

# BATEMANS MARINE PARK

## PROFILE OF LOCAL BUSINESSES

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Change & Water**

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# 1 INTRODUCTION

## 1.1 OVERVIEW

Arche Consulting was commissioned by the Department of Environment, Climate Change and Water (DECCW) on behalf of the Marine Parks Authority (MPA) to undertake surveys of local businesses servicing visitation to and management of NSW Marine Parks.

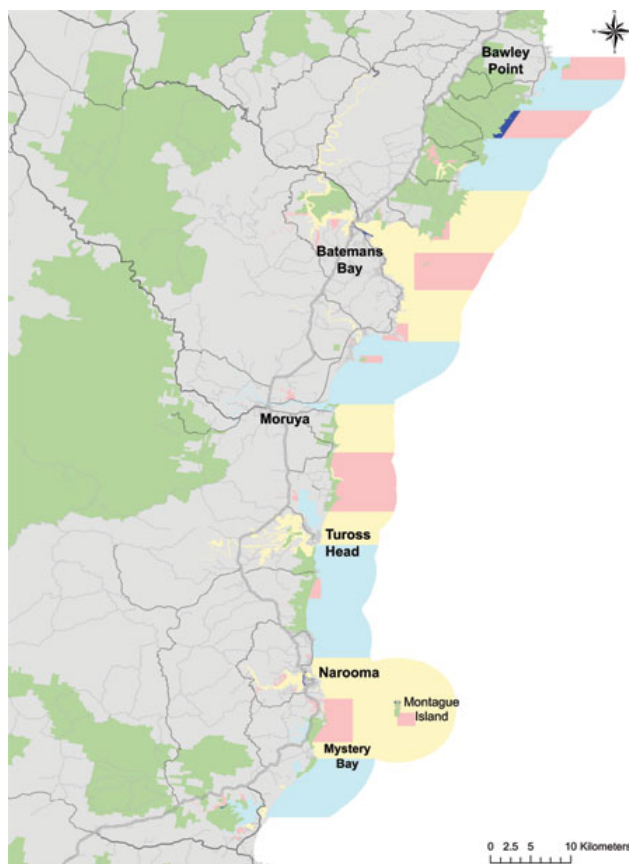
This report is one of six prepared for each of the Marine Park regions. It has been created to provide baseline data about the region servicing visitation to and management of the Marine Park. This information is provided to allow comparative and potentially retrospective analysis. It provides a snapshot of the local economy at the time of the study.

## 1.2 THE MARINE PARK

The Batemans Marine Park was declared a Marine Park in 2006 with a formal zoning plan implemented in 2007.

Batemans Marine Park covers approximately 85,000 hectares, extending from the north end of Murramarang Beach near Bawley Point to Wallaga Lake in the South (mpa.nsw.gov.au 2010).

Figure 1 Map of the Marine Park



Source: DECCW 2010.

Major activities carried out in the Marine Park include:

- beach activities, such as swimming, walking and surfing;
- boating;
- recreational fishing; and
- snorkelling and scuba diving.

There are 84 permits issued in the Batemans Marine Park from the MPA for commercial and recreational activities carried out in the park.

The Marine Park consults with the local community through their local advisory committee which consists of 14 members including those with interests in business, scientific and community issues.



## 2 ECONOMIC PROFILE OF THE LOCAL REGION

### 2.1 OVERVIEW OF THE LOCAL REGION

#### 2.1.1 INTRODUCTION

The following section contains an overview of key economic data for the Eurobodalla LGA. Detailed information is presented in Appendices 2 and 3. Information is sourced from reports produced during the establishment of the Marine Park, economic profiling data and surveys carried out as part of this study. Statistical data used is sourced from the Australian Bureau of Statistics (ABS) and Tourism Research Australia (TRA).

#### 2.1.2 COMMUNITIES OF FOCUS

Batemans Marine Park is serviced by communities located in the Eurobodalla Local Government Area (LGA). The major urban centres bordering the Marine Park are:

- Batemans Bay; and
- Narooma.

Moruya and Bermagui do not directly border the Marine Park, but both are located within 10km of the park boundary. During the consultation period for this project, we were contacted by organisations in the Bermagui Community. This community has self-identified their connection to the Marine Park, and perceive that the Marine Park has an impact on their businesses.

#### 2.1.3 POPULATION OF THE LOCAL REGION

The population of the Eurobodalla LGA in 2009 was approximately 37,442 (ABS 2010). Eurobodalla is a small growing economy that represents about 0.3 per cent of the NSW economy. A main force for growth is the rising population of up to 1,000 per year (CARE 2006). Between 2004 and 2009 growth in the Eurobodalla has on average been 0.9% per annum (ABS 2010).

#### 2.1.4 EMPLOYMENT IN THE LOCAL REGION

Over half of employment in the Eurobodalla LGA is concentrated in four major industries:

- Retail Trade (14%);
- Health Care & Social Assistance (12%);
- Construction (10%); and
- Accommodation & Food Services (9%).

Retail trade, construction and accommodation and food services categories are all at least 5 percent above the NSW average.

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### 2.1.5 TOURISM RELATED BUSINESSES

TRA (2008) estimated that a total of 1,044 businesses in the Eurobodalla LGA were linked to tourism, when compared the ABS national regional profile statistics this represents about 35% of businesses in the area. Of these, 46% were “non-employing” businesses, and only 5% were considered medium to large businesses employing more than 20 staff.

## 2.2 TOURISM AND VISITATION

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### 2.2.1 INTRODUCTION

This section profiles the types of visitors to the Batemans Marine Park area including:

- the types of visitors, and where they come from; and
- key activities of visitors when they are in the region.

The profile is based on Tourism Research Australia local government area profiles (3-4 year rolling average data to June 2007). It should be noted that Tourism Research Australia data set covers the entire Eurobodalla LGA area.

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### 2.2.2 VISITOR TYPES

On average, the Eurobodalla LGA receives 1.169 million visitors per year. Visitors are predominantly domestic day and overnight travellers, with only 2% tourists being international visitors.

The proximity of Eurobodalla LGA and Batemans Bay Marine Park to major urban centres including Canberra provides easy opportunity for short term day and weekend trips. According to Tourism Research Australia, domestic overnight visitors were most likely to live in regional NSW and the ACT.

A TRA overnight visitor survey conducted in February and March 2008<sup>1</sup> found that 56% of respondents were from NSW, and 24% were from the ACT (Table 1).

**Table 1 Domestic overnight visitors by location**

Market	Overnight visitors ('000)
Sydney	178
Other NSW	196
ACT	194
Melbourne	47

*Source: TRA 2008.*

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<sup>1</sup> Sample size of 223.

### 2.2.3 VISITOR ACTIVITIES

The top activities of visitors to the Eurobodalla LGA are “eating out”, “going to the beach” and “just walk or drive around” (Table 2). Of domestic overnight visitors, 58% go to the beach. For domestic day visitors this figure drops to 22%.

**Table 2 Activities by visitor type**

Activity	International	Domestic Overnight	Domestic Day	Total
Go to beach	19,000	391,000	101,000	511,000
Eat out	18,000	347,000	202,000	567,000
Visiting friends / relatives	-	234,000	160,000	394,000
Just walk or drive around	-	254,000	146,000	400,000
Shopping	12,000	194,000	-	206,000
Pubs, clubs, discos etc	8,000	168,000	-	176,000
National / State Parks	7,000	-	-	7,000

*Source: TRA 2008.*

*Note: - = not reported.*

## 3 BUSINESSES SERVICING VISITATION TO THE MARINE PARK

### 3.1 CONSULTATION

#### 3.1.1 OVERVIEW

There were 5 face to face consultations and 3 phone discussions during the survey period. These discussions were held with MPA management, members of the local advisory committee, the key local tourism organisation, Chambers of Commerce representatives and local business owners.

The discussions provided further insight into the perceived links between local businesses and the Marine Park and also provided the opportunity to increase the circulation of the online link through these business networks. This consultation has contributed to both the breadth of business types responding to the survey and further the level of response received.

#### 3.1.2 DETAILS OF LOCAL ORGANISATIONS CONTACTED

The local tourism organisation, Eurobodalla Tourism, has over 300 members. Members include accommodation providers, tourist activity operators and local services.

There are Chambers of Commerce in each community surveyed. Business membership within the Chambers is across retail, accommodation and service based industries. Batemans Bay Chamber of Commerce was contacted.

### 3.2 DEFINING A 'VISITOR' TO THE PARK

Interviews conducted with stakeholders in the region explored their perceptions of what constituted a visitor to the marine park, and thus the type of businesses that serviced visitation. Most stakeholders articulated a broad definition for a marine park visitor to include those that:

- participated in or on water based activities such as boating, swimming, fishing, diving
- enjoyed the views or vistas of the marine park when walking along or nearby the shoreline, or from locations such as clubs/pubs, cafes or parks.

In the main, stakeholders interviewed considered a "visitor to the park" as a non local resident visiting the region for a day trip or overnight stay. This response is not unexpected, given the stakeholders involved in the consultation were linked to the tourism industry. Thus, businesses linked to tourism were considered as linked to the visitation of the Marine Park.

### 3.3 PERMIT HOLDERS

MPA has issued more than 80 permits to commercial operators in the Batemans Marine Park. Permit holders are dominated by boating related businesses, and consist of the following business types:

- charter fishing;
- scuba diving and snorkelling tours;
- marine mammal watching; and
- surf schools.

### 3.4 OTHER BUSINESS LINKS TO THE MARINE PARK

The perception of stakeholders interviewed of business linked to tourism included those businesses who provided:

- accommodation (motels, guest houses, caravan parks, short term rentals etc);
- activities or experiences (boating, whale watching, diving etc);
- dining out or meals (restaurants, cafes, take away food etc); and
- other goods and services (moorings, boat fuel, bait & tackle, boating accessories etc).

A small number of stakeholders consulted included local residents in the definition of a park visitor. Their definition of a linked or associated business was more expansive, to include any business that supplied goods or services to local residents.

An industry affected by the introduction of the zoning plan has been the commercial fishing sector. As these businesses are regulated by Industry and Investment NSW and not servicing visitation to and management of the Marine Park, these businesses were not included in the scope of this study. Consultation did however allow for discussions with the commercial fishing representative from the local advisory committee which provided insight into the broader community effects of the Marine Park and the uncertainty for communities that rely on commercial fishing.

In Bermagui for example, the Bermagui Fishermen's Co-op has diversified its business since the introduction of the Marine Park and associated reductions in commercial fishing. The Co-op has established a wharf precinct for retail and food services. The precinct is enjoyed by both local residents and visitors to the town.

### 3.5 KEY THEMES ARISING FROM CONSULTATION

In speaking with members of the four key communities servicing the Marine Park there have been key themes identified:

- there is a level of concern in sections of these communities about the Park and its implementation due to effects on commercial fishing and further recreational activities;

- many stakeholders consulted indicated their support for the long term protection of the marine environment;
- the business community is eager to improve education and understanding of the positive attributes of the Marine Park both within the communities and beyond to reach potential visitors to the Marine Park;
- stakeholders consulted perceived that there is currently limited knowledge in the business community of the benefits and of the Marine Park and what it can offer businesses and tourists;
- stakeholders perceive that the park has had a negligible effect on local businesses in the community who operate outside of the park; and
- given the relatively new status of the park, tourism stakeholders highlighted an opportunity to better leverage the attributes of the park in attracting visitors to the region. This was perceived as positive, and yet to be fully explored and exploited.

Many stakeholders were keen to form better and more strategic relationships with the MPA. They highlighted opportunities to utilise business and tourism networks to provide information to the business community about the Park. A number expressed interest in the MPA sharing the results of this survey with their organisation.

## 4 SURVEY OUTCOMES

### 4.1 OVERVIEW OF RESPONSE

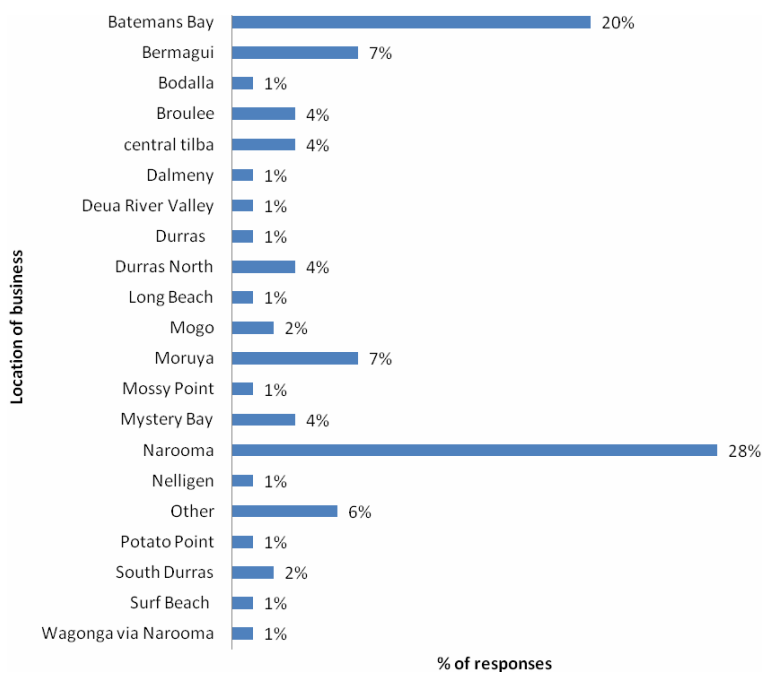
There was a strong response to the online survey with a total of 94 responses. The calculation of a response rate is not possible as the survey was sent out via email and could be forwarded to potential business stakeholders. Survey responses were received by all business types approached in the survey (Figure 4).

### 4.2 ABOUT THE BUSINESSES

#### 4.2.1 BUSINESS LOCATION

Responses were received from communities spanning the border of the Marine Park. The key communities identified as areas of focus, Batemans Bay, Narooma, Moruya and Bermagui represented 62% of the 83 responses.

**Figure 2** Location of businesses responding to the survey

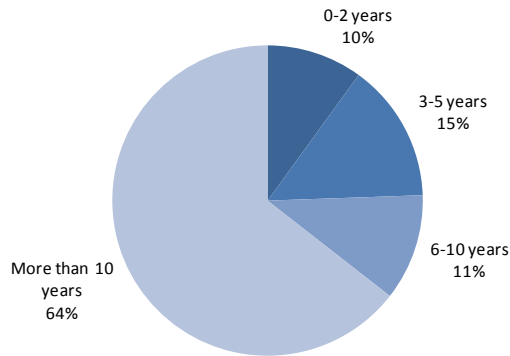


*Note: Number of responses = 83.*

#### 4.2.2 LENGTH OF BUSINESS OPERATION

A large percentage of businesses responding to the survey have been operating for more than 10 years. This spans the Marine Park's initial planning, implementation and first years of operation. The breakdown of response is illustrated in Figure 3.

**Figure 3 Length of business operation**

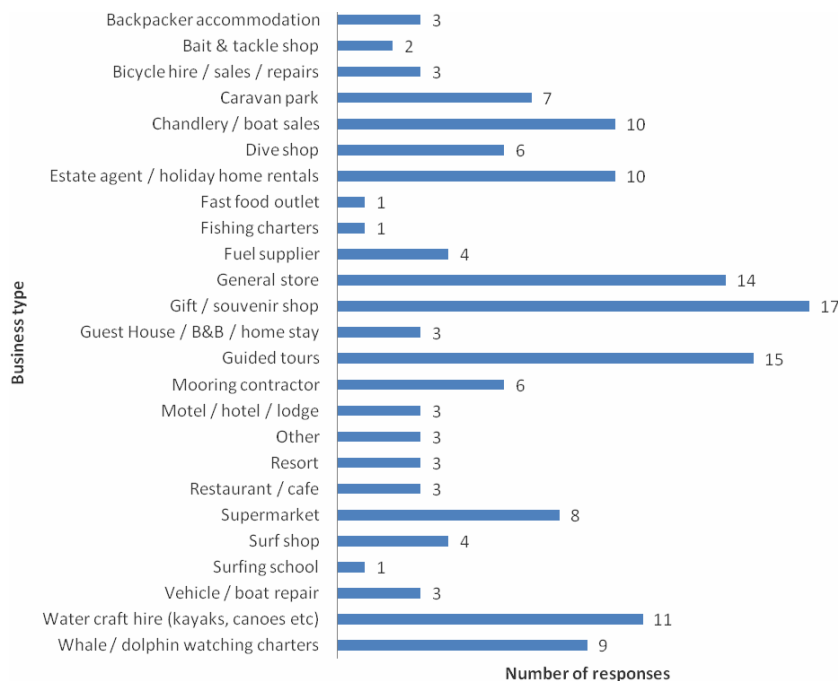


*Note: number of responses 90.*

#### 4.2.3 BUSINESS TYPE

Figure 4 highlights the range of business types that responded to the survey. Responses from marine related industries operating on the park itself or servicing operators on the park were well represented. There is a considerable level of response from accommodation providers and general retail stores also.

**Figure 4 Summary of business responses**

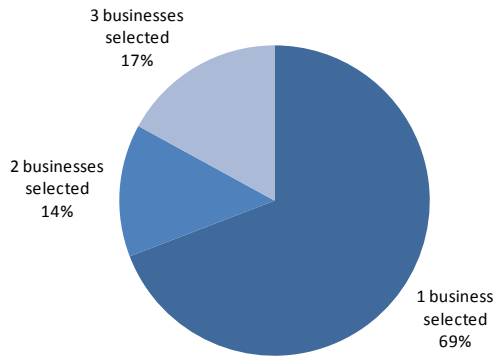


*Note number of responses 94.*

This question provided the opportunity to select more than one business type. Seventeen percent of respondents chose three business types and 14% chose 2 businesses indicating that they run various activities within their business operation. The majority of respondents only selected the 1 business type.



**Figure 5** Number of businesses selected

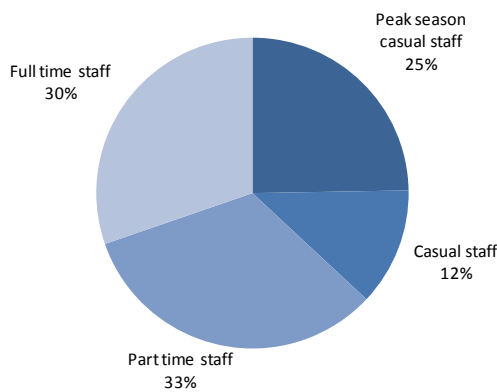


*Note number of responses 94.*

#### 4.2.4 NUMBER OF STAFF EMPLOYED

Across the 70 businesses who responded to this question, there were 647 staff employed. The breakdown between types of employment is illustrated in Figure 6.

**Figure 6** Business employment by tenure



*Note number of responses 70.*

#### 4.2.5 APPROXIMATE ANNUAL TURNOVER

Businesses provided an approximate value of turnover (Table 3). There are many smaller businesses with 47% of respondents stating that their turnover is less than \$200,000. Using the median turnover and the lower level of the largest category average turnover is approximately \$570,000.

**Table 3** Responses to categories of turnover

	\$0- \$200,000	\$200,001- \$500,000	\$500,001- \$1,000,000	\$1,000,001- \$2,000,000	>\$2,000,000
Count	34	13	12	7	7
%	47%	18%	16%	10%	10%

*Note: number of responses 73.*

#### 4.2.6 SEASONALITY OF BUSINESS

Most responding businesses (90% of those who responded to this question) indicated they had a peak season and an off-peak season.

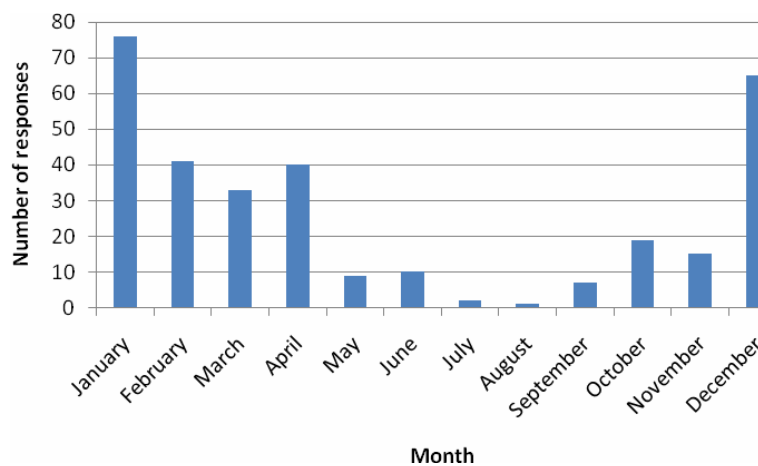
**Table 4 Responses to seasonality**

	Count
Business is pretty even year round	8
We have a peak season and an off-peak season	74

*Note number of responses 82.*

The months highlighted as being peak seasons were largely focused on the summer months and continued moderately through until Easter.

**Figure 7 Peak season month responses**



*Note number of responses 76.*

There were some extra responses in the comments section of this question that highlighted the growing shoulder period and the peaks of school holiday periods. One respondent mentioned that given the high seasonality of business, licensing of number of trips on the Park should be flexible to allow businesses to take advantage of these while they are able.

### 4.3 CUSTOMERS AND CLIENTS

#### 4.3.1 RESIDENCY OF CUSTOMERS

Businesses were asked to identify the proportion of their customers or clients who were visitors, part time residents or permanent residents. All respondents to this question identified that a proportion of their customers were visitors, almost half of the respondents answered between 81-100% of their customers were visitors. The breakdown of response is illustrated in Table 5. This is expected as those businesses that identify with the Marine Park should service visitor activities.

**Table 5 Proportion of customers by residency**

	0-20%	21-40%	41-60%	61-80%	81-100%	No Response	Total
Visitors or Tourists	6%	17%	14%	9%	44%	11%	100%
Part-time residents	28%	18%	6%	1%	0%	47%	100%
Permanent residents	28%	10%	7%	5%	2%	48%	100%

*Note number of responses 84.*

#### 4.3.2 REGULARITY OF CUSTOMER VISITS

Respondents were asked of their customers who were visitors what proportion were one-off, occasional or regular customers. The results shown in Table 6 indicate respondents have customers who fit into each of these categories.

It is difficult to draw significant conclusions from the survey other than that there is a relatively even mix of customer types across most businesses.

**Table 6 Customer type (frequency)**

	None of my customers	Most of my customers	Some of my customers	All of my customers
One - off customers		27	42	1
Occasional customers	2	21	52	2
Regular customers	3	34	31	2

*Note number of responses 77.*

#### 4.3.3 LENGTH OF VISIT TO THE REGION

Respondents answered the most relevant of these options to describe of the customers who were visitors how many were in the region for a day trip, a weekend, a short term holiday and a medium - long term holiday. Table 7 show at least some of the respondents customers were from each of the categories. Weekenders and short term holiday makers are a significant source of custom.

**Table 7 Customer length of visit to the region**

	All of my customers	Most of my customers	Some of my customers	None of my customers
A day trip		4	39	15
A weekend	1	34	42	
A short term holiday	6	28	43	2
A medium - long term holiday		3	30	19

*Note number of responses 79.*

#### 4.3.4 REQUESTS FOR INFORMATION ABOUT THE MARINE PARK

The survey asked businesses how often customers mention the Marine Park or ask for information about the Marine Park. In the face to face consultations this answer was very dependent upon the type of business. However, it was generally the case that questions that arose were focused on where fishing was allowed in the park.

The online survey results are listed in Table 8. It is apparent that many businesses have been asked about the Marine Park at least on one occasion.

**Table 8 Customers enquiring about the Marine Park**

	Count
Most of the time	10
Some of the time	38
Rarely	25
Not at all	9

*Note number of responses 82.*

## 4.4 BUSINESS LINKS TO THE MARINE PARK

### 4.4.1 IMPORTANCE OF THE MARINE PARK TO INDIVIDUAL BUSINESSES

Businesses were asked to rate the importance of the Marine Park to their business. Table 9 outlines 64% of respondents indicated the Marine Park had some level of importance for their business.

**Table 9 Importance of the Marine Park for business**

	Extremely important	Very important	Somewhat important	Not at all important
Number of responses	3	15	31	28

*Note: Number of responses 77.*

There were a considerable number of comments following this question. Key themes from these comments included:

- the Marine Park being there had been detrimental to recreational fishing and related tourism services; and
- importance would be higher if there were further promotion of the activities available in the Marine Park that would entice tourists to the area.

### 4.4.2 IMPACT OF THE MARINE PARK ON BUSINESS

This question asked businesses to rate the impact of the Marine Park on individual businesses servicing visitation to or management of the Marine Park. Responses in Table 10 show while there is a considerable proportion (21%) of respondents who consider the Marine Park to have had a high negative impact on their business there are 40% of respondents where there has been a low but positive impact.

**Table 10 Impact of the Marine Park on business**

	High impact - positive effect	Medium impact - positive effect	Low impact - positive effect	High impact - negative effect	Medium impact - negative effect	Low impact - negative effect
Number of responses	6	6	31	16	5	13
Percent	8%	8%	40%	21%	6%	17%

*Note number of responses 77.*

There was a response that outlined there was no relevance to their business and another unsure whether the low impact had been negative or positive. Additional comments provided were focused around the negative effects.

#### 4.4.3 THE IMPACT OF THE MARINE PARK ON LOCAL BUSINESSES

Businesses were asked to respond to rate the impact of the Marine Park on local businesses. This produced a balance between positive and negative impacts. Comments expressed were largely focused on the detrimental impacts to tourism through the impact on fishing within the communities.

**Table 11 Impact of the Marine Park on local businesses**

	High impact - positive effect	Medium impact - positive effect	Low impact - positive effect	High impact - negative effect	Medium impact - negative effect	Low impact - negative effect
Number of responses	3	14	22	16	12	7
Percent	4%	19%	30%	22%	16%	9%

*Note number of responses 74.*

#### 4.4.4 BUSINESS USE OF ATTRIBUTES OF THE MARINE PARK

This was an open ended question that received 33 responses, these included both questions about what the positive attributes were that could be used and also those who are already using it on their web site, pamphlets, and in information provided to recreational fishers about improved fishing. One respondent indicated they currently do not but would be interested in finding out how.

Responses have been aggregated into key themes in Table 12 and selected verbatim responses are listed in Appendix 1.

**Table 12 Use of attributes in marketing materials**

Aggregated Responses	Number of responses
Used on website and through marketing materials	9
Promote the increase in fish stocks	5
No	14
Provide Marine Park marketing materials to customers	2
Other	3

*Note number of responses 33.*

#### 4.4.5 BUSINESS ABILITY TO PROVIDE INFORMATION ABOUT THE MARINE PARK

Businesses were asked if they were able to provide information to their customers about the Marine Park, options provided were yes, some of the time and no. The breakdown of answers is in Table 13.

**Table 13 Ability to provide information about the Marine Park**

	Count	Percentage
Yes	37	47%
Some of the time	33	42%
No	9	11%

*Note number of responses 79.*

#### INITIATIVES TO BETTER SUPPORT BUSINESS TO INCREASE VISITOR AWARENESS

Businesses were asked how the MPA might be able to better support businesses to increase visitor awareness about the Marine Park. The 41 Responses have been aggregated into key themes. The verbatim responses are listed in Appendix 1.

**Table 14 Aggregated responses - visitor awareness**

Aggregated Responses	Number of responses
Improved policing of sanctuary zones	2
Provide more comprehensive maps, brochures and GPS data that also include bag and catch limit information	5
Promote attractions (including where you are able to fish) within the park to create positive reasons to visit the region through various media including printed / tv	13
Provide further information and detail about the research and science of the Marine Park	6
Improved signage and facilities	2
Removing or minimising the Marine Park	6
Unsure / Content	4
Better understand local business situations	2
Introduce guides	1

*Note number of responses 41.*

#### 4.4.6 OPTIONS FOR MPA TO BETTER SUPPORT LOCAL BUSINESSES

Businesses were asked for suggestions where the MPA could better support local businesses. The responses have been aggregated into key themes and listed in Table 15. Verbatim responses are listed in Appendix 1.

**Table 15** Aggregated response - initiatives for support

Aggregated Response	Number of Responses
Revision of management practices of zones and boundaries	6
Promotion of Marine Park to fishing community and consultation with these groups to lessen the divide	2
Compensation for loss of businesses outside of the commercial fishing sector	1
More proactive promotion of the Park	8
Education programs and further information about scientific results provided to the community	4
Other	6

*Note number of responses 27.*



## 5 BUSINESSES SERVICING MANAGEMENT OF THE MARINE PARK

### 5.1 OVERVIEW OF MPA MANAGEMENT

Batemans Marine Parks Authority management is based in Narooma. Established in 2007 the Park initially employed five people. This has increase to seven full time positions, at an approximate cost of \$585,000 per annum.

The Parks Authority own 3 boats and lease 3 vehicles. These were not sourced locally.

### 5.2 MPA EXPENDITURE

The MPA in Batemans Bay purchase goods and services locally through a mix of contracted suppliers and the purchase of day to day goods with a range of local providers. This is a total local expenditure of approximately \$106,500 per annum. A summary of the MPA expenditure is listed in Table 16.

**Table 16 Summary of local MPA activities and expenditure**

Operational costs	Cost	Contract (Y/N)	Percentage Local
Fuel	\$25,000	N	98%
Boat maintenance & service	\$5,000	N	100%
Vehicle maintenance & service	\$5,000	N	100%
Dive equipment & service	\$3,000	N	95%
Chandlery/Uniforms	\$20,000	N	60%
Maintenance of buoys and signage	\$20,000	Some	50%
Cleaning/Gardening	\$10,000	Y	100%
Advertising & Printing	\$10,000	N	40%
Catering	\$1,000	N	100%
Office supplies	\$6,000	Y	5%
Utilities	\$12,000	N	80%
Temporary accommodation		N	
Security	\$2,000	N	100%
Field consumables	\$2,000	N	90%
Fees for services (research etc)	\$30,000	N	60%
Training	\$19,000	N	30%
Travel expenses	\$25,000	N	
Car leases	\$25,000	N	
<b>Total</b>	<b>\$220,000</b>		

## 6 CONCLUSIONS

### 6.1 THE BATEMANS REGION

This project has analysed relevant ABS and TRA data, and the results of face to face and phone interviews and an online survey with businesses who service visitation to and management of the Marine Park.

The Eurobodalla local government area with over 1.2 million visitors per annum has a significant tourism industry. Representing 35% of all businesses in the area those linked to tourism form a significant part of the business community.

The interest and self identified connection to the Park in the Batemans region is evidently very high with a high level of response to the online survey.

### 6.2 BUSINESSES AND SURVEY RESULTS

Responses from marine related industries operating on the park itself or servicing operators on the park were well represented, however important to note the considerable level of response from accommodation providers and general retail stores also.

There are many smaller businesses with 47% of respondents stating that their turnover is less than \$200,000.

Most responding businesses (90% of those who responded to this question) indicated they had a peak season and an off-peak season. All respondents to this question identified that a proportion of their customers were visitors with a large proportion indicating 81-100% of their customers were visitors.

Many of the businesses are asked about the Marine Park. Consultation highlighted that this was dependent on the type of business. However, it was generally the case that questions that arose were focused on where fishing was allowed in the park.

It is apparent that many businesses have been asked about the Marine Park at least on one occasion.

### 6.3 MARINE PARK EXPENDITURE

When established in 2007 the Park initially employed five people. This has increase to seven full time positions, at an approximate cost of \$585,000 per annum.

The MPA in Batemans Bay purchase goods and services locally through a mix of contracted suppliers and the purchase of day to day goods with a range of local providers. This is a total local expenditure of approximately \$106,500 per annum.

#### 6.4 FUTURE OPPORTUNITIES

Tourism agencies, Business Chambers and many businesses outlined a number of strategies and initiatives that could help businesses leverage the attributes of the Marine Park.

Many stakeholders perceive that there is currently limited knowledge regarding the benefits and what the Marine Park can offer local businesses. There is an opportunity to improve the understanding of local businesses and local residents of the attributes of the Marine Park. This would enable businesses to use the park in marketing and promotion activities, and attract visitors to the region. This could be conducted through established networks to aid the dissemination of appropriate information to local businesses through their forums, meetings, newsletters and email networks would be efficient.

Using the Park as a marketing opportunity is beginning to be explored by local businesses in the area. With 98% of visitors to the Eurobodalla area being domestic visitors who are largely from Sydney and Canberra increasing awareness and understanding of visitors could target these areas.

Australian Bureau of Statistics (2006) 2006 Census of Population and Housing.

Australian Bureau of Statistics (2010) National Regional Profile, Eurobodalla (A), 2004-2008.

TRA (2007) Eurobodalla Visitor Profile and Satisfaction Report.

TRA (2008) Tourism Profiles for Local Government Areas in Regional Australia, City of Eurobodalla.

## 8.1 UTILISING THE ATTRIBUTES OF THE MARINE PARK

*Has your business used the attributes of the Marine Park? If so please briefly describe how (e.g. in marketing or promotional materials).*

- I refer to it in my web site as an acknowledgement of our pristine waters.
- we attend four regional shows and spend sixty thousand on advertising per year most of the time we are fending off negative complaints about the marine park, as people say they are now going elsewhere at the shows.
- fish stocks are improving.
- no but I'd love to know how to.
- I am not aware that there are any attributes, only negatives.
- we have tried to promote the idea that with the exclusion zones fish stocks will pick up.
- marketing.
- our logo is 2 humpback whale tails.
- yes on website and pamphlets used as a major drawcard.
- encourage kayaking on the lake and educate re potential favourable recreational fishing.
- have tried to sell marine park as positive on web page stating that the fishing is better as it is now a managed resource but no one is buying it.
- sanctuary zones, stereotypically pristine.
- not really but people who come have noticed better fishing
- where possible
- there are no attributes.
- we have just started to use the marine park as a great attraction to make a weekend away.
- yes , we tell customers the Clyde River is a Marine Park now, and fishing is getting better.
- no, I would like to be able to take people out on the water but the jetties are too dangerous for boarding people onto a small craft.
- sorry boy's, you can't fish there anymore. Shame you drove all the way from Melbourne.
- we hand out marine park maps.
- yes, on website.

- we provide safe parking for boats, close to boat ramp provide a booking facility to go out on boats, provide marine park maps.
- Point out to guests how good recreational fishing is now.
- yes - providing leaflets.

## 8.2 INCREASING AWARENESS

*How could the Marine Park Authority better support your business to increase visitor awareness about the Marine Park?*

- better policing of sanctuary zones. It is hard to explain to people that I will not take them into a sanctuary zone to fish when they can see other vessels in it and see the same ones later cleaning a good catch of fish.
- provide fishing brochures, complete information regarding size limits and bag limits. It is very difficult to get the up-to-date information out of the local offices. We try to help tourists but we don't have the backup.
- provide us with efficient maps showing exactly where recreational fishing is allowed.
- get on TV and print media and tell visitors that they can fish in Batemans Bay and South Coast. Spend some of our fishing licence money on positive news and research.
- include benefits in local tourist info literature.
- give the local business and residents details as to whether recreational fishing is still going to be possible.
- I'd love a map to display in my office of our specific section of beach, or similar one page spreads to display in the cabin compendiums of not just the zones but photos of the local marine life and where one might spot IE a sea horse. That would be great for all visitors to be able to enjoy the natural wonders we're trying to protect and not just hear about the fishing side of the parks effects.
- provide information to explain beyond 'positive'.
- come clean and stop lying about it.
- provide accurate detailed maps / GPS co-ordinates and information on future restrictions.
- reduce the area of no take zones.
- active policing by Fisheries Department - it is a joke at present.
- Leave.
- advertise attributes.
- put up larger signs saying no fishing on track entrances rather people travelling mile to the coast to find they can't fish.
- make me a certified guide.

- brochures and maps showing attractions and areas accessible to weekend fishermen.
- a marine park outlet, information/representation/promotion facility.
- they could base their closures on real science rather than just a land grab Some of our sanctuary zones are on working oyster leases.
- nothing really I am happy with the fishing maps.
- trade fell away by 30 percent from the announcement of the park mainly due to lack off info.
- leave town.
- MPA should pay compensation for lost business. eg: set up a buy out.
- I hadn't given it any thought until now. I would be happy to place brochures in the cottages.
- more advertising about what areas are Marine parks, re better fishing.
- by providing better facilities like floating jetties. Power, water, petrol, diesel, and pump out encouraging more boaties and yachties to use the marine park for recreation.
- 1 page overview for inclusion in house information pack.
- don't go there. We had no choice.
- provide more information or were to get more information.
- we in fact as environmental educators are very encouraging and supportive of the park and as paddling is very low impact we should not have tour restrictions placed on us now or in the future as we daily serve to encourage understanding and appreciation and stewardship of the marine environment.
- provide an information evening on the marine park and its benefits so we can then promote these to our guests.
- provide electronic collateral/newsletters.
- Advertising.
- provide a list of activities that can be taken in the marine park and advertise them as come to Batemans Bay and in our very own marine park.
- you already do a good job.
- make printed guide available.
- my releasing more fishing spots and change dictatorial attitudes.
- we need to know the boundaries and where fishing is ok.
- provide more info to give to guests.

### 8.3 SUGGESTED INITIATIVES FOR THE MPA

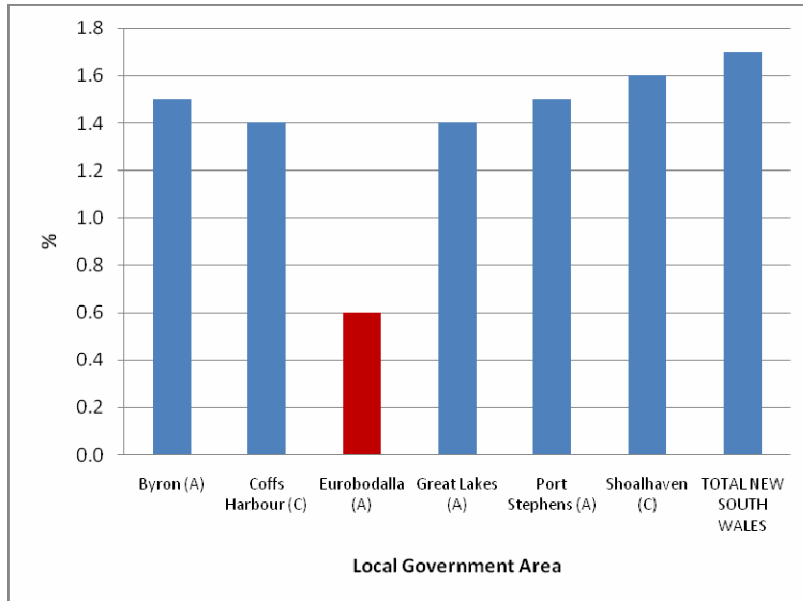
*If you have other suggestions for initiatives that you think the Marine Parks Authority could implement to better support local businesses, please describe below*

- do not agree with locking up areas. Prefer management i.e. lock parts for periods, reopen and lock up other parts etc.
- have stands at regional shows promoting fishing and the marine benefits to our customers. Buy time on TV fishing shows.
- review boundaries annually.
- explain benefit to justify the costs spent. Would like to see more substantial science to justify the no-take zones before zoning them.
- open up all areas to Recreational Fishing and reduce the bag limits within a Marine Park, stop trying to create a feeling of war between MPA and tourists to the area, as most people who use the MP in this part of the coast are recreational fishing tourists.
- compensation for destruction of local businesses and ongoing funding to promote town to re-establish new tourist feature or employment in town such as a call centre that will employ more than 200 people full time with job security located either in Bermagui or Cobargo.
- introduce more areas for commercial fishing. More fishermen, more money to our community, more jobs etc.
- more pro-active TV advertising.
- Marine Park is no good for my business.
- school and education to increase awareness of positives.
- move out.
- stop the professional trapping of fish in the Clyde river.
- promote it to be a major attraction in the area.
- more marketing of the attractions associated with the marine park could entice more visitors to the region.
- a marine park outlet, information/representation/promotion.
- have a column in the local paper with something positive that has come up in recent time or something that the general population can help with This would help break down this THEM & US atmosphere in town.
- positive advertising and less talk of increasing closed areas to fisherman.
- get them to do the job they were supposed to do and not be influenced by political BS.
- school education.



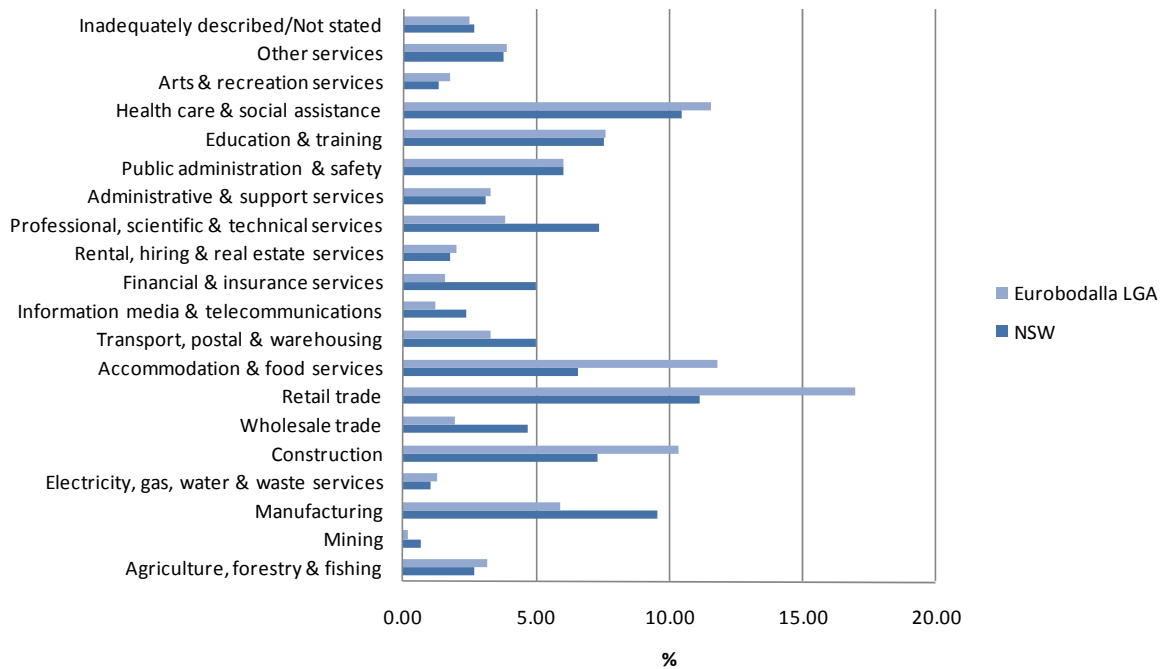
- it would be great to have the large ocean liners coming into the Bay - at present the facilities and bar are not suitable for this kind of business and need upgrading.
- remove it and go away. No such luck I guess.
- link in with us for educational /interpretive holiday programs like we do with national parks (discovery programs).
- promote the aspects of the park which aren't to do with fish, fishing or stopping fishing.
- provide reciprocal website links to businesses websites.
- provide a free first in first serve boat trip around the marine park twice a day, with information guide.
- close down and return to previous arrangements.
- open days.

Figure 8 Population growth 2008-2009 in Eurobodalla



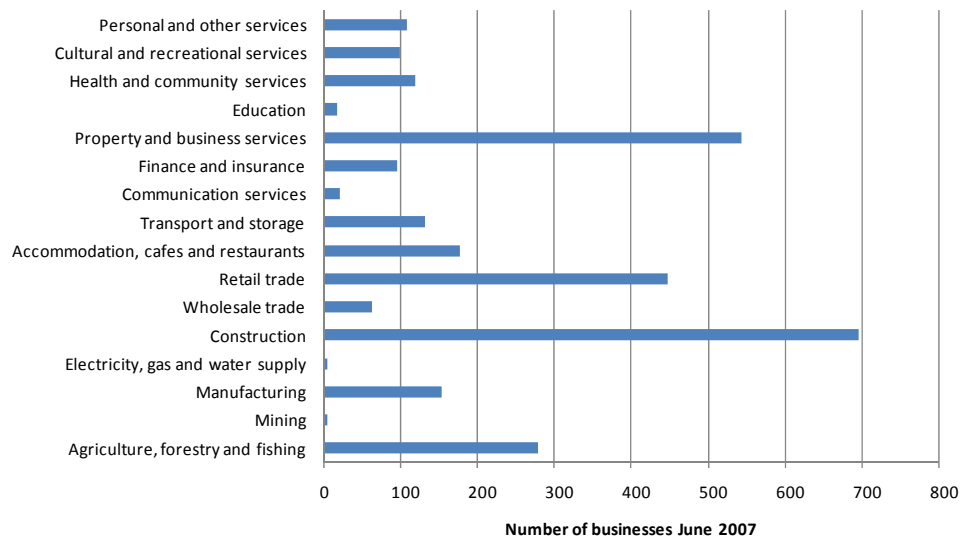
Source: ABS 2010

Figure 9 Employment by industry within NSW and Eurobodalla (2006 Census)



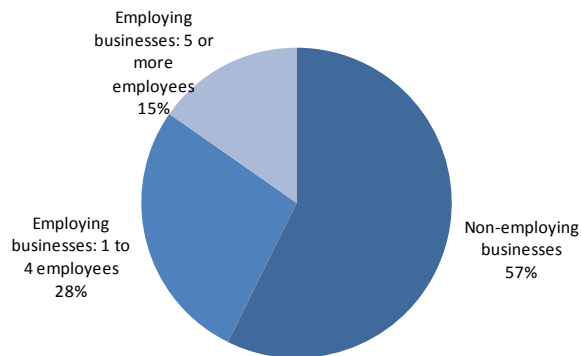
Source: ABS 2006.

**Figure 10** Number of businesses by industry Eurobodalla 2007



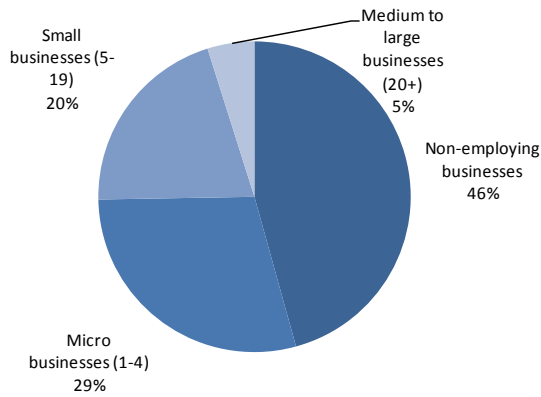
Source: ABS 2010.

**Figure 11** Size of local businesses



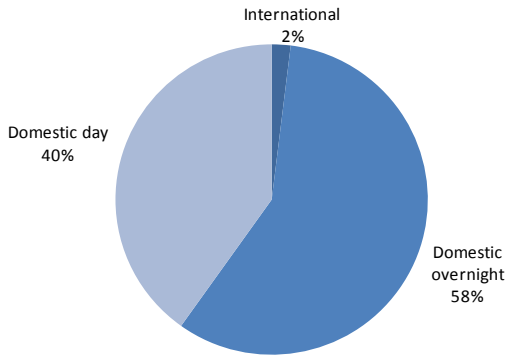
Source: ABS 2010.

Figure 12 Tourism businesses (TRA, 2008)



Source: TRA 2008

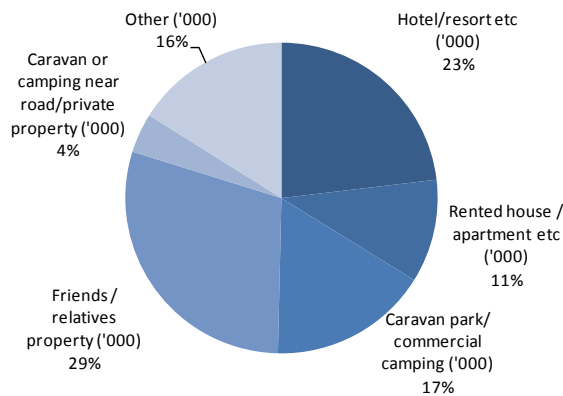
Figure 13 Visitors by type (TRA 2008)



Source: TRA 2008

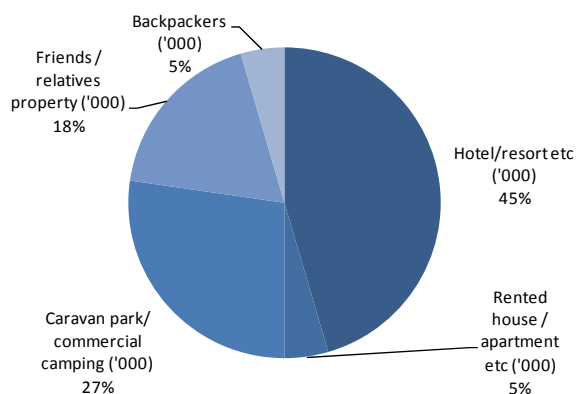
Overnight domestic visitors are most likely to stay at properties owned by friends or relatives (29%), with 23% staying in hotels, motels or resorts (Figure 14). International visitors predominantly stayed in hotels/motel/resorts or at caravan parks and commercial camping grounds (Figure 15).

Figure 14 Accommodation of domestic overnight visitors (TRA 2008)



Source: TRA 2008

Figure 15 Accommodation of international overnight visitors (TRA 2008)



Source: TRA 2008

A TRA survey of overnight visitors conducted in February and March 2008<sup>2</sup> (TRA 2007) found that:

- the top two reasons for visiting Batemans Bay were 'Go to the beach' (40%); and 'Great place for a family holiday' (33%);
- 59% respondents expected the destination to have 'Nature based experiences' and 'Water sports: surfing, swimming or kayaking' (50%); and
- experiences of visitors included 'General sightseeing' (79%) and 'Go to the beach' (75%).

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<sup>2</sup> Sample size of 223.

## 11.1 INTRODUCTION

Understanding the links between the Batemans Marine Park and local business and the Batemans Marine Park

We are seeking information from local businesses to:

- help better understand the links between local businesses and the Marine Park
- help better understand how local businesses connect with visitors to the Marine Park
- obtain your ideas about how the Marine Parks Authority can improve links to the local business community

Arche Consulting has been commissioned by the NSW Department of Environment, Climate Change & Water on behalf of the NSW Marine Parks Authority to conduct surveys of local businesses that provide goods and services for marine park visitors and park management. Please note the surveys are being carried out for all NSW Marine Parks.

The results of this survey will only be provided to the Department and the Marine Parks Authority in aggregated form, and individual responses will be kept confidential.

## 11.2 ABOUT YOUR BUSINESS

1. Where is your business located (town/locality)?

2. Please choose ONE option from the following to describe how long your business has been operating.

- 0-2 years
- 3-5 years
- 6-10 years
- More than 10 years

3. From the following please select up to three options that most appropriately describe your business. If not listed, please describe your business type in the 'other' section.

Backpacker accommodation	Bait & tackle shop	Bicycle hire / sales / repairs
Caravan park	Chandlery / boat sales	Dive shop
Estate agent / holiday home rentals	Fast food outlet	Fishing charters
Fuel supplier	General store	Gift / souvenir shop
Guest House / B&B / home stay	Guided tours	Mooring contractor
Motel / hotel / lodge	Resort	Restaurant / cafe
Supermarket	Surf shop	Surfing school
Utility provision	Vehicle / boat repair	Water craft hire (kayaks, canoes etc)

Whale / dolphin watching charters

Other

4. Please add any additional comments about your business

### 11.3 ABOUT YOUR CUSTOMERS AND CLIENTS

The following questions relate to your customers and clients. If you do not know the answer exactly, please give your best estimates. Please answer each part of each question.

5. What percentage of your current customers are:

	0-20%	21-40%	41-60%	61-80%	81-100%
Visitors or tourists					
Part-time residents (eg own a weekender)					
Permanent residents					

6. This question relates to your customers who are visitors or tourists. Please identify the approximate proportion of your customers who are:

	All of my customers	Most of my customers	Some of my customers	None of my customers
One-off customers				
Occasional customers that return from time to time (eg a couple of times a year)				
Regular customers				

7. This question relates to your customers who are visitors or tourists. Please describe the approximate proportion of your customers visiting the region for:

	All of my customers	Most of my customers	Some of my customers	None of my customers
A day trip				
A weekend				
A short term holiday (0-1 month)				

A medium - long term  
holiday > 1 month

8. This question relates to your customers who are visitors or tourists. How frequently do these customers mention the Marine Park, or ask for information about the Marine Park?

- Most of the time
- Some of the time
- Rarely
- Not at all

9. Please add any additional comments here

#### 11.4 SOME DETAILS ABOUT YOUR BUSINESS

10. For each of the following, please indicate how many staff you employ:

- Full time staff
- Part time staff
- Casual staff
- Peak season casual staff

11. What is the approximate annual turnover of your business?

- \$0-\$200,000
- \$200,001-\$500,000
- \$500,001-\$1,000,000
- \$1,000,001-\$2,000,000
- >\$2,000,000
- Other

12. Choose one of the following to describe your business

- Business is pretty even year round
- We have a peak season and an off-peak season

13. If you have indicated you have a peak season, please select all relevant months that you would consider as peak season.

14. Please add any additional comments here

#### 11.5 YOUR BUSINESS LINKS TO THE MARINE PARK

15. Please choose from the following options to describe how important you think the Marine Park is for your business

- Extremely important - my business wouldn't exist without it
- Very important



- Somewhat important
- Not at all important - it would not matter if the Marine Park was there or not
- Comments

16. Please choose which of the following options best describes the impact of the Marine Park on your business

- High impact - positive effect
- Medium impact - positive effect
- Low impact - positive effect
- High impact - negative effect
- Medium impact - negative effect
- Low impact - negative effect

17. Please choose which of the following options best describes the overall impact of the Marine Park on businesses in your town?

- High impact - positive effect
- Medium impact - positive effect
- Low impact - positive effect
- High impact - negative effect
- Medium impact - negative effect
- Low impact - negative effect

18. Has your business used the attributes of the Marine Park? If so please briefly describe how (e.g. in marketing or promotional materials).

19. Do you feel you are able to provide information to your customers / clients about the Marine Park?

- Yes
- Some of the time
- No
- How could the Marine Park Authority better support your business to increase visitor awareness about the Marine Park?

20. If you have other suggestions for initiatives that you think the Marine Parks Authority could implement to better support local businesses, please describe below.

21. Please add any additional comments here

The following questions relate to the provision of your contact details. Please note, survey results will only be provided to the NSW Department of Environment, Climate Change & Water and the Marine Parks Authority in aggregated form. Details of individual businesses are confidential. You can choose to remain anonymous.

22. Are you willing to provide your contact details to (please choose one or more of the following)

- Arche Consulting for follow up to this survey
- The NSW Department of Environment, Climate Change & Water for participation in future surveys
- Marine Parks Authority Management, to enable them to contact you with information about your local Marine Park
- None of the above

23. Should you wish to provide your contact details please list them below:

Contact Details

Business name:

Contact email:

Contact phone:

Contact name: