LOCAL BUSINESSES SERVICING VISITATION AND MANAGEMENT OF NSW MARINE PARKS

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Abbreviations & Acronyms

DECCW	Department of Environment, Climate Change and Water
LGA	Local Government Area
MPA	Marine Parks Authority
TRA	Tourism Research Australia

1 INTRODUCTION

1.1 PROJECT PURPOSE

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.

The objectives of the project were to:

- collect baseline data on local businesses providing goods and services associated with marine park visitation to, and marine park management of, Cape Byron, Port Stephens – Great lakes, Jervis Bay, Batemans Bay and Lord Howe Islands Marine Parks;
- collect information on local businesses providing goods and services associated with marine park visitation to the Solitary Islands Marine Park to update information already collected in a survey carried out for DECCW; and
- analyse the above survey data to identify any common themes between marine parks.

This report summarises survey results and provides an analysis of common themes across the Marine Parks.

Six companion reports have also been prepared. Each provides a summary of the economic profile of a region and the outcomes of the local survey of businesses.

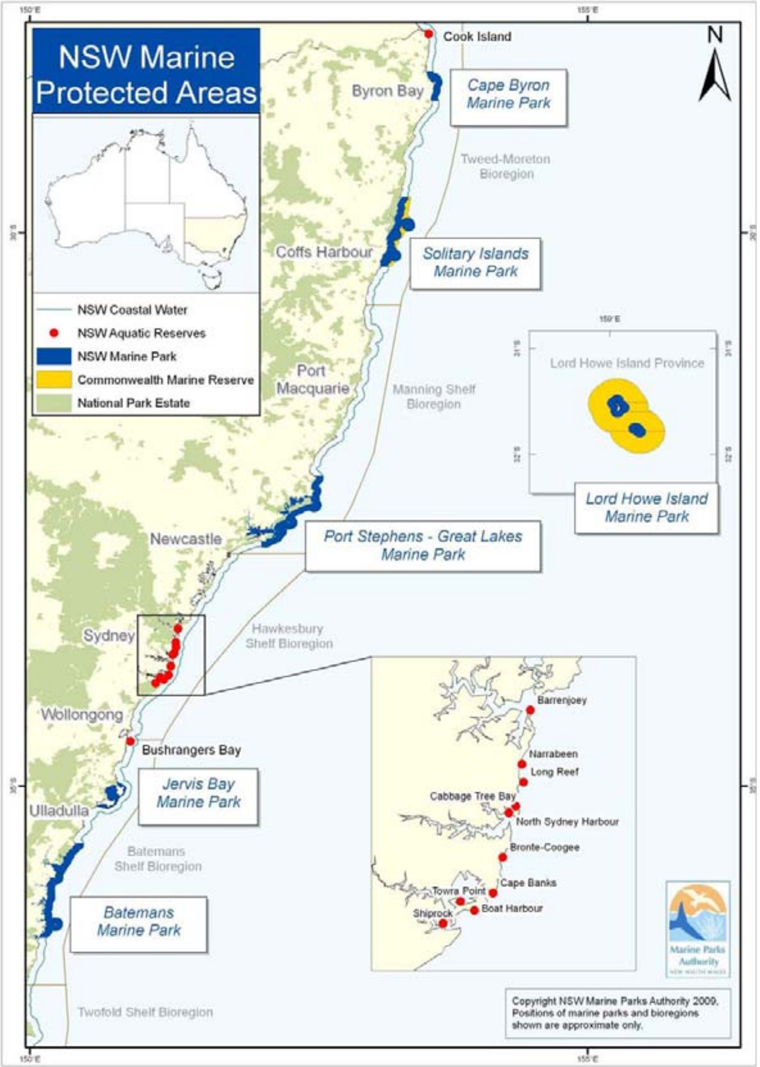
1.2 THE MARINE PARKS

The MPA aims to establish and manage a system of multiple-use marine parks along the NSW coast, the broad objectives of which are to:

- conserve marine biodiversity and maintain ecological processes; and
- provide for ecologically-sustainable use, public appreciation, education, understanding and enjoyment of the marine environment (MPA, 2008).

There are currently six Marine Parks established in NSW under the Marine Parks Act (1997); Solitary Islands, Jervis Bay, Port Stephens-Great Lakes, Lord Howe Island, Cape Byron and Batemans (Figure 1).

Figure 1 Map of the NSW Marine Parks



Source: www.mpa.gov.au (2010).

The MPA employs a variety of tools to manage the protected area, the most prominent of these are zoning plans and permits to regulate activity in Marine Parks.

1.3 PROJECT METHODOLOGY

The approach to this project has been multifaceted including desktop review of previous studies, analysis of Local Government Area (LGA) statistics in the development of profiles for each of the local areas and consultation with key stakeholders within each of the target communities.

Face to face consultation was undertaken with 49 individuals including MPA park management, local councils, chambers of commerce, tourism organisations and local advisory committee members to identify appropriate and important businesses for the survey. These key stakeholders also contributed to survey design and circulation.

Consultation was carried during June 2010 out in the five areas:

- Batemans – 4th June 2010;
- Jervis Bay – 5th June 2010;
- Cape Byron – 9th June 2010;
- Solitary Islands – 21st June 2010; and
- Port Stephens – Great Lakes – 21st June 2010.

The online survey was developed for each of the Marine Parks and was circulated to approximately 2,000 businesses across the five regions surveyed. This estimate is based on the size of mailing lists of those organisations that assisted in the distribution of the survey. The circulation was generally assisted by the involvement of the local tourism organisations and Chambers of Commerce.

During initial discussions with Lord Howe Island Marine Park Management and in consultation with DECCW, it was decided not survey businesses at Lord Howe Island. Various public inquiries were been carried out on Lord Howe Island in relation to the NSW Marine Park, the Commonwealth Marine Park and World Heritage listing. An economic profile has been developed for the Island in consultation with Marine Park management.

2 ECONOMIC PROFILE OF THE LOCAL REGIONS

2.1 POPULATION OF THE LOCAL AREAS SERVICING MARINE PARKS

The population throughout all areas associated with Marine Parks grew strongly between the 2006 and 2009 census. The highest of these is Coffs Harbour and the lowest in Eurobodalla. These estimates are based on data from Australian Bureau of Statistics Local Government Areas (LGAs) which correlate to the communities that are adjacent to or service the Marine Park.

Table 1 LGA average annual population growth

Local Government Area (LGA)	Population June 2006	Population June 2009	Average annual growth 2006-2009
Byron	30,700	32,126	1.53%
Coffs Harbour	67,932	71,677	1.81%
Eurobodalla	36,585	37,442	0.77%
Great Lakes	34,192	35,487	1.25%
Port Stephens	63,272	66,754	1.80%
Shoalhaven	92,346	95,812	1.24%
Total NSW	**6,816,087**	**7,134,421**	**1.53%**

Source: ABS 2010.

The population of the statistical local area of Lord Howe Island is 347 people (ABS 2006). Estimates for the population of Lord Howe Island are not available for 2009.

2.2 TOURISM RELATED BUSINESSES

Communities adjacent to and who service visitation to the Marine Parks are largely linked to tourism trade. Table 2 illustrates over 30% of businesses in all of the LGAs are associated with the tourism industry, higher than across NSW.

Businesses linked to tourism within the relevant LGAs represent 4.5% of the total in NSW compared to only 3.8% of total number of businesses (ABS 2010 and TRA 2008).

Table 2 Number of businesses characteristic or connected to tourism June 2007

Local Government Area	Number of businesses linked to tourism	Total Number of businesses	%
Shoalhaven	2,328	6,780	34.3%
Eurobodalla	1,044	2,964	35.2%
Port Stephens	1,572	4,428	35.5%
Great Lakes	816	2,652	30.8%
Byron	1,302	3,534	36.8%
Coffs Harbour	1,731	5,568	31.1%
NSW	195,426	679,950	28.7%

Source: TRA 2008 & ABS 2010.

2.3 TOURISM AND VISITATION

2.3.1 OVERVIEW

Each Marine Park has unique properties that influence the types of visitor and activities in each region. Proximity to major capital cities is considered a key driver of visitor types. Marine Parks regions also have varying levels of international tourists.

2.3.2 VISITOR TYPES

Table 3 highlights the importance of international visitors to the Byron region. The remaining areas have a much lower reliance on international visitors.

Table 3 Source or tourism visitors across the marine parks regions

	Shoalhaven	Eurobodalla	Port Stephens	Great Lakes	Byron	Coffs Harbour
International	1%	2%	2%	2%	13%	5%
Domestic Overnight	47%	58%	49%	55%	39%	51%
Domestic Day	52%	40%	49%	43%	48%	44%

Note: In a visitor expenditure survey undertaken in Lord Howe Island in 2010 5% of respondents were International (MPA, 2010).

The Shoalhaven area and Port Stephens are largely supported by their proximity to Sydney, which allows for much more overnight visitation (Table 4).

Table 4 Domestic overnight visitors by location ('000)

	Shoalhaven	Eurobodalla	Port Stephens	Great Lakes	Byron	Coffs Harbour
Sydney	650	178	370	297	108	268
Other NSW	255	196	185	169	75	293
ACT	72	194				
Melbourne	20	47	19			
Brisbane					128	65
Other Qld					90	74
Other	61	61	43	45	83	89
Total	1,058	676	617	511	484	789

Note: Overnight visitors per annum average of 3 years to June 2007.
Source: TRA 2008.

2.3.3 VISITOR ACTIVITIES

The activities undertaken by domestic visitors are documented in tourism profiles for LGAs across regional Australia (TRA 2008). These activities are shown in Table 5. Beach activities are important in all areas. It is interesting to note that a significant proportion of activities are not necessarily associated with attributes of Marine Parks such as shopping, visiting relatives and eating out.

Table 5 Domestic activities by LGA

	Shoal-haven	Euro-bodalla	Port Stephens	Great Lakes	Byron	Coffs Harbour
Go to beach	538,000	391,000	341,000	285,000	352,000	381,000
Eat out	453,000	347,000	357,000	267,000	305,000	458,000
Visiting friends / relatives	418,000	234,000	203,000	172,000	201,000	328,000
Just walk or drive around	321,000	254,000	247,000	178,000	164,000	271,000
Shopping	255,000	194,000	190,000	117,000	184,000	266,000
Pubs, clubs, discos etc	247,000	168,000	165,000	142,000	206,000	221,000

Source: TRA 2008.

For all international visitors to the above regions 'Going to the beach' was the top activity. Port Stephens and Coffs Harbour both had mentions of State / National Parks and in Port Stephens 44% of international visitors listed whale/dolphin watching as a key activity.

3 SURVEY DESIGN

In addition to meeting the principle objectives of the project to collect baseline data on local businesses providing goods and services associated with marine park visitation to and management of the Marine Parks, the survey design was focused to gather information from local businesses to:

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

Through initial consultation with Marine Park Management and key organisations within the area, key communities and regions were defined to focus project investigations.

Table 6 LGA and key communities associated with each Maine Park

	Batemans	Port Stephens-Great Lakes	Jervis Bay	Solitary Islands	Cape Byron
Local Government Area	Eurobodalla	Port Stephens Great Lakes	Shoalhaven	Coffs Harbour	Byron
Key Communities	Batemans Bay Moruya Narooma Bermagui	Nelson Bay Forster Hawks Nest	Huskisson Vincentia Nowra	Coffs Harbour Woolgoolga Wooli	Byron Bay Lennox Head Brunswick Heads

Initial discussions also aided in the categorisation of businesses. These categories were found to be similar throughout the Marine Parks and so were consistently represented in each of the surveys circulated. The type of commercial activities permitted within the Marine Parks was generally consistent throughout the NSW Marine Parks and were dominated by:

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

The categories for the survey were defined as:

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		

It was considered that these business types would have a close link to activities associated with each Marine Park or directly service visitors / users of a Marine Park. The level of association will vary with type of business and also the location.

The survey attempted to place each business and its association with the local Marine Park in some context by asking questions that relate to the customers of the business and their perceived link to the Marine Park in each region.

4 SURVEY RESULTS

4.1 INTRODUCTION

A total of 49 people were consulted either face to face or through phone interviews. These consultations included local business owners, local tourism organisations, Chambers of Commerce, Marine and National Park staff and local advisory committee members. The interviews provided some important feedback for survey design and key contact networks to assist in survey circulation.

Table 7 Consultation summary

	Face to face	Phone	Total
Batemans	5	3	8
Jervis Bay	7	2	9
Port Stephens – Great Lakes	7	2	9
Solitary Islands	6	2	8
Lord Howe Island		4	4
Cape Byron	10	1	11
Total	**35**	**12**	**49**

There were total of 195 survey responses received via the online links distributed through the communities servicing NSW Marine Parks. Responses by Marine Park are shown in Table 8.

Table 8 Online survey response

	Online Response
Batemans	94
Jervis Bay	25
Port Stephens – Great Lakes	37
Solitary Islands	19
Lord Howe Island	N/A
Cape Byron	20
Total	**195**

4.2 KEY THEMES ARISING FROM FACE TO FACE CONSULTATION

Throughout face to face consultation it was clear that businesses and communities were generally supportive of the protection of the marine environment which draws visitors to the area and for which a degree of ownership is felt.

Beyond this mutual appreciation and desire to protect there were concerns across the parks. The key themes that arose from discussions are outlined below.

- It is recognised that the attributes of the Marine Park are an opportunity for businesses in the region. It is not clear in many cases however, how best to take advantage of these attributes or if they are currently advertising them how to best leverage this.
- There is perception that the awareness of visitors regarding the Marine Park is generally quite low.
- There is an opportunity for the MPA to be more proactive, have a greater presence and create opportunities to interact with visitors. Suggestions included having a presence (e.g. information stand) during major weekends or festivals.
- There is an opportunity for the MPA to have a more strategic relationship with the local business and tourism organisations. These groups are responsible for promoting the area (including the destination marketing) more generally, and the MP is a key attribute of the region. Suggestions to improve this relationship included biannual meetings with key staff and representatives to discuss direction and possible joint activities.
- There is an opportunity to increase the awareness of local business about the park. Local organisations such as Chambers and Tourism organisations have an established network that could facilitate this. Inclusion of information in organisation newsletters and updates, and occasional attendance at functions and meetings could increase understanding of local business owners about the MP. They could then in turn, provide more accurate information to visitors.
- While the Marine Park may not have had a noticeable impact (positive or negative), most stakeholders indicated that they perceived the benefits of the MP would be long term, in that the key attributes of the region are protected.

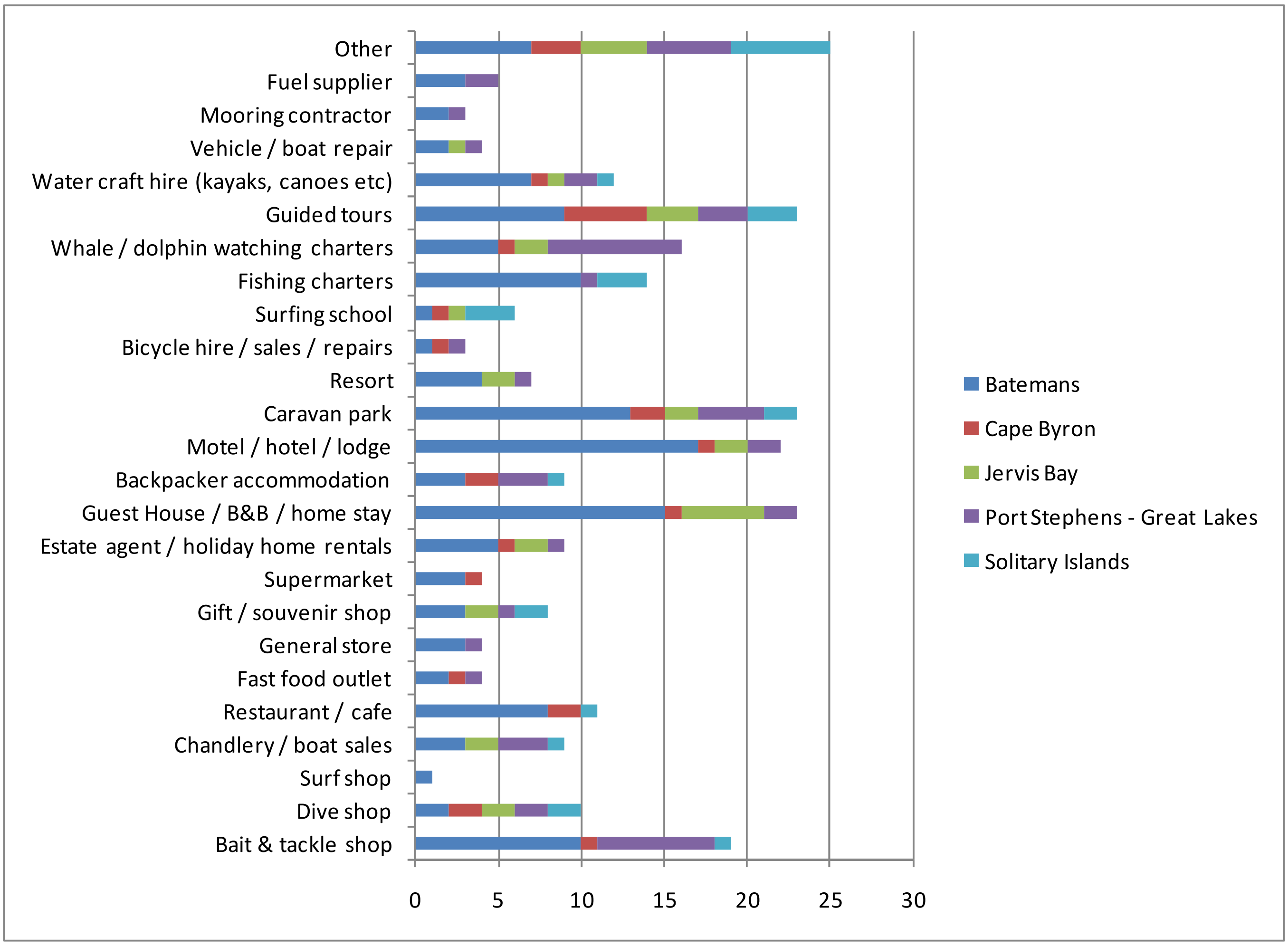
4.3 SURVEY RESPONSES

4.3.1 BUSINESSES

Business type

Survey responses have been gathered from all of the categories of business defined during the survey consultation period. Accommodation businesses (guest houses, motels and caravan parks) provided the most number of responses. Tour operators and bait and tackle shops also had a high number of responses.

Figure 2 Business types



Through the consultation process there has been significant interest from business all across all business categories involved in tourism and service delivery in the region.

Length of business operation

Sixty three percent of respondents across the surveys indicated they had been operating for more than 10 years. This was highest in the Solitary Islands (73%) and Batemans Bay (64%).

Table 9 Length of business operation

	0-2 years	3-5 years	6-10 years	more than 10 years
Batemans	9	13	10	57
Jervis Bay	4	2	5	14
Cape Byron	1	6	4	7
Port Stephens - Great Lakes	1	4	3	27
Solitary Islands		3	1	14
Grand Total	**15**	**28**	**23**	**119**

Employment

The break-up of staff was fairly balanced across the different employment types. One third of all employment was full time. The responses did indicate a high level of peak season casual and casual staff. In both Cape Byron and Batemans the highest proportion of staff of respondents were peak season casual staff.

Table 10 Break-up of staff (count of staff numbers)

	Full time	Part time	Casual	Peak season casual staff	Total
Batemans	160	79	212	196	647
Jervis Bay	102	78	65	34	279
Cape Byron	86	29	51	51	217
Port Stephens - Great Lakes	72	36	38	45	191
Solitary Islands	58	15	39	46	158
TOTAL	**478**	**237**	**405**	**372**	**1,492**
% total	**32%**	**16%**	**27%**	**25%**	

Turnover

Many of the respondents are small with a turnover of less than $200,000 (41%). As shown in Table 11 only 11% of businesses have a turnover of more than $2 million.

Table 11 Typical business turnover (count of respondents)

	$0-$200,000	$200,001-$500,000	$500,001-$1,000,000	$1,000,001-$2,000,000	>$2,000,000
Batemans	34	13	12	7	7
Cape Byron	6	1	3	4	2
Jervis Bay	10	5	2	3	1
Port Stephens - Great Lakes	5	9	5	6	4
Solitary Islands	6	1	1	1	2
All responses	61	29	23	21	16
% All responses	**41%**	**19%**	**15%**	**14%**	**11%**

Using the mid-point of each response category and $2 million for the highest category, a conservative estimate of the combined annual turnover of responding businesses is $95.25 million.

Business seasonality

During face to face discussions and through the results of the surveys there were clear peak seasons acknowledged by the majority of businesses. These peak periods coincide with school holidays, particularly in the summer months. It was recurrent through the face to face consultation that there were busy periods outside of the natural peak seasons attributed to the whale watching season that runs from July – October.

4.3.2 CUSTOMERS AND CLIENTS OF RESPONDING BUSINESSES

Businesses were asked for information about their customers in this section in order to better understand the type of visitors to the region and their awareness of the Marine Park.

Face to face consultation highlighted the dependence of the local economies on visitors and tourists for a variety of business types. Visitors comprise the majority of customers of responding businesses. Thirty-eight percent of all respondents indicated that visitors comprise more than 80% of their customers. Only 15 respondents (less than 10%) indicated that visitors comprised less than 20% of their customer base.

Responses regarding how long customers spent in the region varied, during consultation this was rationalised through discussion of the factors that influence this throughout the year, including school holidays, seasonality and festivals or events.

Consultation highlighted that requests for information about the Marine Park varied depending on the type of activity the business operated and the type of visitor. Zoning maps for recreational fishing was the most common purpose for requesting information about the Marine Park. Survey respondents perceived that visitors held a common misconception that fishing was not permitted in the park. It was noted however that in certain recreational circumstances customers who were given small amounts of information often asked for more.

4.3.3 BUSINESS LINKS TO MARINE PARKS

While many businesses consulted during face to face meetings are dependent upon the coastal waters and species protected within Marine Parks, many stakeholders indicated that a Marine Park was not yet important to their business.

It was often perceived by survey respondents that visitors would sill visit the area, regardless of whether it is a marine park. The potential long term benefits of Marine Parks in protecting the local marine environment was acknowledged by many stakeholders during the consultation.

The survey asked business of their perception of the impact of the local Marine Park on their businesses; the survey results have showed a balanced response between the positive and negative impacts.

Table 12 Self-assessment of the impact of a Marine Park on individual respondents

	Batemans	Cape Byron	Jervis Bay	Port Stephens - Great Lakes	Solitary Islands	% of total response
High impact - positive effect	6	2	9	3	3	**15%**
Medium impact - positive effect	6	6	4	9	2	**17%**
Low impact - positive effect	31	6	8	4	2	**32%**
High impact - negative effect	16	1		4	1	**14%**
Medium impact - negative effect	5		1	7	3	**10%**
Low impact - negative effect	13	1	1	2	2	**12%**

This spread of response was also evident in the following question regarding the overall impact of the local Marine Park on businesses throughout the town.

Many businesses who operate within Marine Parks have mentioned through the consultation period they use the Marine Park in their promotional materials.

During face to face surveys businesses directly linked to Marine Parks generally felt comfortable providing information to their customers regarding the Marine Park (Table 13). There was awareness among most businesses of the zoning maps produced by the MPA.

Table 13 Ability to provide information to your customers

	Yes	Some of the time	No
Batemans	37	33	9
Cape Byron	12	4	
Jervis Bay	16	6	2
Port Stephens - Great Lakes	17	7	3
Solitary Islands	12	2	2
Total	94	52	16
% of total responses	**58%**	**32%**	**10%**

The survey asked for further suggestions for initiatives that the Marine Parks Authority could implement to better support local businesses. These comments can be broadly aggregated into the following themes:

- improve education;
- conduct community forums;
- more public release of research;
- greater business consultation and education regarding regulation;
- consider sponsorship within the communities; and
- increase the public profile of the MPA.

5 MARINE PARK MANAGEMENT EXPENDITURE

MPA expenditure categories are consistent across Marine Parks. Major operational expenses are fuel, boat and vehicle maintenance and service, dive equipment, maintenance of buoys and signage. There is considerable variation in the amount of major costs between Parks.

Table 14 provides an overview of the operational expenditure provided by the Marine Park managers. Due to the higher distance to major regional centres in the Batemans and Lord Howe Island Marine Parks much of their procurement must be directed outside of the region.

Table 14 Marine Parks Authority operational expenditure in local economies

	Batemans	Cape Byron	Jervis Bay	Port Stephens - Great Lakes	Solitary Islands	Lord Howe Island
Operational Expenses	$220,000	$160,500	$140,994	$296,768	$159,482	$101,000
Local Expenditure	$106,500	$103,128	$136,417	$252,252	$158,308	$55,250
Percentage of local spend	**48%**	**64%**	**97%**	**85%**	**99%**	**55%**

Total annual operational expenditure across the Marine Parks is approximately $1.08 million. Local expenditure is estimated at 810,000 or 75% of total expenditure.

All Marine Park managers consulted were eager to support local businesses where possible. Constraints to this were evident in the availability of local suppliers or requirements to use preferred Government contractors.

The number of staff employed by MPA is fairly consistent across five of the six Marine Parks, with Lord Howe Island as the exception. Total local park management salary costs are approximately $3.0 million

Table 15 Marine Parks Authority salary expenditure

	Batemans	Jervis Bay	PS-GL	Lord Howe Island	Solitary Islands	Cape Byron	Total
Number of staff	7	6.5	6	2	8	6	**35.5**
Salaries	$585,000	$619,228	$540,000	$218,000	$615,818	$449,710	**$3,027,756**

6 SUMMARY AND CONCLUSIONS

6.1 MARINE PARK BUSINESSES

The businesses that responded to the survey have identified that they have some connection or link to the management of or visitation to Marine Parks in NSW. A total of 195 businesses responded to the survey.

These businesses included a range of enterprises, including accommodation providers, retailers (including bait & tackle, boat supplies), food service (cafes, restaurants), and providers of marine based experiences (fishing charters, diving, mammal watching).

A total of 1,492 people were employed by responding businesses. One third of these were permanent full time employees. Almost one quarter of employees were peak season casual staff, reflecting the seasonality of tourism in the surveyed regions.

More than one third of businesses that responded were small operations, with a turnover of less than $200,000 per annum. A conservative estimate of total turnover of all responding businesses is approximately $95 million.

Visitors comprise the majority of customers of responding businesses. Thirty-eight percent of respondents indicated that visitors comprise more than 80% of their customers. Only 15 respondents (less than 10%) indicated that visitors comprised less than 20% of their customer base.

Over half (58%) of all respondents indicated that they are able to provide information to customers about the Marine Park. The remainder either did not answer the question, or were unable to always provide the required information.

A total of 51 businesses indicated that the Marine Park was extremely or very important to their business. This accounts for 26% of all respondents.

More than half of all respondents (52%) indicated that the Marine Park had a positive impact on their business. An estimated 887 people are employed in these businesses on a full time, part time, casual or seasonal basis.

Just over one quarter (29%) of respondents indicated the park had had a negative impact on their business. An estimated 504 people are employed by these businesses. The remainder of respondents were either undecided, or felt the park had no negligible impact.

6.2 LOCAL EXPENDITURE BY THE MARINE PARKS AUTHORITY

Local expenditure by the MPA associated with the management of Marine Parks accounts for approximately 75% of their operational expenditure based on 2009/10 estimates. This direct operational expenditure represents $810,000 spent in the local economies adjacent to the Marine Park.

Large expenses such as vessels and vehicles are not commonly sourced within the local region due to the lack of available suppliers. Where possible however, Marine Parks management direct their expenditure to suppliers in the region.

There are between 6 and 8 FTE positions in each of the Marine Parks except Lord Howe Island which employs a staff of 2. The average wages contribution to the local economy across the 6 the Park regions is just over $500,000.

6.3 OPPORTUNITIES FOR THE MARINE PARKS AUTHORITY

Businesses and business networks have identified opportunities to improve the links between local businesses and the MPA. Business owners have expressed their keenness to better understand their local Marine Park. More than 50% indicated that their willingness to provide their contact details to the MPA to receive more information about their local park.

Chambers of Commerce and Tourism Associations who participated in these studies highlighted an opportunity to work more strategically with the MPA. Strategic opportunities included those to:

- improve the understanding of business and how businesses can use the Marine Park in their marketing;
- help businesses provide better information about the park to visitors; and
- promote the park and its attributes to visitors to the region.

These results highlight three specific opportunities that the MPA could explore. These are:

1. The survey results show that there is a proportion of the local community (i.e. business operators) that perceive the park to have a positive impact on their situation. These businesses in turn employ a considerable number of people. There is an opportunity for the MPA to increase interaction with the local business community. By increasing the understanding of these stakeholders of the park, there is an opportunity to build local support for the park.
2. Local businesses interact with visitors to the park. Local businesses provide tourists with information about a range of local activities and attractions, and through their one on one interaction, have an opportunity to directly influence visitor perception of a region. There is an opportunity to increase the ability of local businesses to provide visitors with accurate, knowledgeable and positive information about the Marine Park. The potential benefits of this for the MPA are related to improved compliance and the positive perception visitors have of the park gained through their visitation experience.
3. The survey results and stakeholder consultation indicated that in the main, individual businesses were not yet using the Marine Park in their marketing activities. There is an opportunity to collaborate with local businesses and tourism networks to promote the Marine Park and its attributes. This could be through joint activities, or by providing businesses with information to enable them to commence or improve the way they promote the park.

6.4 ARCHE OBSERVATIONS

At the conclusion of the consultation with local communities it is apparent that there is a significant opportunity to improve links with business in the local regions servicing visitation to and management of Marine Parks. The current state of these relations varies between individual parks and is somewhat driven by the local advisory committee membership and focus. The businesses surveyed through this study feel that a closer association with the MPA would increase community and visitor awareness of Marine Parks as well as increase their value to local economies over time.

The lack of an overarching strategy for interactions and communication with local businesses has lead to varying levels of community and business engagement across the six Marine Parks.

There is an opportunity to discuss the strategic objectives associated with business engagement across the Marine Park areas as a whole. Any such strategy should then be tailored to each Marine Park depending on local advisory committee inputs and upon the opportunities available in each region.

In exploring these opportunities considerations should be given to:

- The use of established networks to facilitate interaction with local businesses. With limited exception, local Chambers of Commerce and Tourism Associations are professional organisations that connect to a large number of businesses. These organisations are able to facilitate interaction through a range of channels including forums, newsletters and email updates.
- Ensuring that interactions are valuable to both parties (MPA and the business community). MPA should consider the skills and level of resourcing required to establish and maintain relationships. An understanding of the tourism sector and small business environment are two key skills required.

7 REFERENCES

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8 APPENDIX 1 SURVEY

8.1 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.

8.2 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

8.3 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

8.4 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

8.5 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:

9 APPENDIX 2 ASSISTING ORGANISATIONS

Organisation	Number of members
Great Lakes Tourism	240
Port Stephens Tourism	260
Myall Coast Chamber of Commerce & Tourism (Hawks Nest / Tea Gardens)	55 (though not all active)
Byron United	300
Brunswick Heads Chamber of Commerce	80
Coffs Coast Tourism	280
Coffs Harbour Chamber of Commerce	120 active
Eurobodalla Coast Tourism	300
Narooma Chamber of Commerce	150
Moruya Chamber of Commerce	
Batemans Bay Chamber of Commerce	
Bermagui Chamber of Commerce	
Jervis Bay Tourism	75
Huskisson Chamber of Commerce	12
Shoalhaven Tourism	800

10 APPENDIX 3 EXPENDITURE SUMMARY

Cost	Batemans	Jervis Bay	Port Stephens - Great Lakes	Lord Howe Island	Solitary Islands	Cape Byron	Total
Fuel	$25,000.00	$12,251.00	$28,998.00	$11,000.00	$11,675.00	$4,642.00	$93,566.00
Boat maintenance and service	$5,000.00	$9,000.00	$19,850.00	$7,000.00	$7,035.00	$2,038.00	$49,923.00
Vehicle maintenance and service	$5,000.00	$1,200.00	$29,870.00	$1,000.00	$9,488.00	$3,218.00	$49,776.00
Dive equipment and service	$3,000.00	$5,000.00	$2,750.00	$3,000.00	$3,137.00	$3,499.00	$20,386.00
Chandlery/Uniforms	$20,000.00	$2,000.00	$5,000.00	$4,000.00	$5,390.00	$1,791.00	$38,181.00
Maintenance of buoys and signage	$20,000.00	$26,000.00	$5,000.00	$3,000.00	$82,520.00	$8,603.00	$145,123.00
Cleaning/Gardening	$10,000.00	$3,492.00	$2,000.00	nil	$4,622.00	$4,784.00	$24,898.00
Advertising & Printing	$10,000.00	$15,855.00	$15,500.00	$14,000.00	$3,913.00	$15,482.00	$74,750.00
Catering	$1,000.00	$1,260.00	$500.00	$1,500.00	$978.00	$1,478.00	$6,716.00
Office supplies	$6,000.00	$6,940.00	$17,300.00	$2,500.00	$2,730.00	$5,060.00	$40,530.00
Utilities	$12,000.00	$7,198.00	$14,500.00	$9,000.00	$15,405.00	$7,006.00	$65,109.00
Temporary accommodation	$0.00	$0.00	$0.00	$4,000.00	$0.00	$0.00	$4,000.00
Other	$2,000.00	$28,798.00	$0.00	$20,000.00	$1,729.00	$28,000.00	*$80,527.00*
Other	$2,000.00	$22,000.00	$5,000.00	$16,000.00	$4,200.00	$12,000.00	*$61,200.00*
Other	$30,000.00		$30,000.00	$5,000.00	$6,660.00	$6,054.00	*$77,714.00*
Other	$19,000.00		$5,000.00			$11,456.00	*$35,456.00*
Other	$25,000.00		$10,000.00			$1,989.00	*$36,989.00*
Other	$25,000.00		$500.00			$4,992.00	*$30,492.00*
Other			$105,000.00			$38,408.00	*$143,408.00*
Total	**$220,000.00**	**$140,994.00**	**$296,768.00**	**$101,000.00**	**$159,482.00**	**$160,500.00**	**$1,078,744.00**

Note: 'Other' represents categories self identified by individual Marine Parks.