

Neptune Islands Group Marine Park Regional Impact Statement

A report prepared for
Department of Environment, Water and Natural Resources

Prepared by



In association with the Australian Workplace Innovation and Social
Research Centre, Dr Hugh Kirkman, Dr Simon Bryars and James Brook

20 August 2012

EconSearch Pty Ltd
214 Kensington Road
Marryatville SA 5068
Tel: (08) 8431 5533
Fax: (08) 8431 7710
www.econsearch.com.au

Contents

Contents	iii
List of Tables	iv
List of Appendix Tables.....	iv
List of Figures	v
List of Appendix Figures	v
Abbreviations	vi
Acknowledgements.....	vii
Document History and Status	vii
Executive Summary	viii
1. Introduction.....	1
1.1 Marine Park Planning Process.....	1
1.2 Policy Commitments	4
1.2.1 Displaced Commercial Fishing Policy Framework.....	4
2. Method of Assessment	5
2.1 Ecological.....	5
2.2 Economic.....	6
2.3 Social	7
3. Neptune Islands Group Marine Park Description	10
3.1 Ecological Description	10
3.2 Socio-economic Profile	11
4. Summary of Impacts.....	14
4.1 Ecological.....	14
4.1.1 Habitats	14
4.1.2 Species.....	14
4.1.3 Ecosystems	19
4.1.4 Case study - White shark at North Neptune Islands	21
4.2 Economic.....	22
4.2.1 Commercial Fishing	22
4.2.2 Aquaculture.....	28
4.2.3 Tourism.....	28
4.2.4 Port, Harbour and Shipping Operations	28
4.2.5 Mining	28
4.2.6 Coastal Development.....	28
4.3 Social	29
4.3.1 Summary of method.....	29
4.3.2 Expected social impacts – at a glance	29
4.3.3 Education and Wellbeing	30
4.3.4 Culture and Heritage.....	31
4.3.5 Recreation and Fishing	31
4.3.6 Local Government, Population and Housing	32
4.3.7 Community.....	33
4.3.8 SEIFA based analysis of impacts.....	33
4.3.9 Next Steps in Social Impact Assessment	34

References	37
Appendix 1 Socio-economic Profile – Lower Eyre Peninsula	40
Appendix 2 Activities and Uses Tables	54
Appendix 3 List of Parties Consulted	67
Appendix 4 MPSIAT feedback.....	70
Appendix 5 Map of Marine Park Showing Draft Zoning.....	76

List of Tables

Table 1-1 Public consultation process to date.....	3
Table 3-1 Summary of habitats.....	11
Table 3-2 Summary of key economic and social indicators for the Lower Eyre Peninsula region.....	13
Table 4-1 Potential first-order responses of some indicator species ^a	18
Table 4-2 Other species which may respond to or benefit from protection	19
Table 4-3 Regional economic impact of marine park zoning on the Northern Zone Rock Lobster fishery based on SARDI estimates of displaced effort	25
Table 4-4 Regional economic impact of marine park zoning on the Northern Zone Rock Lobster fishery based on industry estimates of displace effort	26
Table 4-5 Average annual Marine Scalefish effort in draft sanctuary zones by sector.....	27
Table 4-6 Average annual Marine Scalefish catch in draft sanctuary zones by main species.....	27
Table 4-7 Social impact for Lower Eyre Peninsula Impact Region	34

List of Appendix Tables

Appendix Table 1-1 Summary of key economic and social indicators for the Lower Eyre Peninsula region	41
Appendix Table 1-2 Age distribution of the population for the Lower Eyre Peninsula region and SA, 2000/01 to 2009/10	42
Appendix Table 1-3 Highest level of qualifications for persons aged 15 and over in the Lower Eyre Peninsula region and SA, 2001 and 2006 ^a	44
Appendix Table 1-4 School enrolments in the Lower Eyre Peninsula region and SA, 2001, 2006 and 2011	45
Appendix Table 1-5 Employment, household income and household expenditure, Lower Eyre Peninsula region, 2009/10 ^a	49
Appendix Table 1-6 Components of gross regional product in the Lower Eyre Peninsula region by industry, 2009/10 ^a	50
Appendix Table 1-7 Value of imports and exports by industry, Lower Eyre Peninsula region, 2009/10 ^a	51
Appendix Table 4-1 General views about the Neptune Islands Group Marine Park 70	

Appendix Table 4-2	Tourism, education & wellbeing impacts for Neptune Islands Group Marine Park	71
Appendix Table 4-3	Culture and heritage impacts for Neptune Islands Group Marine Park	72
Appendix Table 4-4	Recreation & fishing impacts for Neptune Islands Group Marine Park	73
Appendix Table 4-5	Population & housing impacts for Neptune Islands Group Marine Park	74
Appendix Table 4-6	Community response impacts for Neptune Islands Group Marine Park	75

List of Figures

Figure 1–1	Marine Park Zones	2
Figure 4–1	Simplified conceptual food web for subtidal high profile reef	20
Figure 4–2	Simplified conceptual food web for subtidal sand plain habitat.....	22

List of Appendix Figures

Appendix Figure 1-1	Lower Eyre Peninsula region.....	40
Appendix Figure 5-1	Map of Marine Park Showing Draft Zoning	76

Abbreviations

ABS	Australian Bureau of Statistics
C	Council
CBA	Cost Benefit Analysis
DC	District Council
DEH	Department for Environment and Heritage
DENR	Department of Environment and Natural Resources
DEWNR	Department of Environment, Water and Natural Resources
fte	full-time equivalent
GABMPCC	Great Australian Bight Marine Parks Consultative Committee
GMUZ	General Managed Use Zone
GRP	gross regional product
HPZ	Habitat Protection Zone
MPLAG	Marine Park Local Advisory Group
MPSIAT	Marine Parks Social Impact Assessment Tool
NL	natural level
PIRSA	Department of Primary Industries and Regions SA
RAZ	Restricted Access Zone
RIAS	Regional Impact Assessment Statement
RIS	Regional Impact Statement
RISE	Regional Industry Structure and Employment
SA	South Australia
SAMPIT	South Australian Marine Parks Information Tool
SARFAC	South Australian Recreational Fishing Advisory Council
SARDI	South Australian Research and Development Institute
SEIFA	Socio-Economic Indexes for Areas
SIA	social impact assessment
SLA	Statistical Local Area
SPA	Special Purpose Area
SZ	Sanctuary Zone
UNHL	unnaturally high level
UNLL	unnaturally low level

Acknowledgements

The consulting team has relied heavily on the voluntary cooperation of a range of government, industry and broader community representatives and is indebted to these people for providing the necessary information, guidance and assistance (list provided in Appendix 3). Janine Baker provided assistance to the ecological impact assessment team early in the project and we are grateful for that. DEWNR and PIRSA officers provided assistance, were supportive of the data collection and interpretation and offered valuable advice throughout.

Document History and Status

Doc Ver	Doc Status	Issued To	Qty elec	Qty hard	Date	Reviewed	Approved
1	Draft	Gary Frost	1	-	4/7/12	JBM	JBM
2	Final	Gary Frost	1	-	2/8/12	JBM	JBM
3	Final	Gary Frost	1	-	20/8/12	JBM	JBM

Printed: 20/08/2012 5:13:00 PM
 Last Saved: 20/08/2012 5:13:00 PM
 File Name: S:\1_Projects\Current\1208_Marine Parks
 Revised\Reports\MP7\Impact Statement MP7_120820.doc
 Project Manager: Julian Morison
 Principal Author/s: Heather Bailey, Simon Bryars, John Spoehr, Julian Morison,
 James Brook, Kate Barnett, Ann-Louise Hordacre, Hugh
 Kirkman, Lisa Rippin
 Name of Client: Department of Environment, Water and Natural Resources
 Name of Project: Marine Parks Revised
 Document Version: 3
 Job Number: 1208

Executive Summary

Located in the Eyre bioregion, the Neptune Islands Group Marine Park is situated in offshore waters south of the Thorny Passage Marine Park. The marine park overlays the whole of the Neptune Islands Conservation Park.

Impacts of implementing the draft management plans were assessed against a base case scenario of no management plans. The base case is not static, and requires an understanding of the existing trends in natural resource, economic and social conditions. There are external factors which influence both the 'with management plan' and the base case scenarios that were taken into consideration.

Marine Park Profile

The Neptune Islands Group Marine Park is influenced by both the warmer Leeuwin Current from the west and the cooler Flinders Current from the east, and seasonal, nutrient-rich upwellings and exposure to high wind, wave and swell energy.

The park comprises steep granite islands with intertidal reefs extending down into deep water and sandy seafloor habitats. The slightly larger North Neptune Island has an area of platform reef adjacent to it, in some areas extending to depths greater than 50m.

From a socio-economic viewpoint the community relevant to the Neptune Islands Group Marine Park is that of the Lower Eyre Peninsula region. The three statistical local areas (SLAs) that comprise the region are Lower Eyre Peninsula (DC), Port Lincoln (DC) and Tumby bay (DC). Some of the key socio-economic characteristics of the region include:

- a resident population of around 22,500 persons in 20010/11.
- a higher concentration of younger people (aged 0 to 14 years), a lower share of persons aged 15 to 64 years and a similar share of people aged 65 and over compared with the State.
- The total population is projected to increase by approximately 13 per cent by 2026, whereas the SA population is expected to increase by around 23 per cent.
- The unemployment rate in the Lower Eyre Peninsula region was 4.2 per cent in the June quarter of 2011, below the state rate of 5.3 per cent.
- Approximately 30 per cent of businesses in the Lower Eyre Peninsula region were classified in the agriculture, forestry and fishing.
- Mean taxable income was \$52,000 in 2009/10, 4 per cent below SA's average of \$54,300.
- Over the period 2000/01 to 2010/11, median dwelling prices increased by 161 per cent (\$278,500 in 2010/11) compared with a 197 per cent in SA as a whole (\$357,500).
- In 2009/10, the top four contributors to GRP were the agriculture, forestry and fishing (18 per cent), ownership of dwellings (12 per cent each), building and construction and property and business services (7 per cent each) sectors.

- The commercial fishing and tourism industries are important to the local economy in terms of contributing to jobs and GRP. Directly and indirectly commercial fishing and aquaculture contributed 13 per cent of GRP (\$121.6 million) and 13 per cent of employment (1,210 fte jobs) in 2009/10. By comparison, the tourism sector contributed 4 per cent of GRP (\$34.7 million) and 6 per cent of employment (540 fte jobs).

Ecological Impacts

The habitats within the park can be considered to be in a condition comparable to the time of European settlement, with the possible exception of anchor damage to seagrass at North Neptune Island. A number of species within the park were assessed as having lower abundances compared with pre-European levels. The current state of the ecosystems in the park was generally considered to reflect the condition of their component habitats and species.

The proposed management arrangements are predicted to have a net positive long-term impact on South Australia's marine biodiversity. Without the proposed management arrangements there is potential for future activities to occur that could impact on marine habitats, species and ecosystems. The positive ecological impacts inside the Neptune Islands Group Marine Park will include (1) maintenance of habitats and ecosystems in relatively good condition, and (2) changes in some ecosystems towards a more natural and resilient condition. Such changes include increases in the size and abundance of some fished species, which may potentially have socio-economic benefits, and the overall shift towards a more natural ecosystem is also expected to provide a number of management benefits, although these potential benefits have not been quantified.

The proposed zoning alone does not address the potential anchor damage issue, which would require complementary management measures, but various zone restrictions (with habitat protection and sanctuary zones each covering about 49 per cent of the park) will assist with the future protection of habitats from a range of potentially damaging activities that may otherwise be possible under the existing management framework. Some habitats of particular conservation note include seagrass meadows in the lee of the islands, and the deep-water pelagic habitat surrounding North Neptune Island. Maintenance of healthy habitats in general is essential for the functioning of ecosystems and the long-term sustainability of fisheries, aquaculture, and marine-based tourism.

Three species (namely southern rock lobster, and greenlip and blacklip abalone), when considered in isolation, have potential to increase in size and abundance inside the single sanctuary zone. All three of these species also have potential for increased larval export to areas outside the sanctuary zone, and southern rock lobster has potential for spill-over of adults to areas outside the sanctuary zone. These changes may potentially have socio-economic benefits, although not quantified in this report. However, the ecosystems in which these species interact are expected to shift towards a pre-European state, which may result in declines rather than increases of some species such as blacklip abalone. Some species of conservation concern such as the western blue groper and harlequin fish will likely benefit from protection inside the sanctuary zone.

Economic Impacts

In summary, the proposed draft zoning is expected to have the following economic impacts on the following sectors of the regional economy: potential positive impact in

the tourism sector in the medium to long term, neutral impact in the aquaculture, property, marine infrastructure and operations, mining and coastal development sectors and short, medium and long term negative impacts in the commercial fishing sector.

Commercial fishing

Table ES1 shows the economic impact on the regional economy of marine park zoning on all affected fisheries. Impacts are based on SARDI's average annual displaced catches and corresponding average annual prices expressed in 2011 dollars. In aggregate, it was estimated that the impact of marine park zoning will generate the following loss of regional economic activity on an ongoing annual basis.

- Approximately \$0.11m in GRP which represents 0.01 per cent of the regional total (\$942m).
- Less than one fte job which represents less than 0.005 per cent of the regional total (9,693 fte jobs).
- Approximately \$0.07m in household income which represents 0.01 per cent of the regional total (\$487m).

Because the reduced access to the fishery will be permanent, the impacts reported in Table ES1 are an estimate of the on-going, annual impact. The State Government has committed to buy out licences and quota entitlements to offset any unsustainable displaced effort and catch. Although details of the buyout are yet to be finalised, any such payments have the potential to at least partially offset the negative impacts outlined above.

Table ES1 Regional economic impact of marine park zoning based on SARDI estimates of displaced effort

Sector	Output		Employment ^a		Household Income		Contribution to GRP	
	(\$m)	%	(fte jobs)	%	(\$m)	%	(\$m)	%
Direct effects								
NZ Rock Lobster	-0.07	52%	0	0%	-0.05	76%	-0.07	66%
Downstream ^b	-0.01	10%	0	14%	0.00	4%	0.00	5%
<i>Total Direct ^c</i>	<i>-0.09</i>	<i>62%</i>	<i>0</i>	<i>14%</i>	<i>-0.06</i>	<i>79%</i>	<i>-0.08</i>	<i>70%</i>
<i>Total Flow-on ^c</i>	<i>-0.06</i>	<i>38%</i>	<i>0</i>	<i>86%</i>	<i>-0.02</i>	<i>21%</i>	<i>-0.03</i>	<i>30%</i>
Total ^c	-0.14	100%	0	100%	-0.07	100%	-0.11	100%
Regional Total ^d	1,754.42		9,693		486.66		941.86	
Impact on Region	-0.01%		0.00%		-0.01%		-0.01%	

^a Full-time equivalent jobs.

^b Downstream activities consist of seafood processing, transport, retail trade and food services.

^c Totals may not sum due to rounding.

^d Lower Eyre Peninsula region (see Appendix 1)

Source: EconSearch analysis

The economic impacts could be greater as the estimated displaced catch may understate the actual catch in some sanctuary zones if they are located on important fishing grounds (hot spots). Impacts could also be over-estimated if sanctuary zones avoid hot spots (Ward and Burch 2012; Stevens et al. 2011a and 2011b). The zoning process attempted to avoid impacts on fishing by avoiding important fishing grounds. PIRSA has advised that statewide some draft sanctuary zones are located on important fishing grounds (hotspots), however advice specific to this park has not been

provided. According to industry-derived estimates of displaced catch (which have not yet been reviewed by SARDI) the aggregate regional impacts could be higher at 2 fte jobs and \$0.15m in GRP.

The potential cumulative impact of the proposed extension to and revised zoning of the Commonwealth Great Australian Marine Park and the proposed Western Eyre Commonwealth Marine Reserve may place further pressure on fishing business viability.

Although the aggregate quantified impacts may not appear large in absolute terms, the economy of the Lower Eyre Peninsula region is a moderately dependent one with a high level of reliance on agriculture and fishing as the core drivers of economic activity. Indeed of the 2,559 businesses in the region approximately 31 per cent are classified in the agriculture, forestry and fishing sector.

However, unemployment in the Lower Eyre Peninsula region is relatively low (4.2 per cent at June 2011) when compared with the state average (5.2 per cent). This suggests that alternative regional opportunities for unemployed labour may be available over time, depending on the skills of those seeking work and the skills demanded by potential employers.

Aquaculture

There are currently no aquaculture operations in this marine park and any future development will need to be consistent with policy commitments, marine park and aquaculture related legislation (PIRSA, pers. comm., 27 June 2012).

Tourism

Existing shark viewing ventures operating around North Neptune Islands are expected to continue under new permitting arrangements.

Port, harbour and shipping operations

There are no ports or harbours in this marine park. No significant impacts on shipping activities arising from the zoning in this park are expected, which is consistent with Government policy commitments.

Mining

No mineral, petroleum or geothermal tenements are currently located within this marine park.

Coastal development

There are no significant projects or infrastructure in or known to be planned for this marine park and these islands are unlikely to be developed due to their Restricted Access status.

Social Impacts

The overall social impacts of the Neptune Islands Group Marine Park on communities living in the region are expected to be minimal. Commercial fishing is one of the two top industry sources of employment and is estimated to contribute 1,210 jobs to employment in the region, compared with tourism which contributes some 540 jobs. This is one of two regions where commercial fishing provides more employment than

tourism. Economic impact assessment identifies no loss of commercial fishing jobs. The impact on recreational fishing is considered to be minimal which is of benefit to those who visit the region for this purpose. Regional unemployment is low as are measured levels of relative disadvantage.

No impacts on local government operations, infrastructure and revenue or compliance related activities are expected as a result of the proposed draft zoning.

Experience elsewhere in Australia and internationally, suggests that a range of benefits from the establishment of marine parks become evident over time. These include increased opportunities for education about marine life and conservation, and increased tourism and ecotourism opportunities. This experience indicates that these benefits usually take approximately five years to be evident, and that in the earliest stages of marine protected areas being developed, local communities are more likely to identify possible negative impacts than potential benefits. It takes time to observe how the park's ecological and economic impacts evolve, with social impacts (positive or negative) flowing from these.

Marine parks have broad support in the South Australian community. Market research commissioned by the state government between 2006 and 2012 found strong support for the concept of marine parks among South Australians with approximately 85 per cent in favour of them in 2012 (87 per cent support in metropolitan Adelaide and 82 per cent support in regional areas). Those least likely to support marine parks have been fishing groups (in 2009 55 per cent of respondents who did not support marine parks identified restricted fishing as the reason, this dropped to 39 per cent in 2012). Between 2011 and 2012 the market research findings identify a decline in those who believe they will have limited access to marine parks and an increase in those who associate swimming, boating and snorkelling with marine parks.

A critical factor in determining the ultimate impact of marine parks is how well local communities are able to adapt to change and how cohesive they are in supporting each other through change. The level of support provided by government to adjust to change is also crucial. One very important factor that affects community attitudes is how informed they are, and feedback from market research and marine park local advisory groups, as well as analysis of media reports indicates a gap in this information. In particular, increasing communities' understanding of the scientific rationale underpinning marine protected areas, and the benefits that these can bring, needs to be enhanced. This is one of the functions of impact assessment which is best conceived of as a continuous process informing both the establishment and operation of marine parks.

1. Introduction

In 2009, the SA Government established 19 marine parks covering approximately 44 per cent of the State's waters. The Government has prepared a draft management plan for each of South Australia's marine parks. These draft management plans include a number of proposed zones where certain activities will be restricted for biodiversity conservation purposes. Global scientific research is demonstrating that marine parks have the potential to conserve coastal and marine biodiversity (PISCO 2007).

However, it is recognised that the zoning of marine parks will come with some costs such as restrictions on commercial and recreational activities. The *Marine Parks Act 2007* provides that when the Minister prepares a draft management plan, an impact statement of the expected environmental, economic and social impacts of the management plan must also be prepared. The impact statements are designed to assist the community to understand the projected impacts of the draft management plans¹ during public consultation.

The Department of Environment, Water and Natural Resources (DEWNR) contracted EconSearch Pty Ltd and its project partners to provide:

1. Impact statements for each of the 19 marine parks which describe both positive and negative impacts of implementing the draft management plans on the local marine ecosystems, economies and communities. These impact statements are to comply with the SA Government's Regional Impact Assessment Statement Policy (RIAS) and with Section 14(4)(c) of the *Marine Parks Act 2007*.
2. A state level Cost Benefit Analysis (CBA) of the proposed management of the 19 marine parks through zoning regulations. The CBA is to comply with the SA Governments Regulatory Impact Statement (RIS) Policy, but is not a RIS in its own right. The results of the CBA are presented in the *Marine Park Impact Statements Main Report*.

1.1 Marine Park Planning Process

Marine parks in South Australia will be zoned for multiple-uses, providing for varying levels of conservation, recreational and commercial use. Zoning provides the basis for the management of marine parks, in accordance with the objects of the *Marine Parks Act 2007*. Figure 1–1 describes the marine park zones.

The Government has developed a table of activities and uses that occur in the marine environment and summarises how these activities are expected to be managed in each marine park zone. The prohibitions and restrictions in the matrix will be included in regulations that will be finalised when marine park management plans are adopted (see Appendix 2).

¹ The impact statements were prepared before the draft management plans were finalised.

Figure 1–1 Marine Park Zones

<i>The management plans will contain the following management zones:</i>	
General managed use	A zone primarily established so that an area may be managed to provide protection for habitats and biodiversity within a marine park, while allowing ecologically sustainable development and use.
Habitat protection	A zone primarily established so that an area may be managed to provide protection for habitats and biodiversity within a marine park, while allowing activities and uses that do not harm habitats or the functioning of ecosystems.
Sanctuary	A zone primarily established so that an area may be managed to provide protection and conservation for habitats and biodiversity within a marine park, especially by prohibiting the removal or harm of plants, animals or marine products.
Restricted access	A zone primarily established so that an area may be managed by limiting access to the area.
<i>To accommodate site specific community needs, within a marine park there may be:</i>	
Special purpose area	An area within a marine park, identified as a special purpose area and with boundaries defined by the management plan for the marine park, in which specified activities, that would otherwise be prohibited or restricted as a consequence of the zoning of the area, will be permitted under the terms of the management plan.

Source: Adapted from sections 4 and 5, *Marine Parks Act 2007*.

The suite of protection provided by this framework will assist with the delivery of the objects of the *Marine Parks Act 2007*. Specifically:

- a) “to protect and conserve marine biological diversity and marine habitats by declaring and providing for the management of a comprehensive, adequate and representative system of marine parks; and
- b) to assist in—
 - i. the maintenance of ecological processes in the marine environment;
 - ii. the adaptation to the impacts of climate change in the marine environment;
 - iii. protecting and conserving features of natural or cultural heritage significance;
 - iv. allowing ecologically sustainable development and use of marine environments; and
 - v. providing opportunities for public appreciation, education, understanding and enjoyment of marine environments.”

The Government dedicated significant resources to gathering environmental, economic and social knowledge and working with community and key stakeholder interests to develop draft park zoning. Key elements of this process are described in Table 1-1.

Table 1-1 Public consultation process to date

Initiative	Timeframe
Statewide consultation on Liberal Government draft policy document <i>Marine protected areas: a shared vision</i> . 23 public meetings/information sessions held involving some 1600 people.	2001/02
Labor Government policy <i>Blueprint for the SA representative system of marine protected areas</i> developed following the above consultation process, with further consultation undertaken with key stakeholders and across relevant government agencies.	2003/04
The Draft <i>Encounter Marine Park Zoning Plan</i> was released for 3 months' public consultation as a pilot process to test key concepts for statewide application. 427 submissions were received. Local consultation was undertaken targeting the Fleurieu Peninsula, Kangaroo Island and Adelaide. 15 public information days and 48 stakeholder group meetings were held.	2005
The Marine Parks Draft Bill (2006) was developed and 3 months' statewide consultation was undertaken on this, involving 16 regional public meetings/information sessions and 112 submissions.	2006-07
On 29 January 2009, the Minister for Environment and Conservation released the outer boundaries of 19 new marine parks, for a public consultation period of three months. During the comment period, approximately 15,000 copies of the consultation brochure with submission form were distributed through various means. By the end of the three month consultation 2,357 submissions had been received by the Department for Environment and Heritage (DEH) representing a total of 3, 295 individual respondents. In addition, 56 public information days were held and 4,800 people were estimated to have been directly engaged in the consultation process. Nearly 150 groups provided comment on either the marine parks network or one or more individual marine parks. These included key interest groups, organisations, businesses, associated bodies, local governments, not for profit organisations, community groups and recreational clubs. Three regional Pilot Working Groups with multi sectoral representation were established to advise on outer boundary design with minimum three meetings of each. Outer boundaries of seven parks were amended as a result of the consultation process.	2009
Phase 1 - Management planning for South Australia's marine parks network. A Statewide community engagement process was undertaken involving: <ul style="list-style-type: none"> • 13 Marine Park Local Advisory Groups (MPLAGs) established across the state, and the Great Australian Bight Marine Parks Consultative Committee (GABMPCC). • 67 public MPLAG meetings were facilitated. • Peak stakeholders were invited to provide early advice on their preferred zoning for • A key stakeholder forum was held where broad agreement was reached on the priority areas for conservation marine parks. 	Late 2009 onwards

Source: Adapted from SA Government Submission to the Marine Parks Select Committee, 2011.

The Scientific Working Group and Marine Parks Council of South Australia are independent advisory bodies providing advice to the Minister. In finalising draft management plans for public consultation, both the Scientific Working Group and Marine Parks Council assessed the merits of the draft zoning schemes and strategies for management against the objects of the *Marine Parks Act 2007* and provided the Minister with independent advice.

In finalising draft management plans, discussions were held with members of the Marine Parks Steering Committee as representatives of relevant Government agencies. The Steering Committee considered whether draft management plans took appropriate consideration of all relevant statutory requirements and effectively implemented the Government's policy commitments for marine parks.

Based on the collective advice from MPLAGs, other community members, peak stakeholders and discussions across relevant agencies, the Government developed a

draft management plan with zoning for each of the 19 marine parks for formal public consultation. The draft management plans are currently out for public consultation.

1.2 Policy Commitments

The Government has made a range of policy commitments² to help ensure South Australian lifestyles and livelihoods are maintained, and to provide more certainty for the industries that use the marine environment. The commitments informed the design of zoning for each marine park, and include:

- access to specific key recreational and commercial fishing sites through appropriate zoning
- access for existing and future aquaculture development through appropriate zoning
- certainty that marine parks will not affect access to, or use of, jetties, break walls or boat ramps
- accommodation of approved coastal development as well as future development and infrastructure needs
- accommodation of approved mining, petroleum and geothermal development activities
- accommodation of shipping and harbor activities
- certainty that marine parks will not create an extra approval process as government agencies will work together to streamline administration.

1.2.1 Displaced Commercial Fishing Policy Framework

The adoption of marine park management plans with zoning will displace some commercial fishing activities. This Policy Framework³ describes the steps that support this process:

1. Avoid displacement by pragmatic zoning;
2. Redistribute effort only where possible without impacting ecological or economic sustainability of the fishery;
3. Market-based buy back of sufficient effort to avoid impact on the fishery;
4. Compulsory acquisition as a last resort option.

The Government expects that market based buy back of effort and any necessary compulsory acquisition will be undertaken under the authority of the Minister for Agriculture, Food and Fisheries. The Minister for Sustainability, Environment and Conservation will consider any fair and reasonable compensation in accordance with section 21 of the *Marine Parks Act 2007*, and it is envisaged that regulations will be drafted to support this process.

² A complete list of the commitments is available at Appendix 2 of the *South Australia's Marine Parks Network Explanatory Document* which accompanies the draft management plans.

³ The Displaced Commercial Fishing Policy Framework is provided at Appendix 5 of the *South Australia's Marine Parks Network Explanatory Document*.

2. Method of Assessment

This study undertook both an impact analysis and an economic evaluation, in the form of a cost benefit analysis (CBA), of implementing the marine park draft management plans. The method and results of the CBA are presented in the Main Report.

Impacts of implementing the draft management plans were assessed against a base case scenario of no management plans. This also applies to the CBA. The base case is not static, and requires an understanding of the existing trends in natural resource, economic and social conditions. There are external factors which influence both the 'with management plan' and the base case scenarios that need to be taken into consideration.

2.1 Ecological

The ecological impact assessment was required to:

1. describe the current status of the marine habitats, plants and animals in each marine park;
2. discuss (in qualitative terms) the services that the protected ecosystems provide to South Australians (where not possible to measure their economic value);
3. identify the range of activities that impact on the environment and quantify how the draft management plans will influence the marine environment, against a base case of no management plans;
4. assess the implications of the management plans in 5, 10 and 20 years on species diversity and abundance, marine habitats, and ecosystem function;
5. include case studies that highlight the potential impacts of the draft management plans on iconic and threatened species and contribute to case studies that effectively communicate the trade-offs between the different environmental, social and economic factors.

The outcomes for Items 1, 4 and 5 listed above are included in each individual park statement and can be found in Section 4 of this impact statement. The outcomes for Item 2 are generic across the park network and are briefly introduced in Section 3.1 of this impact statement and detailed in Appendix 4 of the Main Report (see Ecosystem services). The outcomes for Item 3 inform the outcomes for Items 4 and 5, and are discussed in a generic sense in Appendix 1.1.4 of the Main Report. It should be noted that despite the broad spectrum of activities that can potentially be influenced by zoning under the *Marine Parks Act 2007*, the proposed zones have been located in such a manner that very few current activities will be affected. The most widespread of these is fishing, with the cessation of all forms of fishing inside most SZs and RAZs (with exceptions relating to existing restrictions), and benthic trawling inside HPZs of six parks. Furthermore, predicting species and ecosystem responses to the cessation of fishing is highly complex (see Appendix 1.3 of the Main Report) and, compared to other activities, there are generally more data available to inform the assessment. Consequently, the extent and depth of discussion on fishing-related responses may appear to be disproportionate in comparison to other activities, but this is not intended to place any particular emphasis on fishing as a threatening process.

The process of ecological impact assessment undertaken for the current report can essentially be summarised by three main steps:

1. Activities and uses: determining the range of activities and uses that potentially impact on the marine environment under current management regimes, and then determining how the marine park zoning and management arrangements will influence them.
2. Baseline: determining the current status of the marine species, habitats, and ecosystems in the marine parks; what are we comparing future changes against?
3. Predictions: assessing the implications of the marine park zoning and management arrangements in 5, 10 and 20 years on species, habitats, and ecosystems against the case of no marine park zoning and management arrangements.

A total of 205 species or species groups, 11 habitat types, and 11 habitat-based ecosystem types were selected for the impact assessment (see Appendices 2, 4 and 6 of the Main Report).

Further details of the methodology can be found in Appendix 1 of the Main Report.

2.2 Economic

At a regional level, the economic impact analysis was based on the input-output method. This method provides a standard approach for the estimation of the economic impact of a particular activity. The input-output model is used to calculate industry multipliers that can then be applied to various change scenarios, as has been done in this study.

For this impact assessment an input-output model was constructed specifically for the Lower Eyre Peninsula region (see Map in Appendix 1). The model is known as a Regional Industry Structure and Employment (RISE) model which is an extension of the standard input-output model that is used within the SA Government for various types of impact assessment.

At a micro level individual businesses could be impacted by marine parks. To assess the impact on commercial fishing operations representative financial models of fishing businesses were constructed for each of the relevant fishing sectors. These models were based on financial information collected and reported by EconSearch (2010) over the past 13 years. The results of the financial modelling provided input into the regional RISE model to estimate impacts on the regional economy.

The principal driver for change in fishing industry operations and profitability is lost access to the resource. Estimates of displaced catch were provided by the South Australian Research and Development Institute (SARDI). PIRSA Fisheries and Aquaculture provided detailed information on the recreational and commercial fisheries relating to the:

- current condition of the fishery;
- outlook for the fishery without marine parks management plans;
- marine parks impacts on the fishery; and
- measures to mitigate anticipated impacts.

Discussions were also held with representatives of each of the commercial fishing sectors, recreational fishing, mining, various State Government departments and Local

Government (see Appendix 3). These discussions provided insights to the likely responses of businesses and organisations associated with or members of the interviewee's organisation. Because of time and resource constraints it was not possible to undertake discussions with or collect data from all potentially impacted parties.

Because some of the activities that could potentially be impacted by marine parks are related to the tourism sector, the Lowe Eyre Peninsula RISE model includes explicit specification of the regional tourism industry. This was done by following the standard ABS method of constructing tourism satellite accounts.

The following indicators of economic impact were generated using the economic modelling framework described above:

- value of output,
- gross regional product (GRP),
- household income and
- employment.

(Value of) Output is a measure of the gross revenue of goods and services produced by commercial organisations (e.g. the value of processed seafood products) and gross expenditure by government agencies. Total output needs to be used with care as it can include elements of double counting when the output of integrated industries is added together (e.g. the value of processed seafood includes the beach value of the fish).

Gross regional product (GRP) is a measure of the net contribution of an activity to the regional economy. GRP is measured as value of output less the cost of goods and services (including imports) used in producing the output. In other words, it can be measured as the sum of household income, 'gross operating surplus and gross mixed income net of payments to owner managers' and 'taxes less subsidies on products and production'. It represents payments to the primary inputs of production (labour, capital and land). Using GRP as a measure of economic impact avoids the problem of double counting that may arise from using value of output for this purpose.

Household income is a component of GRP and is a measure of wages and salaries paid in cash and in-kind, drawings by owner operators and other payments to labour including overtime payments, employer's superannuation contributions and income tax, but excluding payroll tax.

Employment is a measure of the number of working proprietors, managers, directors and other employees, in terms of the number of full-time equivalent (fte) jobs. Employment is measured by place of remuneration rather than place of residence.

Further details of the economic method can be found in Section 3.2 of the Main Report.

2.3 Social

The identification of potential social impacts of different marine park zoning options has been informed by a review of relevant research, analysis of the Environmental, Economic and Social Values Statements developed for each park, a review of the minutes and available correspondence of Marine Parks Local Advisory Groups (MPLAG), an overview of local media reports on the parks, an examination of market research on community perspectives on the establishment of marine parks, an

assessment of MPLAG member perspectives on zoning options and targeted impact assessment interviews. An analysis of SAMPIT⁴ data was also undertaken to identify the potential impact of the zoning proposal on recreational fishing. An examination of the impacts of the establishment of marine parks in relevant jurisdictions was undertaken to inform the design of the social impact assessment tool.

A 'Marine Parks Social Impact Assessment Tool' (MPSIAT) was developed by the Australian Institute for Social Research to identify and compare potential social impacts from the preliminary DEWNR marine park sanctuary zones (DEWNR zones) and zones resulting from Marine Park Local Advisory Groups advice (MPLAG zones). MPSIAT respondents provided perspectives on impacts of zoning proposals based on their experience and expertise. Final MPLAG zone advice was normally based on a majority view. While this approach to decision making delivers a decision it does tend to obscure differences in views and opposing views on potential impacts from the perspectives of different stakeholders. The MPSIAT has been designed to shed light on these differences in order to identify a range of potential social impacts identified by key stakeholders. In the context of the impact assessment process these perspectives can inform our understanding of what the social impacts of the draft zoning proposal are likely to be. This impact assessment statement helps to identify what the likely social impacts will be.

This social impact assessment provides baseline perspectives on potential positive and negative impacts across five domains:

- Education and wellbeing;
- Culture and heritage;
- Recreation and fishing;
- Population and housing; and
- Community.

Social vulnerability of the Impact Region associated with each Marine Park has been determined through a combination of Socio-Economic Indexes for Areas (SEIFA) indexes, population (health, family, education, Indigenous status) and economic characteristics (unemployment, job losses).

The SEIFA Indexes presented here provide a measure of the socio-economic disadvantage for the Impact Regions associated with Marine Parks at the time of the 2006 Census⁵. We have included figures from the Index of Relative Socio-economic Disadvantage, the Index of Economic Resources and the Index of Education and Occupation. Each of these provides a slightly different view of the socio-economic profile and potential vulnerability of each region.

SEIFA values have been standardised with Australia (as a whole) having a value of 1000 and a standard deviation of 100, low scores indicate greater disadvantage. South

⁴ The South Australian Marine Parks Information Tool (SAMPIT) is a computer tool designed to gather information from community members about their favourite fishing spots and areas they believe need protection. Data is collected and reported by 'grid cell'. SAMPIT data for 1,739 people is available including 1311 recreational fishers. Quality control by the Department of Environment and Natural Resources included cross-verification of legitimate naming and activities from the data provided (DENR 2010b).

⁵ Australian Bureau of Statistics. 2008. *Census of Population and Housing: Socio-Economic Indexes for Areas (SEIFA), Australia - Data only 2006 (cat. no. 2033.0.55.001) and Information Paper: An Introduction to Socio-Economic Indexes for Areas (SEIFA), 2006 (cat. no. 2039.0)*. Note SEIFA Indexes for the 2011 Census are not yet available.

Australia sits below the Australian average with a relative disadvantage level of 979. At the SLA level, South Australian SEIFA relative disadvantage scores range from a low of 527 through to 1107.

A range of SEIFA values at the statistical local areas (SLA) level are associated with the Impact Regions, noting between one and seven SLAs are associated with each Impact Region. These capture information about average socio-economic conditions for the SLA and Impact Region but do not account for variation of individuals within the areas. Areas identified with relative disadvantage may well have individuals and sub-regions that are relatively advantaged. We have also presented individual variables to provide additional information about the potential social vulnerability of SLAs associated with the Impact Regions.

Where an Impact Region has an SLA falling within the top decile in South Australia (i.e. most disadvantaged) a ranking of High is provided. A ranking in the second highest decile is ranked as Moderate. Where there are moderate to high ranking SLAs they are rated to as Moderate-High.

It is important to acknowledge that the impact of marine parks on employment and wellbeing is likely to vary significantly across regions and will be mediated by a range of social and economic factors including:

- the age and retirement intentions of fishers;
- the ability of fishers to adapt to changes within the region in which they fish;
- the opportunities available to fishers and those dependent on fishers to work in other industry sectors;
- the impact of compensation packages provided to fishers on their financial circumstances and the local economy;
- the influence of lifestyle attachment and importance of place in the lives of fishers
- the extent to which the existence of marine parks might generate employment in tourism, research, education and other sectors.

3. Neptune Islands Group Marine Park Description

Located in the Eyre bioregion, the Neptune Islands Group Marine Park covers 146km² and is situated in offshore waters south of the Thorny Passage Marine Park. The marine park overlays the whole of the Neptune Islands Conservation Park (DENR 2010a).

A map of the Neptune Islands Group Marine Park and the proposed draft zoning is provided at the end of this statement at Appendix 5.

3.1 Ecological Description

The Neptune Island Group Marine Park is influenced by both the warmer Leeuwin Current from the west and the cooler Flinders Current from the east, seasonal, nutrient-rich upwellings and exposure to high wind, wave and swell energy (DENR, 2010a).

The park comprises steep granite islands with intertidal reefs extending down into deep water and sandy seafloor habitats. The slightly larger North Neptune Island has an area of platform reef adjacent to it, in some areas extending to depths greater than 50m (DENR, 2010a).

For the current impact assessment, coastal and marine habitats/ecosystems were divided into the following types: saltmarsh, mangrove, intertidal sand flat, subtidal sand, intertidal seagrass flat, subtidal seagrass, intertidal reef, subtidal high profile reef, subtidal low profile reef, beach, and pelagic. The extent of these habitats (except pelagic) mapped for this park are shown in Table 3-1.

These eleven habitats/ecosystems, and others not considered in the current impact assessment, support thousands of species (Edyvane, 1999; Baker, 2004). They also offer goods and services that are of economic, social and environmental value to SA. The economic value of these services can be difficult to determine but to illustrate the importance of valuing coastal marine habitats in SA a description of the necessary goods and services that need to be taken into account is provided. The goods and services provided by coastal, marine and estuarine habitats were classified under four headings by McLeod and Leslie (2009). These headings were:

- Life supporting services,
- Resources and products,
- Maintaining Earth's living space and
- Recreational and cultural services.

Each one of these headings was divided into categories that could be more easily valued, either directly or as a service. A more detailed discussion of these goods and services is provided in Appendices 4 (habitat specific information) and 5 (consolidated discussion) of the Main Report.

Table 3-1 Summary of habitats

Zone	Shoreline habitats (km of coastline)						Benthic habitats (square km)				
	Beach	Intertidal sand	Intertidal seagrass	Intertidal reef	Mangrove	Saltmarsh	Subtidal high profile reef	Subtidal low profile reef	Subtidal sand	Subtidal seagrass	Unmapped
SZ-1								0.8			70.7
HPZ-1											70.9
Total								0.8			141.6

Source: based on GIS data provided by DEWNR.

Zones are labelled as shown in Appendix Figure 5-1. Land-based RAZs have been omitted from this table.

Shoreline habitats are not available for islands.

3.2 Socio-economic Profile

The socio-economic profile provided in Appendix 1 presents a statistical summary of key economic and social information for the Lower Eyre Peninsula region and, where possible, South Australia (SA). The profile brings together a wide range of existing Australian Bureau of Statistics (ABS) data and some non-ABS data. It has been designed, at a broad level, to aid understanding of the economic and social structure of the region, to indicate how the Lower Eyre Peninsula region contributes to the State economy and to illustrate trends in economic growth or decline.

The Lower Eyre Peninsula region is located at the southern end of Eyre Peninsula (Figure 1). The three statistical local areas (SLAs) that comprise the region are Port Lincoln (DC), Tumby Bay (DC) and Lower Eyre Peninsula (DC). The Lower Eyre Peninsula regional economy is relevant to the Thorny Passage (MP5), Sir Joseph Banks Group (MP6), Neptune Islands Group (MP7) and Gambier Islands Group (MP8) marine parks. Table 1 presents a summary of the key economic and social information detailed further in Appendix 1.

Some key points from the detailed socio-economic profile in Appendix 1 are as follows:

- The estimated resident population of the Lower Eyre Peninsula region was around 22,500 persons in 2010/11.
- Compared with the age distribution of the state as a whole, the Lower Eyre Peninsula region has a higher concentration of younger people (aged 0 to 14 years), a lower share of persons aged 15 to 64 years and a similar share of people aged 65 and over.
- The total population in the Lower Eyre Peninsula region is projected to increase by approximately 13 per cent by 2026, whereas the SA population is expected to increase by around 23 per cent.
- The unemployment rate in the Lower Eyre Peninsula region was 4.2 per cent in the June quarter of 2011, below the state rate and is almost half of what it was in 2003 (June quarter).
- Almost 60 per cent of the businesses operating in the Lower Eyre Peninsula region did not employ anyone and over 20 per cent employed between 1 and 4 people.

- Over the period 2000/01 to 2009/10, the mean taxable income (in nominal terms) increased by 42 per cent in the Lower Eyre Peninsula region (\$52,000 in 2009/10) and 54 per cent in SA as a whole (\$54,350 in 2009/10).
- Median dwelling (units and houses) prices increased by 161 per cent in the Lower Eyre Peninsula region (\$278,500 in 2010/11) and 197 per cent in SA as a whole (\$357,500 in 2010/11) over the period 2000/01 to 2010/11.
- In 2009/10, the top four contributors to total jobs in the region were the agriculture, forestry and fishing (17 per cent), retail trade (16 per cent), health and community services (11 per cent) and education (9 per cent) sectors.
- In 2009/10, the top four contributors to GRP were the agriculture, forestry and fishing (18 per cent), ownership of dwellings (12 per cent each), building and construction and property and business services (7 per cent each) sectors.
- The commercial fishing and tourism industries are important to the local economy in terms of contributing to jobs and GRP. Directly and indirectly commercial fishing and aquaculture contributed 13 per cent of GRP (\$121.6 million) and 13 per cent of employment (1,210 fte jobs) in 2009/10. By comparison, the tourism sector contributed 4 per cent of GRP (\$34.7 million) and 6 per cent of employment (540 fte jobs).

Table 3-2 Summary of key economic and social indicators for the Lower Eyre Peninsula region

Indicator	Lower Eyre Peninsula	SA	Lower Eyre Peninsula as a proportion of SA
Population, 2010/11 (no.)	22,533	1,656,299	1.4%
Birth Rate, 2009/10 (births/1000 residents)	13.5	12.2	-
Death Rate, 2009/10 (deaths/1000 residents)	8.2	7.9	-
Age Distribution, 2009/10:			
Proportion of Population aged 0-14	20%	18%	-
Proportion of Population aged 15-64	64%	67%	-
Proportion of Population aged 65+	16%	16%	-
Dependency Rate, 2009/10:			
Child	32%	27%	-
Aged	25%	23%	-
Total	56%	50%	-
Population Projection, Increase from 2006 to 2026	13%	23%	-
Employment, June qtr 2011:			
Labour Force (no.)	11,219	867,500	1.3%
Unemployed (no.)	476	45,300	1.1%
Unemployment Rate	4%	5%	-
Participation Rate, 2009/10	58%	63%	-
Businesses, June 2009 (no.)	2,559	141,625	1.8%
School Enrollments, 2011	3,659	247,356	1.5%
Tertiary Enrollments, 2011	2,094	208,706	1.0%
Non-school Qualifications, 2006	7,199	595,379	1.2%
Mean Taxable Income, 2009/10 (\$)	51,991	54,349	-
Proportion of Taxable Individuals, 2009/10	73%	74%	-
Value per Building Approval, 2010/11 (\$)	231,750	236,269	-
Median Dwelling Price, 2010/11 (\$)	287,500	357,500	-
Commercial Fishing, Ave/yr 2000/01 to 2009/10:			
Catch (t)	23,491	47,581	49.4%
Value of Catch (\$m)	45	202	22.2%
Charter Boats, Ave/yr 2007/08 to 2009/10 (no. of fish)	34,813	146,341	23.8%
Recreational Fishing, 2007/08:			
Fishers (no.)	28,008	236,463	11.8%
Days Fished (no.)	91,314	1,054,200	8.7%
Gross Regional Product, 2009/10 (\$m)	942	80,356	1.2%
Employment, 2009/10 (fte)	9,693	774,953	1.3%
Tourism, 2009/10 (\$m)	79	4,524	1.8%
Other Regional Exports, 2009/10 (\$m)	487	26,757	1.8%
Regional Imports, 2009/10 (\$m)	900	40,573	2.2%

Source: Appendix 1.

4. Summary of Impacts

4.1 Ecological

This section presents the summarised results of the ecological impact assessment for this particular park. As such, output tables and other information presented that are not otherwise referenced, represent the professional judgement of the authors. Full details behind the assessments can be found in the Main Report and accompanying appendices (see cross-references below).

4.1.1 Habitats

The habitats within the park can be considered to be in a condition comparable to the time of European settlement. The islands are remote, uninhabited, and mainly visited by charter operators (fishing and shark cage diving) and commercial fishers. One of the few potential minor threats could be anchor damage to seagrass (currently unmapped) within the eastern cove of North Neptune Island.

The proposed zoning alone does not address the potential anchor damage issue listed above, which would require complementary management measures. However, the zoning plan will influence future activity and applies specific restrictions on future activity within HPZs, SZs and RAZs, with respectively increasing protection across this hierarchy of zone types (see Appendix 1.2.6 of the Main Report). The Neptune Islands Group Marine Park has HPZ and SZ each covering 49 per cent of the park (and 2 per cent land-based RAZ) and therefore has a high level of protection from potentially damaging future activities.

For the Neptune Islands Group Marine Park, habitats of significance include the seagrass meadows in the lee of the islands, and the pelagic habitat surrounding the North and South Neptune Islands (SZ-1, HPZ-1) as there are few deep-water (>50 m) pelagic areas with this level of protection within the marine parks network.

4.1.2 Species

4.1.2.1 Threatened and protected species

A large number of marine species are protected in SA under either State and/or Federal legislation, including all syngnathids (seahorses, seadragons, pipefishes, pipehorses), all marine mammals and most seabirds. Some of these species are also listed as threatened species under either State and/or Federal legislation. It was beyond the scope of this impact statement to assess all of these species, but some of the species or species groups that were identified in the Ecosystem Food Webs (see Appendix 6 of the Main Report) and/or that are a key feature of this particular marine park are considered here. Each of these species is discussed in more detail in Appendix 3 of the Main Report.

The following species may benefit from maintenance and/or improvement of habitats and ecological processes within the park:

- Australian sea lion (threatened and protected species) (breeding sites at North and South Neptune Islands)

- Little penguin (protected species)
- New Zealand fur seal (protected species) (breeding site at North Neptune Island west)
- White shark (threatened and protected species) (aggregation site at North and South Neptune Islands)
- Syngnathids including the leafy and weedy seadragon (protected species)
- Common dolphins (protected species)
- White-bellied sea eagle (threatened and protected species).

Changes in abundance of these species due to the introduction of the proposed management arrangements are not able to be predicted over the next 20 years due to the complexities of ecosystem interactions and/or a lack of data on current status and zone use. Listed threatened species often have individual recovery plans that identify objectives/actions required to mitigate against threatening processes that will ultimately allow recovery of the species. Protection of critical habitat is often identified in these plans as a useful objective, and thus the protection of breeding and aggregation areas under the proposed zoning arrangements should have some positive impact on the Australian sea lion and white shark. For the white shark it is possible that overall bycatch will be reduced by preventing shark fishing in the immediate vicinity of North Neptune Island as the chance of an interaction with fishing gear is increased at aggregation areas. However, it is unlikely that the main anthropogenic threatening processes to the Australian sea lion and white shark (or the white-bellied sea eagle) will be out-weighed by any potential positive impact from this single park zoning and management plan (see Species Profiles in Appendix 3 of the Main Report). Nonetheless, SZ-1 is of particular note for threatened and protected species within the Neptune Islands Group Marine Park as it:

- includes the waters adjacent to the Australian sea lion breeding colony at North Neptune Island
- includes the waters adjacent to the New Zealand fur seal breeding colony at North Neptune Island west
- is adjacent to a white-bellied sea eagle territory
- includes waters where the western blue groper occurs and is protected (see 4.1.2.2 below).

4.1.2.2 Fished species

South Australia's proposed system of marine parks was designed for biodiversity conservation purposes rather than as a fisheries management tool. Nevertheless, the impact assessment identified that species which are currently fished are most likely to show a direct first-order response over the next 20 years (relative to current uses) to the proposed management arrangements and zonings (see Appendix 1.3 of the Main Report). Therefore the assessment of the impact on 20 indicator fished species has been provided in a specific section here. More detailed discussion on the rationale for selecting the indicator species, and their expected response to protection, can be found in Appendices 1.3.4 and 3 of the Main Report.

Mainly commercial and charter fishing occurs within the park for a variety of species. The current status of some of the indicator species that were able to be assessed within various sanctuary zones of the park was considered to be at an unnaturally low

level (UNLL) compared with a pre-European (pre-fishing) baseline (Table 4-1). A pre-fishing baseline rather than the current baseline is required to enable future predictions of change because the level of fishing activity prior to protection influences the response following protection (see Appendix 1 of the Main Report). The reduced levels of some species do not reflect poorly on fisheries management in accordance with the principles of ecologically sustainable development. Some of the more resident reef fishes (namely western blue groper, harlequin fish, sea sweep, Bight redfish, swallowtail, and bluethroat wrasse) were considered to be at a NL due to the isolation of the park (Table 4-1).

Predicting ecological responses to marine parks is inherently complex and depends on many factors (see Appendix 1.3.7 in the Main Report). In the few instances where it has been attempted, the actual changes have often been different to the predictions (Langlois and Ballantine, 2005). Nevertheless, as required for this assessment, some predictions have been attempted based on a number of assumptions listed in Appendix 1.3.13 of the Main Report. Each species is considered only in isolation and therefore interactions between species also need to be considered when interpreting the potential responses described below (see Section 4.1.3).

Table 4-1 summarises the outcomes of the predictive modelling that was undertaken on a subset of indicator species (see Appendix 1.3 of the Main Report for further details of the methodology, in particular the list of assumptions and limitations in Appendix 1.3.13). Using southern rock lobster as an example, Table 4-1 indicates that the current status of adult southern rock lobster is at an UNLL in SZ-1, which includes reef habitat used by lobster. Under the proposed zoning plan, the adults and sub-adults already resident in this proposed sanctuary zone and any post-larval juveniles that then become residents (or recruits) would be protected. Consequently, the potential exists for the size and abundance of adults to increase within this zone after 5 years (shown as +), 10 years (shown as ++) and 20 years (shown as +++) (Table 4-1). Without the zoning, adult lobsters would continue to be harvested and the population level was assumed to remain as it is today, as indicated by the zeros at 5, 10 and 20 years. Thus the predicted net effect of the proposed zoning shown in Table 4-1 is a positive increase within SZ-1 across 5, 10 and 20 years⁶. Table 4-1 also shows for southern rock lobster that there is potential for: a spill-over as a result of the population density inside the SZs increasing relative to outside to the point where some lobsters will tend to migrate from the SZ; and increased larval production from inside the SZs due to increased lobster abundance and increased spawning. A similar scenario to southern rock lobster is also predicted for greenlip and blacklip abalone in some zones (Table 4-1 except that spill-over is unlikely to occur because greenlip and blacklip abalone are highly sedentary (see Species Profile in Appendix 3 of the Main Report). In addition, second-order ecosystem interactions between blacklip abalone and higher order predators may limit their potential to increase (see Section 4.1.3). Density-dependent factors may also ultimately limit any potential increases in the size and abundance of sedentary species such as abalone that may have limited capacity to move out of an area (see Species Profiles in Appendix 3 of the Main Report).

For resident reef fishes of conservation concern and/or which are vulnerable to localized depletion (namely western blue groper, harlequin fish, bluethroat wrasse, Bight redfish, swallowtail, sea sweep) and which are currently considered to be at a NL at North Neptune Island, there is potential that across 20 years their populations may decline without the proposed zoning (as indicated by a – at 20 years), but that they

⁶ Current management arrangements are aiming for a recovery of lobster populations in the Northern and Southern Zones. Nonetheless, the increase inside SZs would still be expected to be greater than outside, but the net effect of the SZs would be lowered.

would maintain current levels across the 20 year period with the proposed zoning; thus yielding a net positive benefit at 20 years of + (Table 4-1).

Of the other indicator species assessed (and which are not presented in Table 4-1), the following observations were made for the Neptune Islands Group Marine Park:

- Species occurring within the park but with insufficient information to enable an assessment include: King George whiting, snapper, southern garfish and southern calamary.
- Species considered as not occurring within the park include: yellowfin whiting, blue swimmer crab, western king prawn, mud cockle, razorfish and Goolwa cockle.

In addition to the species that were able to be assessed, there are numerous other species (target, byproduct, bycatch) that may also respond to or benefit from the cessation of fishing within SZs (see Appendix 1.3.4 of the Main Report), and which may be found in SZ-1 (Table 4-2). By preventing fishing, a range of benefits for species may be realised including (but not limited to): elimination of direct fishing mortality and post-release mortality; more natural age, size structure and sex ratio of populations, age and size at maturity and fish behaviour; and reduced incidence of disease (see Section 6.1.1 and Appendix 1 of the Main Report for further discussion and references). Each of the species listed in Table 4-2 has a known direct interaction with fishing (see Appendix 2 of the Main Report) which justifies their inclusion here. While the impact of the interaction is largely unknown for most species, the point is that the interaction will be removed through zoning, providing a positive benefit to those species. For example, the southern blue devil is a long-lived (Saunders et al., 2010), site-attached reef fish (Bryars, 2010) that is incidentally caught as bycatch (e.g. Fowler et al., 2009) but which is susceptible to barotrauma (Saunders et al., 2010) and therefore may have a low rate of post-release survival. The southern blue devil will therefore benefit from protection inside SZs.

Table 4-2 includes some of the more mobile finfish species which may not respond directly to zoning but may potentially increase in abundance within the park because of the proposed overall reduction of commercial and charter fishing effort, as per the PIRSA (2011) policy position. While it was assumed that the removal of this effort would minimise negative impacts on areas outside SZs, there is potential for the abundance of some fished species to decline outside SZs through displacement of recreational fishing effort, possibly offset to some extent by spill-over (see Appendix 1.3.12 of the Main Report). However, it should be reiterated (see Appendices 1.1.2 and 1.3.13 of the Main Report) that the assessment of the proposed management arrangements does not take into account possible alternative management responses over the next 20 years within the existing management framework.

Due to its relatively large size and the buffering effect of activities at the boundaries, SZ-1 has significant potential for measurable responses of not only the indicator fished species but also of other fished species (see Tables 4-1 and 4-2).

In addition to possible responses to protection from fishing, many of the fished species will gain long-term positive benefits from protection of the habitats that they rely upon for various stages of their life cycles. These benefits will often be manifested both inside and outside the park boundaries. For the Neptune Islands Group Marine Park, protection of habitats is critical for the long-term sustainability of sedentary species such as southern rock lobster and abalone which use the same habitat for the adult, post-larval and juvenile stages of their life cycles (Bryars, 2003).

Table 4-1 Potential first-order responses of some indicator species^a

Species	Life stages	Sanctuary Zones	Habitat usage	Zone visitation	Recruitment to zone	Recruitment source	Current status	Potential first order responses to zoning at 5, 10 and 20 years							Notes
								Measure	Scenario	5	10	20	Spill over	Larval export	
Southern rock lobster	Adult, sub-adult	1	Reef	Resident	Yes (post-larvae)	South Australia	UNLL	Size	With Zoning	+	++	+++			Assumes stocks will remain at current levels under current fisheries management Net effect will be lowered if current management arrangements aimed at long-term recovery of lobster stocks are realised
							UNLL	Abundance	With Zoning	+	++	+++			
							UNLL	Size	Without Zoning	0	0	0			
							UNLL	Abundance	Without Zoning	0	0	0			
							UNLL	Size	Net effect of Zoning	+	++	+++	✓	✓	
							UNLL	Abundance	Net effect of Zoning	+	++	+++			
Greenlip abalone, Blacklip abalone	Adult, sub-adult	1	Reef	Resident	Yes (post-larvae)	Local	UNLL	Size	With Zoning	+	++	+++			Assumes stocks will remain at current levels under current fisheries management Predictions for blacklip abalone may be lowered by negative second order ecosystem interactions with predators such as southern rock lobster
							UNLL	Abundance	With Zoning	+	++	+++			
							UNLL	Size	Without Zoning	0	0	0			
							UNLL	Abundance	Without Zoning	0	0	0			
							UNLL	Size	Net effect of Zoning	+	++	+++	*	✓	
							UNLL	Abundance	Net effect of Zoning	+	++	+++			
Western blue groper	Adult, sub-adult	1	Reef	Resident	Yes (sub-adults)	Unknown	NL	Size	With Zoning	0	0	0			Fishing interaction with this species is probably relatively low but charter boats do visit regularly. Current status will be maintained with zoning. Incidental mortality from bycatch may continue even though species is protected here.
							NL	Abundance	With Zoning	0	0	0			
							NL	Size	Without Zoning	0	0	-			
							NL	Abundance	Without Zoning	0	0	-			
							NL	Size	Net effect of Zoning	0	0	+			
							NL	Abundance	Net effect of Zoning	0	0	+			
Harlequin fish, Sea sweep, Bight redfish, Swallowtail, Blue throat wrasse	Adult, sub-adult	1	Reef	Resident	Yes (sub-adults)	Unknown	NL	Size	With Zoning	0	0	0			Fishing activity for these species is probably relatively low but charter boats do visit regularly. Current status will be maintained with zoning. Species are highly vulnerable to fishing/serial depletion of reefs. Fishing activity may increase in the region due to charter operators.
							NL	Abundance	With Zoning	0	0	0			
							NL	Size	Without Zoning	0	0	-			
							NL	Abundance	Without Zoning	0	0	-			
							NL	Size	Net effect of Zoning	0	0	+			
							NL	Abundance	Net effect of Zoning	0	0	+			

^a This table must be read in conjunction with the methods and assumptions detailed in Appendix 1.3 of the Main Report.

Labels in 'Sanctuary Zone' column refer to Appendix Figure 5-1, and are for SZs unless otherwise specified.

Life history information with supporting references is detailed in Appendix 3 of the Main Report.

Current status: UNLL = unnaturally low level compared to pre-fishing; NL = natural level compared to pre-fishing. A pre-fishing baseline was required to enable future predictions of change. A current status of UNLL does not necessarily imply that fisheries exploitation of the species is unsustainable.

The + and - symbols do not indicate the magnitude of a change, but are intended to be indicative of the trend over time. The potential responses do not take into account predator/prey interactions that are discussed in Section 4.1.3 below.

Western blue groper is assessed here, rather than in Section 4.1.2.1, as it is fully protected in only part of its range in SA.

Table 4-2 Other species which may respond to or benefit from protection

Common name	Species name
Blue morwong	<i>Nemadactylus valenciennesi</i>
Bronze whaler	<i>Carcharhinus brachyurus</i>
Dusky whaler	<i>Carcharhinus obscurus</i>
Eagle ray	<i>Myliobatis australis</i>
Giant cuttlefish	<i>Sepia apama</i>
Gummy shark	<i>Mustelus antarcticus</i>
Horseshoe leatherjacket	<i>Meuschenia hippocrepis</i>
King George whiting	<i>Sillaginodes punctata</i>
Maori octopus	<i>Octopus maorum</i>
Rock ling	<i>Genypterus tigerinus</i>
Silver trevally	<i>Pseudocaranx georgianus</i>
Snapper	<i>Pagrus auratus</i>
Southern blue devil	<i>Paraplesiops meleagris</i>
Southern calamary	<i>Sepioteuthis australis</i>
Southern fiddler ray	<i>Trygonorrhina dumerilii</i>
Southern garfish	<i>Hyporhamphus melanochir</i>
Spider crab	<i>Leptomithrax gaimardii</i>
Spotted wobbegong	<i>Orectolobus maculatus</i>
Yellowtail kingfish	<i>Seriola lalandi</i>

4.1.2.3 Other species

There are numerous species that are neither listed as protected/threatened nor fished but which may also benefit from maintenance and/or improvement of habitats and ecological processes in the park. Representatives of such species (see Appendix 2 of the Main Report) in the Neptune Islands Group Marine Park include: herring cale (*Olisthops cyanomelas*), long-finned goby (*Favonigobius lateralis*), common bullseye (*Pempheris multiradiata*), Noarlunga hulafish (*Trachinops noarlungae*), Wood's siphonfish (*Siphamia cephalotes*), winkles (*Austrocochlea* spp.), brittlestars, featherstar (*Cenolia trichoptera*), eleven-armed seastar (*Coscinasterias muricata*), short-tail nudibranch (*Ceratosoma brevicaudata*), cartrut shell (*Dicathais orbita*), Roe's abalone (*Haliotis roei*), blue-ringed octopus (*Hapalochlaena maculosa*), *Lepsiella vinosa*, isopods, western black crow (*Nerita atramentosa*), reef crab (*Ozius truncatus*), *Phasianotrochus eximius*, *Phasianotrochus irisodontes*, red bait crab (*Plagusia chabrus*), gorgonian fan coral (*Mopsella klunzingeri*), green coral (*Plesiastrea versipora*), tulip shell (*Pleuroploca australasia*), sea tulips (*Pyura* spp.), *Thalotia conica*, canopy-forming macroalgae (*Ecklonia radiata*, *Cystophora* spp., *Sargassum* spp. and *Scaberia agardhii*), and meadow-forming seagrasses (*Posidonia* spp., *Amphibolis* spp.).

4.1.3 Ecosystems

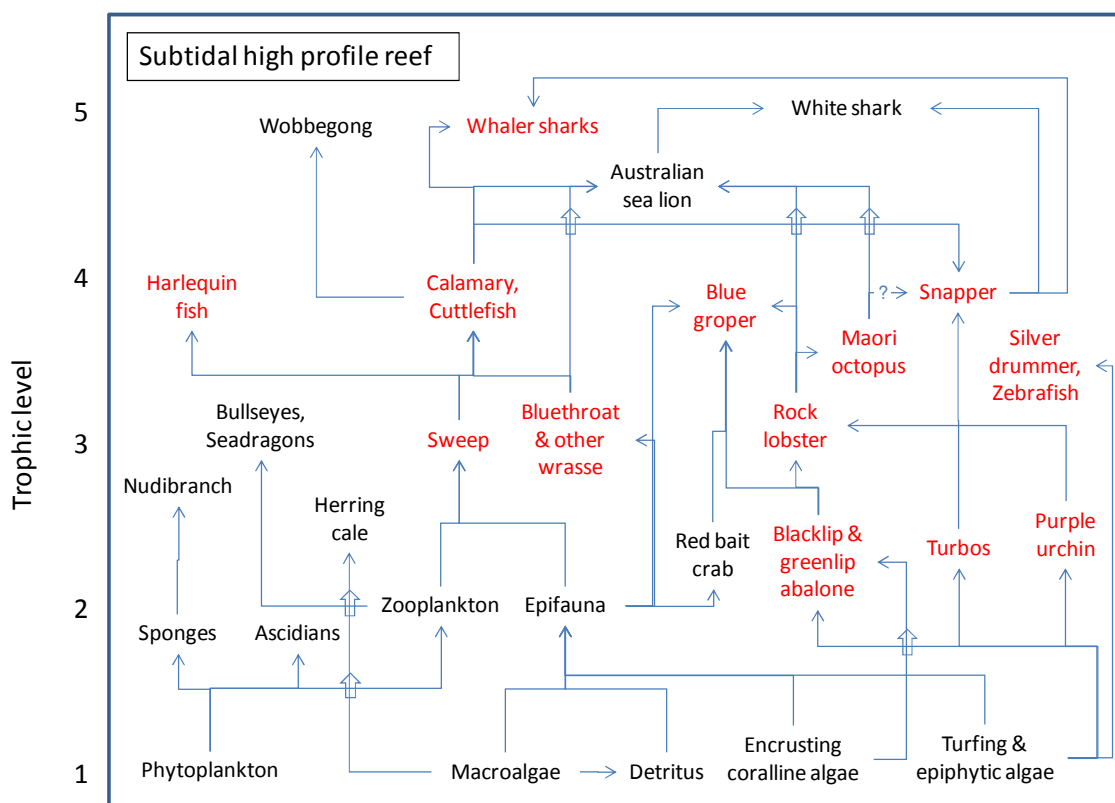
The current state of the ecosystems in the park generally reflects the condition of the component habitats and species documented above. Similarly, responses of the ecosystem to the proposed management changes are informed by the predictions for habitats and species above. The proposed management changes also provide for the restoration of more natural predator-prey relationships (among other interactions) for the more resident species within SZ-1 which encompasses the entire reef habitat

around North Neptune Islands. This may result in increased abundances of some species, but decreases for others. In particular, it can be expected that there will be a response of reef ecosystems with potential interactions between lobster, blacklip abalone, urchins, snapper, blue groper, octopus and the Australian sea lion (see Figure 4–1).

Natural food webs cannot be fully restored, due to the scales over which the more mobile higher- and middle-order fished species range. However, some increase in abundance of such species is expected as a result of the proposed overall reduction of fishing effort in the marine scalefish and charter fisheries, as per the PIRSA (2011) policy position, and there may be localised flow-on effects for food webs inside the marine parks.

It is also apparent from the simplified food webs (see Figure 4–1 and Appendix 6 of Main Report) that many fished species (shown in red text) and non-fished species are ultimately reliant upon the maintenance of habitat-forming species (such as macroalgae and seagrasses) which lie at or near the base of the food webs, and it is these very habitats that will receive a high level of protection within the marine parks network. Thus the marine parks network will have a positive long-term impact on ecosystems regardless of whether there are zone-specific responses following implementation of the management plans.

Figure 4–1 Simplified conceptual food web for subtidal high profile reef



Note: showing links between a variety of species across all trophic levels and indicating those species that interact with fishing (highlighted in red). See Appendix 6 of the Main Report for further details about the food web.

4.1.4 Case study - White shark at North Neptune Islands

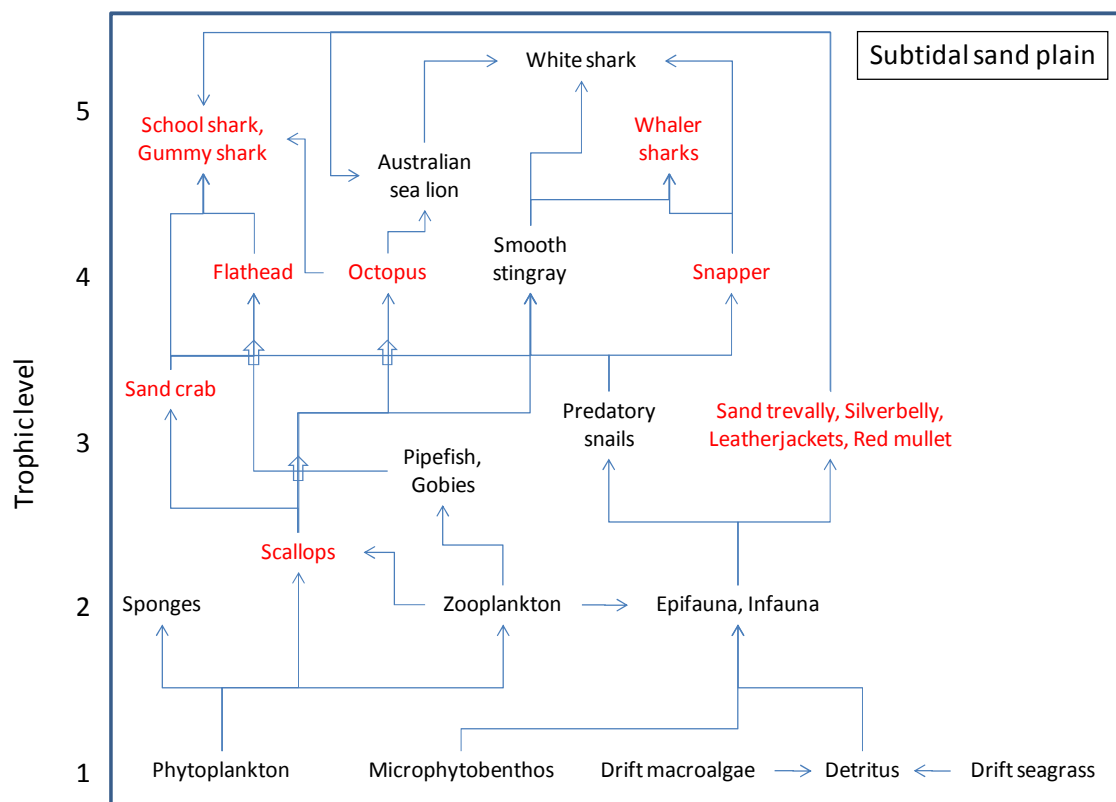
The white shark is a threatened and protected species (see Species Profile in Appendix 3 of the Main Report). It is a highly mobile species that can travel great distances. However, there are locations where white sharks are known to aggregate and become temporary residents. The North and South Neptune Islands within the Neptune Islands Group Marine Park is one such location and has become internationally renowned for shark cage diving where the chance of an encounter with a white shark is probably higher than at any other location in SA. Shark cage diving occurs mainly in the eastern lee of the main island within the North Neptune Islands group. The white sharks are thought to aggregate in the area to prey upon the colonies of New Zealand fur seals and Australian sea lions. The white shark is a protected species but remains threatened by a range of anthropogenic impacts across its range including bycatch in various types of fishing gear (DEWHA, 2009, see Species Profile in Appendix 3 of the Main Report).

Within the Neptune Islands Group Marine Park, a single large sanctuary zone (SZ-1) has been proposed to encompass the entire North Neptune Islands and surrounding waters seaward for several kilometres. The continuation of shark cage diving inside SZ-1 would only continue under a permit and the potential impact of shark cage diving on white sharks in the area is currently being monitored. The South Neptune Islands have been afforded no SZ protection but the lesser protection level of habitat protection zone (HPZ-1). Nonetheless, both SZ-1 and HPZ-1 will offer future protection for the habitats around both island groups, including locally-important seagrass meadows in the lee of the islands, reefs surrounding the islands, deep-water pelagic habitat offshore, and subtidal sand plain habitat. Subtidal sand plain habitat is important as it sustains a variety of biodiversity including the white shark (see Figure 4-2 Simplified conceptual food web for subtidal sand plain habitat).

Long-line fishing for shark species such as bronze and dusky whalers occurs in the vicinity of the Neptune Islands and there is some evidence of negative interactions with the white shark and this type of fishing gear (DEWHA, 2009, see Species Profile in Appendix 3 of the Main Report). Therefore it is possible that overall bycatch mortality of the white shark will be reduced by preventing shark fishing in the immediate vicinity of the North Neptune Islands because the chance of an interaction with fishing gear is known to be increased at aggregation areas, e.g. the probability of a negative interaction between Australian sea lions and shark gill nets is greatest nearest to the colonies (Goldsworthy et al., 2010). Nonetheless, it is unlikely that the main anthropogenic threatening processes to the white shark across its range will be outweighed by any potential positive impact from the individual park zoning and management arrangements at the Neptune Islands Group Marine Park.

In addition to the white shark, there may be conservation benefits for whaler sharks which also aggregate in the area on occasions and become vulnerable to fishing. The prevention of all types of fishing in SZ-1 is also likely to have positive impacts on resident fishes that are vulnerable to fishing and localised depletion such as western blue groper and harlequin fish, and on sedentary commercial species such as southern rock lobster and abalone (see Section 4.1.2.2 and Species Profiles in Appendix 3 of the Main Report). Other fishes such as snapper, silver trevally, and yellowtail kingfish that are captured at the North Neptune Islands may also increase in abundance in the absence of fishing; these species may in turn present additional food items for whaler sharks and the white shark. Thus the Neptune Islands Group Marine Park will offer a variety of biodiversity conservation benefits for a range of species, habitats and ecosystems.

Figure 4–2 Simplified conceptual food web for subtidal sand plain habitat



Note: showing links between a variety of species across all trophic levels and indicating those species that interact with fishing (highlighted in red). See Appendix 6 of the Main Report for further details about the food web.

4.2 Economic

4.2.1 Commercial Fishing

The analysis of the impact of displaced catch and/or effort on commercial fishing is based on:

- Estimates of displaced catch and/or effort provided by the South Australian Research and Development Institute (Ward and Burch 2012).
- PIRSA Fisheries and Aquaculture policy position on redistribution of displaced commercial fishing, which states that the displaced catch for sardines can be redistributed, for prawns can be redistributed up to 2 per cent of total fishery catch, and for other fisheries cannot be redistributed (PIRSA 2011). For fisheries where displaced catch cannot be redistributed it is assumed that the displaced effort will be removed from the fishery.

For some fisheries, the relevant fishing industry association has undertaken their own assessment of displaced catch/effort. The methods and data used to make these industry assessments will be reviewed by SARDI (DEWNR pers. comm., 6 July 2012). Analysis of the impact of displaced catch/effort on commercial fishing based on these industry estimates has been included in the following sections.

4.2.1.1 Summary

The estimated economic impacts on commercial fisheries, based on SARDI's average annual catches and corresponding average annual prices, are relatively small for the Neptune Islands Group Marine Park (see Table 4-3 in Section 4.2.1.5). However, the estimates of historical catches in sanctuary zones for abalone, rock lobster, marine scalefish and charter boat fisheries have a high level of uncertainty because of the limited spatially-resolved data available for these fisheries (Ward and Burch, 2012). According to industry-derived estimates of displaced catch (which have not yet been reviewed by SARDI) the aggregate regional impacts could be higher at 2 fte jobs and \$0.15m in GRP.

The State Government has committed to buy out licences and quota entitlements of displaced effort and catch, although details of the buyout are yet to be finalised. Compensation payments have the potential to at least partially offset the negative impact of the displaced catch reported in Table 4-3. However, if compensation is limited to the buyout of displaced fishing entitlements, the negative impacts on the local economy are unlikely to be fully offset:

- There would be no requirement for the recipients of the buyout to spend or invest the funds in the region.
- Even if all the funds were invested in full in the region it is unlikely the investment would generate economic activity and wealth equivalent to that generated by the displaced fishing activity. This is because fishers have the opportunity to sell their licences at any time (they are fully transferable) but choose not to. If there were alternative investment opportunities locally that fishers had the skill and risk bearing capacity to undertake, then it is reasonable to assume that they would already be doing it.

For entitlement holders there are potentially direct financial losses suffered as a direct consequence of the cancellation of their entitlement. These could take the form of:

- a pecuniary loss such as removal and re-establishment costs or legal costs in acquiring a replacement licence/entitlements
- a capital loss of business operation - the loss of a partial entitlement or the location of sanctuary zones may negatively impact the efficiency of business operations, which might in turn impact on the market value of plant and equipment, as well as the market value of remaining fishing entitlements held by the licence holder.

4.2.1.2 Sardines

SARDI estimates of historical catch in draft sanctuary zones indicate that there would be nil catch displaced from the sanctuary zones in this marine park.

4.2.1.3 Prawns

SARDI estimates of historical catch in draft sanctuary zones and draft habitat protection zones indicate that there would be nil catch displaced from these zones in this marine park.

4.2.1.4 Abalone

SARDI estimates indicate that historically there has been an average annual catch of 799 kg of greenlip abalone in the draft sanctuary zones in this marine park. This represents 0.38 per cent of the greenlip abalone Western Zone A catch. Likewise, SARDI estimates indicate that historically there has been an average annual catch of 201 kg of blacklip abalone in the draft sanctuary zones in this marine park. This represents 0.07 per cent of the blacklip abalone Western Zone A catch. The value of this sanctuary zone catch is approximately \$45,000. The combined sanctuary zone catch of both greenlip and blacklip abalone represents 0.53 per cent of the average annual catch in the Lower Eyre Peninsula region.

According to the Abalone Industry Association of South Australia the SARDI estimates are slightly below estimates prepared by licence holders⁷. The combined sanctuary zone catch of greenlip and blacklip abalone was estimated to be 1,427 kg which represents 0.8 per cent of the average annual catch in the Lower Eyre Peninsula region. Based on these industry estimates (which have not yet been reviewed by SARDI) the value of this sanctuary zone catch is approximately \$65,000.

4.2.1.5 Rock Lobster

SARDI estimates indicate that historically there has been an average annual catch of 1,465 kg of rock lobster in the draft sanctuary zones in this marine park. This represents 0.21 per cent of the Northern Zone Rock Lobster Fishery average annual catch or 0.45 per cent of the average annual catch in the Lower Eyre Peninsula region.

The value of output lost directly in the region by Northern Zone Rock Lobster fishing enterprises was estimated to be \$0.07m and a further \$0.01m was estimated to be lost to associated downstream activities (processing, transport and retail/food services). Flow-on output lost to other sectors of the regional economy was estimated to be \$0.06m. The total loss in output in the region (direct plus indirect) was estimated to be \$0.14m (Table 4-3).

The loss in direct employment in the Northern Zone Rock Lobster fishery in the region was estimated to be less than 1 fte job, while downstream activities were estimated to also lose less than 1 fte job. Flow-on business activity was estimated to lose less than 1 fte job, while the total loss in employment is less than 1 fte job.

Contribution to GRP is measured as value of output less the cost of goods and services (including imports) used in producing the output. The loss in total Northern Zone Rock Lobster fishing industry related contribution to GRP in the region is \$0.11m, \$0.07m lost by fishing directly, \$0.01m in downstream activities and \$0.03m lost in other sectors of the state economy. Because the reduced access to the fishery will be permanent, the impacts reported in Table 4-3 are an estimate of the on-going annual impact.

⁷ The Abalone Industry Association of South Australia estimates were based on industry knowledge and experience and average catch data reported from every map code in the Western Zone Abalone Fishery over a 20 year period from January 1991 to December 2010.

Table 4-3 Regional economic impact of marine park zoning on the Northern Zone Rock Lobster fishery based on SARDI estimates of displaced effort

Sector	Output		Employment ^a		Household Income		Contribution to GRP	
	(\$m)	%	(fte jobs)	%	(\$m)	%	(\$m)	%
Direct effects								
Fishing	-0.07	52%	0	0%	-0.05	76%	-0.07	66%
Downstream ^b	-0.01	10%	0	14%	0.00	4%	0.00	5%
Total Direct ^c	-0.09	62%	0	14%	-0.06	79%	-0.08	70%
Flow-on effects								
Trade	-0.01	8%	0	34%	0.00	6%	-0.01	5%
Manufacturing	0.00	2%	0	4%	0.00	1%	0.00	1%
Accom, Cafe, Rest	0.00	3%	0	8%	0.00	2%	0.00	2%
Transport	0.00	2%	0	4%	0.00	1%	0.00	1%
Other Sectors	-0.03	23%	0	36%	-0.01	11%	-0.02	20%
Total Flow-on ^c	-0.06	38%	0	86%	-0.02	21%	-0.03	30%
Total ^c	-0.14	100%	0	100%	-0.07	100%	-0.11	100%

^a Full-time equivalent jobs.

^b Downstream activities consist of seafood processing, transport, retail trade and food services.

^c Totals may not sum due to rounding.

Source: EconSearch analysis

The economic impact on rock lobster fishers may be higher than the proportion of the catch that will be lost because the small, red lobsters typically taken in State waters (where sanctuary zones are located) are more valuable (reportedly an extra \$10 per kg) than the larger, paler lobsters typically taken in Commonwealth waters. With the total allowable commercial catch at a historically low level, most licence holders in the fishery have targeted these high value rock lobsters to maximise the value of their catch (PIRSA, pers. comm., 29 September 2011). For this reason, if average trip length increases, costs will rise which is likely to lead to a reduction in profits, which will further diminish the value for licences, pots and quota.

Fishers usually fish “stop-over” areas (areas where pots are set on patchy reef en route to more distant fishing grounds) when fishers go on their usual 5-7 day trips (PIRSA, pers. comm., 29 September 2011). Sanctuary zones located over these fishing routes, even if not located in the most productive fishery areas, may disrupt this pattern leading to less efficient fishing patterns, which would mean greater cost per trip.

Since there has already been substantial consolidation occurring in the fishery, with the Total Allowable Commercial Catch presently at 310 tonnes, the introduction of sanctuary zones is likely to add further strain to many of the remaining licence holders.

The estimates of reduced regional economic activity, while relatively small, are likely to persist into the future, i.e. over next 20 years, as the reduced access to the resource will be permanent given the current fully exploited status of the fishery.

Estimates of historical rock lobster catches in the sanctuary zones have a high level of uncertainty because of the limited spatially-resolved data available for the fishery (Ward and Burch, 2012). For instance, it is assumed that catch of the fishery was evenly distributed in state waters within each marine fished area.

According to Ward and Burch (2012) this assumption introduces significant potential for bias in the estimates of historical catches for individual sanctuary zones because it may lead to:

- over-estimation of the historical catch from a sanctuary zone if the fishing hotspots (e.g. rock lobster, abalone or marine scalefish) in state waters of that marine fished area were outside the sanctuary zone; and
- under-estimation of the historical catch from that sanctuary zone if the fishing hotspots (e.g. rock lobster, abalone or marine scalefish) were in a sanctuary zone.

According to Knuckey (2012) the industry estimate of displaced catch is significantly higher than the estimate prepared by SARDI. The sanctuary zone catch of rock lobster was estimated by Knuckey (2012) to be 2,991kg.

Based on these industry estimates, (which have not yet been reviewed by SARDI) the value of output lost directly in the region by Rock Lobster fishing enterprises was calculated to be \$0.15m and a further \$0.03m was estimated to be lost to associated downstream activities. Flow-on output lost to other sectors of the regional economy was estimated to be \$0.11m. The total loss in output in the region (direct plus indirect) was estimated to be \$0.29m (Table 4-4).

Table 4-4 Regional economic impact of marine park zoning on the Northern Zone Rock Lobster fishery based on industry estimates of displace effort

Sector	Output		Employment ^a		Household Income		Contribution to GRP	
	(\$m)	%	(fte jobs)	%	(\$m)	%	(\$m)	%
Direct effects								
Fishing	-0.15	119%	-1	349%	-0.05	84%	-0.08	92%
Downstream ^b	-0.03	24%	0	32%	-0.01	8%	-0.01	11%
Total Direct ^c	-0.18	143%	-1	382%	-0.06	92%	-0.09	103%
Flow-on effects								
Trade	-0.02	14%	0	56%	-0.01	10%	-0.01	9%
Manufacturing	0.00	4%	0	7%	0.00	2%	0.00	2%
Accom, Cafe, Rest	-0.01	5%	0	13%	0.00	3%	0.00	3%
Transport	-0.01	6%	0	9%	0.00	2%	0.00	3%
Other Sectors	-0.07	55%	0	86%	-0.02	32%	-0.04	46%
Total Flow-on ^c	-0.11	83%	-1	171%	-0.03	49%	-0.06	64%
Total ^c	-0.29	226%	-2	553%	-0.09	141%	-0.15	167%

^a Full-time equivalent jobs.

^b Downstream activities consist of seafood processing, transport, retail trade and food services.

^c Totals may not sum due to rounding.

Source: EconSearch analysis

The loss in direct employment in the Rock Lobster fishery in the region was estimated to be 1 fte job, while downstream activities were estimated to lose less than 1 fte job. Flow-on business activity was estimated to lose 1 fte job, while the total loss in employment is to be approximately 2 fte jobs.

The loss in total Rock Lobster fishing industry related contribution to GRP in the region is \$0.15m, \$0.08m lost by fishing directly, \$0.01m in downstream activities and \$0.06m lost in other sectors of the regional economy.

A range of spatial management arrangements are being considered to spread fishing effort across the whole Zone, but especially into deeper waters and the Far West (PIRSA pers. comm. 29 September 2011). The revised zoning in this park may impact upon this initiative.

The potential cumulative impact of the proposed extension to and revised zoning of the Commonwealth Great Australian Marine Park and the proposed Western Eyre Commonwealth Marine Reserve may place further pressure on fishing business viability. The designation of sanctuary zones in State waters has the potential to transfer fishing activity into deeper, offshore Commonwealth waters. If this occurs, it would add to production costs because of increased travel.

4.2.1.6 Marine Scalefish

SARDI estimates of historic effort in draft sanctuary zones for the Marine Scalefish Fishery are provided in Table 4-5 and historic catch for the main fishery species in Table 4-6. The total sanctuary zone catch of marine scalefish represents <0.01 per cent of the average annual catch in the Lower Eyre Peninsula region.

The value of the sanctuary zone catch is estimated to be less than \$1,000.

Table 4-5 Average annual Marine Scalefish effort in draft sanctuary zones by sector

Sector	Sanctuary zone effort (person days)	% effort of sector
Handline	2	0.01
Haulnet	nil	nil
Longline	<1	<0.01
Other	4	0.02

Notes: Handline, longline and other gear sectors based on 10 years of data, haulnet based on 3 years of data

Source: Ward and Burch 2012

Table 4-6 Average annual Marine Scalefish catch in draft sanctuary zones by main species

Species	Sanctuary zone catch (kg)	% species catch in fishery
Garfish	<1	<0.01
King George whiting	12	<0.01
Snapper	18	<0.01
Southern calamary	<1	<0.01

Notes: based on 3 years of data

Source: Ward and Burch 2012

4.2.1.7 Charter Boat

SARDI estimates indicate that historically there has been an average annual charter boat effort of 39 person days in the draft sanctuary zones in this marine park. This represents 0.18 per cent of the average annual effort for the charter boat industry or

0.31 per cent of the average annual catch in the Lower Eyre Peninsula region. The value of this sanctuary zone effort is approximately \$10,000.

4.2.1.8 Sharks⁸

The Gillnet, Hook and Trap sector of the Commonwealth Southern and Eastern Scalefish and Shark Fishery operates in the Neptune Islands Group Marine Park. The fishery occurs predominantly in Commonwealth waters and therefore is managed by Australian Fisheries Management Authority under an Offshore Constitutional Settlement. Target species are school and gummy sharks. A preliminary estimate of an average catch of 57 kg per year will be displaced from the line fishing sector by sanctuary zones in this park. This sanctuary zone catch represents 0.36 per cent of the fishery catch in State waters, and 0.02 per cent of the fishery catch off SA (State and Commonwealth waters).

4.2.2 Aquaculture

There are currently no aquaculture operations in this marine park and any future development will need to be consistent with policy commitments, marine park and aquaculture related legislation (PIRSA, pers. comm., 27 June 2012).

4.2.3 Tourism

Existing shark viewing ventures operating around North Neptune Islands are expected to continue under new permitting arrangements.

4.2.4 Port, Harbour and Shipping Operations

There are no ports or harbours in this marine park. No significant impacts on shipping activities arising from the zoning in this park are expected, which is consistent with Government policy commitments.

4.2.5 Mining

No mineral, petroleum or geothermal tenements are currently located within this marine park.

4.2.6 Coastal Development

There are no significant projects or infrastructure in or known to be planned for this marine park and these islands are unlikely to be developed due to their Restricted Access status.

⁸ Australian Fisheries Management Authority data shows no reported catch by the Southern Bluefin Tuna fishery or Great Australian Bight trawl fishery in South Australian state waters for the period 2001-2010. No impact from the draft zoning is anticipated on these fisheries.

4.3 Social

4.3.1 Summary of method

The social impact assessment drew on multiple sources of information – a review of research relating to established marine parks elsewhere in Australia and overseas; an analysis of market research undertaken in relation to South Australian marine parks; an analysis of MPLAG minutes and of media reports relating to each park, a review of the social values statement prepared for the park, and analysis of the economic impacts identified.

Finally a Marine Parks Social Impact Assessment Tool (MPSIAT) was designed which sought feedback from MPLAG members on different types of social impact expected to flow from preliminary zoning options considered prior to the draft zones presented within the draft management plans.

The findings from these different sources were analysed separately and in combination to determine overall expected social impacts.

Although this report presents impact analysis relating to the draft zones, the MPSIAT findings are included because they represent part of the community consultation process and the draft zones reflect the SA government's response to the findings of that process.

Only four of 12 members⁹ (33 per cent) of the Lower Eyre Peninsula MPLAG responded to the online social impact assessment for the Neptune Islands Group Marine Park.

4.3.2 Expected social impacts – at a glance

The overall social impacts of the Neptune Islands Group Marine Park on communities living in the region are expected to be minimal. Commercial fishing is one of the two top industry sources of employment and is estimated to contribute 1,210 jobs to employment in the region, compared with tourism which contributes some 540 jobs. This marine park is one of two regions where commercial fishing provides more employment than tourism. Economic impact assessment identifies no loss of commercial fishing jobs and regional unemployment and measured disadvantage are both low. The impact on recreational fishing is considered to be minimal which is of benefit to those who visit the region for this purpose.

Experience elsewhere in Australia and internationally (Ledee *et al* 2011, Cocklin *et al* 1998) suggests that a range of benefits will become evident over time. These include increased opportunities for education about marine life and conservation, and increased tourism and ecotourism opportunities. Experience elsewhere indicates that these benefits usually take approximately five years to be evident, and that in the earliest stages of marine protected areas being developed, communities are more likely to identify possible negative impacts than potential benefits. It takes time to observe how the park's ecological and economic impacts evolve, with social impacts (positive or negative) flowing from these.

⁹ Any MPLAG member who indicated they did not wish to participate in the social impact assessment a priori were not approached.

Certainly at this stage of the South Australian marine parks' development, monitoring of media reports, feedback from MPLAGs and analysis of their meeting discussions, illustrates the trend to expect the changes associated with their development to be problematic. One very important factor that affects community attitudes is how informed they are, and feedback from market research and MPLAGs, as well as analysis of media reports indicates a gap in this information. In particular, increasing communities' understanding of the scientific rationale underpinning marine protected areas, and the benefits that these can bring, needs to be enhanced.

Marine parks have broad support in the South Australian community. Market research commissioned by the state government between 2006 and 2012 (McGregor Tan Research 2006, 2007, 2008 and 2009; Square Holes 2009, 2011 and 2012) found strong support for the concept of marine parks among South Australians with approximately 85 per cent in favour of them in 2012 (87 per cent support in metropolitan Adelaide and 82 per cent support in regional areas). People interviewed for this research were able to identify seven main benefits arising from marine parks:

1. preservation of the environment for future generations
2. protection and conservation of marine habitats and wildlife
3. increases in fish stocks
4. greater opportunities for scientific research and education
5. greater opportunities for nature based tourism and recreation
6. protection of cultural and heritage sites
7. greater certainty for marine industries and users.

The research found in 2011 and again in 2012 that 88 per cent believe that protection of the marine environment through managed marine parks is the responsibility of current generations for the benefit of future generations.

The market research found that loss of commercial benefits is a particular concern, particularly for those living in regional areas (33 per cent in 2012) compared with those in metropolitan Adelaide (22 per cent in 2012). Those least likely to support marine parks have been fishing groups (in 2009 55 per cent of respondents who did not support marine parks identified restricted fishing as the reason, this dropped to 39 per cent in 2012).

Between 2011 and 2012 the market research findings identify a decline in those who believe they will have limited access to marine parks and an increase in those who associate swimming, boating and snorkelling with marine parks.

4.3.3 Education and Wellbeing

MPSIAT respondents were divided about the MPLAG park zoning bringing increased understanding of, and education about, marine conservation issues. However, international researchers confirm that these are key outcomes and benefits of marine protected areas (Angulo-Valdes and Hatcher 2010). The establishment of marine parks is likely to attract domestic and international interest from researchers and be the focus of conservation focused education initiatives.

Most MPSIAT respondents believed new local employment opportunities for the local population to be unlikely. Similarly the majority of respondents expected the park

zoning to have no impact, either positive or negative, on personal and community quality of life and overall way of life.

The draft zoning proposal is the result of considerable discussion about how potential negative impacts on users of marine resources in the marine park can be minimised. For this reason it is expected that personal quality of life in general and quality of community life is unlikely to be negatively impacted by the draft zoning proposal.

4.3.4 Culture and Heritage

DEWNR undertook a process of consultation with Aboriginal stakeholders about the establishment of the marine parks. No significant negative impacts on Aboriginal communities were identified. However, it is important that further consultation be undertaken in relation to the likely impact of the draft zoning.

Little is known about the Aboriginal heritage for the Neptune Islands Group Marine Park.

All MPSIAT respondents expected that the MPLAG park zoning to be unlikely to help preserve local Australian heritage (see Appendix Table 4-3).

4.3.5 Recreation and Fishing

4.3.5.1 Recreation

A minority of MPSIAT respondents expected that the proposed MPLAG zoning would encourage more recreational activity, a greater range of recreational activities and improved recreational facilities (see Appendix Table 4-4).

4.3.5.2 Recreational Fishing

The following assessment is based mainly on the SAMPIT mapping¹⁰, with material from separate interviews with the South Australian Recreational Fishing Advisory Council (SARFAC) and the DEWNR project coordinators who facilitated the MPLAG process, where appropriate.

There is very light fishing around both North Neptune and South Neptune Islands. Zoning will have little impact on recreational fishing.

4.3.5.3 Commercial Fishing

The overall social impacts of the Neptune Islands Group Marine Park on communities living in the region are expected to be minimal. Economic impact assessment identifies no loss of commercial fishing jobs, and an estimated loss of an average annual GVP of \$130,000 (mainly in the abalone and rock lobster sectors). The State Government has

¹⁰ The South Australian Marine Parks Information Tool (SAMPIT) is a computer tool designed to gather information from community members about their favourite fishing spots and areas they believe need protection. Data is collected and reported by 'grid cell'. SAMPIT data for 1,739 people is available including 1311 recreational fishers. Quality control by the Department of Environment and Natural Resources included cross-verification of legitimate naming and activities from the data provided (DENR 2010b).

committed to buy out licences and quota entitlements to offset any unsustainable displaced effort and catch. Although details of the buyout are yet to be finalised, any such payments have the potential to at least partially offset the negative impacts outlined above.

Australian researchers have identified the potential psychological impacts on fishing families arising from uncertainty about fishing business viability, reduced family income, reduced self-esteem arising from the loss of fishing occupation and the difficulty of finding alternative employment in the region (Schirmer et al. 2004: 7-8). Much depends on individual fishers' capacity to adapt which in turn has been found to depend on their financial situation, ability to work elsewhere, business skills and willingness to accept rather than resist change (Marshall and Marshall 2007). This diversity means that fishers will vary significantly in the way marine parks affect them, and will have differing views on that impact, as is reflected in Appendix Table 4-4.

Furthermore, there is minimal research on the social impacts of marine parks on commercial fishers and their families in particular, and on communities as a whole (Voyer 2011, 2012, Beeton et al 2012, Fairweather et al 2009). The Great Barrier Reef Marine Park Authority is cited as one exception to this trend (Voyer et al 2012, Beeton et al 2012) while social impact research has also been undertaken in relation to Ningaloo Marine Park in Western Australia (Northcote & Macbeth 2008).

By contrast, economic impacts of marine parks have been significantly more researched. Australian researchers have found that most commercial fishers have adapted their fishing activity and fishing business at least moderately well in the five years following implementation of the 2004 Great Barrier Reef Marine Park rezoning, leading them to conclude that many of the impacts experienced by fishers might be short-term and decline over time as fishers adapt to the change (Ledee et al. 2011: 8). Similarly, research undertaken in New Zealand's Leigh Marine Reserve has found that almost two decades after it was established in 1975, commercial and recreational fishers reported that fishing outside the boundaries had improved over time (Cocklin et al. 1998).

4.3.6 Local Government, Population and Housing

4.3.6.1 Local Government

Through the SA Regional Organisations of Councils, facilitated by the Local Government Association SA, all local government councils which border marine parks in SA were invited to participate in a survey about potential impact of marine park zoning on council operations, council infrastructure and council revenues.

No local council responded. However, based on the response from other local councils and on the expected social and economic impacts, no impacts on local government operations, infrastructure and revenue or compliance related activities are expected as a result of the proposed draft zoning.

4.3.6.2 Population and housing

Economic modeling has estimated no job losses from the fishing industry in the Lower Eyre Peninsula region, as a result of zoning in the Neptune Islands Group Marine Park. Therefore no impact on population and housing is expected.

4.3.7 Community

MPSIAT responses were mixed as to whether the community utilising the Neptune Islands Group Marine Park was strong enough to adapt to and manage changes brought by the proposed zoning of the marine park (see Appendix Table 4-6).

The majority of MPSIAT respondents did not expect business opportunities to increase as a result of the proposed zoning of the park, nor did they envisage the need for training programs to assist local people to transition to new occupations that may emerge from its establishment. However, thought should be given to training programs that assist people to manage changes brought by establishing the park. It is possible that new employment opportunities will emerge, and it will be important for local people to take advantage of those, with training being potentially important to their ability to do so.

A majority of MPSIAT respondents felt it was unlikely that the marine park would become a source of pride to the community using the park, and that it was not expected to increase events and other activities that can bring the community together. Respondents were mixed in their expectations about the park becoming a source of division in the community using the park.

While there is little research evidence about the impacts of marine protected areas on communities as a whole, there are several studies in Australia and overseas that have identified a range of positive impacts, including enhanced tourism opportunities with flow on benefits to other sectors in the local economy (Ward et al. 2001, Cocklin et al. 1998). However, these and other benefits are not apparent in the early implementation stages and where positive impacts are reported these tend to be evident after about five years, becoming increasingly evident over the longer term (Cocklin et al. 1998, reporting on New Zealand marine parks established from 1975 onwards).

Given the minimal economic and recreational fishing impact expected from the draft zoning, significant adjustment pressures on the community using the park is not envisaged.

4.3.8 SEIFA based analysis of impacts

Potential job losses in the Lower Eyre Peninsula Impact Region are expected to be low in the range of approximately three fte associated with the Thorny Passage Marine Park (-0.02 per cent impact on the region), two fte associated with the Sir Joseph Banks Marine Park (-0.02 per cent impact) while no fte job losses are associated with either the Neptune Islands Group and Gambier Islands Group Marine Parks.

In an area of low unemployment (4.2%) and low relative disadvantage (SEIFA and leading indicators) the social impact is therefore expected to be low in the areas associated with the Thorny Park, Sir Joseph Banks, Neptune Islands Group and Gambier Islands Group Marine Parks.

Table 4-7 Social impact for Lower Eyre Peninsula Impact Region

Impact region	Lower Eyre Peninsula			
Marine Park # and Name	5: Thorny Passage	6: Sir Joseph Banks Group	7: Neptune Islands Group	8: Gambier Islands Group
Jobs impact (fte)	-3	-2	0	0
% impact on region	-0.02%	-0.02%	0%	0%
Regional unemployment	Low (4.2%)			
SEIFA relative disadvantage (SLA)	Low			
Index of Economic Resources (SLA)	Low			
Index of Education & Occupation (SLA)	Low			
Proportion of single parent families ^{b,c}	Moderate (Port Lincoln 11.7%)			
Proportion with education lower than year 12 ^{b,c}	Moderate (Tumby Bay 63.2%)			
Proportion of population with Indigenous background ^{b,c}	Moderate-High (Port Lincoln 5.1%, Lower Eyre Peninsula 2.4%)			
% fair or poor health (self report)	Low			
Expected social impact	Low	Low	Low	Low

Note 3 SLAs associated with Impact region

Note rounding errors do occur.

^a Impacts too small to model.

^b Source: Australian Bureau of Statistics (2007). *2006 Census Community Profile Series, South Australia (STE 4)*. Canberra: ABS

^c Source: Australian Bureau of Statistics (accessed 2012). *TableBuilder 2006 Census, South Australia (SLA)*. Canberra: ABS

^d Compiled by PHIDU using data estimated from the *2007-08 National Health Survey (NHS)*, ABS (unpublished); and ABS Estimated Resident Population, average of 30 June 2007 and 2008

Note, an Impact Region or SLA is considered high if it has at least one SLA in the highest decile in SA (a moderate value falls in the second highest decile).

4.3.9 Next Steps in Social Impact Assessment

4.3.9.1 Short term objectives

Social impact research constantly identifies insufficient information as a cause of concern for communities affected by the establishment of marine parks, and notes how important such information can be for effective participation in the process of designing and implementing these parks. This includes better communication of the underpinning science of marine protected areas and how it has influenced their design and the setting of zones (Fairweather et al. 2009). The more recent review of marine parks in NSW (Beeton et al 2012) also found that insufficient community informing, and an associated lack of resourcing for this purpose, has resulted in marine parks-related decision making and the benefits of marine parks being insufficiently understood the general public. There is also research evidence of the importance of informed participation in marine park decision making and management, and in the enforcement of compliance (McPhee 2011, Cocklin et al. 1998).

In this context it is important to note that a range of information provision and consultation strategies were implemented by DEWNR to inform the marine parks decision making process. The SAMPIT and MPLAG processes provided an important opportunity for key stakeholders to contribute to the design of the marine park. This impact assessment report is the foundation for a further community consultation process. Further details about the information provision and consultation processes undertaken by DEWNR are detailed in section 1.1.

A clear message from the market research, media reporting and feedback from MPLAGs is that the scientific arguments in favour of establishing marine parks, including the Neptune Islands Group Marine Park, need to be better understood by the wider community. This is one of the functions of this impact statement which is designed to inform judgements on the impact of the draft zoning proposal. MPSIAT feedback indicates that those members who do not understand the scientific arguments, also tend to disagree that the park's boundaries and proposed zoning are based on sound science.

In their evaluation of New South Wales marine parks, Fairweather et al. (2009: 26) recommended to the Marine Parks Advisory Council of NSW that they be '*... more assertive about the science and other research behind the NSW Marine Park system ...*' partly to refute misinformation being spread by opponents of the parks but also to ensure levels of understanding were increased. Acknowledging community concerns about possible negative impacts on their lives, the researchers identified the importance of ongoing socio-economic impact assessment as one means of improving understanding of the value of marine protected areas to Indigenous, recreational and commercial users of marine parks, mainly because it can capture the economic and social benefits that develop over time (Fairweather et al. 2009: 15-17).

MPSIAT respondents expressed the need for more information about this marine park and how it will operate. Reliance on public forums, open days and processes that involve giving information rather than listening to local voices, have been criticised in local media. It is important to note that a range of information provision and consultation strategies were implemented by DEWNR to inform the marine parks decision making process. The SAMPIT and MPLAG processes provided an important opportunity for key stakeholders to contribute to the design of the marine park. This impact assessment report is the foundation for a further community consultation process. Further details about the information provision and consultation processes undertaken by DEWNR are detailed in section 1.1.

4.3.9.2 Ongoing impact assessment

Social impact assessment that is repeated over time, provides a mechanism for informing as well as engaging communities, involving them in decision making, and identifying and assisting with managing intended and unintended social consequences (Vanclay 2005). However coastal zone management is often criticised for a failure to facilitate effective community engagement in what has been termed a 'democratic deficit' (Vanclay 2012).

Perceptions of social impacts of change reflect knowledge, experience, values and roles. They provide a guide to possible but not certain impacts. To provide greater certainty about likely impacts we need to subject marine park zones to economic and environmental impact identification processes like those adopted in this impact assessment statement, repeating them over time to measure changes. The results of this process are necessary to inform judgments about the magnitude of social impacts.

The opportunity now exists for key stakeholders to provide perspectives on social impacts in the light of new knowledge about industry, employment, species and habitat impacts provided in this impact statement.

References

- Angulo-Valdes, J. and Hatcher, B. 2010, "A new typology of benefits from marine protected areas", *Marine Policy*, 34: 635-644.
- Baker, J.L. 2004, *Towards a System of Ecologically Representative Marine Protected Areas in South Australian Marine Bioregions - Technical Report*, prepared for Coast and Marine Conservation Branch, Department for Environment and Heritage, South Australia.
- Beeton RJS, Buxton CD, Cutbush GC, Fairweather PG, Johnston EL & Ryan R (2012) Report of the Independent Scientific Audit of Marine Parks in New South Wales, Department of Primary Industries and Office of Environment and Heritage, NSW – <http://www.marineparksaudit.nsw.gov.au/audit-report/>
- Bryars, S. 2003, *An Inventory of Important Coastal Fisheries Habitats in South Australia*, Fish Habitat Program, Primary Industries and Resources South Australia, Adelaide.
- Bryars, S. 2010, *Monitoring marine fishes of conservation concern on Adelaide's coastal reefs: results of 2009/2010 surveys for the southern blue devil and harlequin fish*, report to the Adelaide and Mount Lofty Ranges Natural Resources Management Board, Department of Environment and Natural Resources, 29 pp.
- Cocklin, C., Craw, M. and Mcauley, I. 1998, "Marine reserves in New Zealand: use rights, public attitudes, and social impacts", *Coastal Management*, 26 (3) 213-231.
- Department of Environment and Natural Resources (DENR) 2010a, *Environmental, Economic and Social Values of the Neptune Islands Group Marine Park*, Department of Environment and Natural Resources, South Australia.
- Department of Environment and Natural Resources (DENR) 2010b, *Neptune Islands Group Marine Park - Fishing data from SAMPIT Submissions 10 May 2010*, Coast and Marine Conservation – Department of Environment and Natural Resources
- Department of Primary Industries and Resources South Australia (PIRSA) 2011, *Policy Position Regarding Redistribution of Displaced Commercial Fishing – Marine Parks*, Department of Primary Industries and Resources of South Australia.
- DEWHA 2009, *White shark issues paper*, Department of the Environment, Water, Heritage and the Arts, Commonwealth of Australia, 39 pp.
- EconSearch 2010, *Economic Indicators for the Commercial Fisheries of South Australia, Summary report, 2008/09*, report prepared for Primary Industries and Resources South Australia, August.
- Edyvane, K. 1999, *Conserving Marine Biodiversity in South Australia – Part 1 – Background, Status and Review of Approach to Marine Biodiversity Conservation in South Australia*, SARDI Report Number 38, PIRSA.
- Fairweather, P., Buxton, C. and Robinson, J. 2009, *Marine Park science in NSW: an independent review*, a report prepared for the Marine Parks Advisory Council, NSW.
- Fowler, A.J., Lloyd, M. and Schmarr, D. 2009, *A preliminary consideration of by-catch in the Marine Scalefish fishery of South Australia*, F2009/000097-1, SARDI Research Report Series No. 365, South Australian Research and Development Institute (Aquatic Sciences), Adelaide.

- Goldsworthy, S.D., Page, B., Shaughnessy, P.D. and Linnane, A. 2010, *Mitigating Seal Interactions in the SRLF and the Gillnet Sector SESSF in South Australia*, report to the Fisheries Research and Development Institute, South Australian Research and Development Institute (Aquatic Sciences), Adelaide, SARDI Publication No. F2009/000613-1, SARDI Research Report Series No. 405.
- Government of South Australia 2011, *Government Submission to the Marine Parks Select Committee*, July 2011.
- Knuckey, I. 2012, *Impacts of Proposed Marine Park Sanctuary Zones on the South Australian Rock Lobster Industry*, report to SARLAC Inc.
- Langlois, T.J. and Ballantine, W.J. 2005, "Marine ecological research in New Zealand: Developing predictive models through the study of no-take marine reserves", *Conservation Biology* 19:1763–1770.
- Ledee, J., Sutton, S., Tobin, R. and De Freitas, D. 2011, "Responses and adaptation strategies of commercial and charter fishers to zoning changes in the Great Barrier Reef Marine Park", *Marine Policy*, doi: 10.1016/j.marpol.2011.05.009
- Marshall, N. and Marshall, P. 2007, "Conceptualizing and operationalizing social resilience within commercial fisheries in Northern Australia", *Ecology and Society*, 12 (1) www.ecologyandsociety.org/vol12/iss1/art/
- McGregor Tan Research 2006, *Marine Parks Regional Study Report*, report prepared for the Department for Environment and Heritage.
- McGregor Tan Research 2007, *Marine Parks Research – June 2007 McGregor Tan Household Omnibus Survey*, report prepared for the Department for Environment and Heritage.
- McGregor Tan Research 2008, *Marine Parks Statewide Study Final Report*, report prepared for the Department for Environment and Heritage.
- McGregor Tan Research 2009, *Marine Parks Regional Study Report*, report prepared for the Department for Environment and Heritage.
- McLeod, K.L. and Leslie, H.M. 2009, *Ecosystem-Based Management for the Oceans*, Island Press, Washington, DC.
- McPhee, D. 2011, "Marine Park planning and recreational fishing: is the science lost at sea? Case studies from Australia", *Int. JI of Science in Society*, 2 (2) 23-37.
- Northcote J & Macbeth J (2008) *Socio-economic impacts of sanctuary zone changes in Ningaloo Marine Park*, CRC for Sustainable Tourism Pty Ltd - http://researchrepository.murdoch.edu.au/4762/1/socio-economic_impacts.pdf
- PISCO 2007, *The Science of Marine Reserves (2nd Edition, International Version)*, Partnership for Interdisciplinary Studies of Coastal Oceans.
- Saunders, R.J., Bryars, S.R. and Fowler, A.J. 2010, *Preliminary consideration of the biology of several of South Australia's marine fish species that have conservation or management interest*, report to the Department for Environment and Heritage, South Australian Research and Development Institute (Aquatic Sciences), Adelaide, 41 pp. SARDI Publication Number F2009/000693-1. SARDI Research Report Series No. 426.
- Schirmer, J., Casey, A.M. and Mazur, N. 2004, *Socio-economic impact assessment of the proposed Cod Grounds Marine Protected Area*, report prepared for Department of Environment and Heritage, Canberra.
- Square Holes 2009, *Marine Parks*, report prepared for the Department for Environment and Heritage.

- Square Holes 2011, *Reserve Today Preserve Forever – Marine Parks Tracking Report*, report prepared for the Department of Environment and Heritage.
- Square Holes 2012, *Reserve Today Preserve Forever – Marine Parks Tracking Report*, report prepared for the Department of Environment and Heritage.
- Vanclay F (2005) *Engaging communities with social impact assessment: SIA as a social assurance process*, Tasmanian Institute of Agricultural Research, University of Tasmania - <http://www.engagingcommunities2005.org/abstracts/Vanclay-Frank-final.pdf>
- Vanclay F (2012) 'The potential application of social impact assessment in integrated coastal zone management', *Ocean and Coastal Management*, <http://www.sciencedirect.com/science/article/pii/S0964569112001251?v=s5>
- van't Hof, T. 1998, *Social and economic impacts of marine protected areas: a study and analysis of selected cases in the Caribbean*, Caribbean Natural Resources Institute (CANARI), Saba, Netherlands Antilles.
- Voyer M (2011) *Why social factors affect the success of marine parks* School of Environment, University of Technology, Sydney - [http://www.aqob.com.au/details.php?p_id=714&seo=Why social factors affect the success of marine parks&listid=528&menuid=category_id 24&submenuid=categorylist_id 528](http://www.aqob.com.au/details.php?p_id=714&seo=Why%20social%20factors%20affect%20the%20success%20of%20marine%20parks&listid=528&menuid=category_id_24&submenuid=categorylist_id_528)
- Ward T and Burch P 2012, *Revised estimates of historical commercial fishery catches/effort in draft sanctuary zones and draft habitat protection zones in South Australia's Marine Parks*, report to PIRSA Fisheries and Aquaculture. South Australian Research and Development Institute (Aquatic Sciences), Adelaide. SARDI Publication No. F2011/000307-6. SARDI Research Report Series No. 642
- Ward, T., Heinemann, D. and Evans, N. 2001, *The Role of Marine Reserves as Fisheries Management Tools: a review of concepts, evidence and international experience*, Bureau of Rural Sciences, Canberra.

Disclaimer

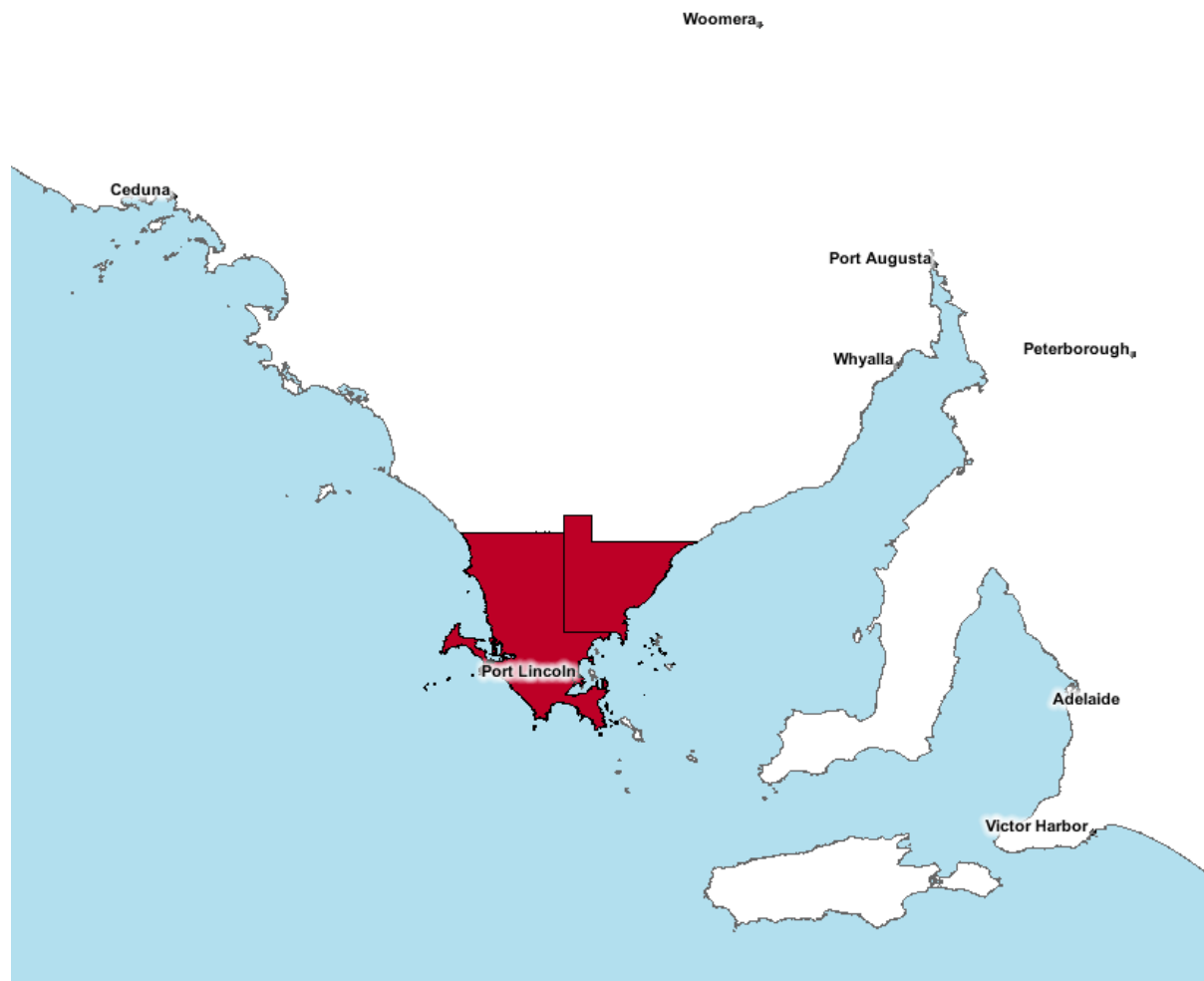
We have prepared the above report exclusively for the use and benefit of our client. Neither the firm nor any employee of the firm undertakes responsibility in any way whatsoever to any person (other than to the above mentioned client) in respect of the report including any errors or omissions therein however caused.

Appendix 1 Socio-economic Profile – Lower Eyre Peninsula

This socio-economic profile provides a statistical summary of key economic and social information for the Lower Eyre Peninsula region and, where possible, South Australia (SA). The profile brings together a wide range of existing Australian Bureau of Statistics (ABS) data and some non-ABS data. It has been designed, at a broad level, to aid understanding of the economic and social structure of the region, to indicate how the Lower Eyre Peninsula region contributes to the State economy and to monitor trends in economic growth or decline.

The Lower Eyre Peninsula region is located at the southern end of Eyre Peninsula (Figure 1). The three statistical local areas (SLAs) that comprise the region are Port Lincoln (DC), Tumby Bay (DC) and Lower Eyre Peninsula (DC). The Lower Eyre Peninsula regional economy is relevant to the Sir Joseph Banks Group (MP6), Neptune Islands Group (MP7) and Gambier Islands Group (MP8) marine parks. Table 1 presents a summary of the key economic and social information detailed further in the report.

Appendix Figure 1-1 Lower Eyre Peninsula region



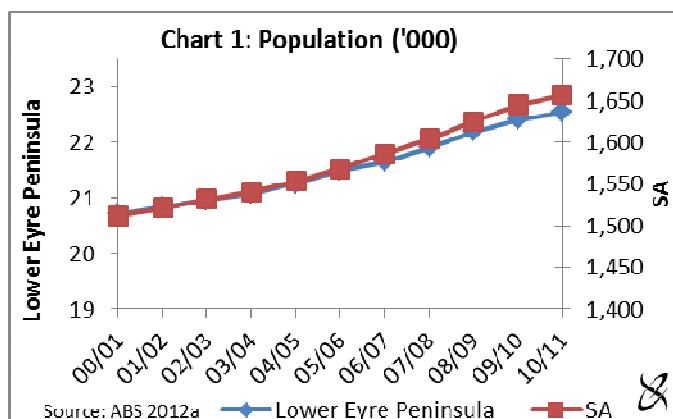
Source: ABS TableBuilder

Appendix Table 1-1 Summary of key economic and social indicators for the Lower Eyre Peninsula region

Indicator	Lower Eyre Peninsula	SA	Lower Eyre Peninsula as a proportion of SA
Population, 2010/11 (no.)	22,533	1,656,299	1.4%
Birth Rate, 2009/10 (births/1000 residents)	13.5	12.2	-
Death Rate, 2009/10 (deaths/1000 residents)	8.2	7.9	-
Age Distribution, 2009/10:			
Proportion of Population aged 0-14	20%	18%	-
Proportion of Population aged 15-64	64%	67%	-
Proportion of Population aged 65+	16%	16%	-
Dependency Rate, 2009/10:			
Child	32%	27%	-
Aged	25%	23%	-
Total	56%	50%	-
Population Projection, Increase from 2006 to 2026	13%	23%	-
Employment, June qtr 2011:			
Labour Force (no.)	11,219	867,500	1.3%
Unemployed (no.)	476	45,300	1.1%
Unemployment Rate	4%	5%	-
Participation Rate, 2009/10	58%	63%	-
Businesses, June 2009 (no.)	2,559	141,625	1.8%
School Enrollments, 2011	3,659	247,356	1.5%
Tertiary Enrollments, 2011	2,094	208,706	1.0%
Non-school Qualifications, 2006	7,199	595,379	1.2%
Mean Taxable Income, 2009/10 (\$)	51,991	54,349	-
Proportion of Taxable Individuals, 2009/10	73%	74%	-
Value per Building Approval, 2010/11 (\$)	231,750	236,269	-
Median Dwelling Price, 2010/11 (\$)	287,500	357,500	-
Commercial Fishing, Ave/yr 2000/01 to 2009/10:			
Catch (t)	23,491	47,581	49.4%
Value of Catch (\$m)	45	202	22.2%
Charter Boats, Ave/yr 2007/08 to 2009/10 (no. of fish)	34,813	146,341	23.8%
Recreational Fishing, 2007/08:			
Fishers (no.)	28,008	236,463	11.8%
Days Fished (no.)	91,314	1,054,200	8.7%
Gross Regional Product, 2009/10 (\$m)	942	80,356	1.2%
Employment, 2009/10 (fte)	9,693	774,953	1.3%
Tourism, 2009/10 (\$m)	79	4,524	1.8%
Other Regional Exports, 2009/10 (\$m)	487	26,757	1.8%
Regional Imports, 2009/10 (\$m)	900	40,573	2.2%

Demographic indicators

- The estimated resident population of the Lower Eyre Peninsula region increased by 9 per cent (approximately 1,800 persons) between 2000/01 and 2010/11 and was around 22,500 persons in 2010/11. Over the same period SA experienced population growth of almost 10 per cent (Chart 1).



- A marginal increase in population together with little change in the birth and death rates (ABS 2011a,b) implies limited inward migration to the region over the period.
- Compared with the age distribution of the state as a whole, the Lower Eyre Peninsula region has a higher concentration of younger people (aged 0 to 14 years), a lower share of persons aged 15 to 64 years and a similar share of people aged 65 and over (Table 2).

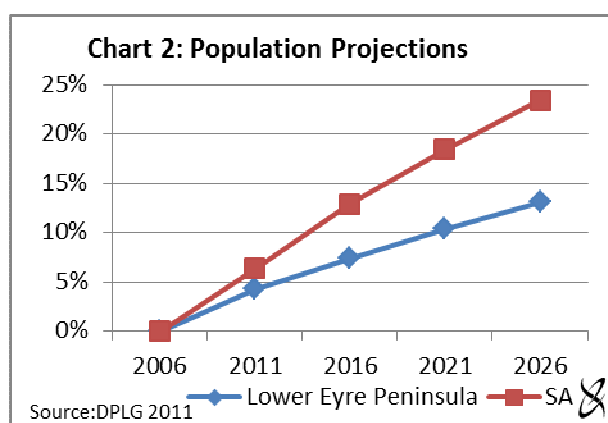
Appendix Table 1-2 Age distribution of the population for the Lower Eyre Peninsula region and SA, 2000/01 to 2009/10

Age	Year									
	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
Lower Eyre Peninsula										
0 to 14	22%	22%	22%	21%	21%	21%	21%	20%	20%	20%
15 to 64	64%	64%	64%	64%	64%	64%	64%	64%	64%	64%
65 or older	14%	14%	14%	14%	15%	15%	15%	15%	16%	16%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
South Australia										
0 to 14	19%	19%	19%	19%	18%	18%	18%	18%	18%	18%
15 to 64	66%	66%	66%	66%	66%	67%	67%	67%	67%	67%
65 or older	15%	15%	15%	15%	15%	15%	15%	15%	15%	16%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: ABS 2010a and ABS 2011c

- The total dependency rate for the Lower Eyre Peninsula region was 56 per cent in 2009/10. This implies that for any dependent person (persons aged 0 to 14 and over 65) there were 2 persons providing support. At the state level the dependency rate was 50 per cent in 2009/10 (ABS 2010a and ABS 2011c).

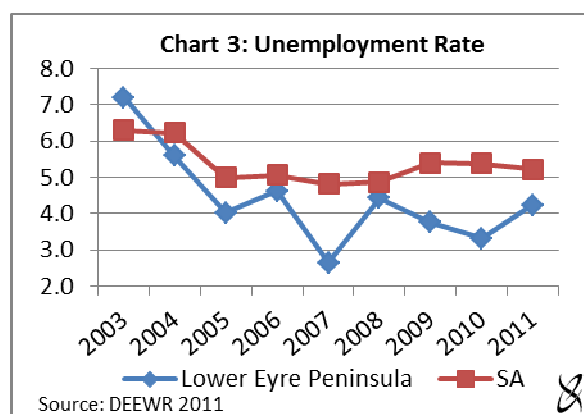
- According to the Department of Planning and Local Government (DPLG) population projections¹¹, the total population in the Lower Eyre Peninsula region is likely to increase by approximately 13 per cent by 2026, whereas the SA population is expected to increase by around 23 per cent (Chart 2).



- Population projections for the Lower Eyre Peninsula region indicate there will be a slight increase for persons aged 0 to 14 years and in the working age population (15 to 64 years) (by 2 per cent from 2006). The population projections for persons 65 or older indicate that a significant increase of around 83 per cent in this age group is expected over the 20 years (DPLG 2011).

Labour force indicators

- In the June quarter of 2011, the labour force in the Lower Eyre Peninsula region was approximately 11,200 (by place of residence), an increase of 12 per cent from the March quarter of 2003. By comparison, the labour force for SA also increased by 14 per cent over the same period (DEEWR 2011).
- The number of unemployed persons in the Lower Eyre Peninsula region was around 800 in March 2003 and 500 in June 2011, a decline of approximately 41 per cent over the period. By comparison, the number of unemployed persons in SA increased by approximately 11 per cent over the same period (DEEWR 2011).
- The unemployment rate in the Lower Eyre Peninsula region was 4.2 per cent in the June quarter of 2011. The unemployment rate for SA for the same quarter was slightly higher at 5.2 per cent (Chart 3). In the Lower Eyre Peninsula region the unemployment rate is almost half of that in 2003 (June quarters) (Chart 3).
- The labour force participation rate for the Lower Eyre Peninsula region fluctuated over the years 2002/03 to 2009/10. In 2009/10 the labour force participation rate in the Lower Eyre Peninsula region was around 58 per cent compared to 63 per cent for SA as a whole (DEEWR 2011, ABS 2010a and ABS 2011c).



¹¹ Population projections are not forecasts, they are based on ABS 2006 *Census of Population and Housing* resident population estimates and trends in mortality, fertility and overseas and interstate migration for South Australia. A range of estimates are published, based on the assumed level of migration. The 'medium level of migration' series has been utilised in this analysis. The method used to compile the projections was not influenced by local factors such as land availability or zoning, that is, it was assumed that these factors would not be limiting on population growth.

Business Count

- The total number of businesses operating at the end of June 2009 in the Lower Eyre Peninsula region was 2,559, 1.8 per cent of the total businesses operating in SA (almost 142,000) (ABS 2011d).
- Of the 2,559 businesses operating in the Lower Eyre Peninsula region, approximately 30 per cent were classified in the agriculture, forestry and fishing sector and 15 per cent were in the construction sector (ABS 2011d).
- Almost 60 per cent of the businesses operating in the Lower Eyre Peninsula region did not employ anyone and over 20 per cent employed between 1 and 4 people (ABS 2011d).

Education and training

- The total number of residents in the Lower Eyre Peninsula region with a non-school qualification increased over the 5 years to 2006. In 2006, approximately 44 per cent of all persons aged 15 or over held some form of non-school qualification, compared with 38 per cent in 2001 (ABS 2007 and 2010a).
- The level of qualification was generally lower for the Lower Eyre Peninsula region than for SA, with the proportion of persons with a bachelor degree or higher being significantly lower (Table 3).

Appendix Table 1-3 Highest level of qualifications for persons aged 15 and over in the Lower Eyre Peninsula region and SA, 2001 and 2006 ^a

Qualification	Lower Eyre Peninsula			
	2001		2006	
Postgraduate Degree	46	1%	102	1%
Graduate Diploma & Graduate Certificate	106	2%	141	2%
Bachelor Degree	746	13%	914	13%
Advanced Diploma & Diploma	634	11%	767	11%
Certificate	2,535	43%	3,053	42%
Level of education not described or stated	1,769	30%	2,222	31%
Total	5,836	100%	7,199	100%
	South Australia			
	2001		2006	
Postgraduate Degree	15,203	3%	22,897	4%
Graduate Diploma & Graduate Certificate	14,361	3%	16,098	3%
Bachelor Degree	95,812	20%	120,979	20%
Advanced Diploma & Diploma	63,469	13%	79,698	13%
Certificate	185,129	38%	212,581	36%
Level of education not described or stated	115,200	24%	143,126	24%
Total	489,174	100%	595,379	100%

^a 2011 Census data on qualifications not available until the second release in October 2012.

Source: 2006 Census of Population and Housing (ABS 2007).

- The total number of students enrolled in primary school in the Lower Eyre Peninsula region decreased by 8 per cent between 2001 and 2011. This decrease was comprised of a 19 per cent decrease in enrolments in government schools and a 41 per cent increase in enrolments at non-government schools (Table 4).
- The total number of Lower Eyre Peninsula region students enrolled in secondary school increased by 4 per cent between 2001 and 2011. The increase was comprised of a 7 per cent decrease in government school enrolments and 40 per cent rise in non-government school enrolments (Table 4).
- Between 2001 and 2011 the total number of Lower Eyre Peninsula regions residents enrolled in a higher education institute increased by 25 per cent. This is lower than that for SA as a whole (38 per cent increase) (ABS 2012b).

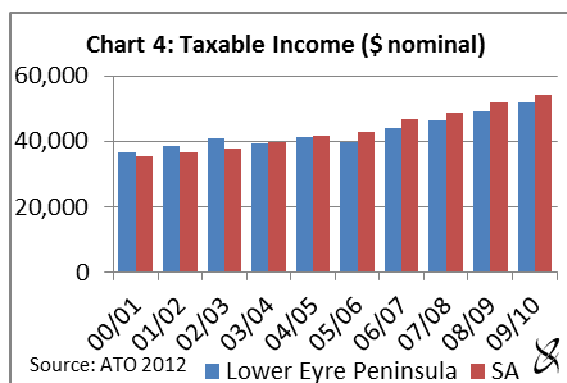
Appendix Table 1-4 School enrolments in the Lower Eyre Peninsula region and SA, 2001, 2006 and 2011

	Census Year		
	2001	2006	2011
Lower Eyre Peninsula			
Pre-school	300	283	287
Primary			
- Government	1,865	1,818	1,506
- Non-Government	411	386	578
Total Primary Student	2,276	2,204	2,084
Secondary Students			
- Government	931	859	865
- Non-Government	303	298	423
Total Secondary Students	1,234	1,157	1,288
South Australia			
Pre-school	18,246	18,533	20,537
Primary			
- Government	103,975	93,220	87,542
- Non-Government	43,150	45,796	48,634
Total Primary Student	147,125	139,016	136,176
Secondary Students			
- Government	57,770	51,752	51,901
- Non-Government	31,725	35,172	38,742
Total Secondary Students	89,495	86,924	90,643

Source: 2011 Census of Population and Housing (ABS 2012b)

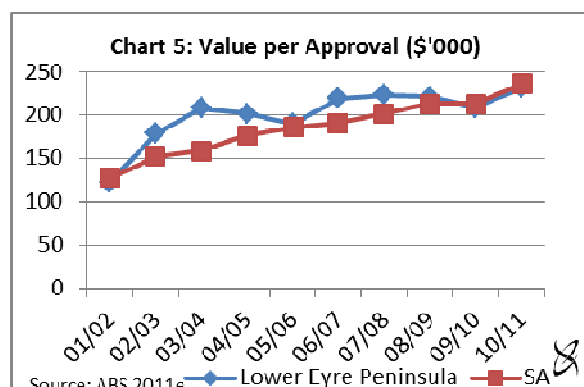
Household income

- The mean individual taxable income in the Lower Eyre Peninsula region was higher than the state average between 2000/01 and 2002/03 but has been consistently lower since then (Chart 4).
- Over the period 2000/01 to 2009/10, the mean taxable income (in nominal terms) increased by 42 per cent in the Lower Eyre Peninsula region and 54 per cent in SA as a whole (Chart 4).
- In 2009/10 mean taxable income was almost \$52,000 in the Lower Eyre Peninsula region and around \$54,350 in SA (Chart 4).



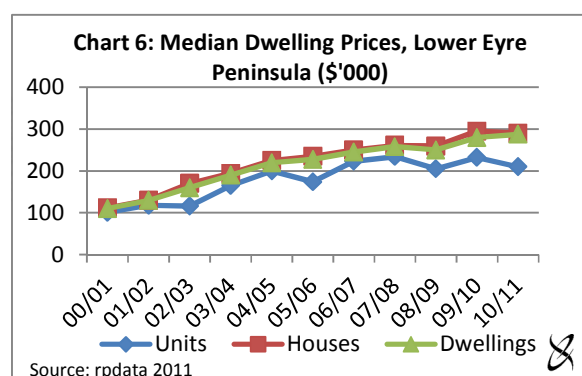
Building approvals

- The number of building approvals for the Lower Eyre Peninsula region decreased by 51 per cent over the period 2001/02 to 2010/11. However, the total value of approvals decreased by less than that, from \$36 million in 2001/02 to \$33 million in 2010/11, a fall of 7 per cent (ABS 2011e).
- For SA the total number of approvals was 3 per cent greater in 2010/11 than in 2001/02, while the total value was 90 per cent higher (ABS 2011e).
- The average value per approval in the Lower Eyre Peninsula region increased by approximately 89 per cent, from \$123,000 in 2001/02 to \$232,000 in 2010/11 (Chart 5).
- For SA, the value per approval increased from \$128,000 in 2001/02 to \$236,000 in 2010/11, an increase of 85 per cent (Chart 5).



Property Values

- Between 2000/01 and 2010/11 the median unit price in the Lower Eyre Peninsula region more than doubled, from \$101,000 in 2000/01 to \$210,000 in 2010/11 (Chart 6). The median unit price in SA as a whole increased by 215 per cent over the same period, from almost \$102,000 to \$320,000 (rpdata 2011).
- The median house price in the Lower Eyre Peninsula region increased by 160 per cent between 2000/01 and 2010/11, from almost \$112,000 to \$290,000 (Chart 6). In comparison, house prices in SA as a whole increased at a higher rate, from \$126,000 to \$370,000 over the same period, a 194 per cent increase (rpdata 2011).



- Overall median dwelling (units and houses) prices increased by 161 per cent in the Lower Eyre Peninsula region (\$278,500 in 2010/11) and 197 per cent in SA as a whole (\$357,500 in 2010/11) over the period 2000/01 to 2010/11 (rpdata 2011).

Commercial fishing

- The average annual catch of abalone in the Lower Eyre Peninsula region over the past 10 years, 2000/01 to 2009/10, was approximately 191 tonnes. The value of this average annual catch was around \$7.1 million (SARDI by special request).
- In the Lower Eyre Peninsula region over the past 10 years, 2000/01 to 2009/10, the average annual catch of prawns was almost 26 tonnes with a beach value of approximately \$450,000 (SARDI). Additional catch of prawns was recorded for this region in the West Coast Prawn fishery but was confidential and could not be reported.
- Annual catch of rock lobster in the Lower Eyre Peninsula region averaged around 234 tonnes with a beach value of approximately \$8.2 million over the period 2000/01 to 2009/10 (SARDI).
- In the Lower Eyre Peninsula region over the past 10 years, 2000/01 to 2009/10, the average annual catch of sardines was almost 22,200 tonnes with a beach value of approximately \$14.1 million (SARDI).
- Annual average catch of Marine Scalefish species including miscellaneous species in the Lower Eyre Peninsula region over the period 2000/01 to 2009/10 was approximately 855 tonnes with a beach value of around \$3.6 million (SARDI).
- Between 2007/08 and 2009/10 the charter boat operators in the Lower Eyre Peninsula region caught on average almost 35,000 fish per annum (SARDI). This compares to an annual average catch for SA of 146,000 fish over the same period (PIRSA 2010).

Recreational Fishing

- Between 2000/01 and 2007/08 the total number of SA resident recreational fishers (those aged 5 and older) in the Lower Eyre Peninsula region (regions 5, 6 and 7 in the report South Australian Recreational Fishing Survey 2007/08 (Jones 2009)) decreased by 43 per cent, from approximately 49,000 in 2000/01 to 28,000 fishers in 2007/08.
- Similarly, at the state level the number of SA resident recreational fishers decreased from an estimated 317,200 in 2000/01 to around 236,500 fishers in 2007/08 (a 25 per cent decrease) (Jones 2009).
- A similar pattern occurred in the total number of days fished by SA resident recreational fishers. In the Lower Eyre Peninsula region the number of days fished by SA resident recreational fishers decreased from around 219,000 days in 2000/01 to approximately 91,000 days in 2007/08 (a 58 per cent decline) (Jones 2009).
- For SA as a whole, the total number of days fished by SA resident recreational fishers almost halved over the seven years, from 1.83 million days in 2000/01 to 1.05 million in 2007/08 (Jones 2009).

Economic Contribution of Tourism to the Region

In aggregate, it was estimated that expenditure by tourists in the Lower Eyre Peninsula region in 2009/10 (approximately \$79m (TRA 2011 and EconSearch analysis)) generated the following level of regional economic and demographic activity.

- Almost \$35 million in GRP which represents 3.7 per cent of the regional total (\$942 million).

- Approximately 600 full-time and part-time jobs which represents 6.1 per cent of the regional total (10,200 total jobs).
- Approximately 500 fte jobs which represents 5.6 per cent of the regional total (9,700 fte).

Regional Economic Structure

- At the time of the 2006 population census it was estimated that approximately 92 per cent of the jobs in the region were held by local residents and the balance were held predominantly by residents of adjacent regions (i.e. travelled to work from the surrounding SLAs). Approximately 98 per cent of employed residents were employed locally, with the balance travelling to other areas in SA for work¹²).
- It was estimated that there were almost 10,200 jobs (9,700 fte jobs) in the Lower Eyre Peninsula region in 2009/10 (by place of remuneration) (Table 5).
- In 2009/10, the top four contributors to total jobs in the region were the agriculture, forestry and fishing (17 per cent), retail trade (16 per cent), health and community services (11 per cent) and education (9 per cent) sectors (Table 5).
- The Lower Eyre Peninsula gross regional product (GRP) was estimated to be \$942 million in 2009/10 (Table 6). This compares with gross state product (GSP) in the same year of \$80.36 billion (ABS 2010b).
- The GRP of the Lower Eyre Peninsula region comprised approximately 1.2 per cent of the SA GSP.
- In 2009/10, the top four contributors to GRP were the agriculture, forestry and fishing (18 per cent), ownership of dwellings (12 per cent each), building and construction and property and business services (7 per cent each) sectors (Table 6).
- Expenditure by households accounted for over one third of the total value of goods and services imported into the region in 2009/10. Among of the intermediate sectors, the top importers in the region in 2009/10 were the building and construction (11 per cent), agriculture, forestry and fishing and manufacturing (8 per cent each) sectors (Table 7).
- Expenditure by tourists (\$79m) contributed approximately 14 per cent of the total value of exports from the region in 2009/10 (Table 7).
- The top contributors to the value of 'other exports' from the region in 2009/10 were the agriculture, forestry and fishing (58 per cent) and manufacturing (18 per cent) sectors (Table 7).

¹² Based on detailed 'journey to work' employment data obtained from the ABS 2006 Census of Population and Housing using the TableBuilder database.

Appendix Table 1-5 Employment, household income and household expenditure, Lower Eyre Peninsula region, 2009/10 ^a

SECTOR	Total Employment		FTE Employment		Household Income		Household Expenditure	
	(jobs)	(%)	(fte)	(%)	(\$m)	(%)	(\$m)	(%)
Agriculture, forestry and fishing	1,709	16.8%	1,893	19.5%	87	18.0%	2	0.3%
Mining	16	0.2%	20	0.2%	1	0.3%	1	0.1%
Manufacturing	717	7.0%	704	7.3%	22	4.6%	13	1.6%
Electricity, gas and water	116	1.1%	132	1.4%	9	1.9%	7	0.8%
Building and construction	747	7.3%	771	8.0%	5	1.0%	11	1.4%
Wholesale trade	510	5.0%	540	5.6%	0	0.0%	0	0.0%
Retail trade	1,603	15.7%	1,337	13.8%	7	1.5%	4	0.5%
Accommodation, cafes & restaurants	540	5.3%	446	4.6%	22	4.5%	0	0.0%
Transport and storage	380	3.7%	378	3.9%	108	22.1%	133	16.4%
Communication services	59	0.6%	65	0.7%	10	2.0%	14	1.7%
Finance and insurance	243	2.4%	247	2.6%	2	0.5%	1	0.1%
Ownership of dwellings ^b	0	0.0%	0	0.0%	5	1.0%	2	0.3%
Property and business services	724	7.1%	697	7.2%	83	17.0%	171	21.1%
Public administration and defence	321	3.2%	321	3.3%	22	4.5%	4	0.4%
Education	894	8.8%	810	8.4%	38	7.8%	18	2.3%
Health and community services	1,143	11.2%	916	9.5%	45	9.3%	18	2.2%
Cultural and recreational services	117	1.1%	90	0.9%	3	0.6%	7	0.8%
Personal services	348	3.4%	325	3.4%	15	3.2%	17	2.1%
Total Intermediate	10,186	100.0%	9,693	100.0%	487	100.0%	424	52.1%
PRIMARY INPUTS								
Household Income	-	-	-	-	-	-	0	0.0%
GOS and GMI ^c	-	-	-	-	-	-	0	0.0%
Taxes Less Subsidies	-	-	-	-	-	-	71	8.7%
Imports	-	-	-	-	-	-	318	39.1%
Primary Inputs Total	-	-	-	-	-	-	389	47.9%
GRAND TOTAL	10,186	100.0%	9,693	100.0%	487	100.0%	813	100.0%

^a The economic profile of the regional economy is also available in terms of a 60-sector industry classification if required.

^b The ownership of dwellings sector is a notional sector designed to impute a return to the state's housing stock. Total value of output in this sector is an estimate of rent earned on leased dwellings and imputed rent on the balance of owner-occupied dwellings.

^c Gross operating surplus and gross mixed income.

Source: ABS (2006), ABS (2008), ABS (2009), ABS (2010b,c), ABS (2011f), ABS (2012a), EconSearch (2009a,b) and EconSearch analysis.

Appendix Table 1-6 Components of gross regional product in the Lower Eyre Peninsula region by industry, 2009/10 ^a

SECTOR	Household Income		GOS and GMI ^c		Taxes less Subsidies		Gross Regional Product	
	(\$m)	(%)	(\$m)	(%)	(\$m)	(%)	(\$m)	(%)
Agriculture, forestry and fishing	87	18.0%	73	22.2%	12	25.3%	173	18.3%
Mining	1	0.2%	3	0.9%	0	0.1%	4	0.4%
Manufacturing	34	6.9%	20	5.9%	2	5.1%	56	5.9%
Electricity, gas and water	11	2.2%	9	2.6%	0	0.6%	20	2.1%
Building and construction	47	9.7%	18	5.3%	3	6.6%	68	7.2%
Wholesale trade	29	6.0%	9	2.6%	3	6.1%	41	4.3%
Retail trade	35	7.1%	11	3.3%	2	4.8%	48	5.1%
Accommodation, cafes & restaurants	18	3.8%	5	1.4%	3	5.4%	25	2.7%
Transport and storage	17	3.6%	19	5.7%	2	4.2%	38	4.0%
Communication services	6	1.3%	8	2.3%	1	1.2%	15	1.5%
Finance and insurance	30	6.2%	26	7.8%	3	7.2%	60	6.3%
Ownership of dwellings ^b	0	0.0%	104	31.4%	10	20.5%	113	12.0%
Property and business services	46	9.5%	16	4.9%	3	5.9%	65	6.9%
Public administration and defence	22	4.5%	4	1.2%	1	1.2%	27	2.8%
Education	38	7.8%	2	0.7%	1	1.7%	41	4.4%
Health and community services	45	9.3%	3	0.9%	1	2.6%	49	5.2%
Cultural and recreational services	3	0.6%	1	0.2%	0	0.4%	4	0.4%
Personal services	15	3.2%	1	0.4%	1	1.2%	17	1.8%
Total Intermediate	487	100.0%	330	100.0%	47	100.0%	-	-
Net Taxes in Final Demand	-	-	-	-	-	-	78	8.3%
Gross Regional Product	-	-	-	-	-	-	942	100.0%

^a The economic profile of the regional economy is also available in terms of a 60-sector industry classification if required.

^b The ownership of dwellings sector is a notional sector designed to impute a return to the state's housing stock. Total value of output in this sector is an estimate of rent earned on leased dwellings and imputed rent on the balance of owner-occupied dwellings.

^c Gross operating surplus and gross mixed income.

Source: ABS (2006), ABS (2008), ABS (2009), ABS (2010b,c), ABS (2011f), ABS (2012a), EconSearch (2009a,b) and EconSearch analysis.

Appendix Table 1-7 Value of imports and exports by industry, Lower Eyre Peninsula region, 2009/10 ^a

SECTOR	Tourism		Other Exports		Total Exports		Imports	
	(\$m)	(%)	(\$m)	(%)	(\$m)	(%)	(\$m)	(%)
Agriculture, forestry and fishing	0	0.0%	283	58.1%	283	50.0%	75	8.4%
Mining	0	0.0%	4	0.8%	4	0.7%	1	0.1%
Manufacturing	4	4.9%	88	18.1%	92	16.2%	70	7.8%
Electricity, gas and water	0	0.0%	7	1.5%	7	1.3%	9	1.0%
Building and construction	0	0.0%	25	5.2%	25	4.5%	101	11.2%
Wholesale trade	2	3.0%	0	0.0%	2	0.4%	30	3.3%
Retail trade	13	16.8%	0	0.0%	13	2.4%	24	2.7%
Accommodation, cafes & restaurants	14	17.2%	0	0.0%	14	2.4%	21	2.4%
Transport and storage	2	2.2%	10	2.1%	12	2.2%	25	2.8%
Communication services	0	0.0%	11	2.2%	11	1.9%	9	1.0%
Finance and insurance	0	0.0%	9	1.9%	9	1.6%	10	1.2%
Ownership of dwellings ^b	3	4.3%	0	0.0%	3	0.6%	10	1.1%
Property and business services	0	0.6%	30	6.2%	31	5.4%	36	4.0%
Public administration and defence	0	0.0%	0	0.0%	0	0.0%	10	1.1%
Education	0	0.1%	0	0.0%	0	0.0%	7	0.7%
Health and community services	0	0.0%	0	0.0%	0	0.0%	7	0.7%
Cultural and recreational services	1	1.3%	0	0.0%	1	0.2%	4	0.4%
Personal services	0	0.0%	0	0.0%	0	0.0%	5	0.6%
Total Intermediate	40	50.4%	468	96.1%	508	89.7%	454	50.4%
PRIMARY INPUTS								
Household Income	0	0.0%	0	0.0%	0	0.0%	-	-
GOS and GMI ^c	0	0.0%	0	0.0%	0	0.0%	-	-
Taxes Less Subsidies	7	9.1%	0	0.0%	7	1.3%	-	-
Imports	32	40.5%	19	3.9%	51	9.0%	-	-
Primary Inputs Total	39	49.6%	19	3.9%	58	10.3%	-	-
FINAL DEMAND								
Household Expenditure	-	-	-	-	-	-	318	35.3%
Government Expenditure	-	-	-	-	-	-	32	3.5%
Gross Fixed Capital	-	-	-	-	-	-	46	5.1%
Change in Inventories	-	-	-	-	-	-	0	0.0%
Tourism	-	-	-	-	-	-	32	3.6%
Other Exports	-	-	-	-	-	-	19	2.1%
Final Demand Total	-	-	-	-	-	-	446	49.6%
GRAND TOTAL	79	100.0%	487	100.0%	566	100.0%	900	100%

^a The economic profile of the regional economy is also available in terms of a 60-sector industry classification if required.

^b The ownership of dwellings sector is a notional sector designed to impute a return to the state's housing stock. Total value of output in this sector is an estimate of rent earned on leased dwellings and imputed rent on the balance of owner-occupied dwellings.

^c Gross operating surplus and gross mixed income.

Source: ABS (2006), ABS (2008), ABS (2009), ABS (2010b,c), ABS (2011f), ABS (2012a), EconSearch (2009a,b) and EconSearch analysis.

References

- Australian Bureau of Statistics (ABS) 2006, *2003/04 Household Expenditure Survey Summary of Results*, ABS Cat. No. 6530.0, Canberra, electronic version.
- ABS 2007, *2006 Census Tables*, Cat. No. 2068.0, Canberra, June.
- ABS 2008, *Agricultural Commodities: Small Area Data, Australia, 2005/06*, ABS Cat. No. 7125.0, Canberra.
- ABS 2009, *Australian National Accounts: Input-Output Tables - Electronic Publication 2005-06*, ABS Cat. No. 5209.0.55.001, Canberra.
- ABS 2010a, *National Regional Profiles*, Cat. No. 1379.0, Canberra, November (and previous issues).
- ABS 2010b, *2009/10 Australian National Accounts, State Accounts*, ABS Cat. No. 5220.0, Canberra.
- ABS 2010c, *Australian National Accounts, Tourism Satellite Account, 2009/10*, ABS Cat. No. 5249.0, Canberra.
- ABS 2011a, *Births, Australia, 2009*, Cat. No. 3301.0, Canberra, March (and previous issues).
- ABS 2011b, *Deaths, Australia, 2009*, Cat. No. 3302.0, Canberra, March (and previous issues).
- ABS 2011c, *Population by Age and Sex, Regions of Australia, 2009/10*, ABS Cat. No. 3235.0, Canberra, August.
- ABS 2011d, *Counts of Australian Businesses, including Entries and Exits, June 2007 to June 2009*, Cat No. 8165.0, Canberra, February.
- ABS 2011e, *Building Approvals, Australia*, Cat. No. 8731.0, Canberra, August (and previous issues).
- ABS 2011f, *Value of Agricultural Commodities Produced, Australia, 2009/10*, ABS Cat. No. 7503.0, Canberra.
- ABS 2012a, *Regional Population Growth, Australia, Population Estimates by Statistical Local Area, 2001 to 2010*, Cat. No. 3218.0, Canberra, March (and previous issues).
- ABS 2012b, *2011 Census of Population and Housing, Basic Community Profiles*, June.
- Australian Taxation Office 2012, *Taxation Statistics 2009/10, Table 3: Personal Tax, Selected items, by state/territory and postcode, for taxable individuals, 2009/10 income year* (and previous issues).
- Department of Education, Employment and Workplace Relations (DEEWR) 2011, *Small Area Labour Markets – June Quarter 2011*, Canberra, December, (and previous issues).
- Department of Planning and Local Government 2011, *Age-sex Population Projections by Local Government Area, 2006 to 2026*, May.
- EconSearch 2009a, *Economic and Environmental Indicators for South Australia and its Regions, 2006/07*, report prepared for the DTED, May.
- EconSearch 2009b, *Input-Output Tables for South Australia and its Regions, 2006/07: Technical Report*, report prepared for the Department of Trade and Economic Development, May.

Jones, K. 2009, *South Australian Recreational fishing Survey 2007/08*, Fisheries Division, Primary Industries and Resources South Australia, December.

PIRSA 2010, *2010 Data Summary of the South Australian Recreational Charter Boat Fishery*, September.

Rpdata 2011, *Median unit, house and dwelling prices by region, 2000/01 to 2010/11*, by special request

Tourism Research Australia (TRA), 2011, *Regional Tourism Profiles 2009/10*, Canberra.

Appendix 2 Activities and Uses Tables

The following tables summarise how activities and uses are expected to be managed once marine park management plans are adopted. The prohibitions and restrictions described in the tables (grey shaded boxes) will be represented in the *Marine Park (Zoning) Variation Regulations 2012*.

Section 4 of the *Marine Parks Act 2007* establishes four types of marine park zones. These are General Managed Use, Habitat Protection, Sanctuary and Restricted Access Zones.

Section 5 of the *Marine Parks Act 2007* provides for Special Purpose Areas. These are areas within a marine park, defined by management plans, in which specified activities will be allowed that would otherwise be prohibited or restricted by zoning.

No additional permits under the *Marine Parks Act 2007* will be required if the activity is already permitted or licensed under another Act.

Exemptions

- The Minister responsible for marine parks may provide a permit for any activity to take place that would not ordinarily be allowed in a specific zone in accordance with section 19 of the *Marine Parks Act 2007*.
- The Regulations also provide an exemption for any person acting in the course of an emergency.
- The Regulations will not apply to a person exercising official powers or functions under a State or Commonwealth Act or an Aboriginal person acting in accordance with an ILUA or Aboriginal tradition..

Existing activities and uses

When management plans are developed, existing and reasonably foreseeable activities and uses will be accommodated, (as outlined by the policy commitments endorsed by Government) by appropriate zoning, the application of Special Purpose Areas or the provision of permits. Apart from fishing activities, any permits, licences or leases that are current at the time of the adoption of management plans, will not be affected by these restrictions.

KEY

GMUZ	General Managed Use Zone - being a zone primarily established so that an area may be managed to provide protection for habitats and biodiversity within a marine park, while allowing ecologically sustainable development and use
HPZ	Habitat Protection Zone - being a zone primarily established so that an area may be managed to provide protection for habitats and biodiversity within a marine park, while allowing activities and uses that do not harm habitats or the functioning of ecosystems
SZ	Sanctuary Zone - being a zone primarily established so that an area may be managed to provide protection and conservation for habitats and biodiversity within a marine park, especially by prohibiting the removal or harm of plants, animals or marine products
RAZ	Restricted Access Zone - being a zone primarily established so that an area may be managed by limiting access to the area

KEY

	Activity is deemed to be consistent with the definition of the zone (i.e. no change to current activity/use).
limit	Activity is deemed to be consistent with the definition of the zone when conducted in accordance with stated limits under the Regulations.
permit	Activity is deemed to be consistent with the definition of the zone when conducted in accordance with a permit under the Regulations.
	Activity is deemed to be inconsistent with the definition of the zone and will not be allowed. However, the Minister for Sustainability, Environment and Conservation may grant a permit for an activity that would otherwise be prohibited or restricted in a zone on a case by case basis.

RECREATION, EDUCATION AND OTHER

	GMUZ	HPZ	SZ	RAZ	Limits / Permits / Exceptions
Operating aircraft				limit	Limit: Aircraft cannot fly within 300m of the ground or sea level, and helicopters not within 500m of the ground or sea level.
Diving e.g. scuba/snorkel					
Pedestrian access					
Recreational boating/yachting					
Surfing/swimming					
Domestic animals			limit		Limit: Dogs on leads (up to 2m long); or animals confined to vessels/vehicles; or animals under effective control and behaving in accordance with relevant local Council by-laws.
Research			permit	permit	Permit ³ : A permit is not required for research authorised under another Act.
Commercial photography / film making			permit		Permit ³ : A permit is not required for commercial photography/film making authorised under another Act.
Competitions / organised events (non-fishing)			permit		Permit ³ : A permit is not required for non-fishing competitions/organised events authorised under another Act.
Tourism operations			permit		Permit ³ : A permit is not required for tourism operations authorised under another Act.

RECREATION, EDUCATION AND OTHER					
	GMUZ	HPZ	SZ	RAZ	Limits / Permits / Exceptions
Animal feeding/baiting/berleying ¹					
Motorised water sports ²					
Lighting and supervision of fires		limit	limit		Limit: Lighting and supervision of fires is confined to designated areas.
Camping		limit	limit		Limit: Camping is confined to designated areas.
Collection of naturally occurring materials for burning in fires					

Notes:

¹ Feeding/baiting/berleying animals is not recommended in marine parks, except as required for fishing, aquaculture, research or tourism purposes.

² A person may transit through a sanctuary zone in a motorised vessel, but gear such as water skis or a wake board must be stowed.

³ Standard permits (and conditions) may be issued for activities that are deemed to be low impact. All other activities will be subject to case-by-case assessments and non-standard permits (and conditions) may be issued. DEWNR will develop a permit policy to provide clear guidance to users about activities that require permits.

KEY

	Activity is deemed to be consistent with the definition of the zone (i.e. no change to current activity/use).
limit	Activity is deemed to be consistent with the definition of the zone when conducted in accordance with stated limits under the Regulations.
permit	Activity is deemed to be consistent with the definition of the zone when conducted in accordance with a permit under the Regulations.
	Activity is deemed to be inconsistent with the definition of the zone and will not be allowed. However, the Minister for Sustainability, Environment and Conservation may grant a permit for an activity that would otherwise be prohibited or restricted in a zone on a case by case basis.

FISHING AND COLLECTING (commercial, recreational and traditional)

Fishing activities are regulated under provisions of the *Fisheries Management Act 2007*.

	GMUZ	HPZ	SZ	RAZ	Limits / Permits / Exceptions
Bait digging/pumping					
Berleying for fishing					
Cockling (pipi and mud cockles)					
Collecting fish by hand (abalone, urchin, scallop, etc)					
Line fishing (including long lining)					
Netting (e.g. dab, haul, swing, gill, beach or power)					
Pot and trap fishing (including drop/hoop nets)					
Purse seine netting (including sardine)					
Raking (crab)					
Spear fishing					
Competitions / organised events (fishing)					

FISHING AND COLLECTING (commercial, recreational and traditional)

Fishing activities are regulated under provisions of the *Fisheries Management Act 2007*.

	GMUZ	HPZ	SZ	RAZ	Limits / Permits / Exceptions
Traditional fishing and collecting (Aboriginal)					Limit: Activity is limited to persons who are exercising their rights in accordance with an ILUA or Aboriginal tradition.
Collecting seagrass/algae (including beach cast)					
Collecting sessile assemblages, stromatolites, fossils and archaeological remains					
Trawling					

KEY

	Activity is deemed to be consistent with the definition of the zone (i.e. no change to current activity/use).
limit	Activity is deemed to be consistent with the definition of the zone when conducted in accordance with stated limits under the Regulations.
permit	Activity is deemed to be consistent with the definition of the zone when conducted in accordance with a permit under the Regulations.
	Activity is deemed to be inconsistent with the definition of the zone and will not be allowed. However, the Minister for Sustainability, Environment and Conservation may grant a permit for an activity that would otherwise be prohibited or restricted in a zone on a case by case basis.

HARBOR, NAVIGATION & TRANSPORT ACTIVITIES ¹

Harbor, navigation and transport activities are regulated under provisions of the *Harbors and Navigation Act 1993*.

	GMUZ	HPZ	SZ	RAZ	Limits / Permits / Exceptions
Navigation markers/aids					
General navigation and operation of vessels (other than anchoring)					
Anchoring of vessels – less than 80 metres (overall length)					
Anchoring of vessels – 80 metres and over (overall length)					Special Purpose Areas will provide for anchoring of vessels 80 metres and over in all harbors and in designated transshipment and anchoring locations and pilot boarding grounds
Permanent vessel moorings			permit		Permit: A permit will be required, which includes assessment by DEWNR and DPTI.
Dredging		limit			Limit: Activity is confined to harbors established under the <i>Harbors and Navigation Act 1993</i> .
Depositing dredged materials		limit			

Notes:

¹ Activities undertaken to support the ongoing operation of ports and harbors will be provided for in all zones. Also, given the extensive development expected to occur over the next 5-10 years in Upper Spencer Gulf, transitional arrangements will be required. For this purpose all HPZ, SZ and RAZ in Upper Spencer Gulf Marine Park will be declared Special Purpose Areas. This will provide for (a) developments comprising a development or project, or that part of a development or project, within the ambit of a declaration under section 46 of the *Development Act 1993*; and (b) activities comprising development approved under section 49 (crown development and public infrastructure) or section 49A (Electricity infrastructure development) of the *Development Act 1993*. This arrangement will be assessed at the time the first management plan is reviewed.

KEY

	Activity is deemed to be consistent with the definition of the zone (i.e. no change to current activity/use).
limit	Activity is deemed to be consistent with the definition of the zone when conducted in accordance with stated limits under the Regulations.
permit	Activity is deemed to be consistent with the definition of the zone when conducted in accordance with a permit under the Regulations.
	Activity is deemed to be inconsistent with the definition of the zone and will not be allowed. However, the Minister for Sustainability, Environment and Conservation may grant a permit for an activity that would otherwise be prohibited or restricted in a zone on a case by case basis.

COASTAL DEVELOPMENTS AND INFRASTRUCTURE ¹

Coastal developments and infrastructure are regulated under provisions of the *Development Act 1993*.

	GMUZ	HPZ	SZ	RAZ	Limits / Permits / Exceptions
Infrastructure (marinas, jetties, pontoons, breakwalls)					
Outfall and pipelines					
Renewable energy infrastructure (wind, wave, tidal)					

Notes:

¹ Coastal developments and infrastructure in HPZ will be managed under the *Development Act 1993* to achieve the definition of the zone (i.e. no harm to habitats or the functioning of ecosystems). Developments will be considered on a case by case basis to ensure that the achievement of the objects of the Act and the zone are supported appropriately. Development Plans and significant projects are informed by the Planning Strategy which now includes the objects of the *Marine Parks Act 2007* so consideration of these will inform the assessment process. In addition, as part of the assessment process, advice or direction may be required from the Coast Protection Board and/or the Environment Protection Authority and other authorities, depending on the nature of the development. These agencies also have the requirement to take into account the objects of the *Marine Parks Act 2007*.

KEY

	Activity is deemed to be consistent with the definition of the zone (i.e. no change to current activity/use).
limit	Activity is deemed to be consistent with the definition of the zone when conducted in accordance with stated limits under the Regulations.
permit	Activity is deemed to be consistent with the definition of the zone when conducted in accordance with a permit under the Regulations.
	Activity is deemed to be inconsistent with the definition of the zone and will not be allowed. However, the Minister for Sustainability, Environment and Conservation may grant a permit for an activity that would otherwise be prohibited or restricted in a zone on a case by case basis.

AQUACULTURE

Aquaculture activities are regulated under provisions of the *Aquaculture Act 2001*.

	GMUZ	HPZ	SZ	RAZ	Limits / Permits / Exceptions
Farming of bivalve molluscs					
Farming of aquatic animals (other than prescribed wild-caught tuna) with regular feeding					
Farming of prescribed wild-caught tuna					
Farming of algae					
Pilot leases					

Notes: Aquaculture in HPZ will be managed under the *Aquaculture Act 2001* to ensure that all reasonable and practicable measures are taken to achieve the definition of the zone (i.e. no harm to habitats or the functioning of ecosystems). The *Aquaculture Act 2001* operates in addition to the *Marine Parks Act 2007* and requires aquaculture policies to seek to further the objects of the *Marine Parks Act 2007* where they apply within a marine park.

KEY

	Activity is deemed to be consistent with the definition of the zone (i.e. no change to current activity/use).
limit	Activity is deemed to be consistent with the definition of the zone when conducted in accordance with stated limits under the Regulations.
permit	Activity is deemed to be consistent with the definition of the zone when conducted in accordance with a permit under the Regulations.
	Activity is deemed to be inconsistent with the definition of the zone and will not be allowed. However, the Minister for Sustainability, Environment and Conservation may grant a permit for an activity that would otherwise be prohibited or restricted in a zone on a case by case basis.

WASTEWATER DISPOSAL/ DISCHARGES

Discharges are generally regulated under provisions of the *Environment Protection Act 1993* and the *Environment Protection (Water Quality) Policy 2003*.

	GMUZ	HPZ	SZ	RAZ	Limits / Permits / Exceptions
Discharge ¹					Discharges regulated under sections 3(2) or 8(7) of Schedule 1 of the <i>Environment Protection Act 1993</i> are prohibited
Extraction and disposal for a desalination plant ¹					
Vessel discharge of wastewater ²					Specifically regulated by Clause 36 of the <i>Environment Protection (Water Quality) Policy 2003</i>

Notes:

¹ Discharges in HPZ will be managed under the *Environment Protection (Water Quality) Policy 2003* to ensure that all reasonable and practicable measures are taken to achieve the definition of the zone (i.e. no harm to habitats or the functioning of ecosystems).

² Wastewater includes black water, concentrated black water and grey water as defined by the *Environment Protection (Water Quality) Policy 2003*.

KEY	
	Activity is deemed to be consistent with the definition of the zone (i.e. no change to current activity/use).
limit	Activity is consistent with the definition of the zone when conducted in accordance with stated limits.
*	Activity is deemed to be inconsistent with the definition of the zone and will not be considered until such time as it can be demonstrated otherwise.
	Activity is deemed to be inconsistent with the definition of the zone and will not be permitted.

RESOURCE EXPLORATION AND PRODUCTION

These activities are regulated under provisions of the *Mining Act 1971*, the *Petroleum and Geothermal Act 2000*, the *Offshore Minerals Act 2000* and the *Petroleum (Submerged Lands) Act 1982* to achieve the objectives of the marine park zones described under the *Marine Parks Act 2007*.

	GMUZ	HPZ	SZ	RAZ	Limits / Permits / Exceptions
Exploration (passive)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
– satellite/high level airborne					
– airborne surveys				*	*Will depend on the nature and timing of the proposed survey in relation to key environmental considerations (e.g. breeding and migration cycles of protected species).
– geophysical/geochemical surveys			limit		Limit: Will depend on the nature and timing of the proposed survey in relation to key environmental considerations (e.g. breeding and migration cycles of protected species).
Exploration (active)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
– geological sampling			*		* Will depend on nature of proposed surveying
– geophysical/geochemical surveys			*		* Will depend on nature of proposed surveying
– drilling (drill rig within zone)		*			* Will depend on nature of proposal and its location
– deviated drilling (drill rig outside zone)			limit	*	Limit: Activity will need to be conducted in accordance with approved conditions * Deviated drilling from outside zone may be considered if consistent with the zone
– trenching/bulk sampling	*	*			* Will depend on nature of proposal and its location

RESOURCE EXPLORATION AND PRODUCTION

These activities are regulated under provisions of the *Mining Act 1971*, the *Petroleum and Geothermal Act 2000*, the *Offshore Minerals Act 2000* and the *Petroleum (Submerged Lands) Act 1982* to achieve the objectives of the marine park zones described under the *Marine Parks Act 2007*.

	GMUZ	HPZ	SZ	RAZ	Limits / Permits / Exceptions
Gas storage					
– carbon sequestration (surface facilities within zone)		*	x	x	* Will depend on nature of proposal and its location
– carbon sequestration (surface facilities outside zone)			*	*	* Deviated drilling from outside zone may be considered if consistent with the zone
Production/ Extraction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
– seawater (for extraction of resources such as salt)					
– through drillhole (surface facilities within zone)		*			* Will depend on nature of proposal and its location
– through drillhole (surface facilities outside zone)			limit	*	Limit: Activity will need to be conducted in accordance with approved conditions * Extraction from deviated drillhole from outside zone may be considered if consistent with the zone
– underground mining with surface facility	*				* Will depend on nature of proposal and its location
– underground mining with no surface facility		limit	*	*	Limit: Activity will need to be conducted in accordance with approved conditions. May be considered if activity does not compromise habitats or the functioning of ecosystems. * Will depend on nature of proposal and its location.
– pipeline on/above ground/seabed/trenched		*			* Will depend on nature of proposal and its location
– pipeline underground			*	*	* Will depend on nature of proposal and its location
– seabed dredging	*				* Will depend on nature of proposal and its location
– pit-type extraction	*				* Will depend on nature of proposal and its location

RESOURCE EXPLORATION AND PRODUCTION

These activities are regulated under provisions of the *Mining Act 1971*, the *Petroleum and Geothermal Act 2000*, the *Offshore Minerals Act 2000* and the *Petroleum (Submerged Lands) Act 1982* to achieve the objectives of the marine park zones described under the *Marine Parks Act 2007*.

	GMUZ	HPZ	SZ	RAZ	Limits / Permits / Exceptions
Processing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
– mineral facility (mobile e.g. vessel based)	*				* Will depend on nature of proposal and its location
– mineral facility (permanent)					
– petroleum/geothermal facility					

Notes: All licence applications under the *Mining Act 1971* and the *Petroleum and Geothermal Act 2000* within and adjacent to marine parks are referred by the Minister for Mineral Resources and Development to the Minister for Sustainability, Environment and Conservation for concurrence. A referral process is required for the approval of on-ground exploration, and production activities, as part of the relevant mining regulation protocols between DMITRE and DEWNR. This provides for case-by-case assessment of each proposed activity. This includes activities deemed consistent with with the definition of the zone. The table indicates which activities are likely to be restricted when leases, licences and permits are considered by the Ministers. Activity proposals are considered by assessing risk. Activities likely to compromise the values of any zone would not be approved. A similar process is expected to be undertaken for activities authorised under the *Offshore Minerals Act 2000* and the *Petroleum (Submerged Lands) Act 1982*.

This table may be revised over time as new technologies and techniques are developed, to ensure that new technologies are appropriately considered, consistent with marine park zone objectives.

The following types of special purpose area may be identified in accordance with section 13(1)(c) of the *Marine Parks Act 2007*. Notwithstanding the zoning of the area, the following activities will be permitted in the special purpose areas.

Special Purpose Areas (significant economic development)

Activities comprising a development or project, or that part of a development or project, within the ambit of a declaration under section 46 of the *Development Act 1993*; and

Activities comprising development approved under section 49 (Crown development and public infrastructure) or section 49A (Electricity infrastructure development) of the *Development Act 1993*.

Special Purpose Areas (harbor activities)

Activities undertaken by or on behalf of the Minister responsible for the administration of the *Harbors and Navigation Act 1993*, or a port operator, for the purposes of maintaining or improving a harbor or port. (Harbor, port and port operator have the same meanings as in the *Harbors and Navigation Act 1993*.)

Special Purpose Areas (submarine cables and pipelines)

Activities undertaken for the purposes of maintaining or improving submarine cables or pipelines comprising public infrastructure (within the meaning of section 49 of the *Development Act 1993*).

Special Purpose Areas (transhipment)

Activities comprising the establishment, maintenance or improvement of facilities for a transhipment point prescribed or to be prescribed under the *Harbors and Navigation Regulations 2009*; and

Activities comprising or connected with loading or unloading a vessel at a transhipment point prescribed under the *Harbors and Navigation Regulations 2009*.

Special Purpose Areas (anchoring)

Activities comprising anchoring a commercial vessel (within the meaning of the *Harbors and Navigation Act 1993*) in an area recommended for that purpose by way of a Notice to Mariners by the Minister responsible for the administration of the *Harbors and Navigation Act 1993*.

Special Purpose Areas (shore-based recreational line fishing)

Recreational fishing from the shore by use of a hand line or rod and line. (Hand line, recreational fishing and rod and line have the same respective meanings as in the *Fisheries Management Act 2007*.)

Special Purpose Areas (Murray Mouth dredging)

Activities associated with dredging undertaken for the purposes of maintaining or improving water flows through the mouth of the River Murray.

Special Purpose Areas (Defence Prohibited Area)

Activities undertaken by the Department of Defence in relation to the Proof and Experimental Establishment (Port Wakefield).

Special Purpose Areas (Aquaculture)

Activities authorised under the *Aquaculture Act 2001*.

Appendix 3 List of Parties Consulted

Name		Affiliation	Organisation
Natalie	Ban	Research Fellow	James Cook University
James	Bennett	Fishery Management Officer	Department for Primary Industries and Resources SA
Michelle	Besley	Fishery Manager	Department for Primary Industries and Resources SA
Rex	Bichard	Abalone Fisher	Abalone Fisheries, Western Zone
Andrew	Burnell	Principal Advisor	Department of Environment and Natural Resources
Mark	Cant	Chief Executive Officer	Regional Development Australia, Whyalla
Jenny	Cassidy	Senior Project Officer	Department for Transport, Energy and Infrastructure
Dave	Cockshell	Chief Petroleum Geophysicist	Department for Primary Industries and Resources SA
Shaun	de Bruyn	Manager	South Australian Tourism Commission
Graham	Edgar	Senior Research Fellow	University of Tasmania
Jon	Emmett	Project Coordinator, Marine Parks Project	Department of Environment and Natural Resources
Alice	Fistr	Manager, Fisheries Policy	Department for Primary Industries and Resources SA
Ian	Fitzgerald	Secretary	South Australian Recreational Fishing Advisory Council
David	Hitchcock	Director, Environment & Infrastructure	The Local Government Association of SA
Peter	Hollister	Director, Marine Transport and Policy	Department for Transport, Energy and Infrastructure
Vera	Hughes	Team Leader, Legislation and Governance	Department of Environment and Natural Resources
Ian	Janzow	Member	Metropolitan Fishers Alliance
Sean	Kalling		Tony's Tuna International
Keld	Knudsen	Senior Policy Adviser	Australian Petroleum Production and Exploration Association
Peter	Lauer	Manager Aquaculture Policy, Planning and Environment Unit	Primary Industries and Regions South Australia
David	Lake	Manager	South Australian Tourism Commission
Nigel	Long	Director Corporate and Social Responsibility	South Australian Chamber of Mines and Energy
Neil	MacDonald	Executive Officer	Charter Boat Owners and Operators Association
	Members		Marine Park Council
	Members		South Australian Regional Organisation of Councils

Name		Affiliation	Organisation
	Members	The Scientific Working Group	Department of Environment and Natural Resources
Samara	Miller	Executive officer	Abalone Industry Association of SA Inc.
Angus	Mitchell	Principal Policy Officer	Department of Environment and Natural Resources
Gary	Morgan	Chairman	Wildcatch Fisheries SA
Steve	Moriarty	Rocklobster Fisher	Rock lobster fisheries
Merilyn	Nobes	Policy Manager, Fisheries and Aquaculture	Department for Primary Industries and Resources SA
Peter	Noble	Secretary	Surveyed Charter Boat Owners and Operators Association
Justin	Phillips	Executive Officer & Industry Liaison Officer (PIFS)	South Australian Rock Lobster Advisory Council, South East Professional Fishermen's Association, Northern Zone Rock Lobster Fishing Association
Keith	Rowling	Fishery Manager	Department for Primary Industries and Resources SA
Brenton	Schahinger	Chairman	South Australian Recreational Fishing Advisory Council
Rob	Shaw		Department for Primary Industries and Resources SA
Scoresby	Shepherd	Senior Research Fellow	South Australian Research and Development Institute
Emmanuel	Sloan	Manager, Aquaculture Planning Unit	Department for Primary Industries and Resources SA
Sean	Sloan	Director of Fisheries and Aquaculture Policy	Primary Industries and Regions South Australia
Adam	Stanford	Commercial Analyst	South Australian Tourism Commission
Graham	Tapley	President	South Australian Sardine Industry
Chris	Thomas	Branch Manager	Department of Environment and Natural Resources
Lianos	Triantafillos	Fishery Manager	Department for Primary Industries and Resources SA
Hank	van der Wijngaart	President	Scuba Divers Federation of SA
Tim	Ward	Program Leader, Wild Fisheries	South Australian Research and Development Institute
Paul	Watson	Executive Officer	South Australian Sardine Industry Association
Scott	Weaver	President	Charter Boat Association of SA
Peter	Welch	Executive Officer	Marine Fishers Association
Ian	Winton	Deputy Chairman	South Australian Recreational Fishing Advisory Council
Alison	Wright	Project Coordinator, Marine Parks	Department of Environment and Natural Resources

Name		Affiliation	Organisation
Qifeng	Ye	Acting Chief Scientist	South Australian Research and Development Institute

Appendix 4 MPSIAT feedback

Appendix Table 4-1 General views about the Neptune Islands Group Marine Park

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't know
Fully understand scientific arguments in favour of this Marine Park	2	1	0	0	1	0
Establishment of this Marine Park is based on sound scientific evidence	3	0	0	0	1	0
DENR Preliminary Marine Park zone for this Marine Park is about right	3	0	1	0	0	0
MPLAG zone advice for this Marine Park is about right	2	0	1	0	1	0
More information is needed about this Marine Park & how it will operate	1	0	1	1	1	0

Note: 4 of 12 members responded to the MPSIAT.

Source: Australian Workplace Innovation and Social Research Centre MPSIAT 2011

Appendix Table 4-2 Tourism, education & wellbeing impacts for Neptune Islands Group Marine Park

	Very unlikely	Unlikely	Neither likely nor unlikely	Likely	Very likely	Don't know
MP likely to increase tourism in our area						
DENR zone	3	0	0	0	1	0
MPLAG zone	2	1	0	1	0	0
There will be more opportunity for charter boats to exploit ecotourism opportunities						
DENR zone	3	0	0	0	1	0
MPLAG zone	2	1	0	1	0	0
MP will provide increased opportunities for education about marine life						
DENR zone	2	0	1	0	1	0
MPLAG zone	2	0	1	0	1	0
MP will provide increased opportunities for our understanding of marine conservation issues						
DENR zone	2	0	1	0	1	0
MPLAG zone	2	0	1	0	1	0
MP will create new employment opportunities for local people						
DENR zone	3	0	0	0	1	0
MPLAG zone	3	0	1	0	0	0
MP will have no impact (positive or negative) on me or my family						
DENR zone	2	0	1	0	1	0
MPLAG zone	3	0	1	0	0	0
MP will improve the quality of life of people in my community						
DENR zone	3	0	0	1	0	0
MPLAG zone	3	0	1	0	0	0
MP will improve my personal quality of life						
DENR zone	3	0	1	0	0	0
MPLAG zone	3	0	1	0	0	0
MP will negatively change our way of life*						
DENR zone	2	0	1	0	1	0
MPLAG zone	3	0	0	0	1	0

Note: 4 of 12 members responded to the MPSIAT. *Question is negatively scored.

Source: Australian Workplace Innovation and Social Research Centre MPSIAT 2011

Appendix Table 4-3 Culture and heritage impacts for Neptune Islands Group Marine Park

	Very unlikely	Unlikely	Neither likely nor unlikely	Likely	Very likely	Don't know
MP will respect the interests of Aboriginal communities						
DENR zone	1	1	1	1	0	0
MPLAG zone	1	1	1	1	0	0
MP will help preserve Aboriginal culture & heritage						
DENR zone	1	1	1	1	0	0
MPLAG zone	1	1	2	0	0	0
MP will help preserve local Australian culture & heritage						
DENR zone	2	1	1	0	0	0
MPLAG zone	2	1	1	0	0	0
MP will help maintain our community identity as a fishing centre						
DENR zone	2	1	1	0	0	0
MPLAG zone	2	1	1	0	0	0

Note: 4 of 12 members responded to the MPSIAT.

Source: Australian Workplace Innovation and Social Research Centre MPSIAT 2011

Appendix Table 4-4 Recreation & fishing impacts for Neptune Islands Group Marine Park

	Very unlikely	Unlikely	Neither likely nor unlikely	Likely	Very likely	Don't know
MP will help to encourage recreational activities						
DENR zone	3	0	0	1	0	0
MPLAG zone	3	0	0	1	0	0
MP will discourage recreational fishing*						
DENR zone	2	0	0	0	2	0
MPLAG zone	3	0	0	0	1	0
MP will bring better local facilities e.g. for recreation & fishing						
DENR zone	2	0	0	1	1	0
MPLAG zone	3	0	0	1	0	0
MP will bring a wider range of activities for local people to participate in						
DENR zone	2	0	0	1	1	0
MPLAG zone	3	0	0	1	0	0
Any significant losses in commercial fishing would be very damaging for my family*						
DENR zone	2	0	0	0	2	0
MPLAG zone	2	0	0	0	2	0
Any significant losses in commercial fishing would be very damaging for the community*						
DENR zone	2	0	0	0	2	0
MPLAG zone	2	0	0	0	2	0

Note: 4 of 12 members responded to the MPSIAT. *Question is negatively scored.

Source: Australian Workplace Innovation and Social Research Centre MPSIAT 2011

Appendix Table 4-5 Population & housing impacts for Neptune Islands Group Marine Park

	Very unlikely	Unlikely	Neither likely nor unlikely	Likely	Very likely	Don't know
MP will bring too many tourists here & change the quality of our life						
DENR zone	3	1	0	0	0	0
MPLAG zone	2	2	0	0	0	0
MP will see too many locals leaving the area						
DENR zone	2	1	0	1	0	0
MPLAG zone	3	0	1	0	0	0
MP will increase property prices making it more difficult for locals to buy houses						
DENR zone	3	1	0	0	0	0
MPLAG zone	3	1	0	0	0	0
MP will lead to a lowering of beachfront property prices						
DENR zone	3	1	0	0	0	0
MPLAG zone	3	1	0	0	0	0

Note: 4 of 12 members responded to the MPSIAT.

Source: Australian Workplace Innovation and Social Research Centre MPSIAT 2011

Appendix Table 4-6 Community response impacts for Neptune Islands Group Marine Park

	Very unlikely	Unlikely	Neither likely nor unlikely	Likely	Very likely	Don't know
Our community will adapt well to having the MP						
DENR zone	2	1	0	0	1	0
MPLAG zone	1	1	0	1	1	0
Our community is strong enough to manage changes brought by the MP						
DENR zone	2	1	0	0	1	0
MPLAG zone	1	1	0	1	1	0
A number of potential business opportunities will be brought by the MP						
DENR zone	3	0	0	1	0	0
MPLAG zone	2	1	0	1	0	0
Need for training programs to help people adapt to new occupations associated with the MP						
DENR zone	2	0	2	0	0	0
MPLAG zone	1	1	2	0	0	0
MP will divide our community into those for & against it*						
DENR zone	1	1	0	0	2	0
MPLAG zone	1	1	0	0	2	0
MP will be a source of pride to this community						
DENR zone	3	0	0	1	0	0
MPLAG zone	2	1	0	1	0	0
MP will increase number of events & other activities that bring the community together						
DENR zone	3	0	1	0	0	0
MPLAG zone	2	1	1	0	0	0

Note: 4 of 12 members responded to the MPSIAT. *Question is negatively scored.

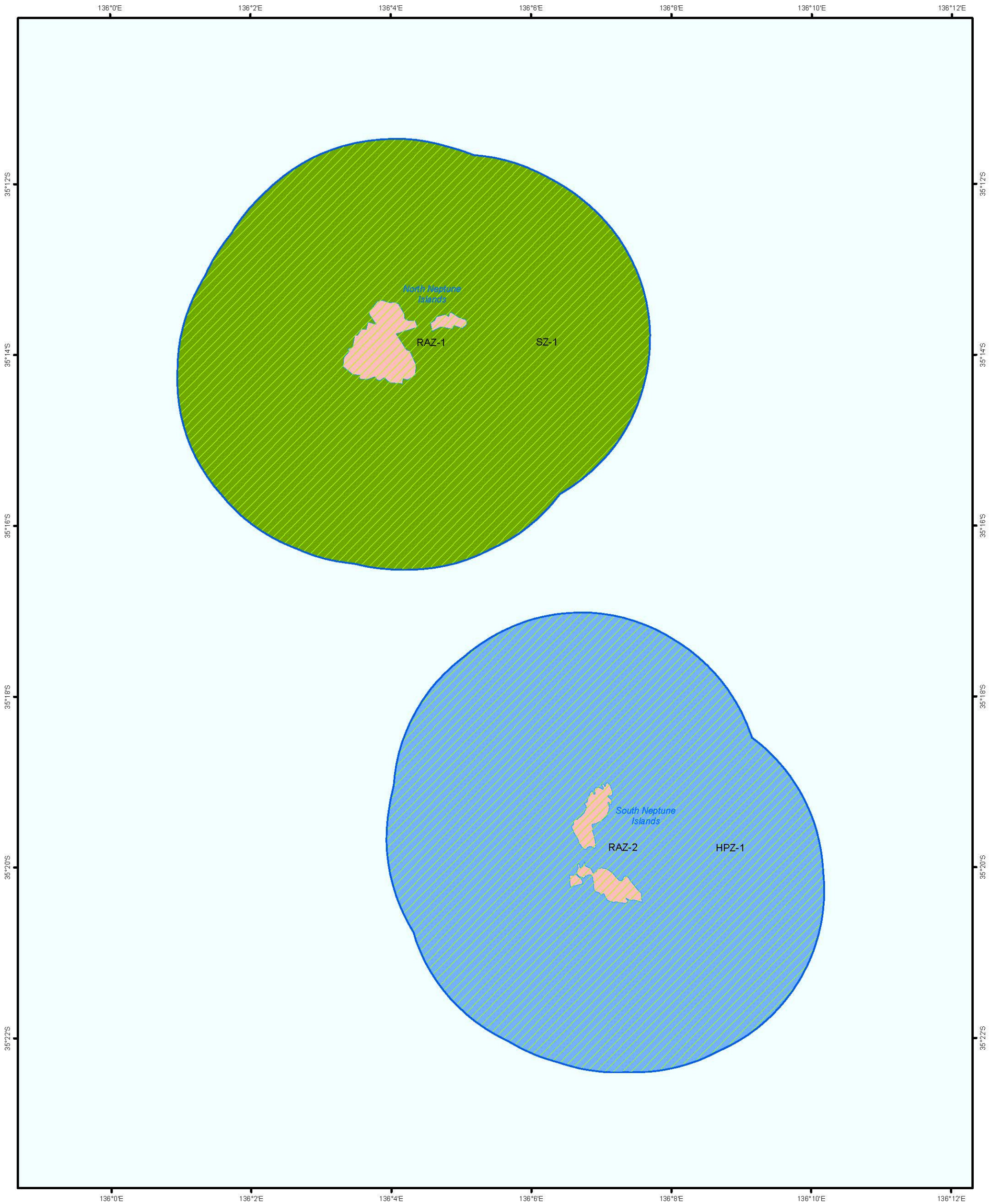
Source: Australian Workplace Innovation and Social Research Centre MPSIAT 2011

Appendix 5 Map of Marine Park Showing Draft Zoning

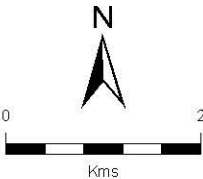
Appendix Figure 5-1 Map of Marine Park Showing Draft Zoning

See next page.

Marine Park 7 - Neptune Islands Group



- | Marine Park Draft Zoning | Topographic |
|-----------------------------------|------------------------------------|
| Restricted Access Zone (Existing) | Existing Reserves under other Acts |
| Sanctuary Zone | Marine Park Boundary |
| Habitat Protection Zone | Coastline (median high water) |



THIS MAP IS INDICATIVE ONLY AND IS NOT
INTENDED FOR NAVIGATIONAL PURPOSES

Produced by Marine Parks Project
Department of Environment, Water and Natural Resources
GPO BOX 1047 Adelaide SA 5001
www.marineparks.sa.gov.au

Data Source Marine Parks, NPWSA,
Topographic Data
Coastline (median high water) - DEWNR
6 August 2012

**Compiled
Projection
Datum** Lambert Conformal Conic
Geocentric Datum of Australia, 1994

© Copyright Department of Environment, Water and Natural Resources 2012.
All Rights Reserved. All works and information displayed are subject to Copyright. For
the reproduction or publication beyond that permitted by the Copyright Act 1968 (Cwth),
written permission must be sought from the Department.
Although every effort has been made to ensure the accuracy of the information displayed,
the Department, its agents, officers and employees make no representations, either express
or implied, that the information displayed is accurate or fit for any purpose and expressly
disclaims all liability for loss or damage arising from reliance upon the information displayed.

