# SOLITARY ISLANDS MARINE PARK

# PROFILE OF LOCAL BUSINESSES

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|---|---|
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## Figures & Tables

# 1 INTRODUCTION

## 1.1 OVERVIEW

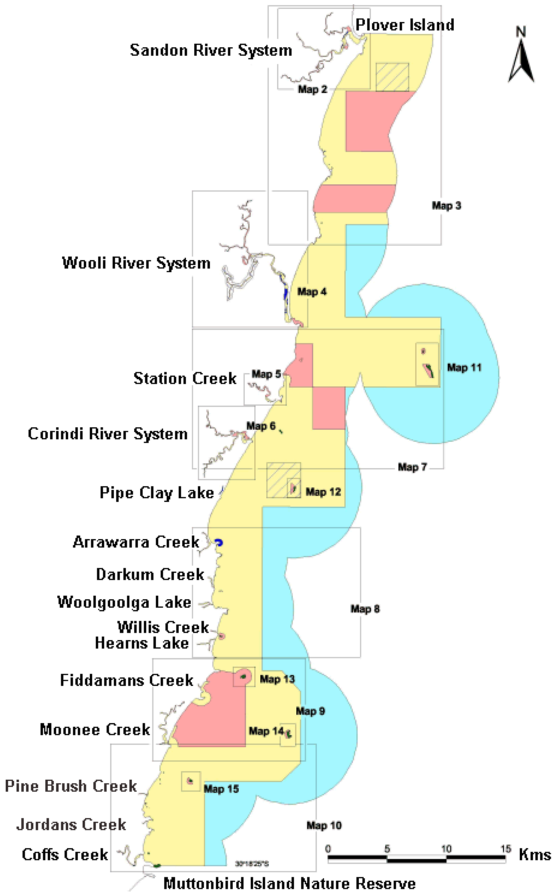
Arche Consulting was commissioned by the Department of Environment, Climate Change and Water (DECCW) on behalf of the Marine Parks Authority (MPA) to undertake surveys of local businesses servicing visitation to and management of NSW Marine Parks.

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

Solitary Islands was the first Marine Park to be declared in NSW. The Solitary Islands Marine Park stretches over 75 Km from Muttonbird Island in the south to the Sandon River and Plover Island in the north. The Marine Park incorporates estuaries to their tidal limit, foreshores to the mean high water mark and extends offshore to the 3 nautical mile state waters boundary. It covers an area of around 71 000 hectares (mpa.nsw.gov.au, 2010).

**Figure 1 Solitary Islands Marine Park**




*Source: www.mpa.nsw.gov.au.*

Major activities undertaken in the Marine Park include:

- beach activities,  swimming, walking and surfing;
- recreational fishing; and
- marine mammal watching.

There are 29 permits issued in the Solitary Islands Marine Park from the MPA for commercial and recreational activities carried out in the park.  Major types of activity for permit holders:

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

There is a local advisory committee that consults with the management of the Marine Park and consists of 12 representatives from various industry and community organisations.

The Solitary Islands Marine Park commissioned a report on the *Impact of Revised Zoning and Management of the Solitary Islands Marine Park on Local Businesses* in 2006.  This survey of local businesses provides a base from which the current study will operate in the area to update the information gathered.

# 2 ECONOMIC PROFILE OF THE LOCAL REGION

## 2.1 OVERVIEW OF THE LOCAL REGION

### 2.1.1 INTRODUCTION

Information is currently available from previous visitor and attitudinal surveys as well as socio economic and management reports documented through the zoning review process currently underway in the Solitary Islands Marine Park. Statistical data used is sourced from the Australian Bureau of Statistics (ABS) and Tourism Research Australia (TRA) and is based on the Coffs Harbour Local Government Area (LGA) within which the Marine Park is located.

### 2.1.2 COMMUNITIES OF FOCUS

Solitary Islands Marine Park is predominantly serviced by Coffs Harbour. There are smaller communities up the coast which have been included in the approach. These include:

- Woolgoolga; and
- Wooli.

All three of these communities border the Solitary Islands Marine Park. While the most northern tips of the Marine Park border the Clarence Valley LGA the major economic impact is felt in the Coffs Harbour region.

### 2.1.3 POPULATION OF THE LOCAL REGION

The population of Coffs Harbour LGA in 2009 was approximately 71,671 people (abs.gov.au). Population has grown 1.4% in 2008-2009 which is below the NSW average of 1.7%, but higher than the 1.3% average across areas outside of Sydney.

### 2.1.4 EMPLOYMENT IN THE LOCAL REGION

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

- Retail Trade (15%);
- Health Care & Social Assistance (13%);
- Accommodation & Food Services (9%).
- Education and Training (9%); and
- Construction (8%).

The region has a strong reliance on retail trade and accommodation and food services categories which are both almost five percent above the NSW average as illustrated in Figure 9.

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

### 2.1.5 TOURISM RELATED BUSINESSES

TRA (2008) estimated that a total of 1731 businesses in the Coffs Harbour local government area were linked to tourism. Of these, 41% were "non-employing" businesses, and 6% were considered medium to large businesses employing more than 20 staff.

## 2.2 TOURISM AND VISITATION

### 2.2.1 INTRODUCTION

This section profiles the types of visitors to the Coffs Harbour area including:

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

The profile is based on Tourism Research Australia local government area profiles which use a 3-4 year rolling average data to June 2007. The TRA data sets cover the entire Coffs Harbour LGA.

### 2.2.2 VISITOR TYPES

On average, the Coffs Harbour LGA receives 1.54 million visitors per year. Visitors are predominantly domestic day and overnight travellers, with only 5% tourists being international visitors (Figure 13).

According to TRA domestic overnight visitors were most likely to come from Sydney or other areas of NSW (Table 1)

Table 1 Domestic overnight visitors by location

| Market | Overnight visitors ('000) |
|---|---|
| Sydney | 268 |
| Other NSW | 293 |
| Brisbane | 65 |
| Other Queensland | 74 |

*Source: TRA 2008.*

### 2.2.3 VISITOR ACTIVITIES

Overnight domestic visitors are most likely to stay in hotels, motels or resorts (48%) or at properties owned by friends or relatives (29%). International visitors predominantly stayed in hotels, motels or resorts (Figure 15).

The top activities of visitors to the Coffs Harbour LGA are eating out, shopping and going to the beach (Table 2). 79% of international visitors, 48% of domestic overnight visitors and 20% of domestic day visitors go to the beach.

**Table 2 Activities by visitor type**

| Activity | International | Domestic Overnight | Domestic Day | Total |
|---|---|---|---|---|
| Go to beach | 59,000 | 381,000 | 133,000 | 573,000 |
| Eat out | 62,000 | 458,000 | 283,000 | 803,000 |
| Visiting friends / relatives | - | 328,000 | 215,000 | 543,000 |
| Just walk or drive around | - | 271,000 | - | 271,000 |
| Shopping | 43,000 | 266,000 | 278,000 | 587,000 |
| Pubs, clubs, discos etc | 31,000 | 221,000 | - | 252,000 |
| National/State Parks | 25,000 | - | - | 25,000 |
| Bushwalking / rainforest walks | 16,000 | 381,000 | - | 16,000 |

*Note: - = not reported.*
*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 3 phone discussions during the survey period. These discussions were held with Marine Parks Authority Management, members of the local advisory committee, key local Chambers of Commerce and local business owners.

Solitary Islands Marine Park is currently undergoing a public submission phase of their zoning plan review which has consumed much focus for both Marine Park management and local business.

There were also 7 phone surveys undertaken due to a low response rate to the online survey link. These responses are detailed in the survey outcomes in section 4.

### 3.1.2 DETAILS OF LOCAL ORGANISATIONS CONTACTED

The local tourism organisation Coffs Coast Tourism has over 280 members. Members include accommodation providers, tourist activity operators and local services.

There is a Chambers of Commerce in Coffs Harbour. Business membership within the Chambers is across retail, accommodation and service based industries.

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.

## 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.

Stakeholders interviewed generally 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 27 permit holders in the Solitary Islands Marine Park and are dominated by boating related businesses and surf schools, they consist of the following business types:

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

Land based commercial activities directly linked to the park include bait and tackle stores and local boat repair and building businesses.

## 3.4 OTHER BUSINESS LINKS TO THE MARINE PARK

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

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

An industry largely affected by the introduction of the zoning plan has been the commercial fishing sector.  While not included in the survey Arche consulted with local representatives who are connected with commercial fishing in the area.

## 3.5 KEY THEMES ARISING FROM CONSULTATION

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

- during the course of consultation the MPA released a revised zoning plan.  While all people consulted with were advised that this report was not related to those plans, people's concerns were still apparent.  A large number of people alluded to the perception that although the Marine Park had not had a high negative impact to date this would certainly change should the zones be increased in area;
- there was concern in the smaller communities who are reliant on recreational fishing that the Marine Park, and the negative publicity surrounding it, was deterring potential visitors from the area who view it as a problematic destination;
- the business community is eager to improve education and understanding of the positive attributes of the Marine Park both within the communities and beyond to reach potential visitors to the Marine Park; and
- stakeholders consulted perceived that there is currently limited knowledge in the business community of the benefits and of the Marine Park and what it can offer businesses and tourists.

# 4 SURVEY OUTCOMES

## 4.1 OVERVIEW OF RESPONSE

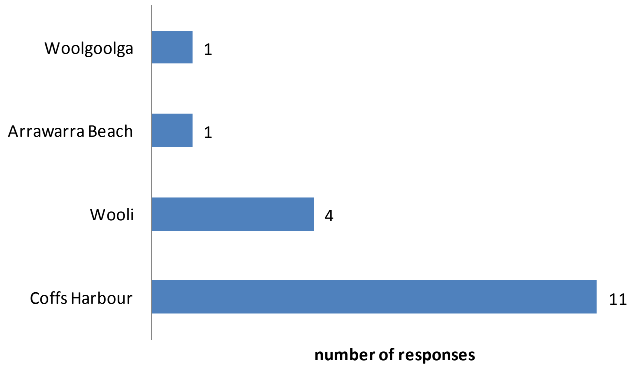
There have been a total of 19 responses to the Solitary Islands online survey. Online survey responses covered a number of the business types approached in the survey which is described in Figure 4.

## 4.2 ABOUT THE BUSINESSES

### 4.2.1 BUSINESS LOCATION

The key communities identified as areas of focus, Coffs Harbour, Wooli and Woolgoolga represented 94% of the 17 responses.

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

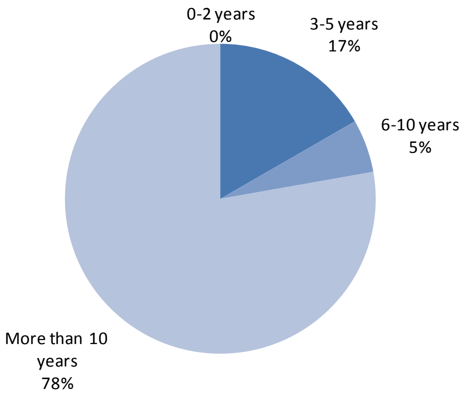



*Note: Number of responses =17.*

### 4.2.2 LENGTH OF BUSINESS OPERATION

A large percentage of businesses responding to the survey have been operating for more than 10 years. This is consistent with other regions surrounding Marine Parks. The breakdown of response is illustrated in Figure 3.

**Figure 3 Length of business operation**

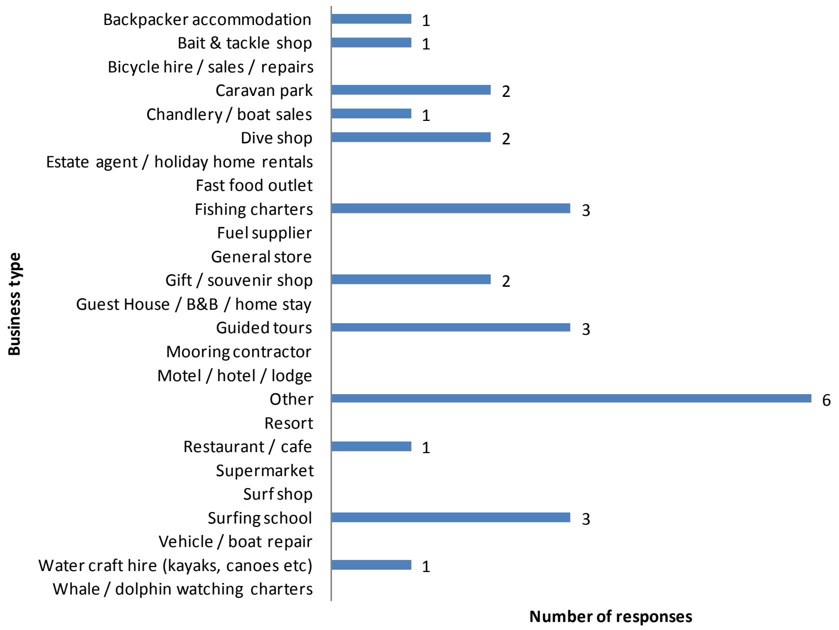



*Note: number of responses 18.*

### 4.2.3 BUSINESS TYPE

This question as illustrated in Figure 4 shows a broad level of response from the business types identified. Responses from marine related industries operating on the park itself or servicing operators on the park were well represented, however important to note the considerable level of response from accommodation providers and general retail stores also.

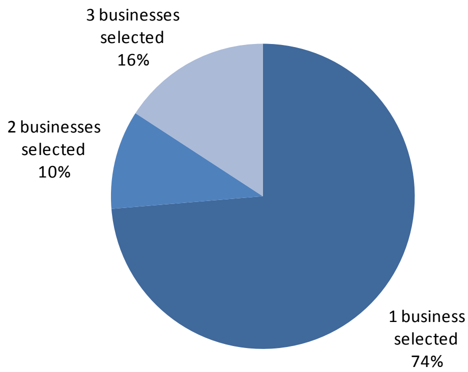
**Figure 4 Summary of business responses**




*Note number of responses 19.*

This question provided the opportunity to select more than one business type,16% of respondents chose three business typed however the majority of respondents only selected the 1 business type.

**Figure 5 Number of businesses selected**

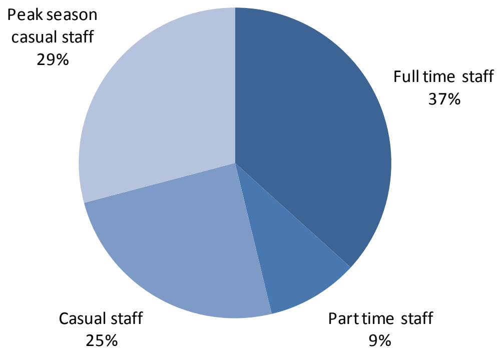



*Note number of responses 19.*

### 4.2.4 NUMBER OF STAFF EMPLOYED

Across the 17 businesses who responded to this question there were 158 staff employed. The breakdown between types of employment is illustrated in Figure 6. This included a high proportion of full time and peak season casual staff.

**Figure 6 Business employment by tenure**




*Note number of responses 17.*

### 4.2.5 APPROXIMATE ANNUAL TURNOVER

This multiple choice question that asked for an approximate value of individual turnover. Results in Table 3 outline 75% of respondents stated their turnover as less than $500,000.

**Table 3 Responses to categories of turnover**

| | $0-$200,000 | $200,001-$500,000 | $500,001-$1,000,000 | $1,000,001-$2,000,000 | >$2,000,000 |
|---|---|---|---|---|---|
| Number of responses | 7 | 5 | 1 | 2 | 1 |
| % | 44% | 31% | 6% | 13% | 6% |

*Note number of responses 16.*

### 4.2.6 PEAK SEASON AND WHAT MONTHS ARE CONSIDERED PEAK SEASON?

Of the responses to whether businesses experienced a peak season 82% of responses indicated they had a peak season and an off-peak season.

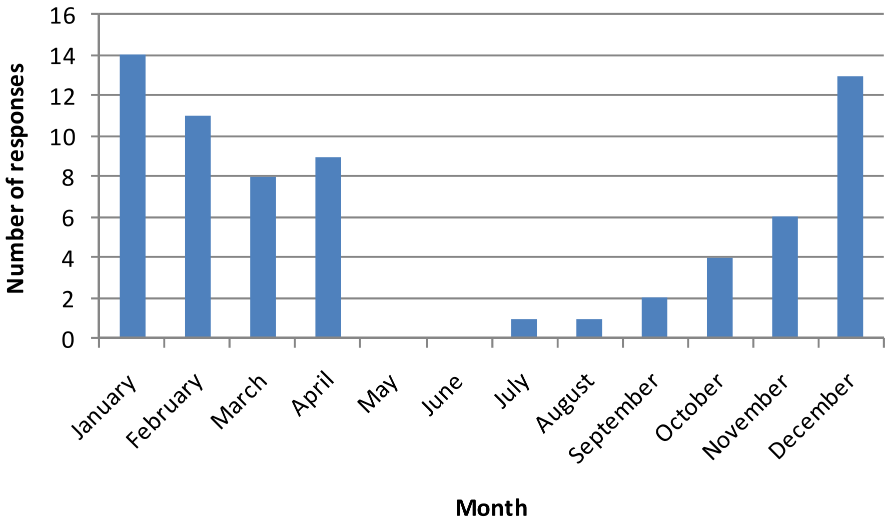
**Table 4 Responses to seasonality**

| | Count |
|---|---|
| Business is pretty even year round | 3 |
| We have a peak season and an off-peak season | 14 |

*Note: Number of responses 17.*

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

**Figure 7 Peak season month responses**




*Note: Number of responses 16.*

## 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. This is expected as those businesses that identify with the Marine Park should service visitor activities.

**Table 5 Proportion of customers by residency**

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

*Note: Number of responses 17.*

### 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, although there is a leaning towards more one-off and occasional customers.

**Table 6 Customer type (frequency)**

| | None of my customers | Some of my customers | Most of my customers | All of my customers |
|---|---|---|---|---|
| One - off customers | 1 | 4 | 7 | 0 |
| Occasional customers | 1 | 9 | 4 | 0 |
| Regular customers | 2 | 5 | 0 | 0 |

*Note number of responses 15.*

### 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. Short term holiday was the most selected option and what more respondents indicated that ‘most of their customers’ were visiting for.

**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 | | 1 | 3 | 1 |
| A weekend | 0 | 3 | 6 | 1 |
| A short term holiday | 0 | 8 | 3 | 1 |
| A medium - long term holiday | | | 3 | 2 |

*Note number of responses 14.*

### 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. Through the face to face consultation and phone survey respondents indicated that most questions were surrounding fishing. The online survey results (Table 8) show that businesses responding are likely to receive questions about the Marine Park occasionally.

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

| | Count |
|---|---|
| Most of the time | 2 |
| Some of the time | 5 |
| Rarely | 6 |
| Not at all | 3 |

*Note: Number of responses 16.*

## 4.4 BUSINESS LINKS TO THE MARINE PARK

### 4.4.1 IMPORTANCE OF THE MARINE PARK FOR BUSINESS

Businesses were asked to rate the importance of the Marine Park to their business. Table 9 outlines 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 | 6 | 3 | 4 |

*Note: Number of responses 14.*

### 4.4.2 IMPACT OF THE MARINE PARK ON YOUR BUSINESS

This question asked businesses to rate the impact of the Marine Park on individual businesses servicing visitation to or management of the Marine Park. Responses to this were balanced across the positive and negative impacts. Negative responses were largely from businesses operating in the Park.

**Table 10 Impact of the Marine park on individual 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 | 2 | 2 | 1 | 3 | 2 |
| % | 23% | 15% | 15% | 8% | 23% | 15% |

*Note: Number of responses 13.*

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

Businesses were also asked to respond to rate the impact of the Marine Park on businesses in the town which produced a few more positive responses than negative. The perception of a negative impact on the town was mentioned by businesses in both Coffs Harbour and smaller communities bordering the Marine Park.

**Table 11 Impact of the Marine Park on other 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 | 3 | 1 | 1 | 3 | 0 |
| % | 27% | 27% | 9% | 9% | 27% | 0% |

*Note: Number of responses 11.*

### 4.4.4 BUSINESS USE OF MARINE PARK ATTRIBUTES

This was an open ended question that received 11 responses. Verbatim responses are listed in Table 12 Use of Marine Park attributes (there were four responses of 'no'). The types of uses were varied across the seven respondents and covered promotional materials and physical educational promotion such as the exhibits.

**Table 12 Use of Marine Park attributes**

| Verbatim Responses |
|---|
| Yes |
| yes in brochures |
| We exhibit some animals that live in the marine park for educational and entertainment purposes |
| Just photos |
| Solitary Islands has no identity and thus difficult to use in marketing. |
| Yes - used through all marketing materials, sense that it adds clout but no comparison to great barrier reef |
| Marketing the no touch, no take zones for diving |

*Note number of responses 11.*

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

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

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

| | Count | Percentage |
|---|---|---|
| Yes | 12 | 75% |
| Some of the time | 2 | 13% |
| No | 2 | 13% |

*Note: Number of responses 16.*

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

Businesses were asked how the Marine Parks Authority might be able to better support businesses to increase visitor awareness about the Marine Park. The 5 responses are listed in Table 14.

**Table 14 Verbatim responses - visitor awareness**

| Verbatim Responses |
|---|
| Plenty of brochures are provided |
| In the future and with our redevelopment I would like to think we can act as an interpretive centre for the MP for our visitors 90K each year |
| Zoning map to include more of the benefit and imagery |
| DL size flyers, these fit into most tourist operators racks. |
| Stop taking our fishing areas or we will not have any visitors this area relies heavily on people who come here to fish. |

*Note number of responses 5.*

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

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

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

| Verbatim Response |
|---|
| Provide more information and brochures about the park to provide to customers. |
| Greater information about the justification for the zones. consistency with regulation requirements |
| Improve marking in the sanctuary zones including signage and GPS markers. review regulation regarding adding activities to current permits. |
| Provide more scientific justification of the zones |
| Increase awareness and provide positive information about why a Marine Park is the best option for protection and conservation. |
| Provide further justification and proof for extension of protection zones.<br>Build link with Coffs Harbour to enhance awareness.<br>Grow face of MPA<br>Stop taking our fishing areas they don't support our business it's hard enough to make ends meet without these idiots cutting our livelihoods. |

*Note: Number of responses 5.*

# 5 BUSINESSES SERVICING MANAGEMENT OF THE MARINE PARK

## 5.1 OVERVIEW OF MPA MANAGEMENT

Solitary Islands Marine Park is located in Coffs Harbour and the office was established in 1999. The MPA shares the premises with the Department of Industry and Investment (fisheries) and National Parks and Wildlife Services. The MPA employs 8 full time staff at an approximate cost of $615,818 per annum.

## 5.2 MPA EXPENDITURE

Solitary Islands Marine Parks Authority Management operate with a split between contracted suppliers and day to day expenses which are shared between providers in the local area. A summary of the Marine Parks expenditure is listed in Table 16. This is a total local expenditure on operational expenditure for goods and services of approximately $158,308 per annum. Operational expenditure outside of the local area is approximately and additional $50,000.

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

| Operational costs | Cost ($) | Contract (Y/N) | Percentage Local |
|---|---|---|---|
| Fuel | 11,675 | N | 100 |
| Boat maintenance and service | 7,035 | N | 100 |
| Vehicle maintenance and service | 9,488 | N | 100 |
| Dive equipment and service | 3,137 | N | 100 |
| Chandlery | 5,390 | N | 100 |
| Maintenance of buoys and signage | 82,520 | N | 100 |
| Cleaning | 4,622 | N | 100 |
| Advertising & Printing | 3,913 | N | $70 |
| Catering | 978 | N | 100 |
| Office supplies | 2,730 | Y | 0 |
| Utilities | 15,405 | Y | 100 |
| Temporary accommodation | | | |
| Other 1 - Postal | 1,729 | N | 100 |
| Other 2 - Uniforms | 4,200 | N | 100 |
| Compliance equipment | 6,660 | N | 100 |
| **Total** | **159,482** | | |

# 6 CONCLUSIONS

## 6.1 THE SOLITARY ISLANDS REGION

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

The Coffs Harbour area receives in excess of 1.5 million visitors per annum. Tourism is an important industry to the region with the TRA indicating 1731 of local businesses are linked to the industry.

## 6.2 BUSINESSES AND SURVEY RESULTS

Response rates to the Solitary Islands Marine Park were low relative to the other Marine Park regions. The current zoning plan review is the main area of focus for businesses linked to the park.

Many of the business types targeted were however represented across the respondents. Many responding businesses (82% of those who responded to this question) indicated they had a peak season and an off-peak season with the key months of visitation through the summer holiday periods.

It is apparent from the survey that many the businesses are asked about the Marine Park. Of responding businesses, 75% indicated that they felt able to provide information to customers about the park, it should be noted however that over half of respondents indicated they were asked about the Marine Park rarely or not at all.

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, 53% 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

THE MPA have 8 full time employees at a cost of approximately $615,818 per annum.

The MPA in Coffs Harbour 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. These good and services include mooring maintenance, chandlery, fuel and diving supplies. This is a total local expenditure of approximately $158,810 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.

An area of focus for the area mentioned by both businesses and local organisations is to improve the perception of the park through positive promotion of its attributes and activities available.

# 7 REFERENCES

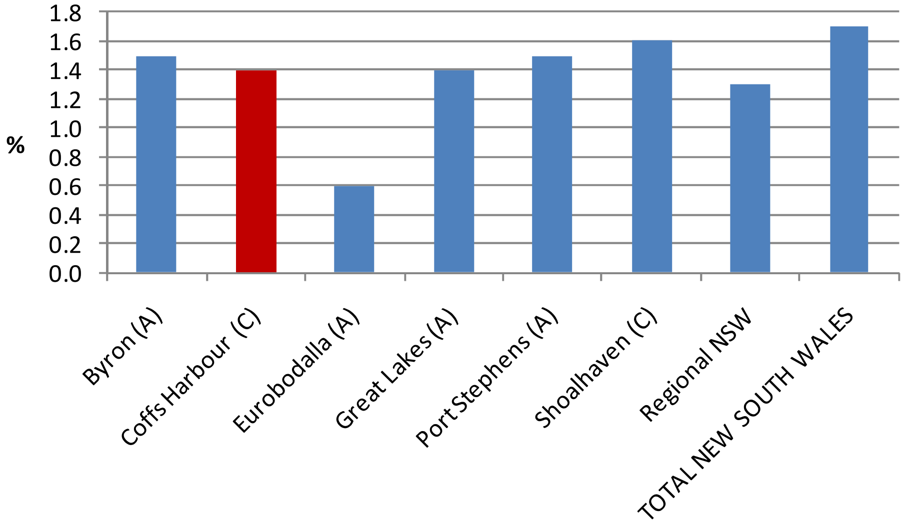
Australian Bureau of Statistics (2006) 2006 Census of Population and Housing.

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

TRA (2007) Visitor Profile and Satisfaction Report.

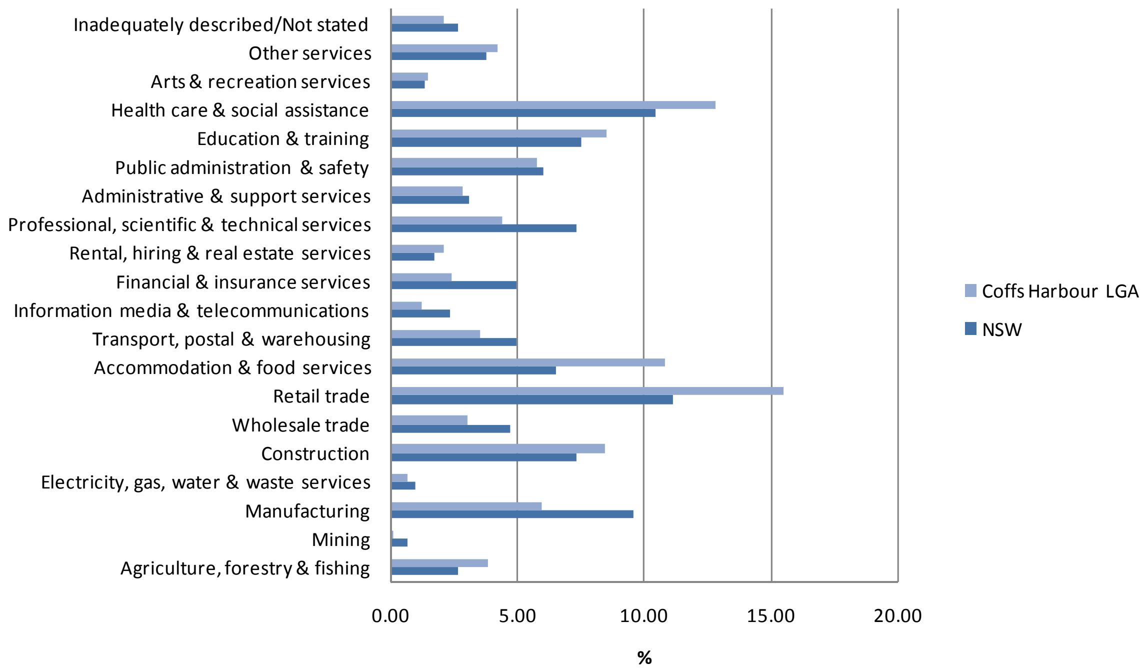
TRA (2008) Tourism Profiles for Local Government Areas in Regional Australia, City of Coff Harbour.

**Figure 8 Population growth 2008-2009 in Coffs Harbour**



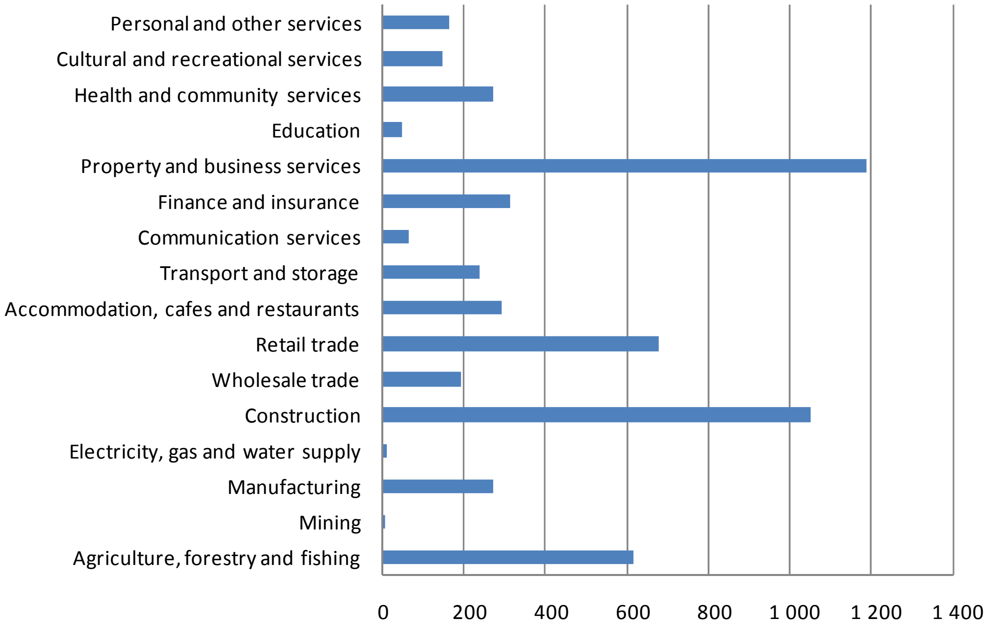

*Source: ABS 2010.*

**Figure 9 Employment by industry within NSW and Coffs Harbour**



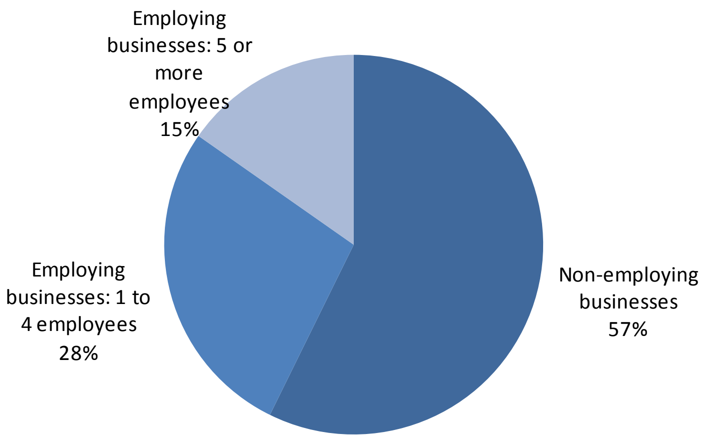

*Source: ABS 2006.*

**Figure 10 Number of businesses by industry Coffs Harbour 2007**



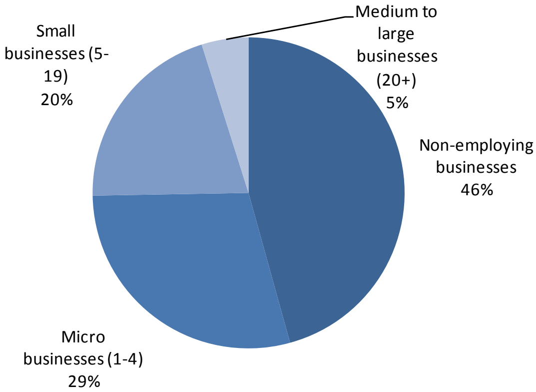

*Source: ABS 2010.*

**Figure 11 Size of local businesses**



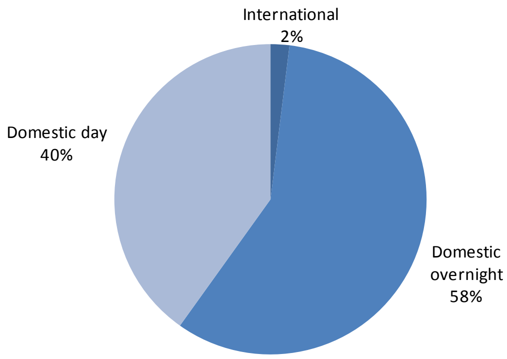

*Source: ABS 2010.*

## Figure 12 Tourism businesses




*Source: TRA 2008*

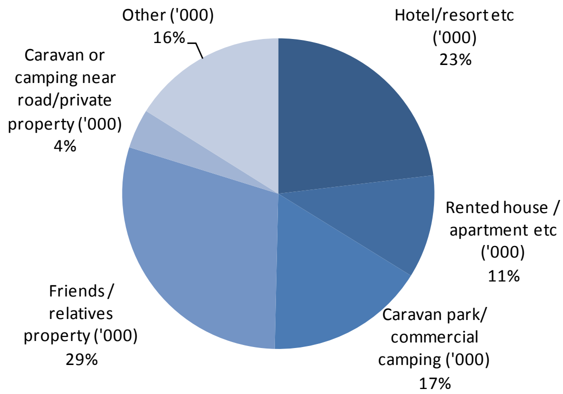
## Figure 13 Visitors by type




*Source: TRA 2008.*

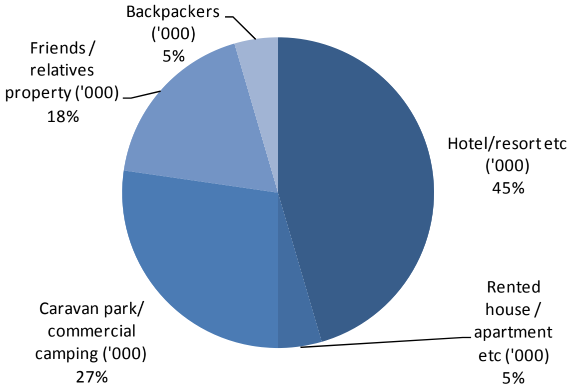
Overnight domestic visitors are most likely to stay at properties owned by friends or relatives (29%), with 23% staying in hotels, motels or resorts (Figure 14). International visitors predominantly stayed in hotels/motel/resorts or at caravan parks and commercial camping grounds (Figure 15).

## Figure 14 Accommodation of domestic overnight visitors




*Source: TRA 2008.*

## Figure 15 Accommodation of international overnight visitors




*Source: TRA 2008.*

## APPENDIX 3 SURVEY

### INTRODUCTION

Understanding the links between the Solitary Islands Marine Park and local business.

We are seeking information from local businesses to:

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

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

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

### ABOUT YOUR BUSINESS

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

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

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

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

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

4. Please add any additional comments about your business

## ABOUT YOUR CUSTOMERS AND CLIENTS

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

5. What percentage of your current customers are:

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

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

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

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

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

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

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

9. Please add any additional comments here

## SOME DETAILS ABOUT YOUR BUSINESS

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

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

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

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

12. Choose one of the following to describe your business

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

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

14. Please add any additional comments here

## YOUR BUSINESS LINKS TO THE MARINE PARK

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

- Extremely important - my business wouldn't exist without it
- Very important
- Somewhat important
- Not at all important - it would not matter if the Marine Park was there or not

- Comments

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

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

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

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

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

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

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

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

21. Please add any additional comments here

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

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

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

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

Contact Details

Business name:

Contact email:

Contact phone:

Contact name: