEWQ1 Ask all: Since November last year, have you visited any of the following Kangaroo Island National Parks, Conservation Parks or Recreation Parks for leisure purposes?
SELECT ALL THAT APPLY (rotate)

1.	Baudin Conservation Park
2.	Beyria Conservation Park
3.	Cape Borda Lightstation
4.	Cape Gantheurme Conservation Park and Wilderness Protection Area, D'Estrees Bay
5.	Cape Willoughby Conservation Park

14	Lack of culture
15	Nothing would make me leave/ no reason/ I wouldn't consider leaving
16	Other (specify)
17	Don't know

Q7. Ask all: Please indicate your level of satisfaction with the following organisations involved in the Island, using a scale from 1 to 10 where 1 means you are "totally dissatisfied" and 10 means you are "totally satisfied".
Please remember if you do not know who this organisation is or what they do, please let me know.

READ OUT, CODE AS 99 IF RESPONDENT DOES NOT KNOW THE ORGANISATION, OR IF THEY DO NOT HAVE AN OPINION OR REFUSE

Rotate a to j		1 Totally dissatisfied										10 Totally satisfied										Don't know
a)	TOMM (Tourism Optimisation Management Model)	1	2	3	4	5	6	7	8	9	10	99										
b)	Kangaroo Island Tourism Alliance (formerly KI Tourism Food Wine and Beverage Association)	1	2	3	4	5	6	7	8	9	10	99										
c)	Kangaroo Island Council	1	2	3	4	5	6	7	8	9	10	99										
d)	Department of Environment and Water	1	2	3	4	5	6	7	8	9	10	99										
e)	Regional Development Adelaide Hills, Fleurieu and Kangaroo Island	1	2	3	4	5	6	7	8	9	10	99										
f)	Kangaroo Island Landscape Board	1	2	3	4	5	6	7	8	9	10	99										
g)	Kangaroo Island Sealink	1	2	3	4	5	6	7	8	9	10	99										
h)	QANTAS	1	2	3	4	5	6	7	8	9	10	99										

Q8a. Ask all: Prior to today, have you heard of Kangaroo Island TOMM, the Tourism Optimisation Management Model? SINGLE RESPONSE

01	Yes	Continue
02	No	Go to Q9
99	Unsure/ don't know	Go to Q9

IF CODE 1 IN Q8a:

Q8b. Heard of TOMM (Code 1 in Q8a): What do you understand the purpose of TOMM - Tourism Optimisation Management Model to be?
DO NOT READ OUT, PROBE FULLY, MULTIPLE RESPONSE

6.	Flinders Chase National Park and Ravine Des Casoars Wilderness Protection Area
7.	Lashmar Conservation Park (Antechamber Bay)
8.	Latham Conservation Park
9.	Seal Bay Conservation Park
10.	Other (specify ie Marine Park)
11.	None of these

DEWQ2 If Park visited (codes 1-10 in DEWQ1) What activities and experiences did you undertake when visiting parks in the last 12 months? SELECT ALL THAT APPLY (rotate)

1.	Camping
2.	Cycling/ Mountain biking
3.	Experiencing nature and scenery
4.	Participating in a guided tour or activity
5.	Picnicking/ BBQ
6.	Socialising with friends
7.	Swimming
8.	Time by myself
9.	Visiting with family
10.	Volunteering in nature
11.	Walking
12.	Water-based activities such as boating or kayaking

DEWQ3 Ask all: Thinking about each of the following statements about parks and the values they hold for you. Using a scale of 1 to 5 where 1 is strongly disagree and 5 is strongly agree, to what extent do you agree or disagree with them?

Rotate A-D		Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
A	Parks provide community spaces for recreation, enjoyment and health	1	2	3	4	5
B	Parks provide protection for native plants and animals or cultural heritage	1	2	3	4	5
C	Parks provide benefit for tourism and the local economy	1	2	3	4	5
D	Parks are not important to me	1	2	3	4	5

SECTION B: KANGAROO ISLAND COUNCIL

KICQ1. Ask all: Using a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you with:

Rotate		Very dissatisfied	Somewhat dissatisfied	Neither satisfied nor dissatisfied	Somewhat satisfied	Very satisfied
1.1	Sealink ferry service	1	2	3	4	5
1.2	The new coach service to/from Adelaide for ferry connection	1	2	3	4	5

KICQ2. Ask all: To what extent do you agree with the following statement: The Planned Dudley trail between Penneshaw and Cape Willoughby is an asset to both visitors to Kangaroo Island and the broader Kangaroo Island community. Please use a scale of 1 to 5 where 1 is strongly disagree and 5 is strongly agree.

01	Strongly disagree
02	Disagree
03	Neither agree or disagree
04	Agree
05	Strongly agree

SECTION C: SATC

SATCQ1. Ask all: Using a scale of 1 to 5 where 1 is not at all important and 5 is very important, how do you rate the importance of the following for Kangaroo Island:

[READ OUT STATEMENT - CODE ONE FOR EACH STATEMENT]

Rotate		1 Not at all important	2 Somewhat unimportant	3 Neither important nor	4 Somewhat important	5 Very important
1.1	Tourism activity in supporting the economic health of the Island	1	2	3	4	5
1.2	Investment in existing and new infrastructure to attract visitors	1	2	3	4	5
1.3	Cruise ships in supporting the socio-economic health of the Island	1	2	3	4	5

ASK ALL: DEMOGRAPHICS

We would just like to ask a few questions about yourself and your household to ensure that this survey has included a good cross-section of the Kangaroo Island community. Just to re-assure you, your answers will not be displayed in any way that will identify you personally.

DEM2. What is your employment status? READ OUT, SINGLE RESPONSE

12	Business Owner/ Operator	
01	Employed full time	
02	Employed part time, 20 hours or more per week	
03	Employed part time, less than 20 hours per week	
04	Employed casually or seasonally	
05	Not employed at moment, looking for work	Go to Prize draw
06	Not employed receiving pension/ allowance for this	Go to Prize draw
07	Retired	Go to Prize draw
08	Pension/ other allowances (Austudy, Carers etc.)	Go to Prize draw
09	Student (no other employment or allowances)	Go to Prize draw
10	Home Duties	Go to Prize draw
11	Other (specify)	Go to Prize draw
99	Refused	Go to Prize draw

DEM3a. Owner/ Operator or employed (codes 1-4 or 12 in DEM2) Through what business activity do you derive most of your income? [READ LIST, CODE ONE ONLY]

01	Agriculture
02	Aquaculture/ Fishing
03	Tourism services and products aimed at tourists
04	Retail
05	Education/ Health
06	Trade e.g. Plumber, electrician, carpenter
07	Construction
08	Transport and Storage
09	Property or Business Services
10	Natural Resource Management
11	Other – government (incl. Council)
12	Other (specify)
13	None of the above

IF DEM2=12 AND DEM3a = 1,2,3,4 or 8 ASK DEM3b

DEM3b. If Business owner (code 1 in Dem2 AND Agriculture, Aquafishing/ tourism/ retail or transport (codes 1,2,3,4 or 8 in DEM3a) Approximately, what percentage of turnover is dependent on tourists for the business you are mainly involved in? [RECORD PERCENTAGE OR DNK, DO NOT READ OUT]

1.4	Sustainable tourism in supporting a strong and prosperous community	1	2	3	4	5
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SECTION D: KANGAROO ISLAND TOURISM ALLIANCE

KITAQ1. Ask all: Using a scale of 1 to 5 where 1 is strongly disagree and 5 is strongly agree, how strongly do you agree that cruise ship visitation has a positive impact on your lifestyle?

01	Strongly disagree
02	Disagree
03	Neither agree or disagree
04	Agree
05	Strongly agree

KITAQ2 Ask all: What measures do you think can be taken to improve partnerships between conservation and tourism? Unprompted

01	Communicate with community about what is being done
02	Communicate with visitors about what they can do/see in terms of conservation
03	Greater dialogue between agencies
04	Greater visibility of development proposals
05	Help tourism operators to work more closely with
06	Introduce an environment ley or tourist levy
07	Its good as it is
08	No cruise ships
09	No development on Parks or Crown Land
10	Residents participating with community conservation to have more awareness
11	Restrict number of cruise ships
12	Restrict visitation numbers
13	Support conservation programs
14	Don't know
15	Other (specify)

KITAQ3 Ask all: Are you aware of Kangaroo Island Tourism Alliance's (KITA) efforts in enhancing experiences, upgrading infrastructure, addressing access challenges, and promoting Kangaroo Island as a tourist destination?

01	Yes, I am aware
02	No, I am unaware

%	Don't know
---	------------

DEM3c.Import codes NOT selected in DEM3a: And from what other business activity, if any, do you derive income? READ OUT, MULTIPLE RESPONSE

01	Agriculture
02	Aquaculture/ Fishing
03	Tourism services and products aimed at tourists
04	Retail
05	Education/ Health
06	Trade e.g. Plumber, electrician, carpenter
07	Construction
08	Transport and Storage
09	Property or Business Services
10	Natural Resource Management
11	Other – government (incl. Council)
12	Other (specify)
13	Did not have any other business activity

IF DEM2=12 AND DEM3c = 1,2,3,4 or 8 ASK DEM3d

QDEM3d. If Business owner (code 1 in DEM2 AND Agriculture, Aquafishing/ tourism/ retail or transport (codes 1,2,3,4 or 8 in DEM3c) And what percentage of turnover is dependent on tourists for the secondary business you are involved in? [RECORD PERCENTAGE OR DNK, DO NOT READ OUT]

%	Don't know
---	------------

IF DEM3a or DEM3c = 3 ASK DEM4 OTHERWISE GO TO Prize Draw

QDEM4. IF Tourism services and products aimed at tourists (code 3 in DEM3a or code 3 in DEM3c) Please describe the nature of the tourism business you are involved in? READ OUT, MULTIPLE RESPONSE

01	Retail
02	Accommodation
03	Restaurant/ Café
04	Local produce e.g. food, wine, craft, art
05	Tourist attraction
06	Guided tours, bus tour driver
07	Other (specify)

Example responses:

Tourist Attraction (code 5): seal bay, flinders chase, Kelly caves, information centres, penguin or wildlife parks, fun park etc.

Local produce (code 4): galleries, vineyard shops, eucalyptus distillery, honey farm, sheep dairy etc.

IF CODE 3, TOURISM, AT DEM3a - ASK QUESTION DEM5a - OTHERWISE GOT TO Prize Draw

DEM5a IF Tourism services and products aimed at tourists (code 3 in DEM3a ONLY):

Do you have any knowledge of how the business you mainly work for has performed financially over the last 12 months? SINGLE RESPONSE

1	Yes	
2	No	Go to Prize draw

DEM5b. IF YES (code 1 at DEM5a): How well has the business that you mainly work for performed financially in the past 12 months in comparison to the previous year? Has it performed.....? READ OUT, SINGLE RESPONSE

1	Better than previous year
2	Stayed the same
3	Worse than previous year
9	Don't know


I would like to thank you for your time and comments, the TOMM resident survey allows residents to express their opinions about a range of issues affecting Kangaroo Island.

ADD PRIZE DRAW

We normally inform our winners by phone and email. If you wish to enter the prize draw and any future McGregor Tan market research activities, please fill in your details below:

First name	
Email	
Contact number	

Month_Completed

<p>McGregor Tan is accredited to the highest professional industry standards (ISO 20252:2019 Market, Opinion and Social Research) for the full scope of research and strategy services including customised research for consumer, social and commercial studies, as recognised by the Australian Market and Social Research Society.</p>	
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