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### Glossary of Key Terms

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<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Benefits</strong></td>
<td>Anything that is for the good of a person, community or thing.</td>
</tr>
<tr>
<td><strong>Coastal Residents</strong></td>
<td>Respondents that completed an intercept questionnaire and also maintain a permanent residence in the shire, region or city in which the interview took place</td>
</tr>
<tr>
<td><strong>Coastal Visitors</strong></td>
<td>Respondents that completed an intercept questionnaire and do not maintain a permanent residence in the shire, region or city in which the interview took place</td>
</tr>
<tr>
<td><strong>CALD</strong></td>
<td>Culturally and linguistically diverse</td>
</tr>
<tr>
<td><strong>Focus group</strong></td>
<td>An unstructured consultation session with a group recruited to represent a cross-section of the local community (generally 8-12) used to develop an understanding of community attitudes on a topic</td>
</tr>
<tr>
<td><strong>General population</strong></td>
<td>Respondents that completed a questionnaire in the online stage of the quantitative research and reside in NSW</td>
</tr>
<tr>
<td><strong>In-depth interview</strong></td>
<td>An unstructured, direct, interview with a representative from a Marine Estate interest/user group used to derive insights into their attitudes to a topic.</td>
</tr>
<tr>
<td><strong>Intercept questionnaire/survey</strong></td>
<td>Survey completed in-person, respondents are approached and invited to complete the questionnaire in a high traffic area such as a shopping centre</td>
</tr>
<tr>
<td><strong>Likert Scale</strong></td>
<td>A five point agreement scale primarily used in quantitative social research. Respondents are asked to indicate their level of agreement with a statement. They are asked to do this by selecting one of five options ranging from “Strongly Disagree” to Strongly Agree” with a neutral middle point generally expressed as “Neither agree nor disagree”.</td>
</tr>
<tr>
<td><strong>Marine Estate</strong></td>
<td>All marine areas of NSW which are affected by tidal influences. The Marine Estate extends seaward by 3 nautical miles and stretches from Queensland to the Victorian border. The Marine Estate includes: The ocean, estuaries, coastal wetlands (saltmarsh, mangroves, seagrass), coastline (e.g. beaches, dunes and headlands), coastal lakes and lagoons connected to the ocean and islands (e.g. Lord Howe Island)</td>
</tr>
<tr>
<td><strong>Marine Estate Management Authority (MEMA)</strong></td>
<td>NSW state government inter-departmental organisation developed to implement government policy for the Marine Estate</td>
</tr>
<tr>
<td><strong>Marine Estate Expert Knowledge Panel (MEEKP)</strong></td>
<td>Independent body of experts with the mandate to provide MEMA with advice on the development and implementation of strategies for the Marine Estate</td>
</tr>
<tr>
<td><strong>Marine Estate interest/user groups</strong></td>
<td>Key organisations, groups or persons that represent those people who actively use the Marine Estate for some particular social, economic or scientific purpose (e.g. Aboriginal community representatives, boating representatives, commercial fishers, conservation groups, etc.)</td>
</tr>
<tr>
<td><strong>Online questionnaire/survey</strong></td>
<td>Survey completed over the internet, respondents are invited to complete the survey via a generic email</td>
</tr>
<tr>
<td><strong>Opportunity</strong></td>
<td>A time or set of circumstances that makes it possible to do something, or achieve an outcome, in the Marine Estate.</td>
</tr>
<tr>
<td><strong>Qualitative research</strong></td>
<td>Exploratory research methodology which uses anecdotal and language based tools to develop insights into a topic (e.g. discussions with experts)</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Quantitative research</strong></td>
<td>Descriptive research methodology that uses statistical tools (e.g. questionnaires) to draw insights and findings on a topic</td>
</tr>
<tr>
<td><strong>Threats</strong></td>
<td>Any activity or process which prevents environmental, social and economic values and benefits that people derive from the estate from being realised. Some threats are likely to vary in complexity and scale across the estate. This can impact on the ability to manage the threat or to adapt to it over time.</td>
</tr>
<tr>
<td><strong>Values</strong></td>
<td>For the purpose of this survey a value is the regard that something is held to deserve; the importance, worth, or usefulness of something.</td>
</tr>
<tr>
<td><strong>Weighting</strong></td>
<td>A statistical technique in which individual respondent’s scores are allocated a value based on certain criteria. In this survey, data was weighted based on age, gender and location. Weighting ensures reliability and representativeness in the analysis</td>
</tr>
</tbody>
</table>
Executive Summary

The NSW Marine Estate covers all coastal and tidally affected waterways (e.g. rivers, estuaries, beaches, coastal lakes, etc.) in NSW up to three nautical miles off the coast.

A major community survey was conducted to evaluate the values and attitudes of the NSW community towards the Marine Estate. The purpose of this research was to prioritise those areas of greatest concern to the NSW community and identify key opportunities for improved management of the Marine Estate. The results of this survey will be used as one of the inputs into the program of work, either planned or being conducted, into the Marine Estate to better manage this valuable asset. The desired long term outcome is for a healthy coast and sea, managed for the greatest well-being of the community, now and into the future.

The findings outlined in this report reflect the views and perceptions (not necessarily scientific fact) of a representative sample of the NSW community regarding the benefits, threats and opportunities for the NSW Marine Estate. The research is based on a sample of n=1,000 respondents from across NSW along with an additional sample of n=727 respondents from seven communities in NSW. These two samples generate a margin of error of 3.1% and 3.63% respectively, both at the 95% confidence level.

Key Findings

A number of environmental, social and economic findings were uncovered throughout the course of the research. The following table summarises the most important benefits, threats and opportunities for the NSW Marine Estate as viewed by the NSW community…

**Benefits**

- The **clean waters** of the Marine Estate **support a variety of unique and abundant** Australian **marine life**
- Its **natural beauty** is a major benefit for the NSW community, even if they don’t visit it often. It provides a **safe space** for people and communities (particularly Indigenous) to socialise and lead an **active healthy lifestyle**
- Economically speaking, the Marine Estate also **provides income** for locals through various industries, particularly **tourism and seafood related industries**

**Threats**

- **Pollution is seen as the major threat** to the Marine Estate. This can be any form of pollution including run-off, marine debris, litter, oil, chemical spills, etc.
- Pollution and **loss of natural areas** are seen as critical threats to economic outcomes, particularly tourism
- **Anti-social behaviour and overcrowding** are seen as key social threats to the safety and enjoyment of people that use the Marine Estate

**Opportunities**

- The NSW community feel that **protecting and rehabilitating coastal wetlands** and **addressing litter and land-based runoff** are **leading opportunities** to improve the health of the Marine Estate
• The major economic opportunities identified were marketing and promoting the beauty and biodiversity of the Marine Estate to promote tourism and addressing coastal hazards

• Socially, the community feel that providing more education programs, improving public access and environmental action support programs are important opportunities for the NSW government

Key insights from the research are summarised below...

Environmental

Environmental well-being should take priority

It is well understood by the majority of the NSW community that the environmental well-being of the Marine Estate must take priority when developing policy.

The leading economic opportunity is the marketing and promotion of the beauty and biodiversity of the Marine Estate (44%), while the leading environmental opportunity is the protection and rehabilitation of habitats and wetlands in the Marine Estate (41%). The NSW community believe that the thriving habitats and diverse and unique ecology of the Marine Estate is a key driver of economic outcomes in NSW.

Both commercial and recreational fishers recognise the need to conserve and support marine life so that future generations will be able to appreciate the Marine Estate as they have. Similarly, those involved in promoting development recognise that the natural beauty of the Marine Estate is a key reason why people want to live in or near the coast of NSW.

Major environmental threats to the Marine Estate include all forms of pollution

The three greatest environmental threats to the Marine Estate as perceived by the NSW community are: littering/dumping of rubbish/marine debris (47%), oil and chemical spills (34%) and water pollution from sediment or run-off (29%).

People consider overfishing to be less of a threat

The proportion of people concerned about this is significantly lower compared to those who identified pollution as one of their top three environmental threats. However, the NSW community are not oblivious to the potential threat of overfishing, with a majority of the community (67%) agreeing that some areas of the Marine Estate should be protected, even if it means recreational and commercial fishing is excluded. Not surprisingly, fishers in all sectors (Indigenous, commercial and recreational) indicate that over-restriction of their activities would have a detrimental impact on their use of the Marine Estate.
Protecting and rehabilitating coastal habitats is a key focus

Forty-one percent of the NSW community indicated that protecting and rehabilitating remaining coastal habitats and wetlands is a key opportunity for the Marine Estate. The NSW community would like to see more effective litter collection services (34%) in the Marine Estate as well as reducing water pollution through better land-management practices which would reduce run-off (26%).

To help facilitate this process, introducing more targeted education programs (25%) to reduce the impact humans have on the environment is seen as a leading social opportunity. This move would also ensure that the NSW government is seen as prioritising the environmental outcomes of the Estate.

Policies aimed at protecting and rehabilitating the Marine Estate should be careful not to marginalise interest groups and instead the government should seek their input into the development of key policies as this will help create holistic support for any rehabilitation programs.

Social

The Marine Estate is integral to the social and cultural foundations that underpin the NSW community

The Marine Estate holds great value for NSW residents as a central part of Australia’s heritage and culture. It is perceived to offer countless opportunities for the community to socialise with friends and family as well as a chance to achieve harmony with nature. For example, the most important social benefit of the Estate - identified by respondents - was the enjoyment people get from knowing its natural beauty is there, even if they can't visit it regularly (48%). Other key benefits include the Marine Estate being recognised as providing a safe space to spend quality time and socialise with friends and family (30%) as well as providing an opportunity to live a healthy and active lifestyle (27%).

The social benefits of the Marine Estate are amplified in coastal Indigenous communities with many of the core traditions that underpin Indigenous culture being fundamentally linked to the Estate. For this reason, more care should be taken to involve Indigenous groups when developing policies that may impact on the Estate.

Anti-social behaviour threatens the social balance

Anti-social behaviour from other members of the NSW community is seen as one of the top three threats to the social benefits of the Marine Estate (58%). Community members were likely to feel that visitors have a strong negative impact in terms of littering, pollution and anti-social behaviour.

Littering and pollution also threaten the natural beauty of the estate which will impact on social outcomes

Fifty-five percent of people feel that a key social threat to the Marine Estate is the potential loss of appeal due to pollution/littering. Following this, overcrowding (31%), danger to swimmers from recreational activities such as boating and jet skiers (31%) and a lack of public access (29%) are also recognised as potential social threats that may impact on their desire to use the Marine Estate.
A range of social opportunities present themselves

Education programs are considered an important way to engage the community (32%) and offer them a sense of ownership and responsibility for the Marine Estate. Improving public access to the Estate (30%) and providing community environmental action support programs (28%) were also considered important.

Economic

The Marine Estate directly and indirectly stimulates the economy

The Marine Estate represents a substantial economic resource to the NSW community as well as a key source of food for certain community groups such as Indigenous people. Fifty-eight percent of respondents in the NSW general population identified that income provided by the Marine Estate was one of the most important economic benefits of the Marine Estate.

Tourism is crucial

The community recognise the Marine Estate as a tourism drawcard and not necessarily as a natural resource for extraction. One of the top two economic benefits of the Marine Estate is derived from the iconic images of Australia which promote tourism (54%).

This finding is once again amplified amongst the Indigenous community with tourism being a key way for cultural values and traditions to be perpetuated.

The results generally indicate that the public perceive tourism as being positive socially, environmentally and economically, with relatively few drawbacks (apart from over-crowding and anti-social behaviour).

Given the focus on the tourism benefits of the Marine Estate, it is no surprise that threats to tourism are seen as a priority. Water pollution affecting the viability of tourism (62%) and the loss of natural areas reserved for tourism (51%) are seen as the greatest economic threats to the Marine Estate. These threats, coupled with the increasing costs to access and use the Marine Estate (42%) are seen as having the potential to cause major damage to the tourism industry in NSW.

Promotion of the beauty and biodiversity of the Marine Estate is recognised as an opportunity

Of most economic importance to the NSW community is the need to promote the beauty and biodiversity of the Marine Estate (44%). Implementing management processes to protect the coastline from storm surges, coastal erosion and inundation (40%) as well as improving public access to the Marine Estate (32%) are critical opportunities for the Marine Estate. However, caution should be used not to cause over-crowding in popular tourist destinations, as it is perceived that overcrowding can have a negative impact on people’s enjoyment of the Marine Estate as well as impacting on the environment.
Values Analysis

Following the analysis of the qualitative and quantitative research findings, four values were identified. These values drive community attitudes towards the Marine Estate and will impact upon the success of future management policies…

Identity

"Australians are a coastal people. The coast is our heritage and way of life and I wouldn’t be me without it."
(Community representative, Lismore)

"We see the environment differently to non-Aboriginal people. We are actually part of the ecosystem."
(Indigenous representative, South East region)

The Marine Estate represents a fundamental piece of the NSW community’s self-identity.

1. **Uniqueness**… The Marine Estate is home to a diverse range of flora and fauna that cannot be found anywhere else in the world. This uniqueness is a manifestation of what it means to be part of the NSW community. Three-quarters of the NSW community indicated that the natural beauty and marine wildlife of the NSW Marine Estate are a key reason why NSW is a great place to live and visit. Amongst the Indigenous community, there are strong historic, contemporary and spiritual links with the Marine Estate.

2. **Continuing health of the Marine Estate**… the NSW community value a sense of wanting to protect the health of the Marine Estate. Eighty-five percent indicated that it is important that the waters and coastline of the Marine Estate stay clean and unpolluted. Similarly, 82% agreed that it is important to maintain the abundance and diversity of marine life in the Marine Estate. A key finding for the Indigenous community was a desire to be more heavily involved in the development of management strategies for the Marine Estate.

3. **Access**… Without easy and unhindered access to the Marine Estate, many people in NSW feel that their deeper connection to the Estate is under threat. This not only underpins the need for up-to-date and reliable infrastructure access, but also the need to provide safe marine areas. Access is of paramount importance to the Indigenous community, given their spiritual and cultural link to the Marine Estate as well as it being a source of food.

4. **A part of our heritage and culture**… Many people report a strong, sentimental attachment to this space as it represents both their own identity and their identity as a member of the broader NSW community. As part of this, the community not only feel a strong cultural connection to the Estate but also feel that they are personally responsible for the protection and ongoing maintenance of the estate. In the quantitative research seven in ten agreed that it is the responsibility of all NSW residents to protect the Marine Estate. The qualitative research found that the Marine Estate represents the focus of thousands of years of spiritual and cultural rituals in the Indigenous community.
Enabler

"I can take the kids to the beach or take a picnic to the creek and everyone has a great time and it’s free which with four kids is great!"

(Community representative, Coffs Harbour)

“Just utilising the rivers and creeks and things like that for fishing and gathering. We have ‘back to country’ where we bring the family back and have a swim and a greet and a yarn and things like that.”

(Indigenous representative, North Coast region)

As a source of almost unending social and environmental interaction, the Marine Estate enables the NSW community to flourish socially, scientifically and economically.

1. **Enabling connection…** As a source of cultural and community identity, the Estate offers a critical way for members of the community to spend time with loved ones and strengthens relationships as well as feeling a part of the community. For many families, learning to fish and extract resources using traditional means is considered a “coming-of-age”.

2. **Value as an escape…** The Marine Estate provides the NSW community with an opportunity to get away from their everyday lives and relax. Sixty-two percent agreed that they enjoy and value spending time in the Marine Estate because it provides them with a getaway from everyday life. For Indigenous community members the Marine Estate goes beyond just an escape from everyday life. It represents the natural state of the world before European colonisation.

3. **Offering choice…** Two-thirds (63%) of the NSW community indicated that they enjoy and value the range of different activities and uses that the Marine Estate offers. For the Indigenous community the Marine Estate offers a choice to return to the native lifestyle which underpins their cultural and spiritual beliefs. Control and restrictions on how these communities interact with the Marine Estate are considered a threat.
 Provider

“[The Marine Estate's] value is in and of itself, as a part of the world that we all need to survive - if we kill it, we will kill off the human race”

(Interest group)

“The sea is my cupboard”

(Indigenous representative, North Coast region)

For many people in the community, the Marine Estate is first and foremost, a provider of food and income. This is particularly true for the Indigenous community, as can be seen in the quote above. As such, a maternal relationship exists between the NSW community and the Estate. For some NSW communities (e.g. Batemans Bay and Eden), this connection is considered fundamental to the survival of that community as core industries such as commercial fishing and tourism rely significantly on the offerings of the Estate.

1. **Source of food and industry...** A third of the NSW population indicated that a key economic benefit of the Marine Estate was the variety of seafood that could be caught and eaten. Sixty-eight percent of respondents also agreed that it is important that the Marine Estate produces a local source of seafood for industry and personal and cultural use. For Indigenous communities, the natural offerings of the Marine Estate can offer a key source of income (through tourism drawcards) which will allow the integrity of their culture to be maintained.

2. **Support for local and state economies...** The Marine Estate is also seen as providing substantial benefits to the NSW economy. Six in ten (58%) indicated that a key economic benefit of the Estate is being a source of income for NSW residents.

3. **A gateway to Australia...** The Marine Estate provides an important link to other Australian and International markets for trade as well as a hub to attract tourism. Over half (54%) of the community agree that the Marine Estate is home to iconic images of Australia – which is a major economic benefit when promoting tourism. Fifty percent argue that it is important that commercial shipping, port operations, boat storage and services continue to occur in the Marine Estate.

4. **Facilities in place to help access the Marine Estate...** The presence of infrastructure such as roads, rail, marinas and boat ramps as well as facilities such as amenities blocks are perceived to not only add economic value to the state but also make the Estate accessible for all the members of the community that may want to utilise it. The public are interested in improving access infrastructure with 30% suggesting that it is the most important social opportunity for the Marine Estate over the next 20 years.
The Great Outdoors

“Every time you see those tourism ads, it’s always centred on the outback or the beach, it’s how we market ourselves as a country”

(Community representative, Sydney)

“Access to water gives us our quality of life – for the Aboriginal man, the community and the culture”

(Indigenous representative, South East region)

The final overarching value of the Estate celebrates the value of the natural, untamed offering that the Marine Estate provides. It is nothing new that humans have an intrinsic link to nature. The untamed natural offerings of the Estate are a cornerstone value for those living in NSW. This value manifests in several ways...

1. **Enjoyment in just knowing it is there**... “People enjoying its natural beauty, even if they can’t visit it regularly” was recognised as the most important social benefit of the Estate (48%).

2. **A celebration of biodiversity**... The NSW community enjoy knowing that the Marine Estate is home to a wide range of marine life. Eighty-two percent of respondents indicated that it is important to maintain the abundance and diversity of marine life in the Marine Estate.

3. **A source of scientific discovery**... Being able to use the Marine Estate to improve scientific knowledge and as a source of education about marine life is vital for the NSW community. Sixty-nine percent agreed that scientific information should be used to inform the management of the Marine Estate. As well as this, around one in five believe that using the Estate as a source of scientific discovery is an important social benefit.

4. **Safety**... As with any wild entity there is always a risk factor for humans. For many people this can often be an appealing feature of the great outdoors. However, intervention such as regulations and usage bodies (e.g. surf lifesavers) are necessary to ensure that the community can engage safely with the Estate. This also includes protecting the community from human impacts such as pollution. This value appears to manifest differently in the Indigenous community. Many Indigenous community members feel that there needs to be a greater recognition of Indigenous links and understanding of the land when management decisions are made. If this is done it will result in better public usage and understanding of the Estate, which will in-turn generate safer and more sustainable usage of these areas.
Additional Findings

The term “Marine Estate” is yet to achieve traction

Very few people in the NSW community were either aware of, or understood what the term “Marine Estate” means. Once the concept was explained, the term appeared to resonate with the majority of respondents with just 11% finding that they did not like the term. This would suggest that a strong push to educate the community through marketing the Marine Estate as a concept would be beneficial to the overall strategy.

Everyone is responsible for the Marine Estate

The NSW community were in agreement that the protection and maintenance of the Marine Estate is the responsibility of all NSW residents, and not just the responsibility of the government.

Community consultation is required when making policy decisions

When it comes to the protection of the Marine Estate, the NSW community would like to be consulted on fundamental policy decisions. In particular, the Indigenous community have felt removed from the decision making process to date. For maximum public support to be obtained, community groups need to be involved in the decision making process and given a better understanding of the scientific justification for the introduction of key policy decisions.

Communication is paramount

Problems lie with the communication of issues, risks and benefits around a policy change and the science/research upon which the policy has been developed. Informing the community about rules and restrictions that have been imposed should also involve a thorough discussion of the reasoning behind any decisions that are made. Many Marine Estate interest/user groups also express the desire for greater collaboration with Marine Estate managers as well as more visibility and accessibility (e.g. via a local presence in the community).

Little awareness or opinion on current management strategies

Transparency was a key issue with relatively few community members knowledgeable of the various management strategies currently in place to protect the Marine Estate. This result was validated by the quantitative findings where 70% of respondents indicated that they neither agreed nor disagreed when asked if the Marine Estate was currently being managed well by the NSW government.

This was further reflected in attitudes to fishing restrictions in Marine Parks with nearly two-thirds (64%) of the NSW general population agreeing that recreational fishing should be allowed in Marine Parks where it is currently restricted, while 38% supported an increase in the area of sanctuary zones (which do not permit any fishing activities) in Marine Parks. Thirty one percent agreed that there should be more restrictions on recreational fishing in Marine Parks, with 52% neither agreeing nor disagreeing and only 17% disagreeing.

However, there were consistent views that restrictions on commercial fishing in Marine Parks should not be reduced (46% of the NSW general population (with a further 42% undecided), 62% and 60% of Coastal Residents and Visitors respectively).
**Strong feelings towards future management strategies**

Marine Estate interest/user groups were highly interested in the future management of the Estate. Generally, these community members were interested in being more involved in the development and implementation of strategies that sustainably incorporated their interests.

Indigenous communities also wish to be involved with the development of management policies right from inception. There has often been a strong feeling in these communities that strategies are forced on them without proper consideration for their cultural, social and spiritual needs.

**Greater dialogue can only offer benefits to all involved**

While there is not a great deal of dialogue between various Marine Estate interest/user groups, particularly those that are perceived to represent seemingly opposing interests (e.g. conservation and development), the majority of Marine Estate interest/user groups indicate a willingness to engage with other Marine Estate interest/user groups which they believe would enhance mutual understanding and potentially more beneficial solutions.

**Dialogue and greater interaction only considered useful if actioned**

However, in order for greater interaction to be effective, it is considered essential by these Marine Estate interest/user groups that decision makers consistently and demonstrably take these interactions and their results into account when developing policy and regulations.

**Regional Outcomes**

The data indicated that very few differences exist across the various regions. Generally speaking, most community members support and encourage the protection of the natural beauty of the Marine Estate from key threats, such as pollution, and the building and facilitation of a flourishing tourism industry in NSW. The nuanced variation that did occur between regions is discussed further in Appendix 2.

**Implications for the MEMA’s Vision**

As part of MEMA’s vision for the Marine Estate, a series of goals were developed for the Marine Estate. At the request of MEEKP, we have developed the following matrix which outlines the way in which the communities’ perceived benefits, threats and opportunities for the Estate relate directly to these goals...
## Marine Estate vision/goals

<table>
<thead>
<tr>
<th>Clean waters</th>
<th>Safe waters</th>
<th>Biologically diverse &amp; resilient ecosystems</th>
<th>Community access</th>
<th>Benefits maintained for future generations</th>
<th>Maximising economic benefits</th>
</tr>
</thead>
</table>

### 1. Benefits

- Natural and clean waters support a variety of habitats and marine life
- Marine life enriches the state as a whole
- Unique biodiversity that characterises NSW
- People enjoy its natural beauty, even if they can’t visit it regularly
- A safe space to socialise with friends and family
- Facilitates a healthy, active lifestyle
- Has a uniqueness which can be passed on to future generations
- Source of income for the whole state
- Home to iconic images of Australia

### 2. Threats

- Littering/dumping of rubbish /marine debris
- Oil and chemical spills
- Pollutions from sediment or run-off
- Anti-social behaviour
- Loss of appeal due to water pollution threatens social outcomes
- Over-crowding
- Water pollution threatens economic outcomes
- Loss of natural areas reserved for tourism
- Increasing costs to access the Marine Estate

### 3. Opportunities

- Protect and rehabilitate remaining coastal wetlands
- More effective litter collection
- Improving land management practices
- Provide community environmental action support programs
- Provide more education programs regarding the use and management of the Marine Estate
- Improve public access
- Facilitate more discussion between experts
- Market the beauty of the Marine Estate
- Develop management strategies to prevent storm surges, coastal erosion and inundation
Background

In engaging with the NSW community, including key Marine Estate interest/user groups, there were four intended outcomes, two of which (italicised) are directly linked to this community survey…

- Improved engagement and facilitated ownership of the Marine Estate and marine park management process.
- Community concerns and issues are directly reflected in the management alternatives developed for the Marine Estate and marine park management process.
- *Increased knowledge of community attitudes and values of the Marine Estate*
- *Increased community engagement capacity for the Marine Estate Management Authority.*

As part of this survey, a program logic model and an evaluation framework have been developed to assess the extent to which these two intended outcomes have been achieved. For further details on this evaluation framework, please refer to Appendix 1.
Introduction

Marine areas in coastal NSW represent a valuable resource to the social, economic and environmental well-being of the state. The NSW Marine Estate covers all coastal and tidally affected waterways (e.g. rivers, estuaries, coastal lakes and beaches, etc.) in NSW out to three nautical miles off the coast. The Estate covers approximately 1,250 kilometres along the eastern coast of Australia and is home to 755 beaches. The NSW Marine Estate is also home to an extensive variety of marine life, ecosystems and natural resources (MEMA, 2013).

In February of 2012, the Independent Scientific Audit of Marine Parks in NSW released key findings and recommendations regarding the management of the Marine Estate. The audit committee made 16 recommendations for a new approach to the management of the Marine Estate, including the establishment of a new Marine Estate Management Authority (MEMA). The aim of MEMA is to advise the NSW Government on the strategic framework and the priorities for the management of the Marine Estate as a single continuum and to recommend ways for better agency coordination. In particular, MEMA is required to identify priority threats and risks affecting the Marine Estate and to conduct informed studies to identify the most cost effective strategies to avoid or manage those risks.

Along with MEMA, the Marine Estate Expert Knowledge Panel (MEEKP) was also established to assist in informing essential strategies and to provide independent expert technical advice to MEMA to inform the future management of the Marine Estate. MEMA and MEEKP aim to develop a thorough understanding of key community benefits derived from the NSW Marine Estate at the local, regional, and state level as well as threats to those benefits. Information on these benefits and threats will be achieved through ongoing and effective community engagement and expert input. The outcomes of this will be used to underpin government strategies for the Marine Estate and in-turn, policy development for the next 10 years.

In late 2013, the Department of Primary Industry (DPI) at the request of MEMA and MEEKP, commissioned Sweeney Research to undertake a representative survey of the NSW community. The aim of the research was to identify the representative views of the NSW community, including key Marine Estate interest/user groups, on the Marine Estate.

The research design involved a mixed methods approach including an exploratory qualitative phase, followed by an extensive multi-faceted quantitative phase. This report presents the detailed findings from the quantitative phase of the research, a summary of the qualitative findings is also included (a full copy of the qualitative report is also included in Appendix 4).
Aims and Objectives

In accordance with the initial brief and further consultation with both MEMA and MEEKP, a series of research objectives were identified. These objectives reflect the intended purpose of the study and have been the focus of Sweeney's research efforts. With that in mind, the overarching aim of the research program is to...

**Figure 1: The Research Aim and Objectives**

Conduct a representative community survey with NSW residents to understand the environmental, social and economic values of, and benefits derived from, the NSW Marine Estate

The specific objectives of the research are...

<table>
<thead>
<tr>
<th>Perceptions of the Marine Estate</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Define what Marine Estate interest/user groups and the community view the Marine Estate to be</td>
</tr>
<tr>
<td>- Ascertain how Marine Estate interest/user groups and the NSW community want the Marine Estate to look like in 20 years (and how they envisage Marine Estate management strategies should evolve to meet this ideal)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Values of the Marine Estate</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Identify the perceived short and long term economic, social and environmental values of the Marine Estate</td>
</tr>
<tr>
<td>- Determine the benefits they derive from the Marine Estate</td>
</tr>
<tr>
<td>- Record perceived changes in the Marine Estate over the short term and the long term and establish perceptions as to why these have occurred</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Threats to the Marine Estate</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Determine the perceived threats (both current and future) to the Marine Estate</td>
</tr>
<tr>
<td>- Prioritise these threats and identify areas that the public and the Marine Estate interest/user groups consider to need the most urgent attention</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities for the Marine Estate</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Identify potential directions for vision development for the Marine Estate as suggested by key Marine Estate interest/user groups</td>
</tr>
<tr>
<td>- Understand the perceived opportunities for the Marine Estate among the public and Marine Estate interest/user groups</td>
</tr>
<tr>
<td>- Prioritise values, benefits and vision according to key Marine Estate interest/user groups and the NSW community</td>
</tr>
</tbody>
</table>
Research Design

To effectively address all of the research objectives, a mixed methods approach was utilised. Starting with an initial exploratory phase consisting of consultation with the MEEKP and MEMA agency staff and formative qualitative research, the findings informed the design of a series of quantitative surveys. Table 1 provides an overview of the research design.

Table 1: The Research Design

<table>
<thead>
<tr>
<th>Stage 1: Knowledge Discovery and Consultation with Internal Stakeholders</th>
</tr>
</thead>
<tbody>
<tr>
<td>• An orientation workshop involving NSW Trade &amp; Investment, MEMA, MEEKP and the Sweeney Research team</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Stage 2: Formative Qualitative Research</th>
</tr>
</thead>
<tbody>
<tr>
<td>• A series of 36 x 45 minute one-on-one in-depth interviews, and 7 x 1.5 – 2 hour focus group discussions with a range of stakeholders and community members</td>
</tr>
<tr>
<td>• Will set the foundation of insights and knowledge that will drive and guide the development and implementation of priority programs</td>
</tr>
<tr>
<td>• Informs question development of quantitative survey</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Stage 3a: Quantitative Research – Representative Online Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Develop online questionnaire in collaboration with NSW Trade &amp; Investment and MEMA based on the qualitative findings</td>
</tr>
<tr>
<td>• Conduct n=1,000 x 19 minute online questionnaires with a fully robust and representative sample of NSW residents</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Stage 3b: Quantitative Research – Intercept Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Develop a tablet intercept survey in collaboration with NSW Trade &amp; Investment and MEMA based on the qualitative findings</td>
</tr>
<tr>
<td>• Conduct n=700 x 10 minute intercept surveys at 7 locations in NSW with a robust sample of local residents and tourists</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Stage 4: Analysis and Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Development of a comprehensive stakeholder map based on research findings for the marine estate</td>
</tr>
<tr>
<td>• Development of an evaluation framework for any future programs associated with the marine estate</td>
</tr>
<tr>
<td>• Final report outlining the key findings of the research</td>
</tr>
</tbody>
</table>

Each of the research stages shown above are expanded upon over the following pages…

**Stage 1: Knowledge Discovery and Consultation**

The research began with an initial knowledge discovery phase with the primary purpose of agreeing upon key objectives for the research, finalising the methodology and obtaining initial insight from MEMA agency staff and MEEKP members regarding their perceptions of public opinion towards values, attitudes, opportunities and threats concerning the NSW Marine Estate. The process involved three substantive consultation sessions as well as engaging an external expert in environmental economics from the Australian National University, Professor Jeff Bennett.

From these initial sessions, it was decided by MEEKP and MEMA that the focus of this research should be on the identification and understanding of the attitudes, behavioural interactions with, and the perceptions of the NSW community and key Marine Estate interest/user groups towards the Marine Estate.
Stage 2: Formative Qualitative Research

The qualitative phase of the research involved two stages: i) conducting 36 in-depth interviews with key Marine Estate interest/user groups, and ii) conducting seven focus groups with representative samples of the NSW community across seven locations…

- Lismore
- Coffs Harbour
- Newcastle
- Orange
- Sydney
- Batemans Bay
- Eden

This fieldwork took place between the 20th of January and the 7th of February in 2014. For further information regarding the qualitative methodology, please see the qualitative research report located in Appendix 4.

The results of the qualitative research were used to develop a comprehensive list of values, benefits, threats and opportunities towards the Marine Estate. These findings were then used to inform the development of stages 3a and 3b of the research.

Stage 3a: Quantitative Research – Representative Online Survey

Following the qualitative research, two quantitative questionnaires were undertaken concurrently by Sweeney Research. The first of these was an online questionnaire conducted with n=1,003 members of the NSW community randomly sampled to avoid bias. The purpose of this survey was to gain a holistic understanding of the values, benefits, threats and opportunities concerning the NSW Marine Estate amongst the NSW community.

Fieldwork

The online fieldwork took place between the 10th of March, 2014 and the 20th of March, 2014. The average questionnaire length was 19 minutes once all outliers had been removed. A copy of the online questionnaire is included in Appendix 3.
Sampling

To ensure credibility in the research results, it was important to ensure that a representative cross-section of the NSW community was surveyed. As a result, relatively few screening criteria were placed on the sample. To be eligible for the research, respondents needed to adhere to the following criteria:

- A resident living in NSW,
- Over the age of 18; and
- Not working for the Department of Planning and Infrastructure, Office of Environment and Heritage, Department of trade and Investment or Transport for NSW.

To obtain a representative sample of the NSW population, a random-stratified sampling (RSS) technique was utilised. RSS involves setting quotas for target groups of the NSW population to ensure a robust and representative sample is achieved across specific population cohorts (i.e. age, gender, and region). The quotas are then randomly filled by inviting respondents from across NSW to participate in the research. Given the requirements of this research project, RSS represented the most efficient sampling procedure available whilst also maintaining robust and representative outcomes that were the mandate of this research. A breakdown of the quotas developed for the research is contained in Appendix 1.

The sample was sourced using an online panel provider – PureProfile. PureProfile maintain a panel of 32,600 people in NSW (further details on PureProfile and their NSW panel can be found in Appendix 1). Invites were delivered to respondents using a standard email generated by the panel provider. Inside each email invite was a unique hyperlink that would take respondents to the online questionnaire.

In total, 1,030 surveys were completed with 27 responses removed after data cleaning (leaving a final total of n=1,003 completes). For more information on the data cleaning process, see Appendix 1. To achieve the desired number of completes, 28,100 invites were emailed to panel members. The final response rate (RR)\(^1\) was 83.7%.

The final sample was weighted by age, gender and regional location so to ensure that full representation of the NSW general population was achieved. The data used for weighting were taken from ABS population estimates. Further information on the weighting process can be found in Appendix 1 of this document.

Table 2 shows the final sample breakdown according to the weighting criteria. Column 1 shows the total number of interviews conducted for each demographic, Column 2 shows the relative number of interviews for each group once the weighting process was completed and the final column indicates the associated confidence interval levels for each sub-section of the sample.

---

1 RR has been defined in this report as the total completes divided by the total completes + screenouts.
### Table 2: Final Online Sample

<table>
<thead>
<tr>
<th>Sampling criteria</th>
<th>Achieved no. of unweighted interviews (n=)</th>
<th>Weighted no. of interviews (weighted population)</th>
<th>Margin of error&lt;sup&gt;2&lt;/sup&gt; (+/- %)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Males</td>
<td>444</td>
<td>493</td>
<td>4.65</td>
</tr>
<tr>
<td>Females</td>
<td>559</td>
<td>510</td>
<td>4.14</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-24</td>
<td>90</td>
<td>121</td>
<td>10.33</td>
</tr>
<tr>
<td>25-29</td>
<td>73</td>
<td>93</td>
<td>11.47</td>
</tr>
<tr>
<td>30-34</td>
<td>114</td>
<td>91</td>
<td>9.18</td>
</tr>
<tr>
<td>35-39</td>
<td>96</td>
<td>89</td>
<td>10</td>
</tr>
<tr>
<td>40-44</td>
<td>85</td>
<td>91</td>
<td>10.63</td>
</tr>
<tr>
<td>45-49</td>
<td>95</td>
<td>87</td>
<td>10.05</td>
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<tr>
<td>50-54</td>
<td>105</td>
<td>88</td>
<td>9.56</td>
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<tr>
<td>55-59</td>
<td>86</td>
<td>79</td>
<td>10.57</td>
</tr>
<tr>
<td>60-64</td>
<td>82</td>
<td>71</td>
<td>10.82</td>
</tr>
<tr>
<td>65+</td>
<td>177</td>
<td>193</td>
<td>7.37</td>
</tr>
<tr>
<td><strong>Regions</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sydney region</td>
<td>568</td>
<td>599</td>
<td>4.11</td>
</tr>
<tr>
<td>Hunter region</td>
<td>150</td>
<td>120</td>
<td>8</td>
</tr>
<tr>
<td>North East</td>
<td>74</td>
<td>81</td>
<td>11.39</td>
</tr>
<tr>
<td>South East</td>
<td>106</td>
<td>89</td>
<td>9.52</td>
</tr>
<tr>
<td>Western region</td>
<td>105</td>
<td>114</td>
<td>9.56</td>
</tr>
</tbody>
</table>

A further breakdown of the sample is provided in Appendix 1.

<sup>2</sup> Maximum margins of error shown are based on a research finding of 50% at the 95% confidence interval
Stage 3b: Quantitative Research – Intercept Survey

An intercept survey was run concurrently with the online survey. This survey was used to achieve an appropriate level of representation amongst the coastal residents and visitors to the Marine Estate.

Fieldwork

The intercept survey took place between the 28th of February, 2014 and 17th of March, 2014. Interviews were conducted in seven locations across the state, these were:

- Ballina
- Coffs Harbour
- Newcastle
- Pittwater
- Sydney
- Bateman’s Bay
- Eden

These locations were selected for the intercept interviews as they represent a cross-section of communities within the Marine Estate.

Sampling

A non-probability quota sampling technique was utilised for the intercept phase of the fieldwork. A non-probability sampling technique involves setting arbitrarily determined quotas which preclude the possibility of all sections of a population being represented in a sample. This methodology was chosen because of the difficulty in targeting Coastal Residents and Visitors using a probabilistic approach, the time available to complete the fieldwork and the limited budget.

In total n=727 intercept surveys were completed across all of the locations. Unlike probability based sampling, non-probability sampling can be affected by sampling bias. Our fieldwork process included protocols to limit the potential bias that may be incurred. These protocols included…

- Interviewers worked in pairs to ensure safety and that best practice procedures were being followed.
- Potential respondents were selected at random. Where interviewers approached a group or family, only one member of the group/family were interviewed.
- Respondents were screened to ensure that they were in one of the target quota groups (Coastal Residents or Visitors) and had not previously taken part in the research.
Similar to the online survey, quota sampling was used to ensure that a robust and representative sample was achieved in each of the regions sampled. Further details of the quotas developed for this component of the research can be found in Appendix 1.

To achieve the desired number of completes, 1614 people were approached and invited to participate in the research. Of these people, n=744 intercept surveys were completed. During data cleaning, 17 completes were removed from the data set leaving a final sample of n=727 tablet completes. This means that the final response rate for the intercept fieldwork was 45%.

The final sample of n=727 was again weighted by the non-probability quotas for age, gender and location that were used during the interviewing process. The decision to weight according to these criteria ensures that each of the seven interviewing regions are given equal weight in the analysis process. Table 3 shows the final sample achieved for each of the intercept regions, the weighting used for each region and the maximum margin of error for each sub-group...
### Table 3: Final Intercept Sample

<table>
<thead>
<tr>
<th>Sampling criteria</th>
<th>Achieved no. of unweighted interviews (n=)</th>
<th>Weighted no. of interviews (weighted population)</th>
<th>Margin of error¹ (+/- %)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Males</td>
<td>356</td>
<td>350</td>
<td>5.19</td>
</tr>
<tr>
<td>Females</td>
<td>371</td>
<td>350</td>
<td>5.09</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>&lt;30</td>
<td>182</td>
<td>231</td>
<td>7.26</td>
</tr>
<tr>
<td>30-49</td>
<td>256</td>
<td>238</td>
<td>6.13</td>
</tr>
<tr>
<td>50+</td>
<td>289</td>
<td>231</td>
<td>5.76</td>
</tr>
<tr>
<td><strong>Regions</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Batemans Bay</td>
<td>100</td>
<td>100</td>
<td>9.80</td>
</tr>
<tr>
<td>Ballina</td>
<td>100</td>
<td>100</td>
<td>9.80</td>
</tr>
<tr>
<td>Coffs Harbour</td>
<td>101</td>
<td>100</td>
<td>9.75</td>
</tr>
<tr>
<td>Newcastle</td>
<td>116</td>
<td>100</td>
<td>9.10</td>
</tr>
<tr>
<td>Eden</td>
<td>101</td>
<td>100</td>
<td>9.75</td>
</tr>
<tr>
<td>Sydney</td>
<td>102</td>
<td>100</td>
<td>9.70</td>
</tr>
<tr>
<td>Hawkesbury/Pittwater</td>
<td>107</td>
<td>100</td>
<td>9.47</td>
</tr>
<tr>
<td><strong>Maritime status</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Residents</td>
<td>375</td>
<td>350</td>
<td>5.06</td>
</tr>
<tr>
<td>Visitors</td>
<td>352</td>
<td>350</td>
<td>5.22</td>
</tr>
</tbody>
</table>

¹ Maximum margins of error shown are based on a research finding of 50% at the 95% confidence interval.

A further breakdown of the intercept sample is provided in Appendix 1.
The Detailed Findings

This section presents the findings of the community survey. The findings satisfy each of the intended outcomes identified in the agreed evaluation framework...

1. There is increased knowledge of community attitudes and values of the Marine Estate

2. There is increased community engagement capacity for the Marine Estate Management Authority

Overall, results indicated that the community survey has contributed to the achievement of these two outcomes by identifying the following…

• The NSW community’s vision for the Marine Estate
• The perceived environmental, social and economic values/benefits of the Marine Estate
• Current and future threats to the Marine Estate
• The opportunities (potential directions for management) for the Marine Estate
Structure of This Report

This report is divided into eight sections:

1. Summary of Qualitative Findings
2. The Quantitative Findings
3. Interactions with the Marine Estate
4. Attitudes towards the Marine Estate
5. Benefits of the Marine Estate
6. Threats to the Marine Estate
7. Opportunities for the Marine Estate
8. Values of the Marine Estate
9. Perceptions of Marine Parks
10. Conclusions

Each section begins by outlining the research objectives it will address, and then discusses key relevant findings across sub-groups for each objective. Interpretation of research findings and discussion around what this means for MEEKP/MEMA is included within the conclusions section of this report.

Significance testing (using False Discovery Rate) has been conducted on the quantitative data to ascertain significant differences among subgroups of the sample. Relevant significant differences have been specifically addressed in the text of the results section in this document. For a full breakdown of results and significant differences by each question for region, age, gender and other key demographics, please refer to Appendix 2 of this document.

The quantitative data in this report for the online survey and the intercept survey were analysed separately. While it was originally intended that the intercept results would be merged and analysed in conjunction with the online sample, this has not been the case with all data for several reasons which are outlined below...

1. **Incompatible Questionnaires**

Prior to launching the fieldwork, several adjustments were made to both surveys due to issues with the length of the survey. The online survey was extended from its original specification of 15 minutes to a 19 minute task so as to accommodate the various question areas. This extension was not possible for the intercept survey due to respondent dropout rates increasing once an intercept survey gets beyond 10 minutes in length. As such, the intercept survey length remained at the original 10 minute duration.
Because of this, a number of questions had to be shortened or adjusted for the intercept survey (e.g. values, observed changes to the Marine Estate, questions on perceived short and long-term threats to the Marine Estate, attitudes towards the Marine Estate and changing the number of possible options etc.). This process meant that some of the questions on the intercept survey were no longer directly comparable with the questions on the online survey.

2. Differing Sample Procedures and Methodologies

While the online questionnaire used a randomised and in-turn representative sample design, the quota sampling of the intercept surveys was targeted at specific sub-sections of the population. As such, the merging of data between survey and sample designs was not appropriate.
Summary of the Qualitative Results

**Constraint**

Focus group discussions/depth interviews generate creative ideas and hypotheses. They are not intended to be a precise and definitive index of what happens in the NSW community. This report should be interpreted with that constraint in mind.
Qualitative Research Outcomes

The qualitative stage of the research comprised 7 focus group discussions with members of the community and 36 in-depth interviews with Marine Estate interest/user groups. The research was conducted in the following regions in NSW...

- North Coast (Coffs Harbour and Lismore)
- Hunter (Newcastle)
- Greater Sydney (Sydney, drawing on a range of suburbs)
- Central Tablelands (Orange)
- South East (Batemans Bay and Eden)

Details of the design of the qualitative stage are included in Appendix 4, including a table of the Marine Estate interest/user groups interviewed.

Throughout the remainder of this section we discuss the results of the interviews according to region as well as discussing the results of the in-depth interviews that took place with Indigenous and CALD representatives and finally discuss the overarching benefits, threats, opportunities and values associated with the Marine Estate...

Regional Dynamics

From the series of focus group discussions held with community members in each of the regions specified above, a number of location specific insights were uncovered.

Across the five regions covered in this qualitative stage of the research program, a significant number of consistencies emerge in relation to the values associated with the Marine Estate as well as the benefits derived, threats perceived and opportunities for the future, with very few regional differences evident. However, a range of contextual points emerged from the focus group discussions held in each location that give some insight into the motivations behind highlighting specific values, benefits, threats and opportunities...

North Coast Perceptions

The two locations covered in the North Coast for the community focus group component of the research were Coffs Harbour and Lismore.

Community members in the North Coast region exhibit a similar amount of pride in, and affection for, their part of the Marine Estate (and Marine Park) and frequently discuss its beauty and contribution to their healthy and happy way of life...

Members of the Indigenous community on the North Coast also have a strong connection with and affection for their part of the Marine Estate – it is seen as central to their sense of self and core to their identity.

Community members in both locations feel that tourism has some positive and negative impacts on their region – on the one hand, tourists are considered to provide an important income stream for their region but on the other, tourists are associated with increased litter, less respect for the Marine Estate and also increased congestion in the region in peak times.
Also, there are some perceptions that opportunities for development are not always capitalised on because of a community concern relating to overdevelopment in their region – a middle ground is desired by many community members who want the benefits of tourism but not at the expense of their areas’ infrastructure and character.

The Indigenous community in this region perceive restrictions placed on access to the Marine Estate (e.g. restrictions on fishing) as a threat to the value they currently place on it – both in terms of the enjoyment they derive as well as its value as a food and cultural resource.

**Hunter Perceptions**

The term ‘Marine Estate’ also has negative associations in the Hunter Region, mainly because the term feels elitist and exclusive.

Community members in the Hunter Region exhibit a strong desire to preserve and protect the character of the area and express a desire to keep tourist numbers contained, and to protect the diversity of industries within the region, including the Newcastle port.

Community members in this region can feel as though restrictions in relation to interactions with the Marine Estate, particularly in relation to recreational fishing can feel inconsistent and excessive.

Additionally, there is perceived to be little done in relation to policing camping sites and other areas for littering in particular.

**Greater Sydney Perceptions**

Sydney is considered synonymous with the coast and the harbour in particular, and for many Sydney community members and Marine Estate interest/user groups, the Marine Estate is most frequently associated with the beach.

Sydney community members react somewhat negatively to the term ‘Marine Estate’ as, for them, there is an assumption that the term refers to residential or commercial development that will be on or near the water (that the government may be selling off land to developers).

High prices attached to waterfront properties in Sydney are perceived to provide proof for the perception that being by the water is considered a privilege.

Crowding issues, the cost of parking and transport and traffic can detract from the community’s enjoyment of the Marine Estate in Greater Sydney.

Sydney residents are interested in having some involvement in the management of the Marine Estate and feel the Government should ask for their input as they develop future plans.

The need for education and information sharing is considered an important element of the management of the Marine Estate into the future – Sydney community members and Marine Estate interest/user groups believe education from an early age could not only ensure safe behaviours and minimal impact from future interactions with the Marine Estate but also could help foster an appreciation and respect for the Marine Estate and organisms within it.
Central Tablelands Perceptions

Community members in the Central Tablelands region were represented in this stage of the research by a focus group discussion conducted in Orange with local community members.

Although these community members feel removed from the Marine Estate in their day to day lives, they still perceive its value and enjoy the access they have to the Marine Estate.

Orange residents feel removed from decision making in relation to the management of the Marine Estate and are not sure how they would have access to decision makers or a way to voice their opinions in relation to what they consider to be priorities for Marine Estate management in the future.

However, these community members perceive a number of benefits that can be derived from the Marine Estate and, as mainly visitors, believe they have the same rights as residents to access and interact with the Marine Estate.

South East Perceptions

The two locations covered in the South East region for the community focus group component of the research were Batemans Bay and Eden.

A strong link to their part of the Marine Estate is evident, both among non-Indigenous and Indigenous community members…

- Non-Indigenous community members love their local area and the lifestyle it affords them – laid back, simple and interacting with nature
- Indigenous community members in this region feel no separation from their environment, rather they are a part of it, and so unrestricted access to their local environment is considered critical

Creating and protecting opportunities for local residents was a key priority across both areas covered within the South East region, particularly in relation to education and employment opportunities for young people in their area (as they feel many younger members of the community are either moving away, or falling onto hard times).

A strong sense in both parts of the South East region covered in this stage of the research relates to the perceived distance of these locations from decision makers and there is a concern that those who are making decisions may lack the local knowledge required to make prudent decisions for local communities.
Indigenous Community Perceptions

Members of the Indigenous communities in Batemans Bay and Lismore as well as a representative for an advocacy group located in Greater Sydney describe a number of varied interactions between their community and the Marine Estate…

- Gathering food is the most commonly mentioned interaction across these communities

The key roles of the Marine Estate for these Indigenous communities relate to providing a source of food as well as fostering community links via formal and informal interactions.

While these Indigenous community representatives feel that the Marine Estate should be protected so that future generations can derive the same benefits they currently enjoy, the issue of restrictions presents a concern…

- Government control and restrictions on how these communities interact with the Marine Estate are considered a threat to Indigenous culture and traditions (e.g. gathering of traditional foods)

There are considered to be a number of opportunities for greater involvement of Indigenous communities in decision making and setting priorities for the Marine Estate…

- Using the knowledge of the Indigenous community of the land and water in their local areas to help in managing the Marine Estate
- Greater recognition of Indigenous links to the land in decision making and development of restrictions and management priorities

CALD Community Perceptions

Culturally and linguistically diverse (CALD) members of the community were engaged via an in-depth interview with the Ethnic Communities Council (ECC). The ECC represents those sections of the NSW which are not from a traditional Anglo-Saxon background and therefore may not share the typical values of the broader NSW community. The results of this interview indicated that there are a number of differences in how various ethnic communities interact with and perceive the Marine Estate…

- The more established ethnic communities (e.g. the Italian community) are more likely to perceive and interact with the Marine Estate in the same way as the broader community
- Newer arrivals to Australia can have differing perceptions of and interactions with the Marine Estate which tend to be based on the prevailing culture of their country of origin

For the representative of the ECC that was interviewed, targeted education is considered a key step in engaging CALD communities in relation to the management of the Marine Estate…

- Education is considered essential for some newer CALD communities in particular, to encourage a greater understanding of the Marine Estate and prioritise it’s management in the present for future generations
• However, it is considered important that any education initiatives and interactions with these communities are in their language of origin and are culturally appropriate – bilingual educators would be considered the ideal, as their cultural awareness as well as communications skills would foster greater engagement among these CALD communities

**Interactions with the Marine Estate and Perceived Changes over Time**

The term ‘Marine Estate’ is largely unfamiliar to members of the community, who generally refer to the area the Marine Estate covers simply as ‘the coast’…

• Those community members who participated in this stage of the research in Lismore would not consider their part of the Richmond river system to be part of the Marine Estate

• Most other community members would assume that the area the Marine Estate covers would only constitute the coast

Spontaneous responses to the term ‘Marine Estate’ among members of the community were confused and the term was frequently misinterpreted (before the correct definition was supplied)…

• Many presumed the term refers to residential developments (mainly because of the word ‘estate’) or could potentially be elitist

Awareness of the term is far higher among Marine Estate interest/user groups (as may be expected) but, as with members of the community, its usage is not frequent in day to day conversations…

• For most, ‘the coastline’ or the ‘marine environment’ are used more commonly

• There is a perception among Marine Estate interest/user groups that the term could be easily misinterpreted by the community (supported by initial community responses to the term)

Interactions with the Marine Estate among community members and Marine Estate interest/user groups have remained largely consistent over time. However, many perceive some decline in access to and the quality of the Marine Estate over time…

• Many community members feel there is more litter now than in the past, both on land and in Marine Estate waters and that potentially, not enough is done to clean up the coastline – many believe that tourism (particularly in areas outside the Greater Sydney region) is largely responsible

• Community members, particularly those in Greater Sydney and Hunter regions, feel that it can be more costly to access the Marine Estate now than in the past and rising costs associated with parking and public transport can detract from their enjoyment of the Marine Estate

• Marine Estate interest/user groups, particularly in relation to recreational and professional fishing and boating across a number of areas feel access to the Marine Estate and particular areas within it has declined over time and they are feeling far more restricted as a result
Values Attributed to the Marine Estate

A number of important values are attributed to the Marine Estate by both members of the community and Marine Estate interest/user groups and central to these values is the ongoing health of the Marine Estate, without which many of the other values as well as benefits derived from the Marine Estate could decline or disappear.

The most important environmental values include…

- **The continuing health of the Marine Estate**… The cleanliness of the Marine Estate as well as its biodiversity and the abundance of marine life it contains
- **Safety**… Referring to the safety afforded to marine life by the regulations and restrictions in place to protect them, as well as the lack of serious pollution in the water
- **Uniqueness**… An environment and mix of organisms that cannot be found in other locations

The key economic values ascribed to the Marine Estate by Marine Estate interest/user groups and community members include…

- **Support for local and state economies**… The attraction to the Marine Estate to tourists is perceived in particular to have both direct and indirect value to businesses in NSW
- **Source of food and industry**… The reason for the existence of the state’s commercial fishing industry as well as a direct source of food for recreational fishers (some of whom rely on the Marine Estate to provide food for their families).
- **Facilities in place to help access the Marine Estate**… The presence of infrastructure such as roads, rail, marinas and boat ramps as well as facilities such as amenities blocks are perceived to have economic value to the state
- **A gateway to Australia**… The Marine Estate provides an important link to other markets for trade

The Marine Estate is perceived by both community members and Marine Estate interest/user groups to have enormous social value for NSW…

- **Part of our heritage and culture**… The Marine Estate is broadly considered to be part of NSW and Australian identity and many report a strong, sentimental attachment to this space. Indigenous community members also place great importance on the value of the Marine Estate as a source through which social structures and practices are maintained and reinforced.
- **Value as an escape**… The Marine Estate affords the community an opportunity to get away from everyday lives and relax and this is considered an important value
- **Enabling connection**… Offering a way for members of the community to spend time with loved ones and strengthens relationships as well as feeling a part of the community. Additionally, the Marine Estate is perceived to play a critical role for Indigenous communities as a food source as well as reinforcement of traditional diets that help these communities remain connected to their culture
• **Offering choice**… Many enjoy and value the range of different activities and uses the Marine Estate offers them

• **Safety**… A significant value is attributed by the community in particular to feeling comfortable swimming there without fear of coming into contact with harmful chemicals, as well as the protection offered to members of the public from services provided by organisations such as Surf Life Saving

• **Medicinal value**… The Marine Estate, and the organisms within it, are valued by many for their medicinal and therapeutic applications

• **Access**… Having access to clean, unspoilt coastal areas

• **Therapeutic value**… The Marine Estate holds value for community members and Marine Estate interest/user groups alike for its healing properties (e.g. benefits of salt water and some plants and organisms that are found in the Marine Estate)

• **A source of scientific discovery**… Being able to use the Marine Estate to improve scientific knowledge and as a source of education for the community about marine life
The Interrelatedness of Values Associated with the Marine Estate

When considering the values attributed to the Marine Estate by community members and Marine Estate interest/user groups, there is a great deal of interrelatedness between the emergent environmental, economic and social values nominated in this stage of the research.

However, one value is considered to be the core value of the Marine Estate, without which, the other values could disappear or decline significantly, either in the short or long term. This is the ongoing health of the Marine Estate – the cleanliness, abundance and biodiversity that is currently associated with the Marine Estate throughout NSW. It is believed that, if the Marine Estate was to become less healthy, then its value as a part of our cultural identity and as a source of income for the state to name two, would be seriously compromised and could disappear entirely over time.

Most Marine Estate interest/user groups and community members feel cognisant of the need to maintain the health of the Marine Estate as a priority and indicate a willingness to have their own impacts on the Marine Estate managed and restricted if scientific evidence suggests those restrictions would be likely to help eliminate threats and ensure their interactions would be possible in the long term (hence, the calls for greater information sharing and collaboration with other groups and decision makers).
Benefits Derived from the Marine Estate

Following on from the values ascribed to the Marine Estate by Marine Estate interest/user groups and members of the community, a number of important benefits are derived

The most important environmental benefits of the Marine Estate include…

- That the Marine Estate may continue… Ensuring the ongoing health of the Marine Estate means that its uniqueness and biological value may continue into the future
- A celebration of biodiversity… A large variety of organisms to observe and interact with as well as to catch and eat

The key economic benefits associated with the Marine Estate include…

- Deriving an income… The Marine Estate provides both direct and indirect benefits to NSW communities
- Broader economic benefits… Other economic benefits of tourist movements beyond the Marine Estate as well as its role as a trade route

The social benefits derived from the Marine Estate that are important to both members of the community and Marine Estate interest/user groups include…

- Health benefits… A number of physical and mental health benefits are derived from the Marine Estate by the community and interactions with the Marine Estate are considered an important part of a healthy lifestyle
- Social interaction… Community members and Marine Estate interest/user groups in particular feel their interactions with the Marine Estate afford them the opportunity to strengthen relationships with family members as well as make new connections with likeminded people (e.g. by joining clubs, etc.)
- Enjoyment… The fun of being able to participate in the activities and pursuits they love
- Peace… The Marine Estate provides a sense of peace and tranquillity to the individual but also the community more broadly
- Appreciation and respect… For both the Marine Estate itself as well as for the points of view of other Marine Estate interest/user groups
- Feeling a connection to nature… A clean and healthy Marine Estate provides the benefit to the community of feeling a part of nature and enjoying its beauty
- Knowledge of the Marine Estate… Scientific discovery as well as personal experience based on interactions with the Marine Estate provide the benefit of increased personal and collective knowledge
Perceived Threats to the Marine Estate

A number of threats are perceived by Marine Estate interest/user groups and community members that could undermine the current values of, and benefits derived from, interactions with the Marine Estate. Environmental threats are considered critically important as they refer to the core value of the ongoing health of the Marine Estate and include…

- **Pollution…** Land run off, litter and the threat of events such as oil and chemical spills are perceived to be the most imminent threat to the Marine Estate by the majority

- **Habitat destruction…** Habitat destruction is considered an important threat to the biodiversity, ecosystems and fish populations in the Marine Estate. This mainly refers to the loss of nursery grounds for fish that are perceived to be under threat from loss of mangroves and other seagrass areas within the Marine Estate (either from development, poor management or pollution)

- **Human extraction from the Marine Estate…** Issues such as overfishing and mining are perceived as highly visible threats to the Marine Estate (although it should be noted there is little evident understanding among the community of exactly what constitutes overfishing)

- **Other human activity…** Activities such as use of motored watercraft and irresponsible practices (such as littering), if unchecked, can increase threats to the health of the Marine Estate

- **Broader, long term threats…** Larger issues such as climate change and water acidification are considered long term threats to the health and biodiversity of the Marine Estate

The main economic threats to the Marine Estate largely revolve around loss of income and include…

- **Restrictions on fishing…** A key area for concern in the Marine Park area of Batemans Bay in particular relates to the loss of livelihood related to restrictions being placed on commercial fishing within these areas, causing a great deal of dissatisfaction and distress within this industry in these areas. While the commercial fishing representatives in Coffs Harbour hold similar views to those in Batemans Bay, the views of the community were not as negative in relation to commercial fishing restrictions (perhaps because of the lack of a community member with a commercial fishing interest in the Coffs Harbour focus group, or that the Marine Park in Coffs Harbour has been in place for three times as long)

- **Decline in tourism…** Depleted marine life and a loss of beauty could mean tourists (and the income they provide for the state) are less attracted to NSW

- **Imprudent development…** Placing commercial interests above all others and overdeveloping an area as well as the alternative of avoiding all development to preserve an area are each considered to be threats to the economic value of the Marine Estate

- **Other restrictions on access…** Restrictions on recreational activities such as fishing, diving and boating, or adding a monetary cost for accessing the Marine Estate would be perceived to undermine its value for many (e.g. businesses may not make as much if costs to access the Marine Estate were to increase for them)
• **Lack of funding to maintain the Marine Estate**… A lack of funding for the maintenance of the Marine Estate is perceived to pose a threat to its economic value by making it less attractive and potentially less safe

A range of social threats to the Marine Estate are highlighted by members of the community and Marine Estate interest/user groups and include…

• **A decline in mental and physical health**… As a result of interacting less frequently with the Marine Estate if its health in particular begins to decline, many feel that the health benefits currently associated with the Marine Estate could be lost and overall health of the community may decline

• **Lack of enjoyment of the Marine Estate**… The satisfaction currently gained from interacting with the Marine Estate could be lost if too many restrictions or costs become associated with those interactions. For example, Indigenous community representatives discuss the costs of obtaining licenses and permits for fishing as potentially prohibitive to members of this community and could have negative impacts on their access to areas they have always traditionally associated with. Restrictions on fishing are also a concern for recreational fishers and are perceived as a threat to their enjoyment of the Marine Estate

• **Decline in social interaction**… It is believed there would be a negative impact on relationships and a potential disconnection from the community if interactions with the Marine Estate were to significantly decline

• **Lack of access for traditional owners of the land**… Representatives of Indigenous communities express concern that restrictions on access to parts of the Marine Estate pose a threat, not only to how these communities will be able to access a valuable food source, but also to the practice of cultural traditions

• **Lack of community knowledge and engagement**… A lack of insight among members of the broader community in relation to the impact of their actions on the local environment, as well as a lack of awareness or perceived relevance of the bigger picture can mean that actions are not as considered as they could be and that the Marine Estate may suffer as a result

Along with the environmental, economic and social threats to the Marine Estate, a number of politically based threats emerge…

• **Lack of engagement**… Some community members and Marine Estate interest/user groups can feel disengaged and disconnected from the management of the Marine Estate either via lack of awareness of the processes in place, or a perception they are not consulted as decisions are being made

• **Lack of trust**… Some concern around whether management of the Marine Estate is consistent and also the perceived importance placed on political pressure compared to scientific information or the wishes of the broader community

• **Lack of ownership**… Some members of the community and Marine Estate interest/user groups report feeling a lack of empowerment to have any role in decision making
Opportunities for the Marine Estate

A range of opportunities are highlighted by participants in this stage of the research that could potentially enhance the value of the Marine Estate or minimise threats.

Some overall opportunities for the management of the Marine Estate were mentioned consistently and include…

- **Communication…** Currently a point of dissatisfaction for some Marine Estate interest/user groups in particular, it is believed that more frequent communication with the community could enhance engagement

- **Consultation…** Engaging in consistent consultation with community and Marine Estate interest/user groups where they feel heard and that they have input into decision making could help to enhance faith in the processes in place

- **Collaboration…** Many Marine Estate interest/user groups in particular express a desire to collaborate with other Marine Estate interest/user groups and decision makers to come to the most mutually beneficial solutions to issues in the Marine Estate

- **Visibility and accessibility…** Being able to have access to decision makers and management of the Marine Estate having a local presence could help enhance interactions

The main environmental opportunity for the Marine Estate relates to…

- **Prioritisation of threats…** Building on community consultation processes and scientific evidence to understand which threats are most imminent and should be tackled as a priority

The most important economic opportunities for the Marine Estate include…

- **Effective marketing of the Marine Estate…** Businesses and Government working together to market the unique beauty of the NSW Marine Estate

- **Expand income opportunities…** Ensure that the most is being made from the business opportunities for the Marine Estate without compromising its current values

A number of social opportunities are also highlighted by community members and Marine Estate interest/user groups, including…

- **Consistent processes in place to understand the Marine Estate…** Regular scientific research and ongoing consultation with community members, particularly those with a great deal of experience interacting with the Marine Estate over time

- **Building on current management arrangements…** Building on the processes in place now and learning from other management models to build the best possible Marine Estate management strategy

- **Educate the population…** There is a real opportunity for educating the NSW population about how the Marine Estate itself works and how it is managed

- **Encourage ownership…** Define roles in management processes so that the community can understand how they can feed into decision making
• **Engage in decision making**… Allowing the community and Marine Estate interest/user groups to feel their influence in management decisions

**Suggested Priorities for Marine Estate Management**

Members of the community and Marine Estate interest/user groups nominated the following three areas they believe should be prioritised by management of the Marine Estate…

• **Education**… Education is considered particularly important for the community – now so that they understand the Marine Estate and how best to interact with it, and into the future so that current values are upheld by future generations

• **Communication and collaboration**… Finding the best, mutually beneficial solutions and communicating regularly with the community, particularly in relation to decision making and the reasons behind decisions

• **Identifying and prioritising threats**… Understanding and prioritising the most imminent dangers to the values held in relation to the Marine Estate based on scientific evidence and community consultation

Further detailed findings including the summaries from the 7 regional focus groups and the 36 in-depth interviews with Marine Estate interest/user groups can be found in Appendix 4. The discussion guides used for the focus group and in-depth interviews are also included in this Appendix.
The Quantitative Findings

For details on how to read the charts, please refer to Interpreting Results in Appendix 1.
Interactions with the Marine Estate

This section of the document outlines the behaviours and interactions of the NSW community with the Marine Estate. The particular objectives covered in this section include…

1. Determine the benefits people derive from the Marine Estate

NSW Marine Estate areas visited in the last 12 months

Respondents were asked to identify the areas of the NSW Marine Estate that they had visited within the last 12 months. The most visited area of the Marine Estate is the Greater Sydney region with around 6 in 10 (59%) NSW residents having visited it in the last 12 months. Following this, just under a third had visited the Hunter region (29%), while 28% had been to the South East region of the Marine Estate in the last 12 months. Just under a quarter (23%) had visited the North Coast region.
Within Greater Sydney, Sydney Harbour was the most visited area with 44% of respondents claiming to have visited this area within the last 12 months. Bondi-Cronulla and the Northern beaches to the North Shore were the second and third most visited areas with just under one quarter of the sample visiting either of these areas (24% and 23% respectively).

Within the Hunter region; Karuah, Port Stephens and Newcastle were the most visited areas within the last 12 months (17%), while within the South East; Bundeena Wollongong and Kiama are the most frequented areas (17%). On the North Coast; Nambucca, Port Macquarie and Laurieton are the most visited (11%). Table 4 shows a breakdown of all the regions by the locations visited…
### Table 4: Marine Estate Locations Visited in the Last 12 Months by Region

<table>
<thead>
<tr>
<th>Column</th>
<th>TOTAL</th>
<th>Sydney region</th>
<th>Hunter</th>
<th>South East</th>
<th>North Coast</th>
<th>West</th>
</tr>
</thead>
<tbody>
<tr>
<td>n=</td>
<td>1003</td>
<td>568</td>
<td>150</td>
<td>106</td>
<td>74</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tweed Heads - Pottsville area</td>
<td>8</td>
<td>6</td>
<td>6</td>
<td>3</td>
<td>29</td>
<td>5</td>
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<tr>
<td>Brunswick Heads/Byron Bay/Ballina area</td>
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<td>5</td>
<td>6</td>
<td>2</td>
<td>20</td>
<td>4</td>
</tr>
<tr>
<td>Evans Head - Yamba area</td>
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<td>2</td>
<td>6</td>
<td>1</td>
<td>11</td>
<td>2</td>
</tr>
<tr>
<td>Wooli - Woolgoolga - Coffs Harbour area</td>
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<td>7</td>
<td>8</td>
<td>8</td>
<td>28</td>
<td>5</td>
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<tr>
<td>Nambucca-Port Macquarie - Laurieton area</td>
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<td>9</td>
<td>12</td>
<td>3</td>
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<td>9</td>
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<td>Taree - Myall Lakes - Forster area</td>
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<td>7</td>
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<td>Karuah - Port Stephens - Newcastle area</td>
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<td>6</td>
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<td>12</td>
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<td>Lake Macquarie area</td>
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<td>4</td>
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<tr>
<td>Wyong - Gosford areas</td>
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<td>18</td>
<td>50</td>
<td>12</td>
<td>7</td>
<td>10</td>
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<td>Hawkesbury River</td>
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<td>17</td>
<td>16</td>
<td>3</td>
<td>3</td>
<td>4</td>
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<td>Pittwater area</td>
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<td>13</td>
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<td>2</td>
<td>2</td>
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<td>Northern Beaches - North Shore area</td>
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<td>6</td>
<td>8</td>
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<td>Sydney Harbour</td>
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<td>57</td>
<td>34</td>
<td>34</td>
<td>9</td>
<td>20</td>
</tr>
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<td>Bondi - Cronulla area</td>
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<td>6</td>
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<td>1</td>
<td>16</td>
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<td>NET: SOUTH EAST</td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>Bundewena - Wollongong - Kiama area</td>
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<td>19</td>
<td>4</td>
<td>44</td>
<td>0</td>
<td>11</td>
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<td>Nowra/Shoalhaven - Jervis Bay area</td>
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<td>14</td>
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<td>7</td>
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<td>Sussex Inlet - Durras area</td>
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<td>2</td>
<td>12</td>
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<td>2</td>
</tr>
<tr>
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<td>3</td>
<td>26</td>
<td>2</td>
<td>5</td>
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<tr>
<td>Bermagui/Bega - Talithra area</td>
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<td>3</td>
<td>1</td>
<td>7</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Merimbula - Eden area</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>10</td>
<td>0</td>
<td>5</td>
</tr>
</tbody>
</table>

Other coastal area in NSW | 4 | 4 | 5 | 5 | 3 | 3 |
None of these | 20 | 21 | 7 | 13 | 4 | 46 |

Online respondents, n=shown above
S5. Which of the following areas have you visited in the last 12 months?
All values shown in percentages
Weighted data
^See “interpreting results” section for assistance when reading this table
Bold blue indicates significantly higher than other regions
Bold red indicates significantly lower than other regions
Perhaps unsurprisingly, respondents were more inclined to visit areas close to where they live. People who live in the Sydney region are more likely to have visited the Hawkesbury (17%), Pittwater (13%), the Northern Beaches-North Shore (32%), Sydney Harbour (57%) and the Bondi-Cronulla area (33%).

Those who live in the Hunter were significantly more likely to visit local areas such as Taree-Myall Lakes-Forster (20%), Karuah-Port Stephens-Newcastle (41%) and Lake Macquarie (49%). Those in the South East region were more likely to have visited Bundeena/Wollongong/Kiama areas (44%), Nowra/Shoalhaven-Jervis Bay (47%), Sussex Inlet/Durras areas (12%), Batemans Bay/Narooma (26%), Bermagui/Bega-Tathra (7%) and the Merimbula-Eden areas (10%). Alternatively, those on the North Coast were more likely to have visited the Tweeds Head-Pottsville area (29%), Brunswick Heads/Byron Bay/Ballina (20%), Evans Head-Yamba (11%), Wooli-Woolgoolga-Coffs Harbour (28%) and Nambucca-Port Macquarie-Laurieton (36%). Those from western areas were significantly less likely to have visited any of the Greater Sydney regions (37%).

Similarly, when people visited Marine Estate areas outside of their local region, they tend to visit areas close by. For instance, people that live in Greater Sydney are most likely to visit either the South East (29%) or the Hunter (24%). People in the Hunter are most likely to visit Greater Sydney (62%), while people living in the South East are most likely to visit Greater Sydney whereas people on the North Coast would tend to visit the Hunter region over other coastal regions.

Household income also appears to play a key role with those earning higher wages being significantly more likely to visit the Greater Sydney region (68%) as opposed to those earning less than $65,000 (51%).

**Professional Interactions with the Marine Estate**

In terms of industry and professional interactions with the Marine Estate, approximately 3% of the NSW population work in a business that is directly reliant on the Marine Estate. Amongst these people, retail trade and agriculture are the most common industries. Across all seven intercept regions, around 1 in 20 (5%) owned, operated or worked for a business that relied on the Marine Estate. Amongst these respondents, hospitality, retail trade and commercial fishing were the most common industry types.
Figure 3: Respondents from both the online survey and intercepts who operate or work for a business in the Marine Estate^ (%)

<table>
<thead>
<tr>
<th>NSW General Population (online) Who Operate or Work for a Business in the Marine Estate</th>
<th>Industry of Business*</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>97</td>
<td>3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Coastal Residents and Visitors (intercept) Who Operate or Work for a Business in the Marine Estate</th>
<th>Industry of Business*</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>95</td>
<td>5</td>
</tr>
</tbody>
</table>

^Chart type: flow-through — see “interpreting results” section for assistance when reading this chart

Q1. Do you own or operate a business, or work for a business that, that relies on the Marine Estate?

NSW general population (online) respondents, n=1,003; Coastal Residents and Visitors (intercept) respondents, n=727; NSW general population and work for a business, n=31; Intercept and work for a business, n=36

All values shown in percentages; Weighted data *Values below 10% not shown
Recreational Activities in the NSW Marine Estate

The Marine Estate offers a number of recreational social activities...

Figure 4: Recreational activities ever done in the Marine Estate

<table>
<thead>
<tr>
<th>Activity</th>
<th>NSW General Population</th>
<th>Coastal Residents</th>
<th>Coastal Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking, exercising, sunbathing</td>
<td>83%</td>
<td>97%</td>
<td>95%</td>
</tr>
<tr>
<td>Take a ferry on Sydney Harbour or other waterway</td>
<td>72%</td>
<td>58%</td>
<td>59%</td>
</tr>
<tr>
<td>Socialising in a marine estate area</td>
<td>64%</td>
<td>91%</td>
<td>83%</td>
</tr>
<tr>
<td>Swimming surfing boarding</td>
<td>59%</td>
<td>82%</td>
<td>80%</td>
</tr>
<tr>
<td>Wildlife appreciation activities</td>
<td>51%</td>
<td>72%</td>
<td>67%</td>
</tr>
<tr>
<td>Tour or cruise boat/ship</td>
<td>47%</td>
<td>29%</td>
<td>39%</td>
</tr>
<tr>
<td>Fishing from the shore</td>
<td>38%</td>
<td>44%</td>
<td>40%</td>
</tr>
<tr>
<td>Fishing from a boat</td>
<td>28%</td>
<td>36%</td>
<td>31%</td>
</tr>
<tr>
<td>Kayaking/canoeing</td>
<td>27%</td>
<td>38%</td>
<td>34%</td>
</tr>
<tr>
<td>Scuba diving/snorkelling</td>
<td>24%</td>
<td>34%</td>
<td>35%</td>
</tr>
<tr>
<td>Power boating water skiing jet skiing</td>
<td>23%</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>Undertake educational activities or scientific research</td>
<td>21%</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>Sailing</td>
<td>17%</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>Voluntary environmental work</td>
<td>13%</td>
<td>15%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Base: Online respondents, n=1,003, Coastal Residents, n=375, Visitors, n=352
Q3. How often, if at all, do you do each of these recreational activities?
^Chart type: discreet options – see "interpreting results" section for assistance when reading this chart
All values shown in percentages Weighted data

Walking, exercising, and sunbathing are the recreational activities undertaken most by all three groups (83% NSW general population, 97% Coastal Residents and 95% Visitors). Amongst the general population the second most common activity is taking a ferry (72%), however, this was sixth amongst the Coastal Residents and Visitors. Outside of this anomaly, all three groups share a fairly similar distribution when identifying marine activities ever undertaken.
When broken down by regions, these results show very little difference. Amongst the NSW general population, people in Sydney were more likely to take a ferry (80%) or go on a tour or cruise boat/ship (52%), alternatively, people in the west were less likely to take a ferry (53%), socialise in a Marine Estate area (49%) or use a tour or cruise boat/ship (31%).

Amongst Coastal Residents, people in Batemans Bay were less likely to take a ferry (32%) or go sailing (3%), Residents from Eden were also less likely to take a ferry (24%) but were more likely to fish from the shore (76%) or a boat (59%), Sydney residents were more likely to take a ferry (91%) while people from Hawkesbury were also more likely to take a ferry (92%) and go sailing (43%).

Within the Coastal Visitors group, those in Eden were less likely to have gone on a ferry (32%), those in Sydney were more likely to have gone on a tour or cruise boat/ship (62%) and less likely to have fished from the shore (6%) or a boat (11%), while those in Hawkesbury were more likely to have taken a ferry (82%).

When we observe the frequency of activities ever undertaken we can see that recreationally walking or exercising in the Estate as well as swimming, surfing and socialising are the most commonly undertaken activities.

Another high use was fishing, with 64% of the NSW general population having ever fished from the shore or from a boat. This was indicatively higher amongst Coastal Residents (80%) and Coastal Visitors (71%).
Figure 5 shows the breakdown of recreational activities for all three groups:

**Figure 5: Frequency of Recreational Activities in the Marine Estate^ (%)**

<table>
<thead>
<tr>
<th>Activity</th>
<th>NSW General Population (online)</th>
<th>Coastal Residents (intercepts)</th>
<th>Coastal Visitors (intercepts)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking exercising sun bathing</td>
<td>50</td>
<td>91</td>
<td>72</td>
</tr>
<tr>
<td>Swimming surfing boarding</td>
<td>18</td>
<td>65</td>
<td>56</td>
</tr>
<tr>
<td>Socialising in a marine estate area</td>
<td>10</td>
<td>62</td>
<td>50</td>
</tr>
<tr>
<td>Wildlife appreciation activities</td>
<td>7</td>
<td>39</td>
<td>32</td>
</tr>
<tr>
<td>Take a ferry on Sydney Harbour or other waterway</td>
<td>7</td>
<td>65</td>
<td>8</td>
</tr>
<tr>
<td>Fishing from the shore</td>
<td>5</td>
<td>21</td>
<td>14</td>
</tr>
<tr>
<td>Undertake educational activities or scientific research</td>
<td>515</td>
<td>613</td>
<td>412</td>
</tr>
<tr>
<td>Fishing from a boat</td>
<td>4</td>
<td>15</td>
<td>11</td>
</tr>
<tr>
<td>Kayaking/canoeing</td>
<td>4</td>
<td>12</td>
<td>10</td>
</tr>
<tr>
<td>Power boating water skiing jet skiing</td>
<td>8</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Sailing</td>
<td>8</td>
<td>315</td>
<td>314</td>
</tr>
<tr>
<td>Scuba diving/snorkelling</td>
<td>3</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Tour or cruise boat/ship</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Voluntary environmental work</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

- Once a month or more
- Less than once a month
- Never

Q3. How often, if at all, do you do each of the following activities?

^Chart type: sum total – see “interpreting results” section for assistance when reading this chart

All values shown in percentages; Weighted data

Amongst the NSW general population (online sample) who do each activity once a month or more, there were several significant differences. Unsurprisingly, ferries are used more commonly amongst those people from Sydney (11%). Alternatively, socialising in the Marine Estate (21%) as well as wildlife appreciation activities (18%) are more prominent in the North Coast of NSW. Education activities and scientific research are more common amongst people under the age of 30 (12%). Alternatively, swimming and surfing activities are more common amongst those aged 30-49 years (23%).
Amongst Coastal Residents there were also several significant variances. Residents from Eden are more likely to fish from the shore (45%) or a boat (39%). Those from Sydney were again more likely to have taken a ferry in the last month (34%). Those with a post-graduate qualification were more likely to have undertaken educational activities or scientific research (19%) in the NSW Marine Estate. Under 30’s are likely to scuba dive more frequently (19%) than other age groups.

Amongst Visitors, Ballina is a location to undertake wildlife appreciation activities with 63% having done it in the last month. Alternatively, Newcastle visitors were more likely to go walking or exercising (94%) and swimming, surfing or boarding (77%). For more detailed regional results of recreational activities undertaken in the Marine Estate, please refer to Appendix 2.
This section of the document discusses attitudes of the NSW community towards the Marine Estate. The particular objectives covered in this section include…

1. Record perceived changes in the Marine Estate over the short term and the long term and establish perceptions as to why these have occurred

2. Define the Marine Estate

Following the behavioural aspect of the research, the various attitudes and perceptions of the Marine Estate were tested. This step is crucial to the development of underlying values for the Marine Estate. To begin the attitudinal analysis, online respondents were asked to identify their perceived changes to the Marine Estate over the last 20 years.
Perceived Changes to the Marine Estate over the Last Twenty Years

Figure 6: Perceived Changes to the Marine Estate over the last 20 years^ (%)

Respondents indicated that extreme weather events (49%), littering (48%) and coastal erosion (44%) have increased the most over the last 20 years. Interestingly, a significantly higher number of people from the North Coast (69%) indicated that they had noticed an increase in coastal erosion compared to other regions.

Other changes to the NSW Marine Estate included an increase in coastal infrastructure (seen as a positive), and water pollution. Perceived changes to the amount and variety of marine life as well as the amount of fish caught were inconclusive, with the majority of respondents either not noticing a change or did not know while similar proportions of respondents had noticed a decrease or an increase.
Given that there are relatively few significant differences across the various regions or demographics, these findings indicate a general consensus amongst the NSW population. Keep in mind however; that there were a substantial number of respondents that indicated ‘Don’t know’ across the various options (18-39%).

Attitudes Towards the Marine Estate

Attitudes towards the Marine Estate were tested using a three-point attitudinal scale: Agree, neither agree nor disagree and disagree. While a larger five-point Likert scale would have been a more ideal approach, limited time was a key issue for both questionnaires. With that in mind, extensive pilot testing revealed that there was limited variance between a three-point and a five-point scale in both questionnaires. It is therefore unlikely that the results would differ significantly if a larger scale had been used.

Figure 7 below shows the NSW general population’s direct attitudes towards the Marine Estate. This question was only asked of the online respondents.

Figure 7: Direct Attitudes Towards the Marine Estate^ (%)
As a whole, the NSW general population recognise that the protection of the Marine Estate is the responsibility of all community members (70%) and not just the responsibility of the government. This sentiment was significantly higher amongst those aged 50+ (76%). Following from this, 69% of community members feel that scientific information should be used to inform the development of management strategies for the Marine Estate. The third most commonly held attitude is that the Marine Estate is an important part of why community members enjoy living in NSW (52%). Interestingly, this was not significantly lower for the western regions that do not have direct access to the Marine Estate again confirming that the NSW Marine Estate is important for all.

Disagreement was relatively limited for all of the attitudinal items. However, 14% indicated that they did not think the Marine Estate is currently being managed well by the NSW government and just 16% felt that the government was managing it well. This indicates that most people may not know how the government is managing the Marine Estate and therefore, more communication is required with the community.

For a small portion of the sample, efficacy was also an issue with 14% indicating that they felt they could not make a personal difference to improve the health of the Marine Estate. However, just one-third (36%) felt that they could make a difference while 50% did not know. Potentially, further education on what members of the public can do to help improve the health of the Marine Estate would be beneficial.

Around half (47%) of the respondents indicated that they liked the term ‘Marine Estate’. However, 1 in 10 (11%) suggested that they did not like using the term ‘Marine Estate’ as a way of describing the coast and marine areas of NSW. With that in mind, the term Marine Estate meets some cognitive resistance amongst the younger segments of the population with only 35% of respondents under 30 indicating that they liked the term ‘Marine Estate’. This contrasted heavily with the older population where 54% of people aged over 50 indicated that they liked the term. This finding indicates a semantic dissonance between the generation Y and Baby Boomer demographics and could potentially be addressed by MEMA through targeted messaging. This strategy will be discussed in more detail in the findings section of this document.

In addition to general attitudes towards the NSW Marine Estate, respondents were also asked to indicate their level of agreement with a series of statements that related to the preliminary values identified during the qualitative research. Once again respondents were asked to answer using a three-point attitudinal scale.

Figure 8 shows the results of the values analysis.
Figure 8: Attitudes Relating to Values Held About the Marine Estate (%)

- **NSW general population (online), n=1,003**

Q4. Please indicate if you agree or disagree with each of the following:

- **It is important that the waters and coastline of the Marine Estate stay clean and unpolluted**
  - Agree: 85%
  - Neither agree nor disagree: 14%
  - Disagree: 2%

- **It is important to maintain the abundance and diversity of marine life in the Marine Estate**
  - Agree: 82%
  - Neither agree nor disagree: 17%
  - Disagree: 1%

- **The natural beauty and marine wildlife of the NSW Marine Estate are a key reason why NSW is a great place to live and visit**
  - Agree: 77%
  - Neither agree nor disagree: 21%
  - Disagree: 2%

- **The Marine Estate is an important place for scientific discovery and educational opportunities**
  - Agree: 72%
  - Neither agree nor disagree: 26%
  - Disagree: 2%

- **It is important that we encourage tourism in the Marine Estate for the local economy**
  - Agree: 71%
  - Neither agree nor disagree: 27%
  - Disagree: 2%

- **It's important that the Marine Estate produces a local source of seafood for industry and for personal use**
  - Agree: 68%
  - Neither agree nor disagree: 29%
  - Disagree: 3%

- **I enjoy and value the range of different activities and uses that the Marine Estate offers (e.g. boating, fishing, swimming, etc.)**
  - Agree: 63%
  - Neither agree nor disagree: 33%
  - Disagree: 4%

- **I enjoy and value spending time in the Marine Estate because it provides me with a getaway from everyday life to de-stress/relax**
  - Agree: 62%
  - Neither agree nor disagree: 34%
  - Disagree: 4%

- **The Marine Estate is a place where I enjoy spending time with family, friends and interacting with my community**
  - Agree: 61%
  - Neither agree nor disagree: 34%
  - Disagree: 5%

- **It is important that commercial shipping, port operations, boat storage and services continue to occur in the Marine Estate**
  - Agree: 50%
  - Neither agree nor disagree: 44%
  - Disagree: 6%

**NSW general population (online), n=1,003**

Q4. Please indicate if you agree or disagree with each of the following?

- Chart type: sum total – see “interpreting results” section for assistance when reading this chart

- All values shown in percentages, weighted data
As can be seen there is a strong pro-environmental trend within the data. Respondents indicated that it is important that the waters and coastline of the Marine Estate stay clean and unpolluted (85%), that the abundance and diversity of marine life in the Marine Estate is maintained (82%) and that the natural beauty and marine wildlife of the NSW Marine Estate are a key reason why NSW is a great place to live and visit (77%). Support for these three statements was generally lower amongst the under 30 age groups (74%, 71% and 67% respectively). This directly contrasted with the over 50 age group who showed significant pro-environmental attitudes (94%, 89% and 83% respectively).

Those with a postgraduate qualification felt that the Marine Estate is an important place for scientific discovery and educational opportunities (84%). These respondents also agreed that it is important to encourage tourism in the Marine Estate (84%) and that the Estate is a place they enjoy spending time with family, friends and interacting with the community (74%), this was also significant for couples with children at home (68%). Similarly, those with a degree suggested that the Marine Estate provides a getaway from everyday life to de-stress/relax (70%). These social benefits of the Estate were also significantly higher for people earning over $65,000 with 66% indicating they enjoy and value spending time in the Estate while 66% also indicated that they enjoy spending time with friends and family in the Estate.

Retirees were heavily focussed on the economic outcomes of the Estate. 82% feel that it is important that we encourage tourism in the local economy. As well as this, 81% indicated that it is important that the Marine Estate produces a local source of seafood, while, 60% agree that it is important that commercial shipping, port operations, boat storage and services continue to operate in the Marine Estate (60%).

Finally, respondents were asked to indicate their level of agreement with a trade-off statement. The statement: “Some areas of the Marine Estate should be protected even if it means recreational and commercial fishing are excluded”, was developed using a similar item from the "Who Cares About the Environment?" survey in 2009¹ and is intended to give a basic understanding of the relative importance of environmental conservation in the Marine Estate compared to the social and economic outcomes of commercial and recreational fishing.

Figure 9 shows the results for all three groups:

Willingness to trade off commercial and recreational fishing access for protected areas was highest amongst Coastal Residents (80%), this was followed by Coastal Visitors (75%). Amongst the NSW general population, 67% of people feel that some areas of the Marine Estate should be protected, even if it means recreational and commercial fishing is excluded. There were no significant differences by region, gender or age group amongst the population when it came to this statement. As noted previously, this implies a general consensus across all three groups.

It is important to remember that support may change if the respondents were personally affected by the protection measures in the Marine Estate. Similarly, agreement is based on a sample that has received little, if any, communications on this issue. Should communications that support or discourage the use of protection measures, such as zones, be targeted at the general population, opinion may be affected.
This section of the document discusses the perceived benefits that the NSW community derive from the Marine Estate. The particular objectives covered in this section include…

1. Determine the benefits they derive from the Marine Estate

A comprehensive list of benefits was developed during the qualitative phase of the research. While all of these benefits are valuable and show the diverse offerings of the Estate, some are more prominent amongst the NSW community than others. To assist in the prioritisation of policies, it is important to understand the most common benefits derived by the community.

In this analysis, we divide the benefits into economic, social and environmental benefits. Please note, while benefits were asked across both samples, NSW DPI on behalf of MEMA requested that the online sample be asked to note the two most important benefits of the Marine Estate while the intercept only be asked to note the single most important benefit of the Marine Estate. This decision was made as a result of the time limitation issues associated with the survey design (the allocated length of the intercept questionnaire was 10 minutes, while the online survey was 19 minutes).
**Economic Benefits**

Figure 10: The Economic Benefits of the Marine Estate* (%)

<table>
<thead>
<tr>
<th>Benefit</th>
<th>NSW General Population (online)</th>
<th>Coastal Residents (intercept)</th>
<th>Coastal Visitors (intercept)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provides a source of income for locals</td>
<td>58</td>
<td>36</td>
<td>34</td>
</tr>
<tr>
<td>Home to iconic images of Australia which promotes tourism</td>
<td>54</td>
<td>39</td>
<td>40</td>
</tr>
<tr>
<td>Provides a variety of seafood to catch and eat</td>
<td>34</td>
<td>14</td>
<td>13</td>
</tr>
<tr>
<td>Provides a trade route for goods around Australia and the world</td>
<td>27</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>None of these</td>
<td>7</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

A clear indication of the economic value of the Marine Estate emerges from the data. The ability of the Estate to provide a source of income is highly important across all three groups. Similarly, the fact that the Estate is home to iconic images of Australia which promote tourism is of paramount importance. This is particularly true for Coastal Residents and Visitors with both indicating that this was the most important economic benefit (39% and 40% respectively).

*Chart type: discreet options – see "interpreting results" section for assistance when reading this chart
All values shown in percentages; Weighted data
Within the NSW general population, the perception that the Marine Estate provides a source of income was significantly lower in the Greater Sydney region (54%). This finding indicates that the Greater Sydney region is not as reliant on the Marine Estate for income compared to other regions. For retirees, the provision of seafood to catch and eat was significantly more important (45%) than other options.

Amongst Coastal Residents, being a home for iconic imagery to promote tourism was less important in Batemans Bay (19%) and Eden (7%). Alternatively, residents in these areas recognised the benefit of the Marine Estate providing a source of income with 62% of Eden residents and 48% of Batemans Bay residents indicating that the most important benefit of the Estate was the ability to source an income. For Visitors there were no relevant significant differences.
Social Benefits

Shows the most important social benefits for all three groups…

**Figure 11: The Social Benefits of the Marine Estate^ (%)**

<table>
<thead>
<tr>
<th></th>
<th>NSW General Population (online)</th>
<th>Coastal Residents (intercept)</th>
<th>Coastal Visitors (intercept)</th>
</tr>
</thead>
<tbody>
<tr>
<td>People enjoy its natural beauty, even if they can't visit it regularly</td>
<td>48</td>
<td>18</td>
<td>26</td>
</tr>
<tr>
<td>Provides a safe space to spend time with family and socialise with friends</td>
<td>30</td>
<td>21</td>
<td>12</td>
</tr>
<tr>
<td>Can help people achieve an active, healthy lifestyle</td>
<td>27</td>
<td>16</td>
<td>17</td>
</tr>
<tr>
<td>Its uniqueness and values can be passed on to future generations</td>
<td>27</td>
<td>26</td>
<td>22</td>
</tr>
<tr>
<td>A source of scientific discoveries</td>
<td>19</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>A way to help people feel a part of nature</td>
<td>18</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Helps people to become more involved with their community</td>
<td>9</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>None of these</td>
<td>7</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

NSW general population (online), n=1,003; Coastal Residents (intercepts), n=375; Coastal Visitors (intercepts), n=352
Q6 online. What do you think are the two most important SOCIAL benefits of the NSW Marine Estate?
Q6 intercept. What do you think is the most important SOCIAL benefit of the NSW Marine Estate?
^Chart type: discreet options – see “interpreting results” section for assistance when reading this chart
All values shown in percentages; Weighted data

The intrinsic value of the Marine Estate is a primary social benefit for the NSW general population (48%). This is followed by: provides a safe space to spend time with family and socialise with friends (30%), helps people achieve an active, healthy lifestyle (27%) and its uniqueness and value can be passed on to future generations (27%).
Amongst the NSW general population, people under 30 are less likely to enjoy the Marine Estate’s natural beauty (36%) while those aged over 50 are more likely to enjoy it (54%). Over 50’s also believe that being able to pass on the estate to future generations is a key benefit (36%). Those earning over $65,000 indicate that the Marine Estate can help them achieve an active, healthy lifestyle (33%). However, this is not the case for those earning less than $65,000 (21%).

While the top four social benefits remain the same for each group, the order of benefits differ slightly across the groups. For Coastal Residents, being able to pass on the values and uniqueness of the Marine Estate to future generations (26%) is considered the most important social benefit, while having a safe space to spend time with family and friends is considered the second most important social benefit (21%). Enjoying its natural beauty and having an active lifestyle are third and fourth (18% and 16% respectively).

Visitors are more likely to recognise the benefit of the area’s natural beauty (26%) followed by its uniqueness and passing values on to future generations (22%), achieving an active lifestyle (17%) and providing a safe space (12%).

For both Coastal Residents and Visitors, there were no significant differences by location, age or gender.
Environmental benefits

Figure 12: Environmental Benefits of the Marine Estate^ (%)

The standout environmental benefit of the Marine Estate across all groups was its clean waters that support a variety of habitats and marine life. Amongst the NSW general population 72% indicated it was one of the two most important environmental benefits of the Estate. Along with this, 50% of Coastal Residents and 43% of Visitors indicated it was the most important environmental benefit.

The benefit identified as second most important amongst the NSW general population was its abundance of marine life followed by the unique biodiversity that cannot be found anywhere else in the world. However, amongst Coastal Residents and Visitors, the order changes slightly with these groups considering the unique biodiversity as a more important benefit than the abundance of marine life.

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NSW general population (online), n=1,003; Coastal Residents (intercepts), n=375; Coastal Visitors (intercepts), n=352
Q7 online. What do you think are the two most important ENVIRONMENTAL benefits of the NSW Marine Estate?
Q7 intercept. What do you think is the most important ENVIRONMENTAL benefit of the NSW Marine Estate?
^Chart type: discreet options – see “interpreting results” section for assistance when reading this chart
All values shown in percentages; Weighted data
Amongst the NSW general population, males were more likely to indicate the abundance of marine life (48%) as an important benefit. Alternatively, females were more inclined to think that the unique biodiversity of the Estate was one of the most important (43%) benefits; this was also significant amongst those with a post-graduate qualification (53%). Amongst those aged over 50, the clean waters that support marine habitats was a clear preference (81%), this was also the case with retirees (82%).
Threats to the Marine Estate

This section of the document outlines the perceived threats to the Marine Estate of NSW community. The particular objectives covered in this section include…

1. Determine the perceived threats (both current and future) to the Marine Estate
2. Prioritise these threats and identify areas that the community consider to need the most urgent attention

Threats to the NSW Marine Estate were assessed via unprompted and prompted questions. Initially, the NSW general population (via the online survey) were asked to indicate (via an open-ended question) what they believed were the greatest threats to the NSW Marine Estate. The purpose of this question was to obtain respondents spontaneous (or unprompted) opinions. This allows participants to provide and unbiased opinion prior to testing specific prompted measures. The first section below discusses the results for the unprompted question.

Unprompted Threats to the Marine Estate

There were several key themes identified throughout the analysis of the open-ended responses. Figure 13 shows a word cloud of the answers written by the online respondents when asked to identify the immediate threats to the Marine Estate…

Figure 13: Word Cloud – Immediate Threats to the Marine Estate^

NSW general population (online), n=1,003
Q9. What do you think are the greatest threats to the Marine Estate today?
^see “interpreting results” section for assistance when reading this wordcloud
The most commonly mentioned unprompted threat was that of pollution. While respondents recognised that there were various types of pollution, the word itself has strong semantic connotations for the NSW general population. The next most commonly mentioned word was “overfishing”, however, this was mentioned substantially less than pollution. Other words used included “people”, “litter”, “rubbish” and “Government”.

After coding of these open-ended responses, a clear hierarchy of unprompted threats presented themselves. Figure 14 shows the coded results for the unprompted threats to the Marine Estate…

**Figure 14: Coded – Immediate Threats to the Marine Estate^ (%)**

```
<table>
<thead>
<tr>
<th>Threat</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pollution</td>
<td>48</td>
</tr>
<tr>
<td>Overfishing</td>
<td>18</td>
</tr>
<tr>
<td>Litter</td>
<td>13</td>
</tr>
<tr>
<td>Human impacts</td>
<td>11</td>
</tr>
<tr>
<td>Commercial Activity</td>
<td>7</td>
</tr>
<tr>
<td>Development/Over Development</td>
<td>6</td>
</tr>
<tr>
<td>Climate Change</td>
<td>5</td>
</tr>
<tr>
<td>Government</td>
<td>5</td>
</tr>
<tr>
<td>None/Nothing</td>
<td>5</td>
</tr>
<tr>
<td>Don't know</td>
<td>11</td>
</tr>
</tbody>
</table>
```

*NSW general population (online), n=1,003  
*Values below 5% not shown  
Q9. What do you think are the greatest threats to the Marine Estate today?  
^Chart type: pick any – see “interpreting results” section for assistance when reading this chart  
All values shown in percentages, Weighted data
Overall, around half (48%) indicated that pollution was the main threat to the Marine Estate. This could include various forms of pollution, for example…

“Pollution from industry, mining, fertilisers, erosion due to rising sea levels”

“Pollution from the homes and roads that drain into the water”

Interestingly, females were significantly more likely to indicate that pollution is a threat to the NSW Marine Estate compared to males (55% vs 41% respectively).

Following pollution, around 1 in 5 (18%) identified overfishing or taking illegal catch as the greatest threat to the Estate…

“Overfishing, from boats illegally discharging into the harbour, people illegally taking shellfish and other marine life from reef areas”

“My biggest gripe is the catching and keeping of undersized fish by many recreational anglers.”

Other key threats to the Marine Estate include: littering (13%), human impacts (11%) and commercial activities. No further significant differences were evident by gender, age or location.

**Government’s Role**

Throughout many of the responses there was also a common anti-coalition rhetoric with a number of people laying direct blame for these threats on the NSW government as well as considering their involvement in policy development as a direct threat to the NSW Marine Estate…

“The new liberal/coalition government, they are hogtied to the big end of town, and make stupid decisions to help out their developer mates. Look at the loss of caravan parks, the Catherine hill debacle, the list is endless…”

“Government using funding for political purposes. Successful programs do not continue even though they get results e.g. caring for our country grants. the programs stop because the community (council) cannot afford to continue”

“From what I have heard the new government wants to open up areas that have been made into marine national parks. If this is the case it would be a huge threat to the new Marine Estate”

“Government ownership leads to a loss of utility of any asset”
Prompted Threats to the Marine Estate

Following the identification of unprompted threats to the NSW Marine Estate, the NSW general population (online survey), Coastal Residents and Visitors (intercept sample) were asked to select what they considered to be the most important threats to economic activity, social activity and the environment within the NSW Marine Estate.

For the NSW general population sample, respondents were asked to select their top three threats while Coastal Residents and Visitors that completed the intercept survey were asked to select their top two. This questioning strategy was undertaken at the request of NSW DPI on behalf of MEMA and was necessary due to differences between the timing for completion of the two questionnaires (i.e. the online survey was 19 minutes and the intercept was 10 minutes).
Threats to Economic Activity

Figure 15 shows the prompted economic threats to the Marine Estate identified by the three target groups...

**Figure 15: Threats to Economic Activity in the Marine Estate**

<table>
<thead>
<tr>
<th>Threat to Economic Activity</th>
<th>NSW General Population (online)</th>
<th>Coastal Residents (intercept)</th>
<th>Coastal Visitors (intercept)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Water pollution affecting local businesses/tourism</td>
<td>62</td>
<td>44</td>
<td>50</td>
</tr>
<tr>
<td>Loss of natural areas reserved for nature tourism</td>
<td>51</td>
<td>47</td>
<td>47</td>
</tr>
<tr>
<td>Increasing costs to access and use the Marine Estate</td>
<td>42</td>
<td>18</td>
<td>24</td>
</tr>
<tr>
<td>Increasing costs and regulation of local businesses</td>
<td>30</td>
<td>20</td>
<td>19</td>
</tr>
<tr>
<td>Declining levels of coastal and marine-based tourism</td>
<td>21</td>
<td>12</td>
<td>14</td>
</tr>
<tr>
<td>Restrictions on tourism activities in the Marine Estate</td>
<td>13</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>Restrictions on commercial fishing/aquaculture</td>
<td>13</td>
<td>13</td>
<td>7</td>
</tr>
<tr>
<td>Not enough commercial opportunities for tourism</td>
<td>10</td>
<td>10</td>
<td>6</td>
</tr>
<tr>
<td>Restrictions on coastal property development</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>None of these</td>
<td>9</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

NSW general population (online), n=1,003; Coastal Residents (intercepts), n=375; Coastal Visitors (intercepts), n=352
Q12 online. What do you think are the 3 MAIN ECONOMIC threats that the NSW government should address?
Q12 intercept. What do you think are the 2 MAIN ECONOMIC threats that the NSW government should address?
*Chart type: discreet options – see "interpreting results" section for assistance when reading this chart
All values shown in percentages; Weighted data
The impact of water pollution on businesses and tourism was identified by the NSW general population (62%) and Visitors (50%) as the greatest threat and by Coastal Residents as the second greatest threat (44%) to economic activity in the Marine Estate. The threat of losing natural areas reserved for tourism was also identified as a major threat with 51% of the NSW general population, and around half of the Coastal Residents and Visitors (47% each) indicating that it was a major threat. Following this, increasing costs to access and use the NSW Marine Estate as well as increasing regulations on local businesses were also identified as important threats.

Amongst the NSW general population, (57%) females were more likely to indicate that the loss of natural areas is a major threat compared to just 45% of males. Extending from this, people under 30 years of age (30%) were more likely to identify declining levels of tourism as a key threat to economic activity compared to other age cohorts.

Coastal Residents in Batemans Bay were more likely to indicate that restrictions on coastal property development were a major threat (21%) compared to other regions, while Residents indicated that restrictions on tourism (27%) and restrictions on commercial fishing (33%) are key threats. There were no relevant significant differences amongst Visitors.

For a breakdown of the results by key subgroups for each group, please refer to Appendix 2.

**Threats to Social Activity**

Social threats to the NSW Marine Estate were dominated by anti-social behaviour (58% NSW general population, 46% Coastal Residents, 43% Visitors) and the potential loss of appeal due to water pollution, litter, etc. (55% NSW general population, 47% Coastal Residents, 47% Visitors).
Figure 16 shows the distribution of social threats for all three groups…

**Figure 16: Social Threats to the Marine Estate\(^\ast\) (%)**

<table>
<thead>
<tr>
<th>Threat</th>
<th>NSW General Population (online)</th>
<th>Coastal Residents (intercept)</th>
<th>Coastal Visitors (intercept)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anti-social behaviour affecting safety and enjoyment</td>
<td>58</td>
<td>46</td>
<td>43</td>
</tr>
<tr>
<td>Loss of appeal due to water pollution/littering</td>
<td>55</td>
<td>47</td>
<td>47</td>
</tr>
<tr>
<td>Loss of appeal due to overcrowding</td>
<td>31</td>
<td>12</td>
<td>15</td>
</tr>
<tr>
<td>Danger to swimmers (from jet skiers, boats, etc)</td>
<td>31</td>
<td>16</td>
<td>21</td>
</tr>
<tr>
<td>Lack of public access</td>
<td>29</td>
<td>23</td>
<td>24</td>
</tr>
<tr>
<td>Not enough restriction on commercial fishing</td>
<td>17</td>
<td>18</td>
<td>17</td>
</tr>
<tr>
<td>Over restriction of recreational fishing</td>
<td>17</td>
<td>16</td>
<td>13</td>
</tr>
<tr>
<td>Danger to water users from sharks(^*)</td>
<td>11</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Impacts of fishing on snorkelling and Scuba diving</td>
<td>8</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>None of these</td>
<td>7</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

\(^*\)Chart type: discreet options – see “interpreting results” section for assistance when reading this chart

*Item not included in the intercept questionnaire

All values shown in percentages; Weighted data

NSW general population (online), n=1,003; Coastal Residents (intercepts), n=375; Coastal Visitors (intercepts), n=352

Q13 online. What do you think are the 3 MAIN SOCIAL threats that the NSW government should address?

Q13 intercept. What do you think are the 2 MAIN SOCIAL threats that the NSW government should address?

*Chart type: discreet options – see “interpreting results” section for assistance when reading this chart

*Item not included in the intercept questionnaire

All values shown in percentages; Weighted data
Other key social threats raised by the NSW general population included loss of appeal due to overcrowding (31% - not seen as a threat by Coastal Residents (12%) and Coastal Visitors (15%)), danger to swimmers (31% NSW general population, 16% Coastal Residents and 21% Coastal Visitors) and a lack of public access to the NSW Marine Estate (29% NSW general population, 23% Coastal Residents and 24% Coastal Visitors).

Lower priority threats to the NSW Marine Estate were restrictions on commercial and recreational fishing (17% NSW general population), danger from shark attacks (11% NSW general population) and the impacts of fishing on snorkelling and scuba diving (8% NSW general population, 10% Coastal Residents and Visitors).

Within the NSW general population, males were more likely to indicate that restrictions on recreational fishing were a key threat (21% vs 13% of females). Those aged under 30 suggested that the impacts of fishing on snorkelling and scuba diving were a key threat (16%). Alternatively, those aged 50+ were more likely to indicate anti-social behaviour (69%), danger to swimmers (39%) and an over-restriction on recreational fishing (24%) as key threats compared to other age cohorts.

Finally, those earning less than $65,000 were more likely to indicate that anti-social behaviour was a major threat compared to those earning less than $65,000 (63% vs 53% respectively).

While Coastal Residents and Visitors shared the view of the NSW general population in terms of the top two threats to the NSW Marine Estate (anti-social behaviour and loss of appeal due to water pollution/littering), the third most important threat to Coastal Residents and Visitors is a lack of public access to the Marine Estate (mentioned 23% and 24% respectively), indicating that accessibility to the Marine Estate is potentially a problem in some areas.

No significant differences were identified for Coastal Residents amongst key subgroups. However, male Coastal Visitors were more likely to indicate that a lack of public access to areas of the Marine Estate was a major threat (33% vs 15% of females).
Threats to the Environment

Finally, respondents from all three groups were asked to indicate the greatest threats to the environment of the Marine Estate. Please note, that due to time constraints, some items of this question were not asked of Coastal Residents and Visitors. Where this was the case, the chart is marked with an N/A...

**Figure 17: Threats to the Environment of the Marine Estate^ (%)**

<table>
<thead>
<tr>
<th>Threat</th>
<th>NSW General Population (online)</th>
<th>Coastal Residents (intercept)</th>
<th>Coastal Visitors (intercept)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Littering/dumping rubbish/marine debris</td>
<td>47</td>
<td>36</td>
<td>39</td>
</tr>
<tr>
<td>Oil and chemical spills</td>
<td>34</td>
<td>29</td>
<td>21</td>
</tr>
<tr>
<td>Water pollution from sediment or run-off</td>
<td>29</td>
<td>22</td>
<td>27</td>
</tr>
<tr>
<td>Over development of the coast^</td>
<td>22</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Mining of oil and gas</td>
<td>21</td>
<td>16</td>
<td>20</td>
</tr>
<tr>
<td>Climate change/global warming/natural disasters</td>
<td>20</td>
<td>16</td>
<td>16</td>
</tr>
<tr>
<td>Illegal catching/taking of fish and other marine life</td>
<td>18</td>
<td>16</td>
<td>16</td>
</tr>
<tr>
<td>Over-fishing</td>
<td>16</td>
<td>18</td>
<td>16</td>
</tr>
<tr>
<td>Dredging and spoil dumping</td>
<td>16</td>
<td>9</td>
<td>12</td>
</tr>
<tr>
<td>Loss of coastal habitats</td>
<td>13</td>
<td>16</td>
<td>13</td>
</tr>
<tr>
<td>Not enough protected areas for conservation</td>
<td>11</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>Boating activity causing habitat damage/pollution</td>
<td>8</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>Shark nets impacting on marine wildlife^</td>
<td>7</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Marine pests/diseases^</td>
<td>6</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>None of these</td>
<td>6</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

NSW general population (online), n=1,003; Coastal Residents (intercepts), n=375; Coastal Visitors (intercepts), n=352
Q14 online. What do you think are the 3 MAIN ENVIRONMENTAL threats that the NSW government should address?
Q14 intercept. What do you think are the 2 MAIN ENVIRONMENTAL threats that the NSW government should address?
^Chart type: discreet options – see “interpreting results” section for assistance when reading this chart
*Item not included in the intercept questionnaire
All values shown in percentages; Weighted data
Littering, oil and chemical spills, land-based runoff and other forms of pollution were clear priorities when it comes to environmental threats. However, there is still some concern for other threats such as over-development, natural disasters, resource extraction and to a lesser extent overfishing.

Amongst the NSW general population, people aged over 50 were more likely to consider oil and chemical spills as a major environmental threat (41%) and were also more likely to consider the mining of oil and gas as a major threat (27%) compared to other groups. However, those aged under 30 considered shark nets more of an environmental threat than other age groups (13%).

A similar hierarchy of main threats to the environment of the NSW Marine Estate was identified by Coastal Residents and Visitors. The main difference between the results was that water pollution from sediment or run-off was considered more of a threat amongst Visitors than amongst Residents and the NSW general population.

No significant differences were evident amongst sub-groups for Coastal Residents and Visitors.

**Threats to the Marine Estate**

The NSW general population were also asked if they believed there would be any additional threats to the Marine Estate over the next 20 years. Approximately, half (48%) indicated that they thought there would be additional threats.

**Figure 18: Will There Be Additional Threats over the Next 20 Years?**

NSW general population (online), n=1,003
Q10. Do you think there will be any additional threats to the Marine Estate in the future?

*Chart type: sum total – see “interpreting results” section for assistance when reading this chart
All values shown in percentages, Weighted data
Those that indicated that there would be additional threats to the Marine Estate in the future were asked to identify what these threats would be. Similar to the ‘current threats’ identified, concerns with pollution were top of mind and as such were perceived as the overriding threat. In addition to this, respondents identified people, overpopulation, erosion, climate change, global warming and overfishing as other potential threats in the next 20 years.

Figure 19 shows a wordcloud identifying the most common words mentioned by respondents in this question.

Figure 19: Future Threats to the Marine Estate

NSW general population (online) respondents that feel there will be future threats, n=482
Q11. Could you explain what threats you believe will become an issue in the next 20 years?
^see “interpreting results” section for assistance when reading this wordcloud
Opportunities for the Marine Estate

This section of the document discusses the potential opportunities for the Marine Estate that the NSW community would like to see the government focus on. The particular objectives covered in this section include...

1. Ascertain how the NSW community want the Marine Estate to look in 20 years and how they envisage the Marine Estate should evolve to meet this ideal

2. Understand the NSW community’s perceived opportunities for the Marine Estate

3. Identify potential directions for vision development for the Marine Estate as suggested by the NSW community

A number of economic, social and environmental opportunities were identified during the qualitative research. Respondents were asked to identify opportunities the NSW Government should make a priority. As with the benefits analysis, online respondents were asked to provide the two most important opportunities, while the intercept sample were asked to indicate their most important opportunity. Intercept respondents were only asked to provide details for environmental and economic opportunities. Online respondents were also asked to provide their top two social benefits.
### Economic Opportunities

**Figure 20: Economic opportunities for the Marine Estate**

<table>
<thead>
<tr>
<th>NS General Population (online)</th>
<th>Coastal Residents (intercept)</th>
<th>Coastal Visitors (intercept)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market and promote the beauty/biodiversity of the Marine Estate to promote tourism</td>
<td>44</td>
<td>46</td>
</tr>
<tr>
<td>Develop/implement management responses to storm surges/coastal erosion/inundation</td>
<td>40</td>
<td>N/A</td>
</tr>
<tr>
<td>Improve public access to areas of the Marine Estate</td>
<td>32</td>
<td>18</td>
</tr>
<tr>
<td>Allow more environmentally sensitive coastal development</td>
<td>24</td>
<td>17</td>
</tr>
<tr>
<td>Ease restrictions and reduce costs for businesses</td>
<td>12</td>
<td>N/A</td>
</tr>
<tr>
<td>Grow boating &amp; maritime industries within the Marine Estate</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>Promote new industries in the Marine Estate</td>
<td>7</td>
<td>N/A</td>
</tr>
<tr>
<td>Allow commercial fishing access in some marine parks where it is currently restricted</td>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>None of these</td>
<td>11</td>
<td>5</td>
</tr>
</tbody>
</table>

NSW general population (online), n=1,003; Coastal Residents (intercepts), n=375; Coastal Visitors (intercepts), n=352
Q15 online. What do you think are the 2 main ECONOMIC opportunities that the NSW government should focus on over the next 20 years?
Q15 intercept. What do you think is the main ECONOMIC opportunity that the NSW government should focus on over the next 20 years?
*Chart type: discreet options – see “interpreting results” section for assistance when reading this chart
All values shown in percentages; Weighted data
The NSW general population indicated that their preferred economic opportunities were to market and promote the beauty and biodiversity of the NSW Marine Estate (44%), as well as developing and implementing management response to storm surges, coastal erosion and inundation (40%), this was significantly higher in the North Coast region (58%).

In addition to this, around one-third (32%) indicated that improvements to public access were required while around one-quarter (24%) thought that more environmentally sensitive coastal development should be prioritised. Interestingly, just 5% of the NSW general population indicated that commercial fishing should be allowed in some marine parks where it is currently restricted.

Amongst Coastal Residents, marketing and promoting the Estate was clearly dominant (46%), more so in Newcastle where this result was significantly higher (65%). In both Batemans Bay and Eden, 19% suggested that commercial fishing should be allowed in some marine parks where it is currently restricted, significantly higher than any in other regions.

Environmental Opportunities

Following on from the economic opportunities of the Marine Estate, all groups were asked to identify the environmental opportunities for the Estate that should be the priority of the NSW Government. These results are shown overleaf:
Figure 21: Environmental Opportunities for the Marine Estate\(^a\) (\%)  

<table>
<thead>
<tr>
<th>NSW General Population (online)</th>
<th>Coastal Residents (intercept)</th>
<th>Coastal Visitors (intercept)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protect &amp; rehabilitate remaining coastal habitats and wetlands</td>
<td>41</td>
<td>35</td>
</tr>
<tr>
<td>Provide more effective litter collection services</td>
<td>34</td>
<td>14</td>
</tr>
<tr>
<td>Improve land management practices to reduce run-off</td>
<td>26</td>
<td>12</td>
</tr>
<tr>
<td>Provide targeted education programs to reduce human impacts</td>
<td>25</td>
<td>N/A</td>
</tr>
<tr>
<td>More protected areas to conserve marine biodiversity</td>
<td>22</td>
<td>17</td>
</tr>
<tr>
<td>Establish restrictions on commercial and recreational fishing where needed</td>
<td>16</td>
<td>7</td>
</tr>
<tr>
<td>More monitoring and research to inform decision making</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>None of these</td>
<td>8</td>
<td>1</td>
</tr>
</tbody>
</table>

\(^a\)Chart type: discreet options – see “interpreting results” section for assistance when reading this chart.
All values shown in percentages; Weighted data.

Q16 online. What do you think are the 2 main ENVIRONMENTAL opportunities that the NSW government should focus on over the next 20 years?
Q16 intercept. What do you think is the main ENVIRONMENTAL opportunity that the NSW government should focus on over the next 20 years?

NSW general population (online), n=1,003; Coastal Residents (intercepts), n=375; Coastal Visitors (intercepts), n=352
Protecting and rehabilitating coastal habitats and wetlands was the highest scoring item for all three groups, with 41% of the general population selecting it as one of their two most important opportunities and 35% of Coastal Residents and 32% of Visitors indicating it is the most important environmental opportunity. Other priority opportunities included more effective litter collection services (34%), improvements to land management practices to reduce run-off (26%) and targeted education campaigns (25%).

Amongst the NSW general population, those aged over 50 (34%) were more likely to consider improvement to land management practices to reduce run-off as a key priority. Amongst both coastal groups there were no relevant significant differences.

For Coastal Residents and Visitors, more protected areas to conserve marine biodiversity was considered an opportunity for 17% and 20% respectively.

**Social Opportunities**

The final component of the opportunities analysis looks at the social opportunities for the Marine Estate. Only online respondents were asked to identify the most important social opportunities for the Marine Estate.
The NSW general population indicated that providing more education programs/information to the community should be a priority (32%), 3 in 10 suggest improving public access to the Marine Estate and a quarter (28%) suggest providing community environmental support. Females were more likely to indicate that providing more education programs (37%) and providing community action programs (33%) should take priority.
Values

Objectives:

This section of the document discusses the values associated with the Marine Estate. These have been derived using the results of both the qualitative and quantitative research. These results utilise the economic, social and environmental findings from the rest of this report to determine four overarching cultural values for the Marine Estate. The particular objectives covered in this section include…

1. Identify the perceived short and long term economic, social and environmental values of the Marine Estate

To successfully prioritise public policies for the Marine Estate it is important to identify the underlying values that drive the NSW community’s behaviours, attitudes and perceptions of the Marine Estate. In this section we utilise the results of the quantitative research, as well as the preliminary values identified during the qualitative research, to identify and profile the values of the NSW community when it comes to the Estate. Four underlying values were identified amongst the community, these were:

Identity

“*Australians are a coastal people. The coast is our heritage and way of life and I wouldn’t be me without it*”  
(Community representative, Lismore)

“We see the environment differently to non-Aboriginal people. We are actually part of the ecosystem.”  
(Indigenous representative, South East region)

The Marine Estate represents a fundamental piece of the NSW community’s self-identity. In the qualitative research, several cultural manifestations for this latent value were identified:

1. **Uniqueness...** The Marine Estate is home to a diverse range of flora and fauna that cannot be found anywhere else in the world. This uniqueness is a manifestation of what it means to be part of the NSW community. This value was reinforced in the quantitative research where three-quarters of the NSW community indicated that the natural beauty and marine wildlife of the NSW Marine Estate are a key reason why NSW is a great place to live and visit. Amongst the Indigenous community, there is a strong historic, contemporary and spiritual link with the Marine Estate. This link drives a key feeling of national and personal identity for those members of the Indigenous community that live in or around the Estate.
2. **Continuing health of the Marine Estate**...Given that its uniqueness represents, in part, what it means to be from NSW it is unsurprising that another manifestation of the Community Identity value is a sense of wanting to protect the health of the Marine Estate. Once again, this value was represented strongly in the quantitative research. Eighty-five percent indicated that it is important that the waters and coastline of the Marine Estate stay clean and unpolluted. Similarly, 82% agreed that it is important to maintain the abundance and diversity of marine life in the Marine Estate. A key finding for the Indigenous community was a desire to be more heavily involved in the development of management strategies for the Marine Estate. It is felt that Indigenous knowledge of local areas and waterways would give a more keen understanding of the issues and potential management solutions available.

3. **Access**... Without easy and unhindered access to the Marine Estate, many people in NSW feel that their deeper connection to the Estate is under threat. This not only underpins the need for up-to-date and reliable infrastructure access, but also the need to provide safe marine areas. For example, 3 in 5 people (58%) indicated that anti-social behaviour affecting personal enjoyment was the greatest social threat to the Marine Estate. Access is of paramount importance to the Indigenous community, given their spiritual and cultural link to the Marine Estate as well as it being a source of food and other natural resources.

4. **A part of our heritage and culture**...The Marine Estate is an intrinsic part of NSW and Australian identity. Many people report a strong, sentimental attachment to this space as it represents both their own identity and their identity as a member of the broader NSW community. As part of this, the community not only feel a strong cultural connection to the Estate but also feel that they are personally responsible for the protection and ongoing maintenance of the estate. In the quantitative research seven in ten agreed that it is the responsibility of all NSW residents to protect the Marine Estate. The qualitative research found that the Marine Estate represents the focus of thousands of years of spiritual and cultural rituals in the Indigenous community. As such, Indigenous community members also place great importance on the value of the Marine Estate as a source of culture, through which social structures and practices are maintained and reinforced.
Enabler

"I can take the kids to the beach or take a picnic to the creek and everyone has a great time and it’s free which with four kids is great!"

(Community representative, Coffs Harbour)

“Just utilising the rivers and creeks and things like that for fishing and gathering. We have ‘back to country’ where we bring the family back and have a swim and a greet and a yarn and things like that.”

(Indigenous representative, North Coast region)

As a source of almost unending social and environmental interaction, the Marine Estate enables the NSW community to flourish socially, scientifically and economically. The Estate supports the social framework that underpins a feeling of community:

1. **Enabling connection**... As a source of cultural and community identity, the Estate offers a critical way for members of the community to spend time with loved ones and strengthens relationships as well as feeling a part of the community. Sixty one percent of the community agree that the Marine Estate is a place where they enjoy spending time with family and friends and interacting with the community. In the qualitative research, it became clear that the Marine Estate was a key enabler for socialisation amongst Indigenous communities. For many families, learning to fish and extract resources using traditional means is considered a “coming-of-age”.

2. **Value as an escape**... The Marine Estate provides the NSW community with an opportunity to get away from their everyday lives and relax. For many members of the NSW community, this is considered an important aspect of their life and enables them to de-stress from the pressures of everyday life. In the quantitative findings 62% agreed that they enjoy and value spending time in the Marine Estate because it provides them with a getaway from everyday life. In the Indigenous community, this value is intensified. For these members of the community, the Marine Estate goes beyond just an escape from everyday life. It represents the natural state of the world before European colonisation.

3. **Offering choice**... Many people enjoy and value the range of different activities and uses the Marine Estate offers them. Once again the quantitative research supported this finding with two-thirds (63%) indicating that they enjoy and value the range of different activities and uses that the Marine Estate offers. For the Indigenous community the Marine Estate offers a choice to return to the native lifestyle which underpins their cultural and spiritual beliefs. With that in mind, Government control and restrictions on how these communities interact with the Marine Estate are considered a threat to Indigenous culture and traditions (e.g. gathering of traditional foods).
Provider

“[The Marine Estate’s] value is in and of itself, as a part of the world that we all need to survive - if we kill it, we will kill off the human race”

(Interest group)

“The sea is my cupboard”

(Indigenous representative, North Coast region)

For many people in the community, the Marine Estate is first and foremost, a provider of food and income. This is particularly true for the Indigenous community, as can be seen in the quote above. As such, a maternal relationship exists between the NSW community and the Estate. For some NSW communities (e.g. Batemans Bay and Eden), this connection is considered fundamental to the survival of that community as core industries such as commercial fishing and tourism rely significantly on the offerings of the Estate.

1. **A gateway to Australia…** The Marine Estate provides an important link to other Australian and International markets for trade as well as a hub to attract tourism. Over half (54%) of the community agree that the Marine Estate is home to iconic images of Australia – which is a major economic benefit when promoting tourism. Along with this, 71% agree that it is important to encourage tourism in the Marine Estate, while fifty percent argue that it is important that commercial shipping, port operations, boat storage and services continue to occur in the Marine Estate. For Indigenous communities, the natural offerings of the Marine Estate can offer a key source of income (through tourism drawcards) which will allow the integrity of their culture to be maintained.

2. **Support for local and state economies…** The Marine Estate is also seen as providing substantial benefits to the NSW economy. Six in ten (58%) indicated that a key economic benefit of the Estate is being a source of income for local communities. Similarly, the attraction of the Marine Estate to Coastal Visitors is perceived to have a strong flow-on effect (both direct and indirect) on businesses in NSW. As with the previous point, the economic value of the Estate has implications for the welfare of Indigenous communities in the state.

3. **Source of food and industry…** A third of the NSW population indicated that a key economic benefit of the Marine Estate was the variety of seafood that could be caught and eaten. Sixty-eight percent of respondents also agreed that it is important that the Marine Estate produces a local source of seafood for industry and personal and cultural use. For many of the fishing Marine Estate interest/user groups interviewed in the qualitative research the Estate is seen as the reason for the existence of the state’s commercial fishing industry as well as a direct source of food for recreational fishers. Additionally, the Marine Estate plays a critical role for Indigenous communities as source of food to share with their families and a reinforcement of traditional diets that helps native communities remain connected to their culture.
4. Facilities in place to help access the Marine Estate... As a provider, it is imperative that the community feel they have access to the public resources available from the Estate. The presence of infrastructure such as roads, rail, marinas and boat ramps as well as facilities such as amenities blocks are perceived to not only add economic value to the state but also make the Estate accessible for all the members of the community that may want to utilise it. The public are interested in improving access infrastructure with 30% suggesting that it is the most important social opportunity for the Marine Estate over the next 20 years. As a source of income, and as a source of food it is also critical for the Indigenous community that access to the Marine Estate is not hindered.
The Great Outdoors

“Every time you see those tourism ads, it’s always centred on the outback or the beach, it’s how we market ourselves as a country.”

(Community representative, Sydney)

“Access to water gives us our quality of life – for the Aboriginal man, the community and the culture”

(Indigenous representative, South East region)

The final overarching value of the Estate celebrates the value of the natural, untamed offering that the Marine Estate provides. It is nothing new that humans have an intrinsic link to nature. The untamed natural offerings of the Estate are a cornerstone value for those living in NSW. This value manifests in several ways...

1. **Enjoyment in just knowing it is there**... This research has revealed that the intrinsic value of the Marine Estate is very powerful. “People enjoying its natural beauty, even if they can’t visit it regularly” was recognised as the most important social benefit of the Estate (48%). This finding was reinforced by the qualitative research where many community members expressed their desire to know that the natural habitats and marine life in the estate were being kept safe, even if they themselves were not likely to visit the Estate in the foreseeable future. In the Indigenous community, the Marine Estate represents a substantial source of spiritual and historic significance. It is therefore crucial that the Marine Estate exists, even if members of this community are not in close proximity to it.

2. **A celebration of biodiversity**... In the qualitative research, the celebration of biodiversity was noted as a benefit. However, following the quantitative phase, it has been allocated a more central role as a key manifestation of the great outdoors value. The NSW community enjoy knowing that the Marine Estate is home to a wide range of marine life. Eighty-two percent of respondents indicated that it is important to maintain the abundance and diversity of marine life in the Marine Estate. As noted earlier, this has significant cultural implications for people in NSW. However, extending from this, maintaining biodiversity is also crucial for the community on an ethical and moralistic level. This value is once again heavily integrated in the Indigenous community, with various respondents acknowledging that the fauna and flora of the Estate have a strong link to native culture.

3. **A source of scientific discovery**... Being able to use the Marine Estate to improve scientific knowledge and as a source of education about marine life is vital for the NSW community. Sixty-nine percent agreed that scientific information should be used to inform the management of the Marine Estate. As well as this, around one in five believe that using the Estate as a source of scientific discovery is an important social benefit. Many traditional treatments for illnesses and ailments are drawn from Indigenous understanding of the land. Similarly many life lessons are taught to young Indigenous persons via their families link to the Estate.
4. **Safety**... As with any wild entity there is always a risk factor for humans. For the many people this can often be an appealing feature of the great outdoors. However, intervention such as regulations and usage bodies (e.g. surf lifesavers) are necessary to ensure that the community can engage safely with the Estate. This also includes protecting the community from human impacts such as pollution. This value appears to manifest differently in the Indigenous community. Many Indigenous community members feel that there needs to a greater recognition of Indigenous links and understanding of the land when management decisions are made. If this is done it will result in better public usage and understanding of the Estate, which will in-turn generate safer and more sustainable usage of these areas.
Perceptions of Marine Parks

Marine parks are an important part of the Marine Estate. With that in mind, a series of questions were asked to determine public perceptions and attitudes towards the use and management of marine parks.

**Marine Park Visitation**

To begin, all three groups were asked if they had ever visited a marine park.

**Figure 23: Ever Visited a Marine Park^ (%)**

![Chart showing marine park visitation percentages.](image)

NSW general population (online), n=1,003; Coastal Residents (intercepts), n=375; Coastal Visitors (intercepts), n=352

Q19. Have you ever visited a marine park?

^Chart type: sum total – see "interpreting results" section for assistance when reading this chart

All values shown in percentages; Weighted data

Interestingly, there was a significant difference between the three groups. While only a third of the NSW general population can remember visiting a marine park, 4 in 5 Coastal Residents and three quarters of Visitors indicate that they have visited a marine park.

Amongst the NSW general population, people in Sydney were more likely to indicate that they hadn’t visited a marine park (32%) or they didn't know (30%) if they had visited a marine park. Alternatively, residents in the Hunter were more likely to have visited a marine park (49%). Unsurprisingly, those in the west were significantly less likely to have visited a marine park (55%). In terms of demographic differences, those aged 70-74 were more likely to have visited a marine park (68%), while singles were more likely to indicate that they didn't know (45%). Interestingly, those who earn less than $65,000 are less likely to have visited a marine park (44%).
All Coastal Residents in the Coffs Harbour region had visited a marine park (100%). In contrast, those in Eden and Sydney were significantly less likely to have visited a marine park (33% and 28% respectively). Amongst Coastal Visitors, 97% in Ballina had visited a marine park while 88% had visited a marine park in Newcastle. In contrast, 49% of Coastal Visitors in Sydney and 40% in Hawkesbury had not visited a marine park. Demographically speaking, 86% of Coastal Visitors aged 30-49 had visited a marine park.

Support for Marine parks as a Management and Conservation Tool

Following this visitation analysis, online respondents were asked to indicate their support for marine parks as a management and conservation tool. This was done using a five-point agreement/support scale (i.e. 1=strongly support using marine parks as a management and conservation tool, 5=strongly against using marine parks as a management and conservation tool).

**Figure 24: Support for Using Marine Parks as a Management and Conservation Tool** (%)

<table>
<thead>
<tr>
<th>Strongly support using marine parks</th>
<th>Somewhat support using marine parks</th>
</tr>
</thead>
<tbody>
<tr>
<td>32</td>
<td>34</td>
</tr>
<tr>
<td>Unsure</td>
<td>31</td>
</tr>
<tr>
<td>Strongly against using marine parks</td>
<td>21</td>
</tr>
</tbody>
</table>

**NSW general population (online), n=1,003**

Q20. Do you support the use of marine parks as a way of managing the use and conservation of the marine environment?

^Chart type: sum total – see “interpreting results” section for assistance when reading this chart
All values shown in percentages; Weighted data

Two-thirds (67%) indicated that they strongly/somewhat supported the use of marine parks as a management and conservation tool, while only 3% indicated that they did not support the use of marine parks for this. Those that supported or were against the use of marine parks were asked an open-ended follow up question to justify their reason for giving this answer.
Figure 25: Wordcloud - Reasons for Supporting the Use of Marine Parks

NSW general population (online) respondents that support using marine parks, n=673
Q21. Why do you support the use of marine parks as a way of managing use and conserving the marine environment?
*Note: The words “protected”, “protects” and “protection” were all changed to “protect”.
*see “interpreting results” section for assistance when reading this wordcloud

Responses generally focussed on the conservation and protection of marine areas and wildlife. In particular, responses were targeted towards reducing the impact that humans have on the natural ecology of marine park areas. Figure 26 shows the coded responses for the 67% of the NSW general population that support the use of marine parks as a management tool:
Figure 26: Coded – Reasons for Supporting the Use of Marine Parks as a Management Tool

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conservation/Protecting the Ecosystem</td>
<td>20</td>
</tr>
<tr>
<td>Protect Marine Life/Wildlife</td>
<td>17</td>
</tr>
<tr>
<td>Reduces Human/Commercial Impact</td>
<td>13</td>
</tr>
<tr>
<td>Controlled Areas/Patrolled</td>
<td>13</td>
</tr>
<tr>
<td>Research</td>
<td>12</td>
</tr>
<tr>
<td>For the Future/Children</td>
<td>12</td>
</tr>
<tr>
<td>Better Management/Ability</td>
<td>10</td>
</tr>
<tr>
<td>Education</td>
<td>8</td>
</tr>
<tr>
<td>Improving the environment</td>
<td>8</td>
</tr>
<tr>
<td>Involves the Community/Awareness</td>
<td>7</td>
</tr>
<tr>
<td>Marine Parks need protection</td>
<td>6</td>
</tr>
<tr>
<td>Unsure of Marine Parks' abilities</td>
<td>6</td>
</tr>
<tr>
<td>Too much protection/Enjoy using the area for recreation</td>
<td>5</td>
</tr>
<tr>
<td>Others</td>
<td>10</td>
</tr>
</tbody>
</table>

NSW general population (online) respondents that support using marine parks, n=673

*Values below 5% not shown

Q21. Why do you support the use of marine parks as a way of managing use and conserving the marine environment?

*Chart type: pick any – see “interpreting results” section for assistance when reading this chart

All values shown in percentages, Weighted data

Around 1 in 5 indicated that the protection and conservation of the environment or ecosystem was their primary motivation. A number felt that this was both a personal and community wide responsibility:

“We must conserve and protect our natural treasures and wildlife. It is our responsibility”

This was followed by 17% who indicated that the protection of marine wildlife was the main reason for supporting the use of marine parks. This finding was accompanied by 13% who indicated that marine parks reduce human and commercial impacts. In particular, respondents felt that marine parks could protect the wildlife of the Marine Estate from the impacts of overfishing and commercial operations:
"I think they would help protect marine life, both fish and plant, from things like over fishing, people damaging areas and boats or tankers causing harm"

Reasons for not supporting the use of Marine Parks as a Management Tool

Respondents that did not support the use of marine parks were asked to provide responses for their answer. Given that only n=27 people (3% of the NSW general population) indicated that they were strongly/somewhat against the marine parks, no statistical analysis was conducted on these findings. However, Table 5 below shows a selection of the responses given for this question:

Table 5: Reasons for Not Supporting the Use of Marine Parks

<p>| Impact on fishing | “The marine parks have made recreational fishing virtually impossible due to the plague of small yellow leatherjackets that eat your bait, lines, sinkers and make it impossible to bottom fish for flathead, snapper, morwong in the seas off the far south coast of NSW, I can only speak from Bermagui but I have heard that they are from Sydney to Eden and since we have had no commercial trawling fishing we have been inundated with these pest fish, tourists will not come if they can't catch fish so the tourism industry will suffer soon, as fishermen will go elsewhere” |
| “If I want to get in a tinny and throw a cork line over the edge, I want to do it like me dad did. All these restrictions are tiresome. WHAT WILL BE WILL BE” |
| “Because some are too restrictive against recreational fishermen” |</p>
<table>
<thead>
<tr>
<th>Topic</th>
<th>Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over-regulation</td>
<td>“As a political business gimmick, promises are first made with the views of certain social pressure group, but broken later when the members of that pressure group have deteriorated in their spirit. Moreover, billions of tax-dollars shall go into the hands of people [who are] beneficiaries of such marine project. And on top of all these possible unethical rituals, people need to pay more taxes to cover up the losses of the government.”</td>
</tr>
<tr>
<td></td>
<td>“I think overregulation and enforcement have become job opportunities for bureaucrats and a focus for extremist greenies to the detriment of the environment itself and the people of NSW”</td>
</tr>
<tr>
<td></td>
<td>“The level of bureaucracy involved in everyday life is beyond staggering. It is a growth industry in itself and the only purpose much of it serves is [to] create more interference and red tape and waste colossal amounts of taxpayers money”</td>
</tr>
<tr>
<td>Limits protection area</td>
<td>“Locking an area up does little to conserve the marine life. Fish swim they don't know boundaries. Control activities and co-exist with the marine life”</td>
</tr>
<tr>
<td></td>
<td>“We should treat all our marine resources equally, making it a park means that we only protect that area and ignore the rest. It sends out the wrong signal to people”</td>
</tr>
<tr>
<td>Too much impact on community</td>
<td>“I believe in private property not socialism”</td>
</tr>
<tr>
<td></td>
<td>“Every park is close to a popular area where people holiday”</td>
</tr>
<tr>
<td></td>
<td>“The way animals are treated within these parks”</td>
</tr>
<tr>
<td></td>
<td>“I feel they are too restrictive on the citizens around the areas”</td>
</tr>
<tr>
<td>Government agenda</td>
<td>“Too much bull***t, not enough truth, not policed properly”</td>
</tr>
<tr>
<td></td>
<td>“I hate greenies”</td>
</tr>
</tbody>
</table>
Attitudes towards Marine Parks

Respondents were shown a series of statements about marine parks and asked to indicate their agreement with each. Answers were once again collected using a three-point agreement scale.

Nearly two-thirds (64%) of the NSW general population agree that recreational fishing should be allowed in marine parks where it is currently restricted. However, this contrasts with two in five (38%) of the NSW general population agreeing there should be an increase in the area of sanctuary zones (which do not permit any fishing activities), with 55% neither agreeing nor disagreeing, and only 7% disagreeing. In addition, 31% of the NSW general population agree that there should be more restrictions on recreational fishing in marine parks, with 52% neither agreeing nor disagreeing and only 17% disagreeing. A larger proportion of Coastal Residents (53%) and Visitors (49%) were in favour of larger sanctuary zones in NSW. The variation in results to similar questions and the large proportion of responses neither agreeing nor disagreeing to these questions seems to indicate that there is confusion regarding management arrangements for marine parks in relation to fishing restrictions. Recommendations for the management of marine parks could include work to increase community awareness of management strategies used within marine parks to protect marine biodiversity; increased community participation in decision making; and/or simplifying the marine park management strategies.

The community attitude toward allowing recreational fishing in marine parks where it is currently restricted is significantly higher amongst over 50’s with 74% indicating agreement. Alternatively, it is significantly lower amongst those under thirty (51%). This finding once again highlights a potential intergenerational polarisation when it comes to the maintenance and protection of the Marine Estate. This polarisation may be the result of different preferred recreational activities (i.e. older respondents were more likely to be recreational fishermen).

Three in five of the NSW general population and four out of five of the Coastal Residents and Visitors believe that more should be done in marine parks to reduce the impacts of catchment runoff and stormwater. However, a large proportion of responses (73%) neither agreed nor disagreed that more should be done to protect marine habitats in marine parks, potentially suggesting some uncertainty about habitat conservation strategies that can be implemented in marine parks. This result for the NSW general population was in sharp contrast to the Coastal Residents and Visitors where 79 and 80% agreed that more should be done to protect marine habitats in marine parks respectively.

Around half of the NSW general population believe marine parks in NSW are well managed with just 7% disagreeing with this. Comparing differences between age groups, significantly more of the over 50’s age group (59%) agree with marine parks being well managed and significantly less of the under 30’s agree (40%). In contrast over 50’s were more likely to believe that there should be no marine parks in NSW (29%).

Males are more likely to disagree that the area of sanctuary zones should be bigger (11%) and are more likely to disagree with the postulation that more should be done to protect marine habitats in marine parks (14%).

The findings of the NSW general population contrast quite heavily with the views of the Coastal Residents and Visitors, as can be seen in Figure 27 overleaf.
Also contrasting with the NSW general population, around two-thirds of Coastal Residents (69%) and Visitors (63%) agree that there should be more public infrastructure to encourage access to marine parks.

In Batemans Bay, Coastal Residents were more likely to agree that there should be fewer restrictions on commercial fishing (37%). While in Eden, Coastal Residents were more likely to disagree with the suggestions that more should be done to reduce the impacts of catchment runoff (16%), that the area of sanctuary zones should be bigger (43%) and that more should be done to protect marine habitats in marine parks (22%). Local females were more likely to agree that there should be more restrictions on recreational fishing (48%). This contrasts with over 50’s, 50% of whom disagreed with this suggestion.

Amongst Visitors there were no relevant significant differences.
Conclusions and Recommendations

The Marine Estate represents a significant economic, social and environmental asset to the people of NSW. Almost six million people in NSW live within 50 km’s of the coast (MEMA, 2013). Along with this, millions of domestic and international visitors come to NSW every year to enjoy the natural offerings of the Estate. Throughout this report the behaviours and attitudes of the NSW community have been explored. Extending from this, the perceived benefits of, the threats to, and the opportunities for the Marine Estate have also been identified.

Key Findings

From the extensive analysis that has been conducted on the research results, several clear discussion points emerge...

Benefits, Threats and Opportunities

Environmental

Environmental well-being should take priority

It is well understood by the majority of the community that the environmental well-being of the Marine Estate must take priority when developing policy.

This was emphasised in the quantitative research with the leading economic opportunity for the NSW general population being the marketing and promotion of the beauty and biodiversity of the Marine Estate (44%), while the leading environmental opportunity was the protection and rehabilitation of habitats and wetlands in the Marine Estate (41%). For the most part, the NSW community believe that the thriving habitats and diverse and unique ecology of the Marine Estate is a key driver of economic outcomes in NSW. The qualitative research found that this sentiment is understood and recognised by most Marine Estate interest/user groups, including both commercial and recreational fishers who recognise the need to conserve and support marine life so that future generations will be able to appreciate the Marine Estate as they have. Similarly, those involved in the promoting development (i.e. Chambers of Commerce) recognise that the natural beauty of the Marine Estate is a key reason why people want to live in or near the coast of NSW. Tourism based user groups also acknowledge that their business is reliant on the continuing health and well-being of the Marine Estate’s ecology. This sentiment was supported by the quantitative results where 52% of the NSW general population indicated that the NSW Marine Estate is an important part of why they like living in NSW.

However, as is often the case where economic, social and environmental interests meet, the health of the environment in the Marine Estate can often take a lesser priority to the more direct benefits associated with social and economic outcomes. For all online and intercept survey respondents, it is considered critical that the full range of interests in the community be taken into account when developing management strategies.
Major environmental threats to the Marine Estate include all forms of pollution

When asked to identify the greatest threats to the Marine Estate, 48% of the NSW general population indicated pollution. Similarly, when asked to identify the three greatest environmental threats to the Marine Estate the most commonly noted were: littering/dumping of rubbish/marine debris (47%), oil and chemical spills (34%) and water pollution from sediment or run-off (29%). Many community members and Marine Estate interest/user groups have also noticed an increase in the amount of litter they encounter in the Marine Estate (48%).

Following these pollution based threats, over development (22%) and resource extraction activities (21%) were also seen as key threats to the ongoing health of the Marine Estate. After this, global factors such as climate change were a key issue to around a fifth of the community.

People consider overfishing to be less of a threat

Sixteen percent of the NSW general population perceive overfishing to be a major threat to the Marine Estate (this was slightly higher amongst Coastal Residents (18%)). Notably, the proportion of people concerned with overfishing is significantly lower compared to those who identified pollution as one of their top three environmental threats. However, the NSW general population are not oblivious to the potential threat of overfishing, with a majority of them (67%) agreeing that some areas of the Marine Estate should be protected, even if it means recreational and commercial fishing is excluded.

Government policy should focus on protecting and rehabilitating remaining coastal habitats

Forty one percent of the NSW general population indicated that protecting and rehabilitating remaining coastal habitats and wetlands is a key opportunity for the Marine Estate. The NSW general population would also like to see more effective litter collection services (34%) in the Marine Estate. Along with this, the NSW general community also recognise an opportunity to reduce water pollution through better land-management practices to reduce run-off (26%) as well as introducing more targeted education programs to reduce the impact humans have on the environment (25%).

Acknowledging this, policies aimed at protecting and rehabilitating the Marine Estate should be careful not to marginalise the input of social and economic interest groups such as recreational fishermen and local Indigenous communities as this will help generate holistic support for any rehabilitation programs.
The Marine Estate is integral to the social and cultural foundations that underpin the NSW community

The Marine Estate holds great value for all respondents surveyed as a central part of Australia’s heritage and culture. The Marine Estate offers countless opportunities for the community to socialise with friends and family as well as a chance to achieve harmony with nature. For example, the most important social benefit of the Estate - identified by respondents - was the enjoyment people get from knowing its natural beauty is there, even if they can’t visit it regularly (48%). Other key benefits include the Marine Estate being recognised as providing a safe space to spend quality time and socialise with friends and family (30%) as well as providing an opportunity to live a healthy and active lifestyle (27%).

The qualitative research showed that the social benefits of the Marine Estate are amplified in coastal Indigenous communities with many of the core traditions that underpin Indigenous culture being fundamentally linked to the Estate. For this reason, more care should be taken to involve Indigenous groups when developing social policies that may impact on the Estate.

Anti-social behaviour threatens the social balance

Anti-social behaviour is seen as one of the top three threats to the social benefits of the Marine Estate (58% of the NSW general population). Similarly between 43% and 46% of Coastal Residents and Visitors see anti-social behaviour as one of the top two social threats to the Marine Estate respectively. With regards to the qualitative research, community members were likely to feel that visitors have a strong negative impact in terms of littering, pollution and anti-social behaviour.

Littering and pollution also threaten the natural beauty of the estate which will impact on social outcomes

Fifty-five percent of the NSW general population feel that a key social threat to the Marine Estate is the potential loss of appeal due to pollution/littering. Following this, overcrowding (31%), danger to swimmers from recreational activities such as boating and jet skiers (31%) and a lack of public access (29%) are also recognised as potential social threats to the Marine Estate that may impact on their desire to use the Marine Estate in the future if these social threats remain unchecked.

Little awareness or opinion on current management strategies

Transparency was a key issue with relatively few community members knowledgeable of the various management strategies currently in place to protect the Marine Estate. This result was validated by the quantitative findings where 70% of respondents indicated that they neither agreed nor disagreed when asked if the Marine Estate was currently being managed well by the NSW government.

This was further reflected in attitudes to fishing restrictions in Marine Parks with nearly two-thirds (64%) of the NSW general population agreeing that recreational fishing should be allowed in Marine Parks where it is currently restricted, while 38% supported an increase in the area of sanctuary zones (which do not permit any fishing activities) in Marine Parks. Thirty one percent agreed that there should be more restrictions on recreational fishing in Marine Parks, with 52% neither agreeing nor disagreeing and only 17% disagreeing.
However, there were consistent views that restrictions on commercial fishing in Marine Parks should not be reduced (46% of the NSW general population (with a further 42% undecided), 62% and 60% of Coastal Residents and Visitors respectively).

This limited awareness was also reflected in Marine Estate findings, with only 17% of the NSW general population feeling that there are not enough restrictions on commercial fishing. Alternatively, 17% indicate that there are too many restrictions on recreational fishing.

However, Marine Estate interest/user groups that are affected by these restrictions (e.g. the Indigenous community, recreational and commercial fishing, spear fishers, etc.) note that over-restriction would have a detrimental impact on their enjoyment and use of the Marine Estate.

A range of social opportunities present themselves

The NSW general population were divided as to which social opportunities should take priority. Education programs are clearly considered an important way to engage the community (32%) and offer them a sense of ownership and responsibility for the Marine Estate. As well as educating the community, improving public access to the Estate (30%), providing community environmental action support programs (28%) and facilitating more discussions between experts are all considered important (26%).
Economic

The Marine Estate directly and indirectly stimulates the economy

The Marine Estate represents a substantial economic resource to the NSW general population as well as a key source of food for certain community groups such as Indigenous communities and recreational and commercial fishers. Fifty-eight percent of the NSW general population identified that income provided by the Marine Estate was one of the most important economic benefits of the Marine Estate.

Albeit, only 3%-5% of the NSW general population sampled, operate or work for a business that they perceive directly benefits from the Marine Estate, the result indicates that potentially a large proportion of businesses and individuals throughout NSW benefit indirectly from the tourism generated by the Marine Estate.

Tourism is crucial

The community recognise the Marine Estate as a tourism drawcard and not necessarily as a natural resource for extraction. The NSW general population understand that tourism is a core component of the Australian economy and will continue to grow over the next 20 years. One of the top two economic benefits of the Marine Estate is derived from the iconic images of Australia which promote tourism (54%).

This finding is once again amplified amongst the Indigenous community with tourism being a key way for their cultural values and traditions to be perpetuated.

The results generally indicate that the public perceive tourism as being positive socially, environmentally and economically and with relatively few drawbacks (apart from over-crowding and anti-social behaviour). Acknowledging this, if community members were to be disadvantaged in the short to medium-term (economically or socially) by these policies or tourism was found to have a negative impact on the environment then support for tourism development could substantially decrease.

Pollution and loss of natural beauty are key threats to maintaining tourism

Given the focus on the tourism benefits of the Marine Estate, it is no surprise that threats to tourism are seen as a priority by the NSW general population. Water pollution affecting the viability of tourism (62%) and the loss of natural areas reserved for tourism (51%) are seen as the greatest economic threats to the Marine Estate. These threats, coupled with the increasing costs to access and use the Marine Estate (42%) are seen as having the potential to cause major damage to the tourism industry in NSW.

Promotion of the beauty and biodiversity of the Marine Estate is recognised as an opportunity

Of most economic importance to the NSW general population is the need to promote the beauty and biodiversity of the Marine Estate (44%). Implementing management processes to protect the coastline from storm surges, coastal erosion and inundation (40%) as well as improving public access to the Marine Estate (32%) are critical opportunities for the Marine Estate. However, caution should be used not to cause overcrowding in popular tourist destinations, as it is perceived that overcrowding can have a negative impact on people’s enjoyment of the Marine Estate as well as impacting on the environment.
The following table summarises the key outcomes for each of the benefits, threats and opportunities for the NSW Marine Estate as captured during this research study...

Table 6: Summary of Key Benefits, Threats and Opportunities

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Economic</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• The Marine Estate is a source of income for local residents and the state as a whole</td>
</tr>
<tr>
<td></td>
<td>• Home to iconic images of Australia which promotes and supports local tourism</td>
</tr>
<tr>
<td>Social</td>
<td>• People are able to enjoy its natural beauty, even if they can’t visit it regularly</td>
</tr>
<tr>
<td></td>
<td>• Provides a safe space to spend time with family and socialise with friends</td>
</tr>
<tr>
<td></td>
<td>• Allows people to facilitate a healthy, active lifestyle</td>
</tr>
<tr>
<td></td>
<td>• Has a uniqueness which can be passed on to future generations</td>
</tr>
<tr>
<td>Environmental</td>
<td>• Natural and clean waters of the Marine Estate support a variety of habitats and marine life</td>
</tr>
<tr>
<td></td>
<td>• There is an abundance of marine life which enriches the NSW state as a whole</td>
</tr>
<tr>
<td></td>
<td>• Contains biodiversity that cannot be found anywhere else in the world, underpinning the uniqueness that characterises NSW as a whole</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Threats</th>
<th>Economic</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Issues with water pollution are threatening to affect tourism in NSW</td>
</tr>
<tr>
<td></td>
<td>• Loss of natural areas and habitats within the Marine Estate reserved for tourism can damage the reputation of this industry</td>
</tr>
<tr>
<td></td>
<td>• Increasing costs to access the Marine Estate threaten industries across NSW that rely on the Marine Estate</td>
</tr>
<tr>
<td>Social</td>
<td>• Anti-social behaviour within Marine Estate areas (e.g. beaches) are a key threat to the communities and their enjoyment of the Marine Estate</td>
</tr>
<tr>
<td></td>
<td>• Loss of appeal due to water pollution/littering is not only considered a major economic threat, but also a key social threat for people that wish to enjoy the Marine Estate</td>
</tr>
<tr>
<td></td>
<td>• Whilst tourism is important, overcrowding of Marine Estate areas is not wanted. Overcrowding impacts on peoples enjoyment of the area</td>
</tr>
<tr>
<td>Environmental</td>
<td>• Littering/dumping of rubbish/marine debris in the Estate is a central environmental threat</td>
</tr>
<tr>
<td></td>
<td>• Along with littering and pollution, oil and chemical spills are considered major threats to the environmental well-being of the Marine Estate</td>
</tr>
<tr>
<td></td>
<td>• Pollution from sediment or run-off is also seen as a key threat</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Economic</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Marketing and promoting the beauty and biodiversity of the Marine Estate to promote tourism</td>
</tr>
<tr>
<td></td>
<td>• Developing and implementing management strategies to prevent storm surges, coastal erosion and inundation</td>
</tr>
<tr>
<td></td>
<td>• Improving public access to the Marine Estate</td>
</tr>
<tr>
<td>Social</td>
<td>• Providing more education programs regarding the use and management of the Estate</td>
</tr>
<tr>
<td></td>
<td>• Improve public access</td>
</tr>
<tr>
<td></td>
<td>• Facilitating more discussion between experts</td>
</tr>
<tr>
<td>Environmental</td>
<td>• Protect and rehabilitate remaining coastal habitats and wetlands</td>
</tr>
<tr>
<td></td>
<td>• Extending from this, more effective litter collection services</td>
</tr>
<tr>
<td></td>
<td>• Improving land-management practices to reduce run-off</td>
</tr>
<tr>
<td></td>
<td>• Provide community environmental action support programs</td>
</tr>
</tbody>
</table>

A further analysis of the benefits, threats and opportunities broken down by region and key subgroups can be found in Appendix 2.
Values

From the findings outlined above, several key values were identified for the Marine Estate. These values underpin the behaviours, perceptions and attitudes towards the Marine Estate. The primary values developed from this research include…

Table 7: Summary of Key Values

<table>
<thead>
<tr>
<th>Identity</th>
<th>Enabler</th>
<th>Provider</th>
<th>The Great Outdoors</th>
</tr>
</thead>
<tbody>
<tr>
<td>• <strong>Uniqueness</strong>... The Marine Estate is home to a diverse range of flora and fauna that cannot be found anywhere else in the world. This uniqueness is a manifestation of what it means to be part of the NSW community.</td>
<td>• <strong>Enabling connection</strong>... As a source of cultural and community identity, the Estate offers a critical way for members of the community to spend time with loved ones and strengthens relationships as well as feeling a part of the community.</td>
<td>• <strong>A gateway to Australia</strong>... The Marine Estate provides an important link to other Australian and International markets for trade as well as a hub to attract tourism.</td>
<td>• <strong>Enjoyment in just knowing it is there</strong>... This research has revealed that the intrinsic value of the Marine Estate is very powerful. One of the most popular benefits of the Marine Estate is that people enjoying its natural beauty, even if they can't visit it regularly.</td>
</tr>
<tr>
<td>• <strong>Continuing health of the Marine Estate</strong>... The NSW community feel a need to protect the Marine Estate from degradation and unsustainable use</td>
<td>• <strong>Value as an escape</strong>... The Marine Estate provides the NSW community with an opportunity to get away from their everyday lives and relax.</td>
<td>• <strong>Support for local and state economies</strong>... The Marine Estate is also seen as providing substantial benefits to the NSW economy.</td>
<td>• <strong>A celebration of biodiversity</strong>... The NSW community enjoy knowing that Australia and the Marine Estate is home to a wide range of marine life. This also has significant cultural implications for the NSW community as a whole.</td>
</tr>
<tr>
<td>• <strong>Access</strong>... The NSW community need up-to-date and reliable infrastructure access to the Marine Estate as well as safe access to marine areas</td>
<td>• <strong>Offering choice</strong>... Many enjoy and value the range of different activities and uses the Marine Estate offers them.</td>
<td>• <strong>Source of food and industry</strong>... A third of the NSW population indicated that a key economic benefit of the Marine Estate was the variety of seafood that could be caught and eaten.</td>
<td>• <strong>A source of scientific discovery</strong>... Being able to use the Marine Estate to improve scientific knowledge and as a source of education about marine life is vital for the NSW community.</td>
</tr>
<tr>
<td>• <strong>A part of our heritage and culture</strong>... The Marine Estate is an intrinsic part of NSW and Australian identity. Many people (including the Indigenous community) report a strong, sentimental attachment to this space.</td>
<td></td>
<td>• <strong>Facilities in place to help access the Marine Estate</strong>... it is imperative that the community feel they have access to the public resources available from the Estate.</td>
<td>• <strong>Safety</strong>... As with any wild entity there is always a risk factor for humans. Regulations and usage bodies (e.g. surf lifesavers) are necessary to ensure that the community can engage safely with the estate.</td>
</tr>
</tbody>
</table>
Perceptions of the Marine Estate

As well as identifying the benefits, threats and opportunities for the Marine Estate, a number of other findings were identified throughout the study…

The term “Marine Estate” is yet to achieve traction

As highlighted during the qualitative research, very few people in the NSW community were either aware of, or understood what the term “Marine Estate” referred to. Upon hearing the term, many assume it refers to development (especially residential) or that it can sound elitist. However, once the concept was explained, the term appeared to resonate with the majority of respondents with just 11% finding that they did not like the term. This would suggest that a strong push to educate the community through marketing the Marine Estate as a concept would be beneficial to the overall strategy.

Everyone is responsible for the Marine Estate

The NSW community were in agreement that the protection and maintenance of the Marine Estate is the responsibility of all, and not just the responsibility of the government. They recognise that the Marine Estate is important and it is a fundamental reason why they live in NSW and why it needs to be protected.

Community consultation is required when making policy decisions

When it comes to the protection of the Marine Estate, the NSW community would like to be consulted on fundamental policy decisions. In particular, the Indigenous community have felt removed from the decision making process to date. For maximum public support to be obtained, community groups need to be involved in the decision making process. Whilst it is recognised that not all policies will please everyone in the community, a greater understanding behind the science and reasons for the introduction of some policy decisions would be appreciated.

Communication is paramount

Across both the qualitative and quantitative stages, a number of opportunities for the management of the Marine Estate were highlighted, with communication and consultation being a central point for all respondents surveyed. Informing the community about rules and restrictions that have been imposed should also involve a thorough discussion of the reasoning behind any decisions that are made. Many respondents also expressed the desire for greater collaboration with Marine Estate managers as well as more visibility and accessibility (e.g. via a local presence in the community).

Little opinion on current management strategies

The qualitative research found that transparency was a key issue with relatively few community members knowledgeable of the various management strategies currently in-place to protect the Marine Estate. This result was duplicated in the quantitative findings with 70% of respondents indicating that they neither agreed nor disagreed when asked if the Marine Estate was currently being managed well by the NSW government.
Strong feelings towards future management strategies

Respondents were highly interested in the future management of the Estate. Generally, community members were interested in being more involved in the development and implementation of strategies that incorporated their interests. For example, the scientific community are interested in seeing the science inform the strategies and management policies of the future, conservation groups are interested in protecting the unique flora and fauna located in the Estate, fishing groups are interested in seeing their livelihoods and recreational well-being taken in to account.

Indigenous communities also wish to be involved with the development of management policies right from inception. There has often been a strong feeling in these communities that strategies are forced on them without proper consideration for their cultural, social and spiritual needs.

Marine Estate Interest/User Group Interactions

Representatives from a number of Marine Estate interest/user groups were included as part of the qualitative phase of the research. These groups represent a range of perspectives on the management of the Marine Estate and while in many cases various groups are in agreement on the intrinsic values they associate with the Marine Estate as well as the benefits the broader community derives, there are differences in their views on the key threats to the Marine Estate.

The groups covered include various peak body groups, local councils, chambers of commerce, representatives from fishing and boating industries, other industry bodies (e.g. tourism, aquaculture), the Indigenous community, conservation and science. All of these Marine Estate interest/user groups are aware of each other’s presence and have some perception of other Marine Estate interest/user group views and priorities. However, there appears to be little regular direct interaction between different groups.

This lack of direct interaction between Marine Estate interest/user groups means that each group most frequently interacts with decision makers, either in Government or local councils and also that perceptions of other groups are not often based on direct interaction with them (particularly those who are perceived to take an opposing view) and so there is some degree of scepticism or wariness of those representing seemingly opposing interests. These groups and their interactions are described below…

Peak body groups… Surfing and surf lifesaving representatives are far more likely to have regular dialogue and support from the Government and local councils in particular in relation to implementing programs and airing concerns and feel their values are more closely aligned with conservation and education groups’ views. Recreational fishing and boating groups, as well as the businesses (e.g. bait shops) that support them feel that they are not consulted by decision makers and, while they present their points of view to decision makers, their views are not considered.
Local Councils... Local councils are more likely than other Marine Estate interest/user groups to have interactions with Government as well as different community groups. These interactions are mostly considered fruitful and productive. However Councils call for greater interaction with Government as well as the scientific community, particularly when they are required to explain decision making to members of the community (e.g. recreational anglers who may not be part of a particular club or representative group).

Ethnic Communities Council... Interactions for this group are mainly limited to a range of Government departments, particularly in relation to education and engagement with a range of ethnic groups in NSW on various issues (including and beyond the Marine Estate).

Chambers of Commerce... The Chamber of Commerce representatives interact most frequently (as expected) with local businesses. However, there is little evidence from these representatives that their interaction extends to the fishing and boating industry and so, while there is awareness of the grievances of these groups, Chambers of Commerce representatives are more likely to discuss the long term benefits of protecting the Marine Estate from potential overfishing practices and the positive expected effect on local tourism. There is little evidence from the commercial fishing and boating industry that the Chamber of Commerce plays a strong role for them.

Fishing and boating industry (including oyster farmers)... These groups are most likely to report they interact directly with Government and have a number of contacts with whom they can air concerns and grievances. However, some of these groups remain frustrated, as they feel they communicate their concerns but do not feel they receive regular communication back from decision makers.

Tourism... The tourism representative included in this research most frequently interacts with Government in developing strategies to drive tourism in their area. There is also some evident contact between tourism representatives and local fishing groups, however, there is little evidence from this research that these interactions are commonplace throughout the Marine Estate.

Indigenous community... Indigenous community representatives indicate they interact most frequently with local councils and Government in representing their community's concerns and issues and to develop initiatives to engage the Indigenous community in their local area.

Conservation and education... These groups report they most frequently interact with Government and the science community to represent their perspective and lobby for action where they see an issue or a set of conditions that threaten the local fauna and/or flora. However, there is little direct contact with those they consider to hold different viewpoints and some belief that these opposing points of view could never achieve a consensus or a compromise (particularly so for conservation groups).

Science... The scientific community engages most frequently with Government, or other agencies that commission them to undertake research. Additionally, the scientific community also interacts with engaged members of the public (who may or may not be involved in another Marine Estate interest/user group group) via a range of seminars, published materials and talks/presentations.
While interactions between these groups do not currently appear to be regular or meaningful, there is a desire from many groups for greater, more productive interaction with other groups, particularly those who they consider to have the most diametrically opposed points of view…

**Scientific evidence should be at the centre of interactions and decision making**

This is a commonly held belief among Marine Estate interest/user groups, who believe the scientific evidence should be considered before other interests such as political concerns. However, the science community can feel sceptical that scientific information may not be considered by various Marine Estate interest/user groups consistently.

**Greater dialogue can only offer benefits to all involved**

While there is not a great deal of dialogue between various Marine Estate interest/user groups, particularly those that are perceived to represent seemingly opposing interests (e.g. conservation and fishing), the majority of Marine Estate interest/user groups indicate a willingness to engage with other groups which they believe would enhance mutual understanding and potentially more beneficial solutions.

**Dialogue and greater interaction only considered useful if actioned**

However, in order for greater interaction to be considered effective, it is considered essential for the Marine Estate interest/user groups that decision makers consistently and demonstrably take these interactions and their results into account when developing policy and regulations.

**Implications for the MEEKP principle vision**

As part of MEEKP’s vision for the Marine Estate, a series of objectives were developed. At the request of the panel, we have developed the following matrix which outlines the way in which the perceived benefits, threats and opportunities for the Estate relate directly to these objectives…
### Marine Estate vision/objectives

<table>
<thead>
<tr>
<th>Clean waters</th>
<th>Safe waters</th>
<th>Biologically diverse &amp; resilient ecosystems</th>
<th>Community access</th>
<th>Benefits maintained for future generations</th>
<th>Maximising economic benefits</th>
</tr>
</thead>
</table>

#### 1. Benefits

| Natural and clean waters support a variety of habitats and marine life | ✓ | ✓ | ✓ | ✓ |
| Marine life enriches the state as a whole | ✓ | ✓ | ✓ | ✓ |
| Unique biodiversity that characterises NSW | ✓ | ✓ | ✓ | ✓ |
| People enjoy its natural beauty, even if they can’t visit it regularly | ✓ | ✓ | ✓ | ✓ |
| A safe space to socialise with friends and family | ✓ | ✓ | ✓ | ✓ |
| Facilitates a healthy, active lifestyle | ✓ | ✓ | ✓ | ✓ |
| Has a uniqueness which can be passed on to future generations | ✓ | ✓ | ✓ | ✓ |
| Source of income for the whole state | ✓ | ✓ | ✓ | ✓ |
| Home to iconic images of Australia | ✓ | ✓ | ✓ | ✓ |

#### 2. Threats

| Littering/dumping of rubbish/marine debris | ✓ | ✓ | ✓ | ✓ |
| Oil and chemical spills | ✓ | ✓ | ✓ | ✓ |
| Pollutions from sediment or run-off | ✓ | ✓ | ✓ | ✓ |
| Anti-social behaviour | ✓ | ✓ | ✓ | ✓ |
| Loss of appeal due to water pollution threatens social outcomes | ✓ | ✓ | ✓ | ✓ |
| Over-crowding | ✓ | ✓ | ✓ | ✓ |
| Water pollution threatens economic outcomes | ✓ | ✓ | ✓ | ✓ |
| Loss of natural areas reserved for tourism | ✓ | ✓ | ✓ | ✓ |
| Increasing costs to access the Marine Estate | ✓ | ✓ | ✓ | ✓ |

#### 3. Opportunities

| Protect and rehabilitate remaining coastal wetlands | ✓ | ✓ | ✓ | ✓ |
| More effective litter collection | ✓ | ✓ | ✓ | ✓ |
| Improving land management practices | ✓ | ✓ | ✓ | ✓ |
| Provide community environmental action support programs | ✓ | ✓ | ✓ | ✓ |
| Provide more education programs regarding the use and management of the Marine Estate | ✓ | ✓ | ✓ | ✓ |
| Improve public access | ✓ | ✓ | ✓ | ✓ |
| Facilitate more discussion between experts | ✓ | ✓ | ✓ | ✓ |
| Market the beauty of the Marine Estate | ✓ | ✓ | ✓ | ✓ |
| Develop management strategies to prevent storm surges, coastal erosion and inundation | ✓ | ✓ | ✓ | ✓ |
APPENDICES: 1-4 & References

(Note - these have been removed due to the length of the report and can be downloaded separately)