



MARINE ESTATE COMMUNITY SURVEY FINAL REPORT

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RESEARCH

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					
	Clean waters	Safe waters	Biologically diverse & resilient ecosystems	Community access	Benefits maintained for future generations	Maximising economic benefits
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	✓	✓	✓		✓	✓