

# PORT STEPHENS – GREAT LAKES MARINE PARK

## PROFILE OF LOCAL BUSINESSES

Prepared For: **The Department of Environment and Climate Change & Water**

Prepared By: **Arche Consulting Pty Ltd**

Version: **June 2010**



Arche Consulting  
T + 61 0421 274076  
Phillip Street  
Sydney NSW 2000  
[www.arche.com.au](http://www.arche.com.au)

ABN 35 131 934 337

**Disclaimer**

*This report was prepared by Arche Consulting in good faith exercising all due care and attention, but no representation or warranty, express or implied, is made as to the relevance, accuracy, completeness or fitness for purpose of this document in respect of any particular user's circumstances. Users of this document should satisfy themselves concerning its application to, and where necessary seek expert advice in respect of, their situation. The views expressed within are not necessarily the views of the Department of Environment, Climate Change and Water NSW (DECCW) and may not represent DECCW policy.*

© Copyright State of NSW and the Department of Environment, Climate Change and Water NSW

## Table of Contents

|       |   |    |
|-------|---|----|
| 1     | Introduction.....                                       | 1  |
| 1.1   | Overview.....   | 1  |
| 1.2   | The Marine Park .....                                   | 1  |
| 2     | Economic profile of the local region.....               | 3  |
| 2.1   | Overview of the local region .....                      | 3  |
| 2.1.1 | Introduction .....                                      | 3  |
| 2.1.2 | Communities of focus.....                               | 3  |
| 2.1.3 | Population of the local region.....                     | 3  |
| 2.1.4 | Employment in the local region.....                     | 3  |
| 2.1.5 | Tourism related businesses .....                        | 4  |
| 2.2   | Tourism and visitation .....                            | 4  |
| 2.2.1 | Introduction .....                                      | 4  |
| 2.2.2 | Visitor types .....                                     | 4  |
| 2.2.3 | Visitor activities .....                                | 5  |
| 3     | Businesses servicing visitation to the Marine Park..... | 6  |
| 3.1   | Consultation .....                                      | 6  |
| 3.1.1 | Overview.....   | 6  |
| 3.1.2 | Details of local organisations .....                    | 6  |
| 3.2   | Defining a visitor to the park .....                    | 7  |
| 3.3   | Permit holders .....                                    | 7  |
| 3.4   | Other businesses linked to the park .....               | 7  |
| 3.5   | Key themes arising from consultation.....               | 8  |
| 4     | Survey outcomes .....                                   | 9  |
| 4.1   | Overview of response .....                              | 9  |
| 4.2   | About the business .....                                | 9  |
| 4.2.1 | Business location .....                                 | 9  |
| 4.2.2 | Length of business operation .....                      | 10 |
| 4.2.3 | Business type.....                                      | 10 |
| 4.2.4 | Number of staff employed .....                          | 11 |
| 4.2.5 | Approximate annual turnover .....                       | 11 |
| 4.2.6 | Seasonality of business .....                           | 12 |

|       |   |    |
|-------|---|----|
| 4.3   | Customers and clients .....   | 12 |
| 4.3.1 | Residency of customers .....  | 12 |
| 4.3.2 | Regularity of customer visits .....                                       | 13 |
| 4.3.3 | Length of visit to the region .....                                       | 13 |
| 4.3.4 | Requests for information about the Marine Park .....                      | 14 |
| 4.4   | Business links to the Marine Park .....                                   | 14 |
| 4.4.1 | Importance of the Marine Park to business .....                           | 14 |
| 4.4.2 | Impact of the Marine Park on individual businesses .....                  | 15 |
| 4.4.3 | Impact of the Marine Park on local businesses .....                       | 15 |
| 4.4.4 | Business use of attributes of the Marine Park .....                       | 15 |
| 4.4.5 | Business ability to provide information about the Marine Park .....       | 16 |
| 4.4.6 | Initiatives to better support business to increase visitor awareness..... | 16 |
| 4.4.7 | Options for MPA to better support local businesses .....                  | 17 |
| 5     | Businesses servicing management of the Marine Park .....                  | 18 |
| 5.1   | Overview of MPA management .....  | 18 |
| 5.2   | MPA expenditure .....   | 18 |
| 6     | Conclusions .....   | 20 |
| 6.1   | The Port Stephens - Great Lakes region .....                              | 20 |
| 6.2   | Businesses and survey results.....  | 20 |
| 6.3   | Marine Park expenditure .....   | 20 |
| 6.4   | Future opportunities .....  | 21 |
| 7     | References .....  | 22 |
| 8     | Appendix 1 Verbatim responses .....                                       | 23 |
| 8.1   | Utilising the attributes of the Marine Park.....                          | 23 |
| 8.2   | Increasing awareness .....  | 23 |
| 8.3   | Suggested initiatives for the MPA .....                                   | 24 |
| 9     | Appendix 2 ABS LGA statistics .....                                       | 26 |
| 10    | Appendix 3 Tourism related statistics.....                                | 28 |

## Figures & Tables

|           |   |    |
|-----------|---|----|
| Table 1   | Domestic overnight visitors by location.....                              | 4  |
| Table 2   | Top visitor activities .....  | 5  |
| Table 3   | Responses to categories of turnover .....                                 | 11 |
| Table 4   | Responses to seasonality .....  | 12 |
| Table 5   | Proportion of customers by residency .....                                | 13 |
| Table 6   | Customer type (frequency) .....   | 13 |
| Table 7   | Customer length of visit to the region .....                              | 14 |
| Table 8   | Customers enquiring about the Marine Park .....                           | 14 |
| Table 9   | Importance of the Marine Park for business .....                          | 14 |
| Table 10  | Impact of the Marine park on business.....                                | 15 |
| Table 11  | Impact of the Marine Park on local businesses .....                       | 15 |
| Table 12  | Ability to provide information about the Marine Park.....                 | 16 |
| Table 13  | Aggregated responses - visitor awareness .....                            | 16 |
| Table 14  | Aggregated response - initiatives for support.....                        | 17 |
| Table 15  | Summary of local MPA activities and expenditure .....                     | 18 |
| Figure 1  | Map of the Marine Park.....   | 1  |
| Figure 2  | Location of businesses responding to the survey .....                     | 9  |
| Figure 3  | Length of business operation .....  | 10 |
| Figure 4  | Summary of business responses .....                                       | 10 |
| Figure 5  | Number of businesses selected.....  | 11 |
| Figure 6  | Business employment by tenure .....                                       | 11 |
| Figure 7  | Peak season months.....   | 12 |
| Figure 8  | Population growth 2008-2009 in Port Stephens and Great Lakes 2007 .....   | 26 |
| Figure 9  | Employment by industry within NSW, Port Stephens and Great Lakes .....    | 26 |
| Figure 10 | Number of businesses by industry Port Stephens and Great Lakes 2007 ..... | 27 |
| Figure 11 | Size of local businesses Great Lakes .....                                | 27 |
| Figure 12 | Size of local businesses Port Stephens .....                              | 27 |
| Figure 13 | Tourism businesses Port Stephens .....                                    | 28 |
| Figure 14 | Tourism businesses Great Lakes .....                                      | 28 |
| Figure 15 | Visitors by type Port Stephens .....                                      | 28 |
| Figure 16 | Visitors by type Great Lakes.....   | 29 |
| Figure 17 | Accommodation of domestic overnight visitors Port Stephens.....           | 29 |
| Figure 18 | Accommodation of domestic overnight visitors Great Lakes .....            | 29 |
| Figure 19 | Accommodation of international overnight visitors Port Stephens.....      | 30 |
| Figure 20 | Accommodation of international overnight visitors Great Lakes .....       | 30 |



# 1 INTRODUCTION

## 1.1 OVERVIEW

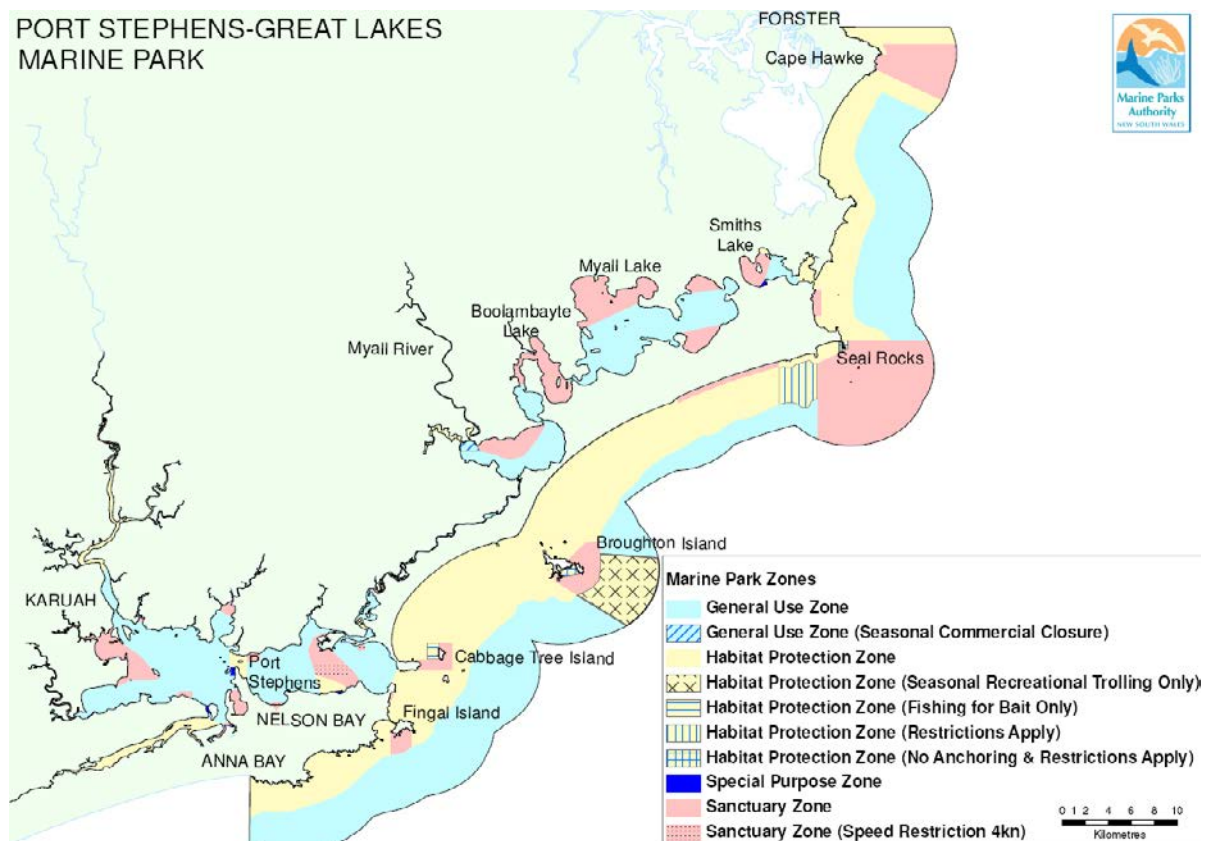
Arche Consulting was commissioned by the Department of Environment, Climate Change and Water (DECCW) on behalf of the Marine Parks Authority (MPA) to undertake surveys of local businesses servicing visitation to and management of NSW Marine Parks.

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

Port Stephens-Great Lakes Marine Park was declared a Marine Park in 2005 and extends from Cape Hawke Surf Life Saving Club near Forster south to Birubi Beach Life Saving Club at the northern end of Stockton Beach. The Park includes offshore waters to the 3 nautical mile limit of state waters, Port Stephens and the Karuah River, the Myall River, Myall and Smiths Lakes and all their creeks and tributaries to the tidal limit. The park covers an area of approximately 98 000 hectares (mpa.nsw.gov.au, 2010).

Figure 1 Map of the Marine Park



Source: [www.mpa.gov.au](http://www.mpa.gov.au)

Major activities carried out in the Marine Park include:

- beach activities, such as swimming, walking and surfing;
- boating and kayaking;
- recreational fishing;
- snorkelling;
- whale and dolphin watching and
- competition events including surf carnivals and triathlons.

There are 90 permits issued in the Port Stephens - Great Lakes Marine Park from the MPA 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 INTRODUCTION

Port Stephens - Great Lakes Marine Park falls across two Local Government Areas (LGA) - Port Stephens and Great Lakes. The following section contains an overview of key economic data for the LGAs. 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

Key communities within each of the LGAs are:

Port Stephens:

- Nelson Bay and surrounds including Anna Bay, Corlette, and Salamander Bay.

Great Lakes:

- Forster & Tuncurry;
- Smiths Lake; and
- Hawks Nest and Tea Gardens.

This section provides an overview of the key characteristics of the region.

#### 2.1.3 POPULATION OF THE LOCAL REGION

The combined population of the two LGAs in 2009 was approximately 102,241 people (abs.gov.au). Between 2008 and 2009, population grew 1.4% in Great Lakes and 1.5% in Port Stephens. These are both below the NSW average of 1.7%, but higher than the 1.3% average across areas in NSW outside of Sydney.

#### 2.1.4 EMPLOYMENT IN THE LOCAL REGION

Retail trade, construction and accommodation and food services are industries in which both Great Lakes and Port Stephens are above the total proportions for NSW. Retail trade is the largest employer in both LGAs. The major difference between the two LGAs is in the Public Administration and Safety industry where employment within the sector in Port Stephens is more than 5% than in Great Lakes.

According to ABS data in 2008, over half of all businesses in both Great Lakes and Port Stephens 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 1,572 businesses in the Port Stephens LGA were linked to tourism. Of these, 43% were “non-employing” businesses, and 9% were considered medium to large businesses employing more than 20 staff.

TRA (2008) estimated that a total of 816 businesses in the Great Lakes LGA were linked to tourism. Of these, 43% were “non-employing” businesses, and 6% were considered medium to large businesses employing more than 20 staff.

TRA estimates that visitors to Port Stephens LGA spend on average \$403 million per year and those to Great Lakes LGA spend on average \$246 million.

## 2.2 TOURISM AND VISITATION

### 2.2.1 INTRODUCTION

This section profiles the visitors to the Port Stephens and Great Lakes area including:

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

The profile is based on Tourism Research Australia’s LGA profiles which use 3-4 year rolling average data to June 2007.

Note that TRA data sets cover the entire Port Stephens and Great Lakes LGA areas.

### 2.2.2 VISITOR TYPES

On average, the Port Stephens LGA receives 1.256 million visitors per year. Visitors are predominantly domestic day and overnight travellers, with only 2% tourists being international visitors.

On average, the Great Lakes LGA receives 926,000 visitors per year. Visitors are predominantly domestic day and overnight travellers, with only 2% tourists being international visitors.

According to TRA domestic overnight visitors to both LGAs were most likely to live in Sydney (Table 1).

**Table 1 Domestic overnight visitors by location**

| Market    | Port Stephens<br>(‘000) | Great Lakes<br>(‘000) | Total Overnight<br>(‘000) |
|-----------|-------------------------|-----------------------|---------------------------|
| Sydney    | 370                     | 297                   | 667                       |
| Other NSW | 185                     | 169                   | 354                       |
| Melbourne | 19                      |                       | 19                        |

Source: TRA 2008.

### 2.2.3 VISITOR ACTIVITIES

The top activities of visitors to the Port Stephens Marine Park region are “eating out” and “going to the beach” (Table 2). In the Port Stephens LGA, 85% of international visitors, 55% of domestic overnight visitors and 35% of domestic day visitors to go to the beach. Dolphin or whale watching is experienced by 44% of all international visitors to Port Stephens LGA. In the Great Lakes LGA, 86% of international visitors, 56% of domestic overnight visitors and 28% of domestic day visitors to go to the beach.

**Table 2 Top visitor activities**

| Activity                     | Port Stephens |         |         | Great Lakes |         |         | Total     |
|------------------------------|---------------|---------|---------|-------------|---------|---------|-----------|
|                              | Intl          | Dom O/N | Dom Day | Intl        | Dom O/N | Dom Day |           |
| Go to beach                  | 23,000        | 341,000 | 215,000 | 12,000      | 285,000 | 114,000 | 990,000   |
| Eat out                      | 24,000        | 357,000 | 271,000 | 11,000      | 267,000 | 156,000 | 1,086,000 |
| Visiting friends / relatives | -             | 203,000 | 180,000 | -           | 172,000 | 143,000 | 698,000   |
| Just walk or drive around    | -             | 247,000 | 142,000 | -           | 178,000 | 94,000  | 661,000   |
| Shopping                     | 18,000        | 190,000 | -       | 7,000       | 117,000 | -       | 332,000   |
| Pubs, clubs, discos etc      | 11,000        | 165,000 | -       | 6,000       | 142,000 | -       | 324,000   |
| Whale / dolphin watching     | 12,000        | -       | -       | -           | -       | -       | 12,000    |
| National/ State Parks        | 9,000         | -       | -       | -           | -       | -       | 9,000     |

Source: TRA 2008.

### 3 BUSINESSES SERVICING VISITATION TO THE MARINE PARK

#### 3.1 CONSULTATION

##### 3.1.1 OVERVIEW

There were 5 face to face consultations and 2 phone discussions during the survey period. These discussions were held with MPA management, members of the local advisory committee, key local Chambers of Commerce and tourism organisations 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

The local business and tourism organisations interviewed all expressed their willingness to work more closely with the MPA.

| Organisation   | Number of members             | Key networking / information sharing   |
|--|-------------------------------|--|
| Great Lakes Tourism  | 240                           | Monthly newsletters<br>Email updates for important information<br>Functions<br>Columns in local paper<br>Regular radio spots |
| Port Stephens Tourism  | 260                           | Board meetings<br>E-newsletters<br>Email updates for important information   |
| Myall Coast Chamber of Commerce & Tourism (Hawks Nest / Tea Gardens) | 55<br>(though not all active) | Meetings   |

*Note: Nelson Bay Town Management is another organisation that represents businesses in the Port Stephens region. The survey was sent to this organisation during the course of the project and we are unsure if it was passed on to stakeholders.*

### 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; or
- 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.

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 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

There are 90 permits issued in the Port Stephens - Great Lakes Marine Park from the MPA for commercial and recreational activities carried out in the park. The types of businesses that hold permits include:

- charter fishing;
- marine mammal watching;
- marine based competitions and events (such as triathlons, fishing tournaments);
- snorkelling; and
- other commercial activities:
  - surf schools;
  - kayak hire and tours; and
  - boat hire.

### 3.4 OTHER BUSINESSES LINKED TO THE 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

Key themes arising from the consultation included:

- 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 (eg information stand) during major weekends or festivals;
- there was recognition of activities MPA had contributed to (eg \$150,000 tourism program) and contributions to local tourism information brochure. A key issue arising was the follow-up when the current print run of collateral ran out and the website became dated. Current information sources were viewed as good;
- 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; and
- 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.

One stakeholder noted an opportunity to develop some form of accreditation or rating for tourism operators, so they could demonstrate they were “Marine Park friendly”. This could then be used to differentiate companies.

Awareness of the MP in Hawks Nest / Tea Gardens community was perceived by stakeholders interviewed there as quite low. Local businesses involved in the Chamber of Commerce did not really perceive themselves connected to the Marine Park.

## 4 SURVEY OUTCOMES

### 4.1 OVERVIEW OF RESPONSE

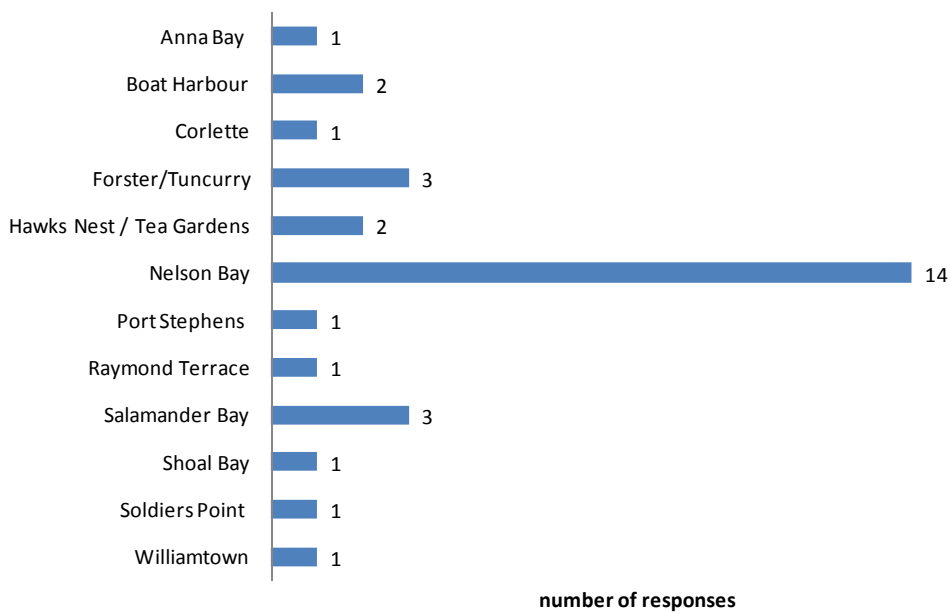
There have been a total of 37 responses to the Port Stephens - Great Lakes online survey. Online survey responses covered all business types approached in the survey which is described in Figure 4.

### 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, Nelson Bay, Forster, Hawks Nest, Tea Gardens were represented in responses. There were however no responses from Smith's Lake.

Figure 2 Location of businesses responding to the survey



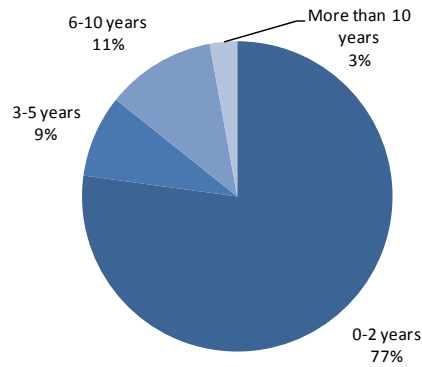
*Note: Number of responses = 31.*

---

#### 4.2.2 LENGTH OF BUSINESS OPERATION

A large percentage of businesses responding to the survey have been operating for more than 10 years. The breakdown of response is illustrated in Figure 3.

**Figure 3** Length of business operation



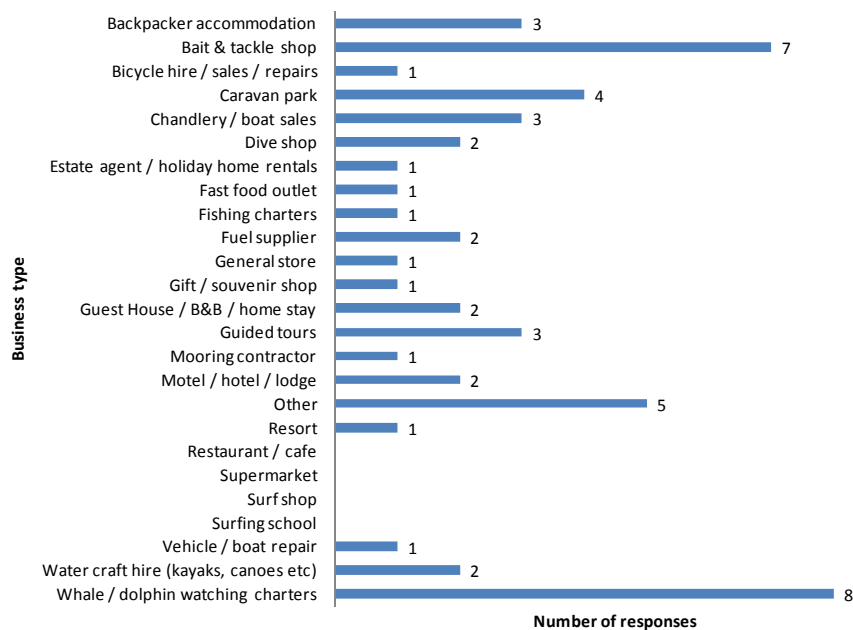
*Note: number of responses 35.*

---

#### 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 also a considerable level of response from accommodation providers and general retail stores.

**Figure 4** Summary of business responses

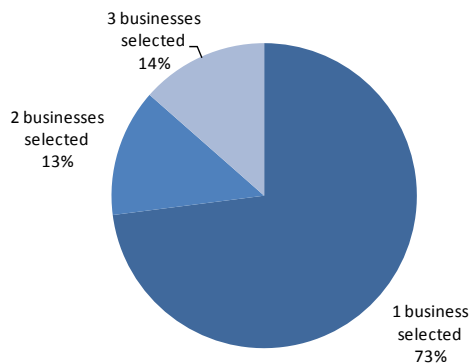


*Note number of responses 37.*



This question provided the opportunity to select more than one business type, the majority of respondents only selected the 1 business type as illustrated in Figure 5.

**Figure 5** Number of businesses selected

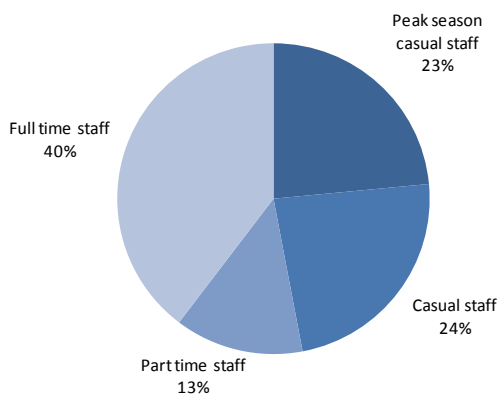


*Note number of responses 37.*

#### 4.2.4 NUMBER OF STAFF EMPLOYED

Across the 28 businesses who responded to this question, there were 217 staff employed (an average of 7.75 positions). The breakdown between types of employment is illustrated in Figure 6.

**Figure 6** Business employment by tenure



*Note number of responses 28.*

#### 4.2.5 APPROXIMATE ANNUAL TURNOVER

This multiple choice question that asked for an approximate value of individual turnover. Results in Table 3 outline a broad spread across the income brackets.

**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 | 5             | 9                   | 5                     | 6                       | 3            |
| %                   | 18%           | 32%                 | 18%                   | 21%                     | 11%          |

*Note number of responses 28.*

#### 4.2.6 SEASONALITY OF BUSINESS

Most responding businesses (93% of those who responded to this question) indicated they had a peak season and an off-peak season.

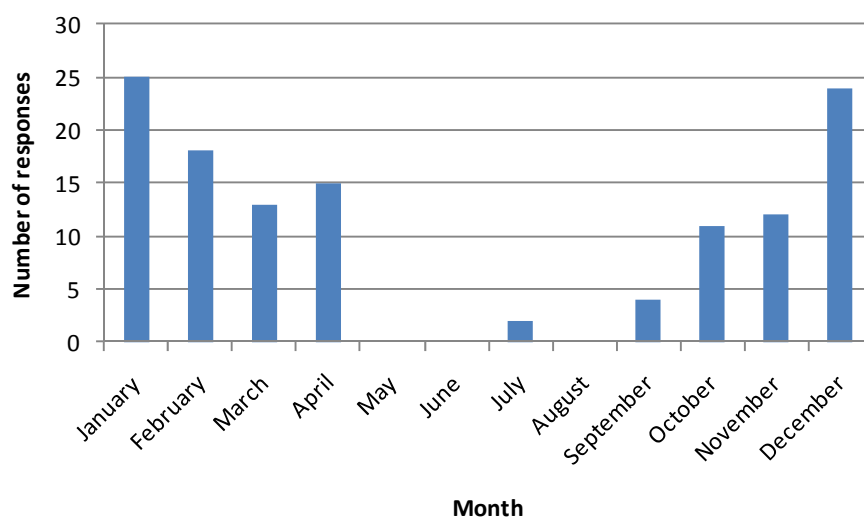
**Table 4 Responses to seasonality**

|  | Count |
|--|-------|
| Business is pretty even year round           | 2     |
| We have a peak season and an off-peak season | 26    |

*Note number of responses 28.*

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

**Figure 7 Peak season months**



*Note number of responses 25.*

### 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 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 29.*

#### 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.

**Table 6 Customer type (frequency)**

|                      | None of my customers | Most of my customers | Some of my customers | All of my customers |
|----------------------|----------------------|----------------------|----------------------|---------------------|
| One - off customers  |                      | 15                   | 12                   |                     |
| Occasional customers |                      | 7                    | 21                   |                     |
| Regular customers    | 1                    | 15                   | 11                   |                     |

*Note number of responses 29.*

#### 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                   |                     | 4                    | 13                   | 3                    |
| A weekend                    |                     | 12                   | 9                    |                      |
| A short term holiday         | 1                   | 9                    | 12                   |                      |
| A medium - long term holiday |                     | 1                    | 5                    | 13                   |

*Note number of responses 29.*

#### 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. It is apparent that businesses have been asked about the Marine Park but it does not occur as much as in other Marine Parks areas.

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

|                  | Count |
|------------------|-------|
| Most of the time | 6     |
| Some of the time | 6     |
| Rarely           | 11    |
| Not at all       | 6     |

*Note number of responses 29.*

## 4.4 BUSINESS LINKS TO THE MARINE PARK

### 4.4.1 IMPORTANCE OF THE MARINE PARK TO BUSINESS

Businesses were asked to rate the importance of the Marine Park to their business. Table 9 outlines 71% 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 | 1                   | 11             | 8                  | 8                    |

*Note: Number of responses 27.*

There were comments following this question which recognised that while the Marine Park was not critically important right now that that importance would increase into the future with the protection of the asset enhancing future business opportunity.

#### 4.4.2 IMPACT OF THE MARINE PARK ON INDIVIDUAL BUSINESSES

This question asked businesses to rate the impact of the Marine Park on individual businesses servicing visitation to or management of the Marine Park. There were three respondents who selected 2 answers, their comments regarding this indicated there were marketing positives, however also highlighted that if managed incorrectly there are public awareness and habitat issues to the detriment of business.

Responses in Table 10 show a balance between positive and negative impacts.

**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 | 3                             | 9                               | 4                            | 4                             | 7                               | 2                            |
| %                   | 10%                           | 31%                             | 14%                          | 14%                           | 24%                             | 7%                           |

*Note number of responses 26.*

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

Businesses were also 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 question 16. Again 2 respondents selected 2 choices, both positive and negative impacts.

**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                             | 9                               | 7                            | 1                             | 6                               | 4                            |
| %                   | 10%                           | 30%                             | 23%                          | 3%                            | 20%                             | 13%                          |

*Note number of responses 26.*

#### 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, verbatim responses are listed in Appendix 1.

| Aggregated Responses                            | Number of responses |
|---|---------------------|
| Used on website and through marketing materials | 8                   |
| Provide Marine Parks Authority materials        | 3                   |
| No  | 7                   |
| Other   | 1                   |

*Note number of responses 19.*

#### 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 12.

**Table 12 Ability to provide information about the Marine Park**

|                  | Count | Percentage |
|------------------|-------|------------|
| Yes              | 17    | 63%        |
| Some of the time | 7     | 26%        |
| No               | 3     | 11%        |

*Note number of responses 27.*

#### 4.4.6 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 15 responses to this question have been aggregated into key themes.

**Table 13 Aggregated responses - visitor awareness**

| Aggregated Responses   | Number of responses |
|--|---------------------|
| Provide more comprehensive maps, brochures and GPS data that also include bag and catch limit information  | 8                   |
| 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 | 2                   |
| Provide further information and detail about the research and science of the Marine Park   | 3                   |
| Other  | 2                   |

*Note number of responses 15.*

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

Businesses were asked for suggestions where the Marine Parks Authority could better support local businesses. The responses have been aggregated into key themes and listed in Table 14.

**Table 14** Aggregated response - initiatives for support

| Aggregated Response  | Number of Responses |
|--|---------------------|
| More positive and improved distribution of promotional tools (including brochures, signs, DVD)                                   | 4                   |
| Education programs and further information about scientific results provided to the community                                    | 4                   |
| Greater interaction with local business including potential forums, discussions regarding regulations and accreditation programs | 4                   |
| Other  | 1                   |

*Note number of responses 13.*

## 5 BUSINESSES SERVICING MANAGEMENT OF THE MARINE PARK

### 5.1 OVERVIEW OF MPA MANAGEMENT

Port Stephens Great Lakes MPA management is based in Nelson Bay. Declared in 2005 the Park initially employed five people. This increased to 6 full time positions in 2008. Total staff salary costs are estimated to be \$560,000 per annum (excluding on-costs).

### 5.2 MPA EXPENDITURE

The MPA 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 \$297,000 per annum.

MPA has made a number of capital purchases including the purchase of vessels, replacement of vessel motors and contribution to the cost of a floating berth shared with other agencies. This capital expenditure is in the order of \$110,000 since the part was established.

A summary of the MPA annual operational expenditure is listed in Table 15. This excludes expenditure associated with the function of committees, and fees paid to other agencies (DPI, Department of Lands). Estimates of local expenditure have not been provided for each cost category. MPA management estimate approximately 85% of operations budget is spend locally.

**Table 15 Summary of local MPA activities and expenditure**

| Operational costs                | Cost     | Contract (Y/N) | Percentage Local |
|----------------------------------|----------|----------------|------------------|
| Fuel & oil (boats)               | \$28,998 | N              |                  |
| Boat maintenance & service       | \$19,850 | N              |                  |
| Vehicle maintenance & service    | \$7,070  | N              |                  |
| Dive equipment & service         | \$2,750  | N              |                  |
| Chandlery/Uniforms               | \$5,000  | N              |                  |
| Maintenance of buoys and signage | \$5,000  | N              |                  |
| Cleaning/Gardening               | \$2,000  | N              |                  |
| Advertising & Printing           | \$15,500 | N              |                  |
| Catering                         | \$500    | N              |                  |
| Office supplies                  | \$16,300 |                |                  |
| Utilities                        | \$14,500 | N              |                  |
| Temporary accommodation          |          |                |                  |
| Security                         |          |                |                  |
| Field consumables                | 5,000    | N              |                  |
| Fees for services (research      | \$30,000 | N              |                  |



| Operational costs | Cost             | Contract (Y/N) | Percentage Local |
|-------------------|------------------|----------------|------------------|
| etc)              |                  |                |                  |
| Training          | \$6,000          | N              |                  |
| Travel expenses   | \$10,000         | N              |                  |
| Car leases        | \$22,800         | Y              |                  |
| Rent              | \$105,000        | Y              |                  |
| <b>Total</b>      | <b>\$296,768</b> |                |                  |

## 6 CONCLUSIONS

### 6.1 THE PORT STEPHENS - GREAT LAKES 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.

Visitors to Port Stephens LGA spend on average \$403 million per year and those to Great Lakes LGA spend on average \$246 million, this drives the high level of employment in accommodation and food services and retail trade. There are a many small businesses in the areas, with non-employing businesses representing over half of total businesses and 43% of tourism businesses in both LGAs.

### 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.

Most responding businesses (93% 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 portion indicating 81-100% of their customers were visitors.

It is apparent from the survey that many the businesses are asked about the Marine Park. Of responding businesses, 63% indicated that they felt able to provide information to customers about the park.

Responses about the impact of the Marine Park on both individual businesses and businesses in the town were fairly balanced across the positive and negative spectrums. Of respondents, 55% indicated a level of positive impact on their business, and 63% indicated they perceived a positive impact on businesses in their town.

### 6.3 MARINE PARK EXPENDITURE

When established in 2005 the Park initially employed 5 FTE staff. Since 2008, the MPA has 6 FTE staff, at an approximate cost of \$560,000 per annum (excluding on-costs).

The MPA in Port Stephens purchase goods and services locally through a mix of contracted suppliers (for office premises and cars) and the purchase of day to day goods with a range of local providers. Good and services purchased locally include: mooring maintenance; vehicles and vessel maintenance and running costs; dive supplies; advertising and printing.

MPA management estimate 85% of the total operations budget is spent locally. This is a total local expenditure of approximately \$250,000 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.

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 Marine Park is a key attribute of the region. This type of strategic relationship could assist the MPA to increase visitor awareness and grow opportunities for marketing for local business.

There is an opportunity to increase the awareness of local business about the park. Local organisations such as Chambers and Tourism organisations have established networks 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.

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

Australian Bureau of Statistics (2010) National Regional Profile, Port Stephens & Great Lakes, 2004-2008.

TRA (2007) Port Stephens & Great Lakes Visitor Profiles and Satisfaction Reports.

TRA (2008) Tourism Profiles for Local Government Areas in Regional Australia, City of Port Stephens and Great Lakes.

## 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).*

- yes. Include information on website, as well as in brochures.
- the park is promoted within our business with MPA material but general marketing is restricted as limited means unavailable.
- yes, marketing and day to day use of the park. It is the main reason do business with us.
- yes. We market our proximity to the MP and NP and the activities that are available to visitors in both. We utilise literature and maps produced by the MP and NP and we talk up the activities and attributes of both.
- brochures & flyers.
- marketing material at events and in brochures for council funded projects.
- only via the Port Stephens Tourism Visitors guide.
- hand out brochures.
- the fact that its here.
- it would be better if the Commercial Fishermen were not here.
- yes...the PSMPA have supplied us with excellent material promoting the PSM.
- there are non accept for Green whale/dolphin watch enterprises and Green dive operations.
- too restrictive for our business.

## 8.2 INCREASING AWARENESS

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

- provide brochure. If they are looking for more detailed information I send them to the boat shed.
- provide with zoning maps. Need better information. Maps need to be better, Sea maps could have more information, provide GPS based information.
- have better supporting material available for business that can be promoted within business and have a better understanding of basic business within the park so can be viable for the future.
- better sign-age and more people patrolling to educate rather than issue infringements.

- improve the profile - not just about fishing restrictions, but heaps of benefits for fish life.
- more compact maps indicating sanctuary zones and perhaps an overview of some of the more important regulations within the Marine Park would be useful. In particular recreational fishermen 'friendly' information would be useful to counter some of the misconceptions and negative publicity of anti-regulation interest groups would be very helpful.
- yes you shouldn't need a gps to know if you are in a fishing no go zone or not.
- education or information sessions on what the marine park is about/protecting. Info on research being done by the MPA.
- maintain brochure levels one on one briefing to business.
- better informational interpretative signs at key location.
- it would be better if the Commercial Fishermen were not here.
- keep supplying us with material. We will have over 10,000 holiday guests stay with us over the next 12 months so we are in a very good position to hand out material.
- get back to prioritising the real threats pollution, siltation and reopening wetlands etc. and stop the lock out preference deals with the greens and get real, some of us actually have a knowledge of fisheries science.
- I feel the boundaries are not properly marked and almost impossible to log on a GPS and there has been no input to the makers of GPS cards to input the exclusion zone.
- They can't.

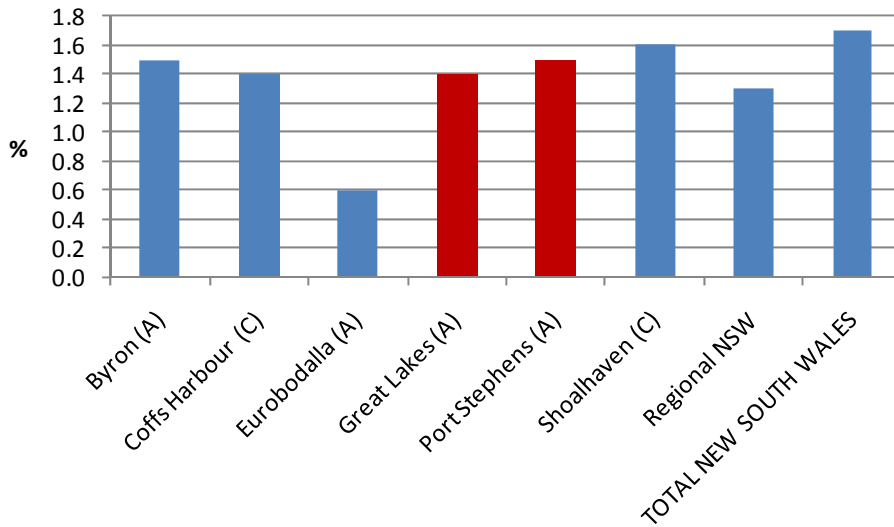
### 8.3 SUGGESTED INITIATIVES FOR THE MPA

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

- distribute more detailed maps more broadly among business community. Marine Park is not on the radar of local businesses. Many wouldn't know if existed.
- some sort of accreditation process that enables businesses to market themselves as "marine park friendly" Working more closely with local tourism organisation (Port Stephens Tourism) in a strategic way to promote the park Funding to enable MPA to have a local presence on key tourism weekends.
- a better approach to general visitors and better education.
- inside Port Stephens commercial netting should be banned as it is in Lake Macquarie.
- we are asked a lot about the various zones and we have brochures. However, these can be confusing for visitors. Simplify.

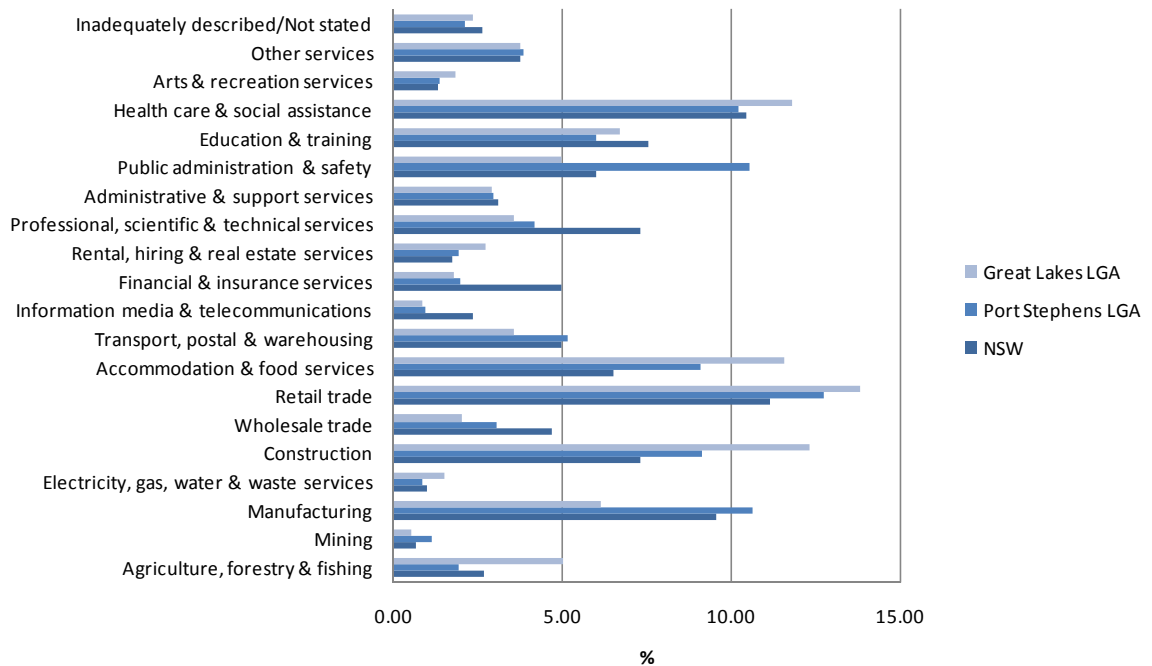
- some expenditure aimed at positive marketing the recreational fishermen (perhaps on TV fishing shows or in fishing magazines) over a sustained period would be very helpful.
- marine animal rescue and education.
- make signage clearer and easier to follow. It would be better if the Commercial Fishermen were not here.
- the PMA could advise business on a regular basis how effective the marine zoned areas have been in restoring and protecting the various marine species.
- allow access to ultra low impact practices like recreational fishing and manage the fishery and its stocks. Protect the biodiversity against real threats as already listed.
- have a one on one with key business like Marine, Motels, Hotels, Clubs, Tourism board.
- MPA only there supporting select business, ie Whale & Dolphin Watching.
- High levels of internal regulation make it difficult at times for local MPA staff to get projects and works approved. This can lead to delays.

Figure 8 Population growth 2008-2009 in Port Stephens and Great Lakes 2007



Source: ABS 2010.

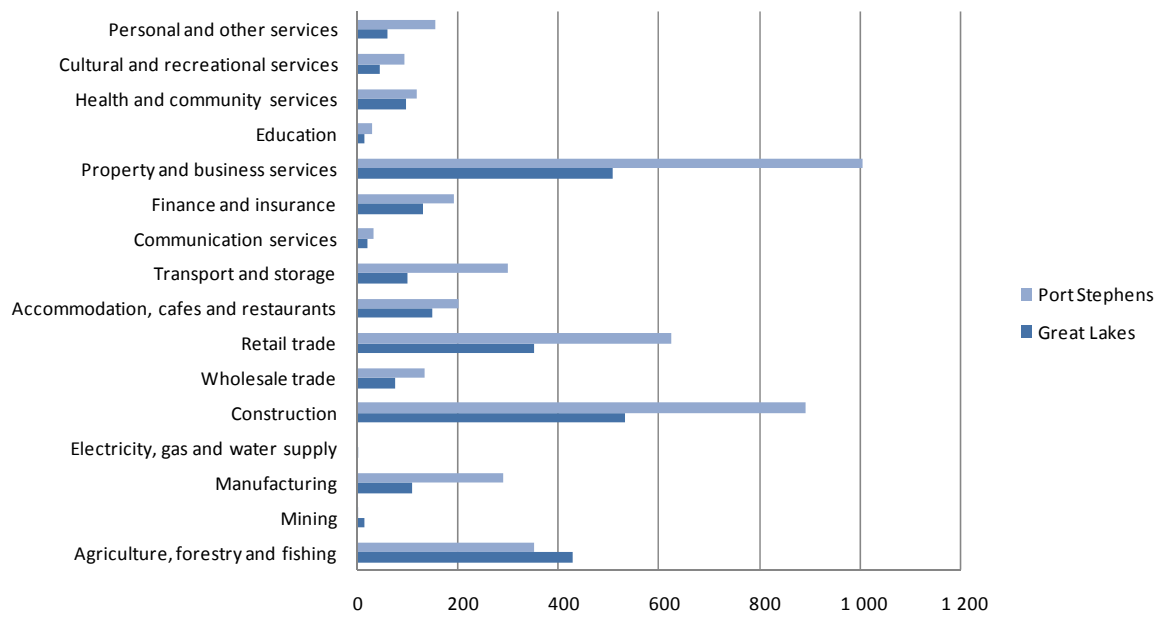
Figure 9 Employment by industry within NSW, Port Stephens and Great Lakes



Source: ABS 2006.

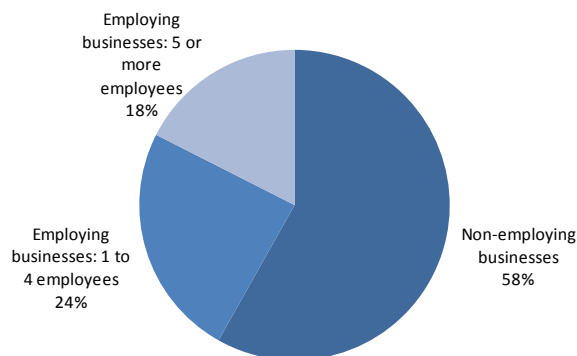


**Figure 10** Number of businesses by industry Port Stephens and Great Lakes 2007



Source: ABS 2010.

**Figure 11** Size of local businesses Great Lakes



Source: ABS 2010.

**Figure 12** Size of local businesses Port Stephens

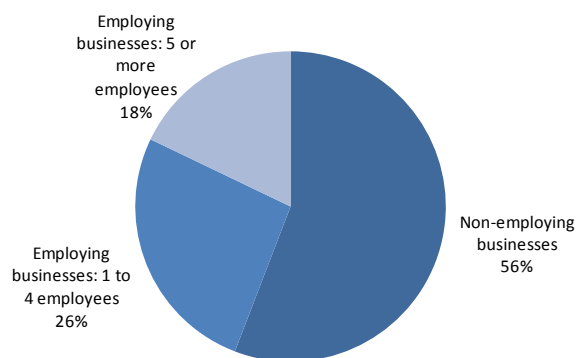
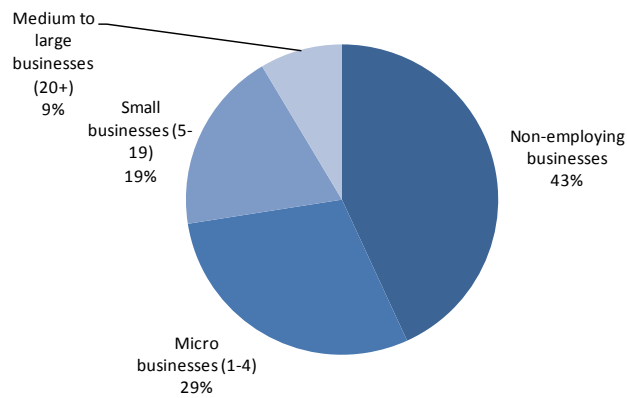
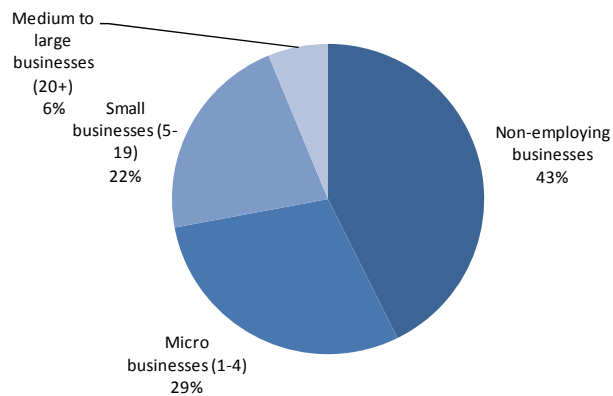


Figure 13 Tourism businesses Port Stephens



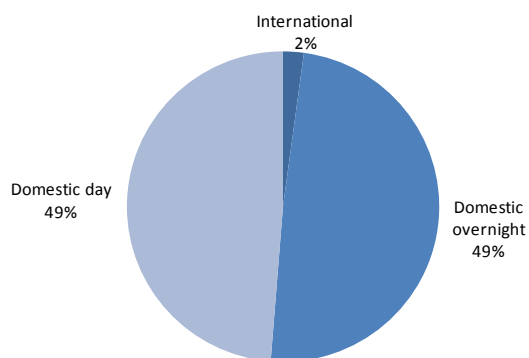
Source: TRA 2008.

Figure 14 Tourism businesses Great Lakes



Source: TRA 2008.

Figure 15 Visitors by type Port Stephens



Source: TRA 2008.

Figure 16 Visitors by type Great Lakes

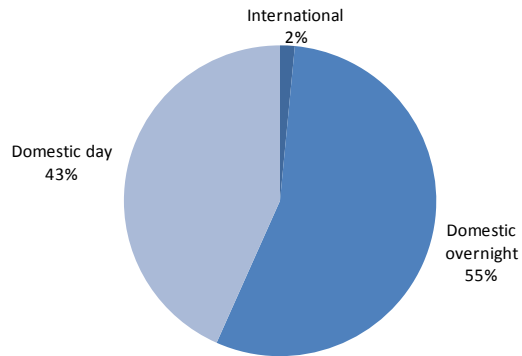
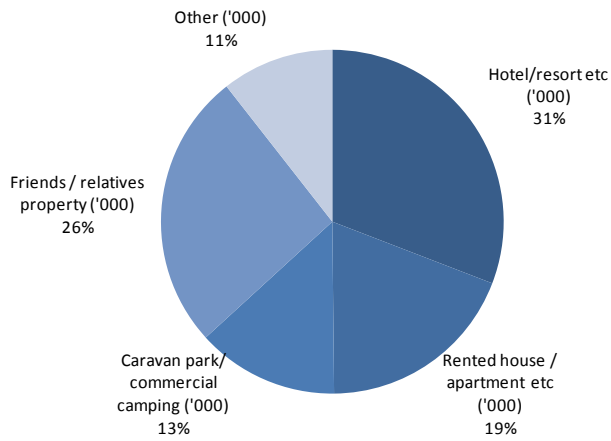


Figure 17 Accommodation of domestic overnight visitors Port Stephens



Source: TRA 2008.

Figure 18 Accommodation of domestic overnight visitors Great Lakes

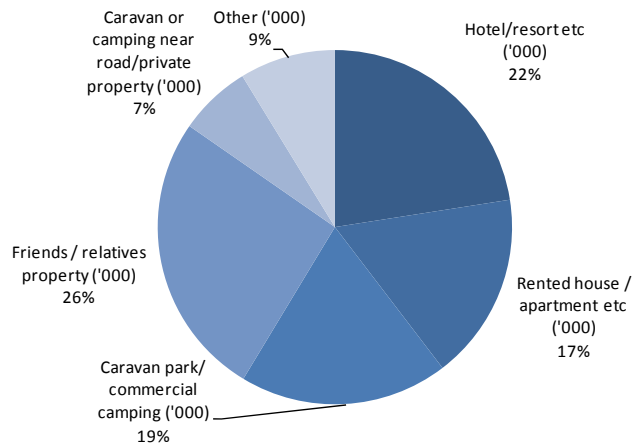
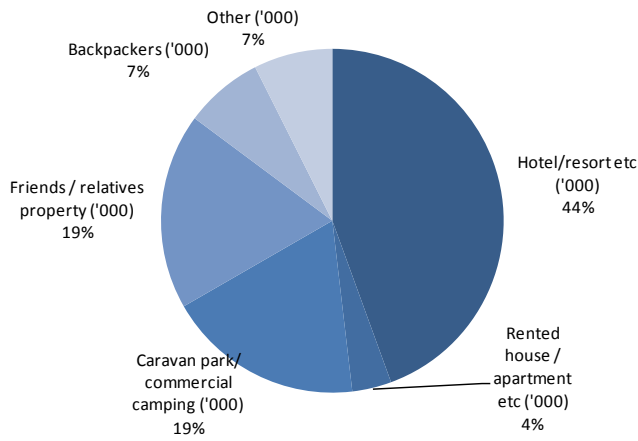
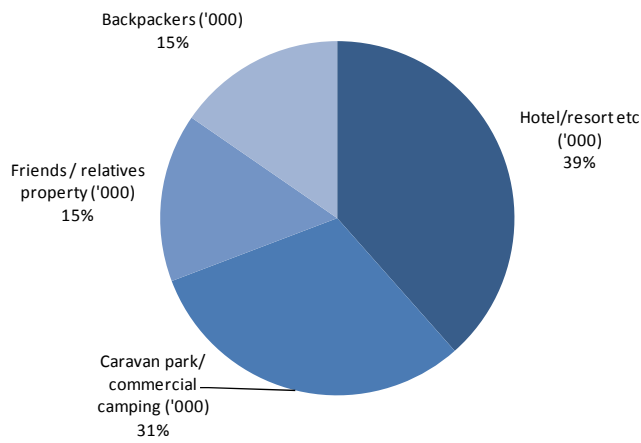


Figure 19 Accommodation of international overnight visitors Port Stephens



Source: TRA 2008.

Figure 20 Accommodation of international overnight visitors Great Lakes



Source: TRA 2008.