

JERVIS BAY MARINE PARK

PROFILE OF LOCAL BUSINESSES

Prepared For: **Department of Environment, Climate Change
and Water**

Prepared By: **Arche Consulting Pty Ltd**

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Arche Consulting
T + 61 0421 274076
Phillips Street
Sydney NSW 2000
www.arche.com.au

ABN 35 131 934 337

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1 INTRODUCTION

1.1 OVERVIEW

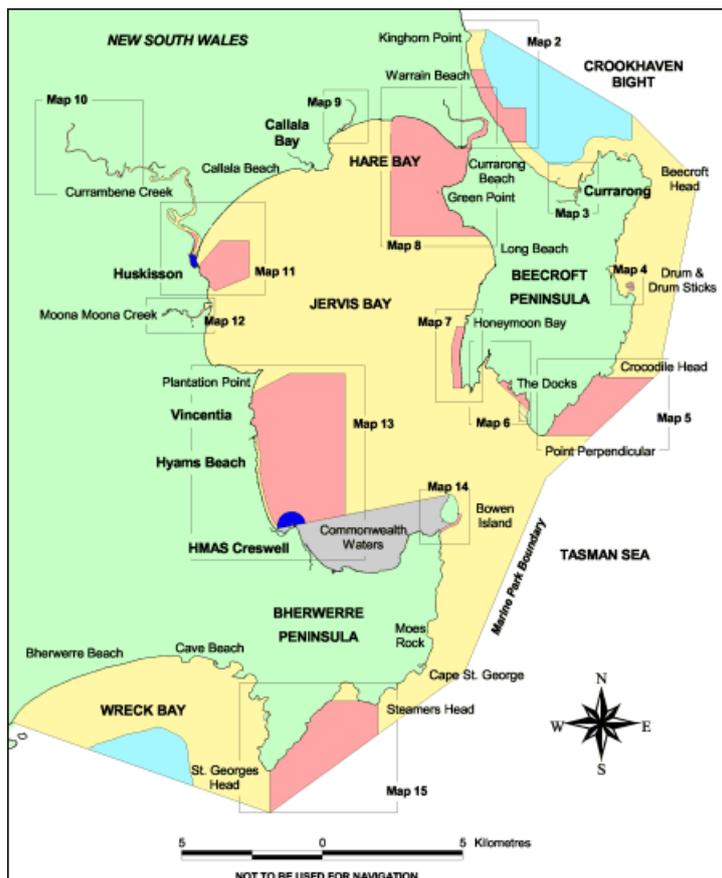
Arche Consulting was commissioned by the Department of Environment, Climate Change and Water (DECCW) on behalf of the Marine Parks Authority (MPA) to undertake surveys of local businesses servicing visitation to and management of NSW Marine Parks.¹

This economic profile 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.

1.2 THE MARINE PARK

The Jervis Bay Marine Park was declared a Marine Park in 1998 with a formal zoning plan implemented in 2002. It spans around 100km of coastline and adjacent ocean extending from Kinghorn Point in the north and Sussex Inlet in the south, covering 22,000ha (mpa.nsw.gov.au).

Figure 1 Map of Marine Park



Source: www.mpa.nsw.gov.au

¹ The final report summarises survey results and provides an analysis of common themes across the NSW Marine Parks.

The park's proximity to Sydney and Canberra is an important factor in Marine Park visitation with day trip, weekend and longer term holidays all types of visitation.

Established in 1998 Jervis Bay Marine Park was one of the first Marine Parks to be declared in NSW. The zoning plan brought into force in 2002 was developed to protect the important natural and cultural values of the marine park, while providing for a range of sustainable uses (MPA 2009 zoning plan review report).

Major activities carried out in the Marine Park include:

- beach activities, with swimming, walking and surfing
- boating
- recreational fishing and
- snorkelling and scuba diving

There are 31 permits issued in the Jervis Bay Marine Park from the Marine Park Authority for commercial and recreational activities carried out in the park.

2 ECONOMIC PROFILE OF THE LOCAL REGION

2.1 OVERVIEW OF THE LOCAL REGION

2.1.1 OVERVIEW

Statistical data used is sourced from the Australian Bureau of Statistics (ABS) and Tourism Research Australia (TRA) based on the Shoalhaven Local Government Area (LGA) within which the Marine Park is located.

2.1.2 COMMUNITIES OF FOCUS

Jervis Bay Marine Park is serviced by communities located in the Shoalhaven LGA. The major communities are:

- Huskisson;
- Vincentia; and
- Nowra.

Smaller communities that are adjacent to the marine park include:

- Hyams Beach;
- Callala Beach;
- Callala Bay;
- Currawong; and
- Culburra

2.1.3 POPULATION OF THE LOCAL REGION

The population of the Shoalhaven LGA in 2006 was 88,405 people (ABS 2010). Key communities adjacent to the Marine Park have a total population just 10,000 people (MPA NSW 2008).

2.1.4 EMPLOYMENT IN THE LOCAL REGION

Over half of employment in the Shoalhaven LGA is within four major industries:

- Retail Trade (17%)
- Accommodation & Food Services (12%)
- Health Care & Social Assistance (11.5%)
- Construction (10.3%)

Commercial fishing has been an important industry within the Jervis Bay area, with around 34 commercial fishing permit holders (Marine Park Authority, 2008 SC&E uses)

According to ABS data in 2008 over 52% of all businesses in the Shoalhaven area were non-employing businesses, with only 18% employing 5 or more employees.

2.1.5 TOURISM RELATED BUSINESSES

TRA (2008) estimated that a total of 2,328 businesses in the Shoalhaven LGA were linked to tourism. Of these, 40% were “non-employing” businesses, and only 6% were considered medium to large businesses employing more than 20 staff.

TRA estimates that visitors to the Shoalhaven LGA spend on average \$471 million per year.

2.2 TOURISM AND VISITATION

2.2.1 INTRODUCTION

This section profiles the types of visitors to the JBMP 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 two key data sources:

- Tourism Research Australia local government area profiles (3-4 year rolling average data to June 2007);
- Tourism Research Australia visitor survey conducted in 2006.

Note that Tourism Research Australia data sets cover the entire Shoalhaven LGA area, and include localities such as Berry and Kangaroo Valley, destinations that attract tourists for reasons not connected to the marine park.

2.2.2 VISITOR TYPES

On average, the Shoalhaven LGA receives 2.236 million visitors per year. Visitors are predominantly domestic day and overnight travellers, with only 1% tourists being international visitors

The proximity of Shoalhaven LGA and Jervis Bay Marine Park to major urban centres Sydney, Canberra and Wollongong, provides easy opportunity for short term day and weekend trips. According to Tourism Research Australia, domestic overnight visitors were most likely to live in Sydney and other regions of NSW.

Table 1 Domestic overnight visitors by location

Market	Overnight visitors ('000)
Sydney	650
Other NSW	255
ACT	72
Melbourne	20

Source: TRA 2008.

A TRA visitor survey conducted in June and July 2006²(TRA 2007) found that 88% of respondents were from Sydney, and 73% were overnight visitors.

2.2.3 VISITOR ACTIVITIES

The top activities of visitors to the Shoalhaven LGA are eating out, going to the beach and visiting friends or relatives (Table 2). Of domestic overnight visitors, 24% go to the beach. This figure for domestic day visitors drops to 18%. It should be noted that statistics include trips to non-beach locations in the Shoalhaven LGA (e.g. Berry and Kangaroo Valley).

Table 2 Activities by visitor type

Activity	International	Domestic Overnight	Domestic Day	Total
Go to beach	18,000	538,000	246,000	802,000
Eat out	18,000	453,000	495,000	966,000
Visiting friends / relatives	-	418,000	346,000	764,000
Just walk or drive around	-	321,000	304,000	625,000
Shopping	16,000	255,000	-	271,000
Pubs, clubs, discos etc	14,000	247,000	-	261,000
National / State Parks	8,000	-	-	8,000
Bushwalking / rainforest walks	8,000	-	-	8,000

Source: TRA, 2008.

A TRA visitor survey conducted in June and July 2006³(TRA 2007) found that:

- The top two reasons for visiting the Shoalhaven were 'Variety of things to see and do' (29%); and to spend time with 'partner' (27%), 'family' (23%) or 'friends' (20%);
- 75% respondents expected the destination to have 'Nature based experiences' (75%); and
- The majority of respondents (63%) experience was to 'Just walk or drive around/taking in the sights/general sightseeing'.

The beach was identified by visitors among the "key strengths" of the region.

² Sample size of 121.

³ Sample size of 121.

3 BUSINESSES SERVICING VISITATION TO THE MARINE PARK

3.1 CONSULTATION

3.1.1 OVERVIEW

There were 7 face to face consultations and 2 phone discussions during the survey period. These discussions were held with Marine Parks Authority Management, members of the local advisory committee, key local Chambers of Commerce and local business owners.

Jervis Bay Marine Park is currently undergoing a public submission phase of their zoning plan review which has consumed much focus for both Marine Park management and the local community.

3.1.2 DETAILS OF LOCAL ORGANISATIONS CONTACTED

The local tourism organisation Shoalhaven Tourism has over 800 members to which the survey will be distributed. Members include accommodation providers, tourist activity operators and local services. The Jervis Bay region more specifically also has two tourism networks which have upward of 70 members.

Huskisson Chamber of Commerce operates within the local Jervis Bay area and has 12 regular members.

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.

3.2 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. As with other regions, 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.

Stakeholders interviewed perceived that most businesses in the area would not readily identify themselves as having a link to the marine park. Businesses holding a permit were the exception to this. They noted that many local businesses such as restaurants or cafes do not always perceive they are a part of the local tourism industry.

With only one exception, 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 that most of the stakeholders involved in the consultation were linked to the tourism industry.

3.3 PERMIT HOLDERS

There are 31 permit holders in the Jervis Bay Marine Park. Permits are mainly held by boating related businesses, and consist of the following business types:

- charter fishing
- scuba diving and snorkelling tours
- marine mammal watching
- 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).

3.5 KEY THEMES ARISING FROM CONSULTATION

In speaking with members of the key communities servicing the Marine Park key themes discussed were:

- community was involved in much debate through the zoning plan consultation and implementation;
- stakeholders interviewed were generally accepting of the concept of the Marine Park, and can relate to the long term benefits of the park in protecting a key attribute of the region. They noted that in time, the Marine Park will in time attract visitors that are aware of the value of natural attributes;
- stakeholders identified opportunities for the MPA to increase the promotion of the attributes of the park, and increase efforts to increase awareness among visitors. They perceive that the current levels of awareness of visitors to the region are not high;
- data about the MPA and information on research success is difficult to get access to. The MPA could do a better job at sharing information beyond the Advisory Committee. The results of research, and the key statistics collected from permit holders are examples of this;

- MPA could be more aware of the interests of local businesses. Taking a more proactive role in developing relationships with local businesses - particularly on an informal level would assist in increased understanding of both parties;
- Developing a presence in the town at key local events and major tourism weekends are examples of proactive steps that the MPA could take; and
- MPA could increase the signage around the park to better inform residents and tourists alike.

4 SURVEY OUTCOMES

4.1 OVERVIEW OF RESPONSES

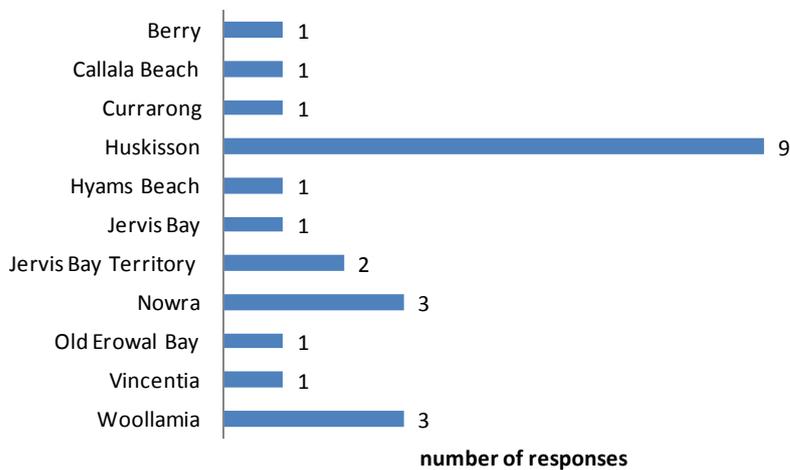
There have been a total of 25 responses to the Jervis Bay online survey. Survey responses covered many business types approached as described in Figure 4.

4.2 ABOUT THE BUSINESS

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, Huskisson, Vincentia and Nowra accounted for 13 responses or 54% of responses.

Figure 2 Location of businesses responding to the survey.

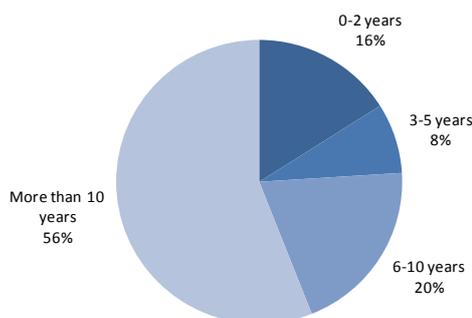


Note: Number of responses = 24.

4.2.2 LENGTH OF BUSINESS OPERATION

Over half of the businesses responding to the survey have been operating for more than 10 years which is consistent with other Marine Park results. The breakdown of responses is illustrated in Figure 3.

Figure 3 Length of business operation

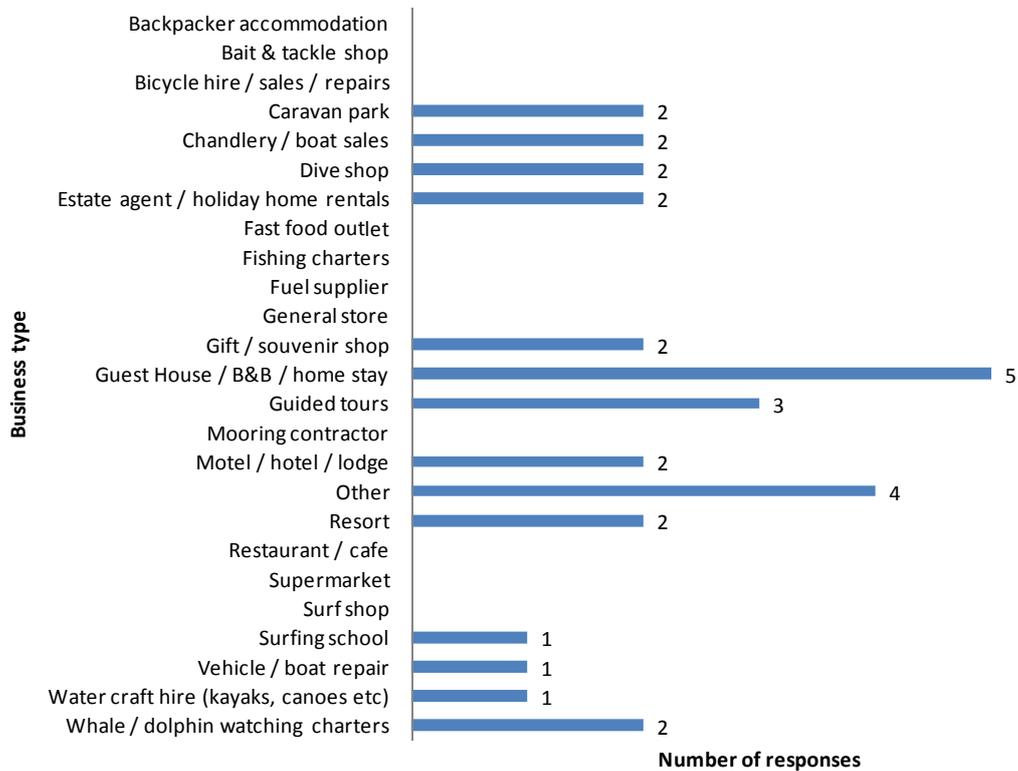


Note: number of responses 25.

4.2.3 BUSINESS TYPE

This question as illustrated in Figure 4 shows a broad range of response from the business types identified. Responses from marine related industries operating on the Park itself or servicing operators on the Park were well represented, as well as strong levels of response from accommodation providers stores also.

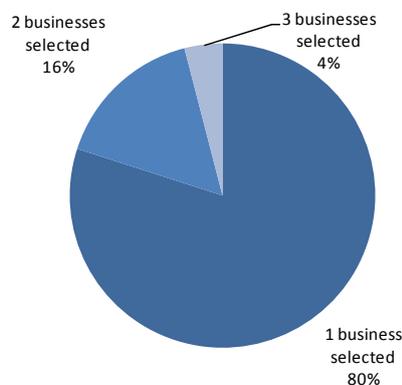
Figure 4 Summary of business responses



Note number of responses 25.

This question provided the opportunity to select more than one business type, 80% of respondents chose one business type.

Figure 5 Number of businesses selected

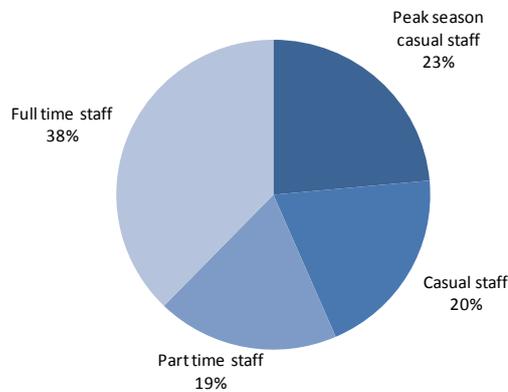


Note number of responses 25.

4.2.4 NUMBER OF STAFF EMPLOYED

Across the 21 businesses who responded to this question, there are 191 staff employed. The breakdown between types of employment is illustrated in Figure 6.

Figure 6 Employment by tenure



Note number of responses 21.

4.2.5 APPROXIMATE ANNUAL TURNOVER

The annual turnover of businesses who responded to the survey indicates that small businesses dominate those that identify with the Park. Forty eight percent of respondents stated their turnover as less than \$200,000 (Table 3).

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
Number of responses	10	5	2	3	1
%	48%	24%	10%	14%	5%

Note number of responses 21.

4.2.6 SEASONALITY OF BUSINESS

Of the responses to whether businesses experienced a peak season 71% of responses indicated they had a peak season and an off-peak season.

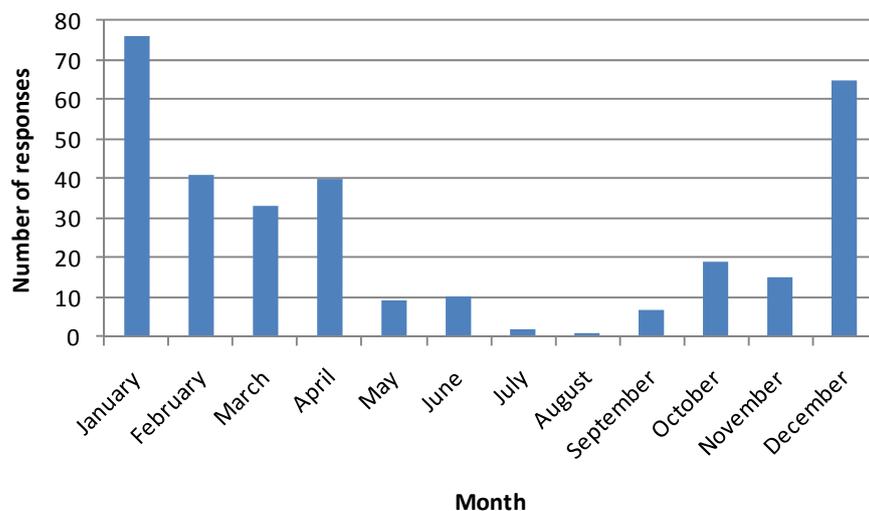
Table 4 Responses to seasonality

Business is pretty even year round	We have a peak season and an off-peak season
7	17

Note number of responses 24.

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 18.

The whale watching season from June to November was mentioned both in the online responses and during face to face consultation as a growing market that attracted visitors to the region during the quiet winter months.

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.

Table 5 Customer type (residency)

	0-20%	21-40%	41-60%	61-80%	81-100%	No Response	Total
Visitors or Tourists	8%	8%	20%	20%	36%	8%	100%
Part-time residents	24%	16%	8%	4%	0%	48%	100%
Permanent residents	28%	20%	16%	0%	0%	36%	100%

Note number of responses 23.

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 a proportion of customers who fit into each of these categories.

Table 6 Customer type (frequency)

	None of my customers	Most of my customers	Some of my customers	All of my customers
One - off customers		10	11	
Occasional customers		5	13	
Regular customers	2	14	2	

Note number of responses 24.

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 answers responses in Table 7 show at least some of the respondents customers were from each of the categories.

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		2	10	3
A weekend	2	12	6	
A short term holiday	1	2	15	
A medium - long term holiday			6	7

Note number of responses 21.

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. The online survey results are listed in Table 8. This indicates that customers are aware of the Marine Park and seek information.

Table 8 Customers enquiring about the Marine Park

Most of the time	Some of the time	Rarely	Not at all
5	12	4	3

Note number of responses 24.

4.4 BUSINESS LINKS TO THE MARINE PARK

4.4.1 IMPORTANCE OF THE MARINE PARK FOR BUSINESS

Businesses were asked to rate the importance of the Marine Park to their business. Table 9 outlines 83% 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	2	9	9	4

Note: Number of responses 24.

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 there is a considerable proportion (39%) of respondents who believe that the Marine Park has had a highly positive impact on their business.

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	9	4	8		1	1
%	39%	17%	35%	0%	4%	4%

Note number of responses 23.

There were few responses to the open ended section to this question, these included:

- “it could be higher if the park had a more visible interaction with local businesses and their customers. We spend a lot of time promoting the Park through our business”.
- “our customers are choosing to fish elsewhere or not fish - so generally trade has been down”.

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 businesses in the town which produced a similar balance between positive and negative impacts as in when discussing their own businesses.

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	8	7	5			2
%	36%	32%	23%	0%	0%	9%

Note number of responses 22.

4.4.4 BUSINESS USE OF ATTRIBUTES OF THE MARINE PARK

This was an open ended question that received 16 responses, responses have been aggregated into key themes, 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	8
Promote the park verbally to visitors	2
No	4
Other	2

Note number of responses 16.

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	16	67%
Some of the time	6	25%
No	2	8%

Note number of responses 24.

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. A selection of responses is provided in Table 14.

Table 14 Verbatim responses - visitor awareness

Verbatim Responses
Spend more time informing us of activities in the park. Work on some joint activities with us like our school programs
The greatest impact that the Marine Park could have on the future viability and health of Jervis Bay is to stand with the community and strongly object to the wanton over-development that the Shoalhaven Council is allowing on the shores of the Bay
Concerted advertising and reminding visitors that Huskisson is the hub for visitors in the area
Promote the park as a Tourist Destination
Keep the beaches clean and areas available to local fishing businesses
By supplying more relevant brochures, handouts and in particular glossy inserts for our room compendiums
separate recreational fishing areas
Sponsoring guided tours
Posters of booklets
Have a presence in the park areas in the busy times of the year (long weekends, summer holidays)
Better information about zones would be useful (e.g. GPS coordinates)

Note: number of responses 14 including a "na".

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
Establish a positive presence in the community	5
Improved promotional tools (including brochures, signs, DVD)	7
Education programs and further information about scientific results provided to the community	1
Allow a marina in the community	2
Other	1

Note number of responses 16.

5 BUSINESSES SERVICING MANAGEMENT OF THE MARINE PARK

5.1 OVERVIEW OF MPA MANAGEMENT

Jervis Bay MPA management is based in Huskisson NSW. There are 5 permanent full time staff, 1 temporary full time and 1 part time staff member. They also source a research casual locally for various projects.

5.2 MPA EXPENDITURE

The MPA operate with both contracted and uncontracted local suppliers. Total local expenditure is approximately \$136,417 per annum (based on figures provided for 2009/10). This operational expenditure is broken down in the below table.

Of major assets owned by the MPA there are 3 watercraft that have been purchased since the Marine Park was declared at a total cost of approximately \$200,000. Vehicles are leased at a cost of approximately \$29,000.

Table 16 Summary of MPA activities and expenditure

Operational costs	Cost	Contract (Y/N)	Percentage Local
Fuel	\$12,251	n	95%
Boat maintenance and service	\$9,000	n	100%
Vehicle maintenance and service	\$1,200	n	100%
Dive equipment and service	\$5,000	n	100%
Chandlery	\$2,000	n	100%
Maintenance of buoys and signage	\$26,000	Yes	100%
Cleaning	\$3,492	Yes	100%
Advertising & Printing	\$15,855	n	75%
Catering	\$1,260	n	100%
Office supplies	\$6,940	n	100%
Utilities	\$7,198	Yes	0%
Temporary accommodation			
Vehicle lease	\$28,798	Yes	100%
Depot rental	\$22,000	Yes	100%
Total	\$140,994		

6 CONCLUSIONS

6.1 THE JERVIS BAY 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.

With an estimated \$471 million spent per annum on tourism and over 12% of employment in the accommodation and food sector, the Shoalhaven region has a strong reliance on tourism and visitation to the area. The beach, an attraction for 802,000 visitors per annum is a recognised asset in the Jervis Bay area and one which business owners are eager to protect.

6.2 BUSINESSES AND SURVEY RESULTS

There have been a total of 25 responses to the Jervis Bay online survey. Responses were received from communities surrounding the Marine Park. The key communities identified as areas of focus, Huskisson, Vincentia and Nowra accounted for 13 responses or 54% of responses.

Forty eight percent of respondents stated their turnover as less than \$200,000 indicating that those businesses that identify that they are linked to the park are generally small businesses.

A high level of respondents indicated the Marine Park was important to their business (83% selecting extremely important, very important or somewhat important).

Through the survey and the consultation regard the Marine Park a number of points could be made. These include:

- support for the long term protection of the marine environment, and the environmental attributes of the region that attract visitors was strong;
- the fear of development restrictions and the negative impact it may have on tourism and facilities in the area was raised; and
- there was broad support for the Marine Park as an appropriate method of protecting the environment.

6.3 MARINE PARK EXPENDITURE

Jervis Bay MPA management is based in Huskisson NSW. There are 5 permanent full time staff, 1 temporary full time and 1 part time staff member. They also source a research casual locally for various projects.

The MPA in Jervis 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 \$136,417 per annum.

6.4 FUTURE OPPORTUNITIES

There was a recurring message that involved the MPA to actively establish a more positive and prominent position in the community. This would assist the broader population becoming increasingly informed about the Park. Examples of specific actions included the presence of the MPA staff at community events and during peak seasons to aide in the education of visitors to the community.

Similar to other regions surrounding NSW Marine Parks businesses are eager to better understand the attributes that will assist to promote their business interests. Growth of community and visitor education about the benefits and results of the Marine Park research is integral in growing opportunity for business.

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

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

TRA (2007) Shoalhaven Visitor Profile and Satisfaction Report.

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

APPENDIX 1 VERBATIM RESPONSES

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).

- just a mention that Jervis bay is a marine park in our description of where we operate.
- photographs of paddlers on the bay, photos of marine life in the bay.
- only that we are situated on a Marine park and we have ask the marine park personnel to talk to our school programs. This has been done without a representative from the business there as requested by the Marine Park which is a shame in my opinion.
- our museum is physically located on the shores of the Bay and tells its story. It is the pristine beauty of the Bay/Marine Park which draws people to this area.
- refer to the previous detail about the in-house video of Jervis Bay.
- marketing materials.
- I personally spend 15-20 minutes with most new arrivals outlining all the wonderful things that there are to see and do in the area. This encompasses the Booderee National Park, the Marine Park and the general area.
- yes , we tell our Customers we are in the Middle of a Jervis Bay Marine Park
- advertising, surveying,
- we mention in blurb as this a valid significant point related to the ongoing nature of the area
- yes. WE use it in marketing and positioning our business and our region for whale watching.
- yes we use it in marketing and advertising.

SUGGESTED INITIATIVES FOR THE MPA

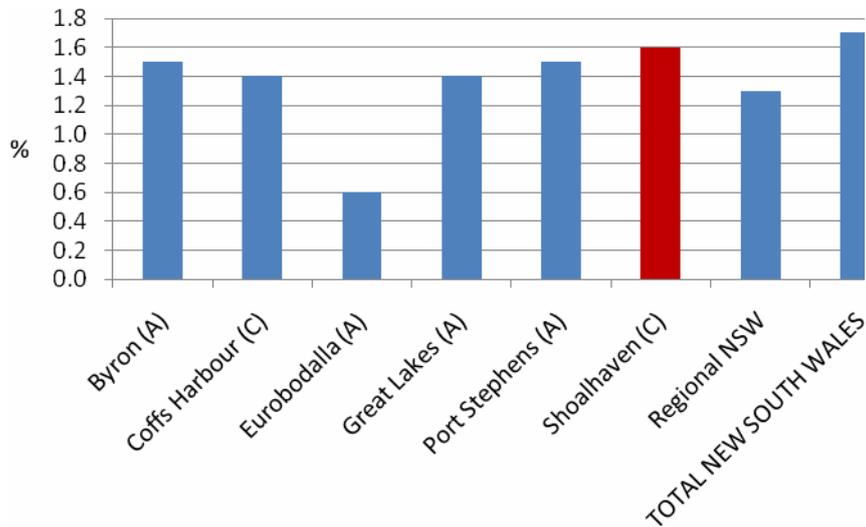
If you have other suggestions for initiatives that you think the Marine Parks Authority could implement to better support local businesses, please describe below.

- a marina at Huskisson would be the best thing that could happen in this area. We feel it would be great for Jervis Bay.
- a bigger positive presence through an information centre in Huskisson and promotional material in the Tourist information centres. Information collating projects companies could assist with and even get their customers to help. People who love this environment like to help. Please remove the signs from the middle of Chinaman's beach and others and set them back on the rocks.
- signs which are easier for the public to read and understand.

- the marine park should be a visible member of the whole community .. get involved with the community and business organisations.
- posters & brochures to display at our property.
- advertise to the public the fact that the marine park is an important part of Jervis Bay. And promote it in the same manner as Booderee market the national park.
- supply of great brochures as we get many overseas clients.
- put local business first.
- possibly a DVD that can be shown on in-room TVs.
- create an area just for recreational fishermen within 1 km of Currarong Village.
- promoting endemic marine species.
- a Marina to protect the park and facilitate boating at the same time.
- dvds to play in guest rooms.
- be seen more in the town. Have a visual presence either on the water or in the street during busy times. Meet local businesses - walk down the main street is the best way. Forums etc for business are attended by those who see themselves as connected. A lot don't connect their business to the MP - so don't go out of their way to attend.
- better marketing of the marine park. Responding to issues / illegal activity
Improve MPA awareness of businesses and what's important to business. Better understanding of what they do and how it impacts on business (red tape).
- a lot of businesses don't realise the marine park exists or why it might be a positive. All you hear is negatives about the MPA - could take positive steps to improve relationships with recreational fishers.

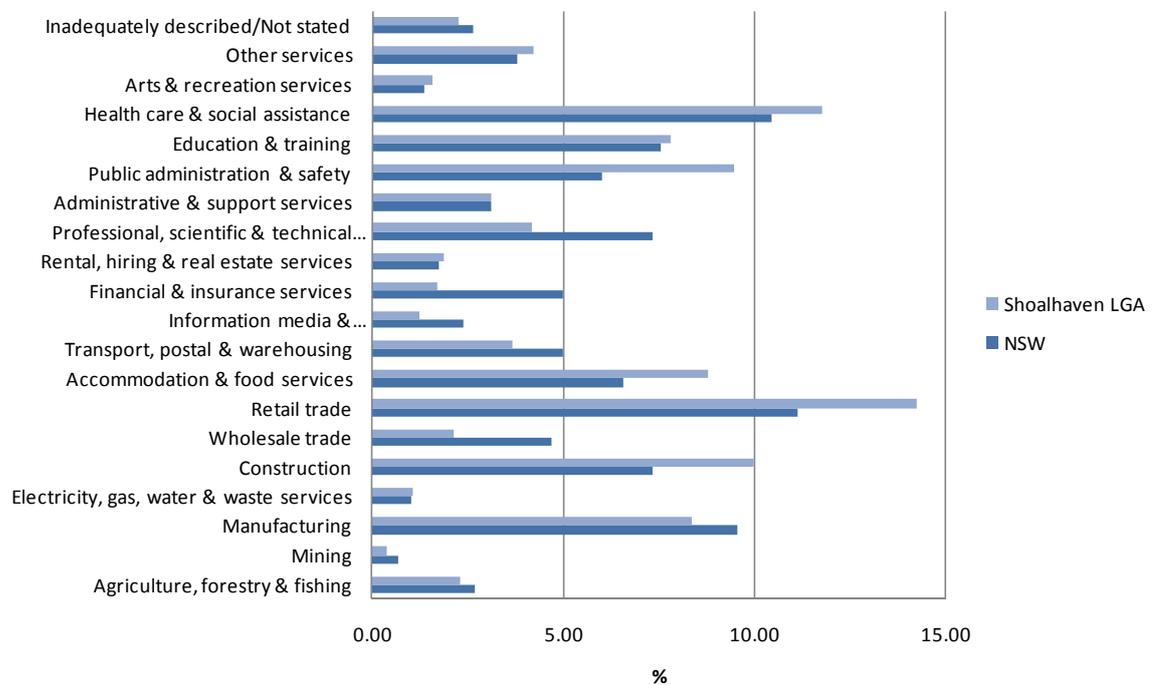
APPENDIX 2 ABS SELECTION OF LGA STATISTICS

Figure 8 Population growth 2008-2009 in Shoalhaven



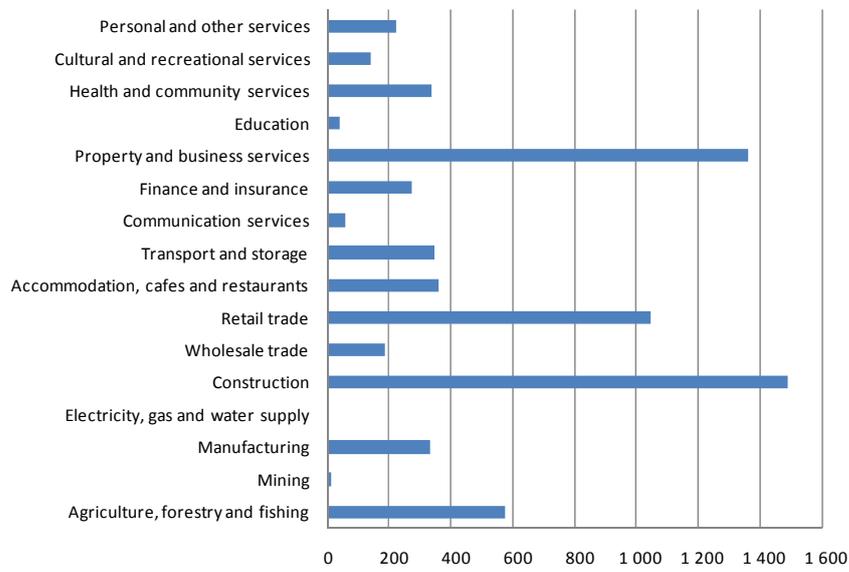
Source: ABS 2010.

Figure 9 Employment by industry within NSW and Shoalhaven



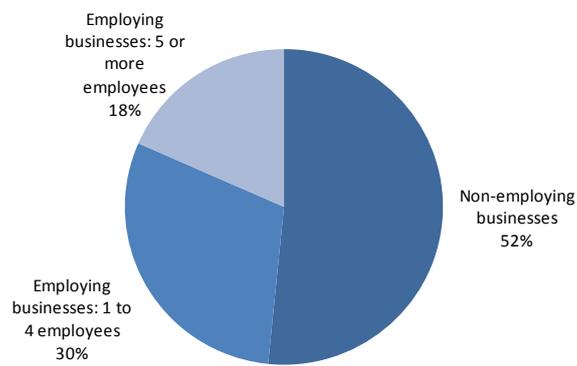
Source: ABS 2006.

Figure 10 Number of businesses by industry Shoalhaven 2007



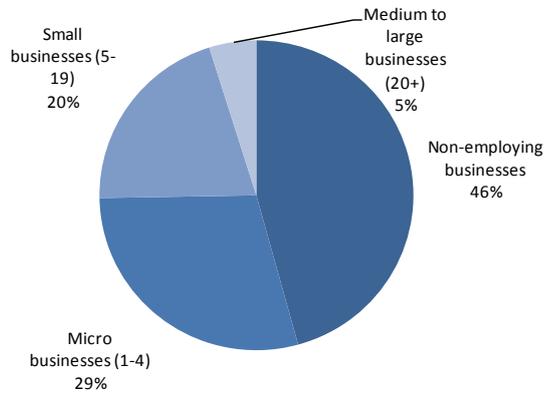
Source: ABS 2010.

Figure 11 Size of local businesses



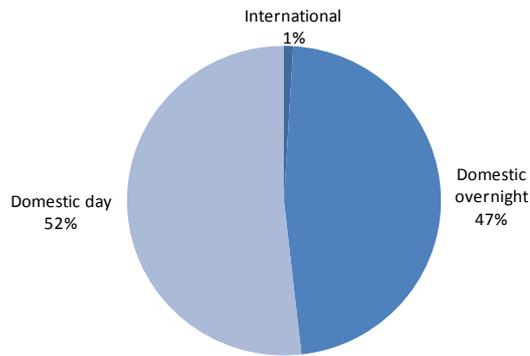
Source: ABS 2010.

Figure 12 Tourism businesses by size



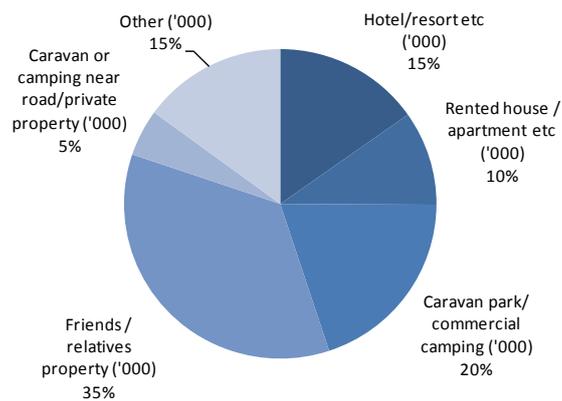
Source: TRA 2008.

Figure 13 Visitors by type



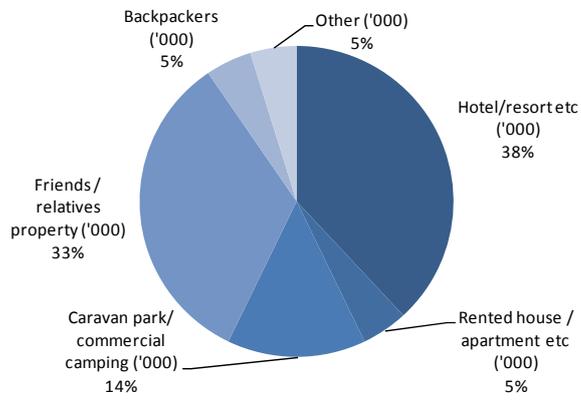
Source: TRA 2008.

Figure 14 Accommodation of domestic overnight visitors



Source: TRA 2008.

Figure 15 Accommodation of international overnight visitors



Source: TRA 2008.

APPENDIX 4 SURVEY

INTRODUCTION

Understanding the links between the Jervis Bay Marine Park and local business.

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.

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

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

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

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: