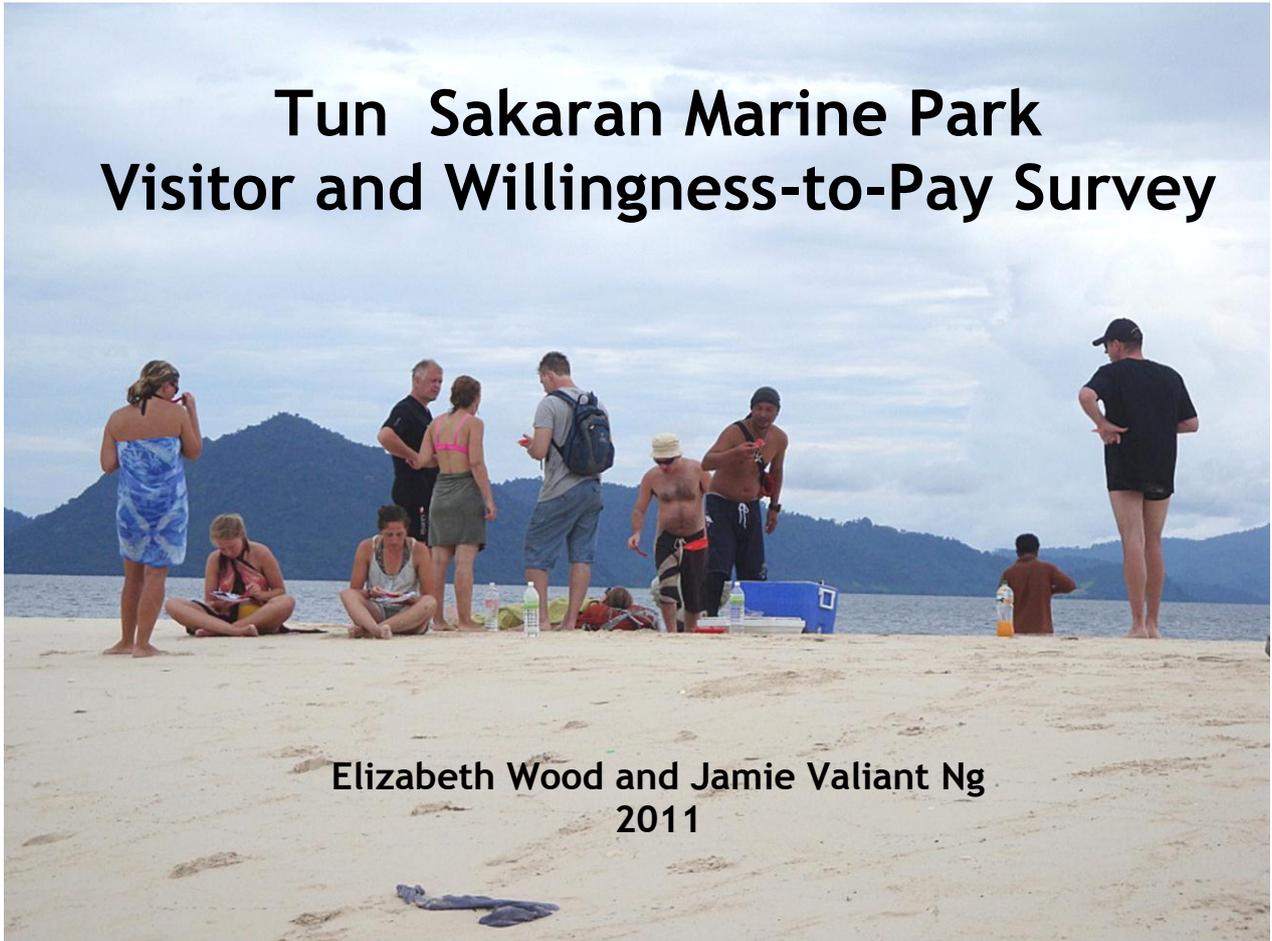


Semporna Islands Darwin Project

Capacity building to enhance Marine Protected Area effectiveness

Tun Sakaran Marine Park Visitor and Willingness-to-Pay Survey



Elizabeth Wood and Jamie Valiant Ng
2011



Contact information

Dr Elizabeth Wood: Marine Conservation Society; Semporna Islands Darwin Project
Manager. ewood@f2s.com; elizabeth.wood@mcsuk.org

Jamie Valiant Ng: SIDP/Sabah Parks: Community Outreach & Public Awareness Officer.
jmieval@hotmail.com

Helen Brunt: SIDP Sabah Coordinator: helen@sempornaislandsproject.com

Sabah Parks, PO Box 163, 91307 Semporna, Sabah, Malaysia
PO Box 10626 Kota Kinabalu, Sabah www.sabahparks.org.my sabahparks@gmail.com

Marine Conservation Society, Unit 3 Wolf Business Park, Alton Road, Ross-on-Wye,
Herefordshire HR9 5BU UK
www.mcsuk.org info@mcsuk.org

Semporna Islands Darwin Project

www.sempornaislandsproject.com

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Tun Sakaran Marine Park

Visitor and Willingness-to-Pay Survey

Contents

Introduction and Aims	2
Summary	2
Methods	4
1. Survey Results	
1.1. Respondent profile	5
1.2. Places visited and activities undertaken	7
1.3. Interest in alternative activities	8
1.4. Diver experience and dive operators	10
1.5. Rating of quality and health of reefs in TSMP	11
1.6. Additional comments	13
1.7. Willingness-to-pay	15
2. Discussion and conclusions regarding entry and diving fee	17
Annex 1. Letter to tour operators	20
Annex 2. Survey questionnaire	21

Introduction and aims

Tun Sakaran Marine Park was gazetted as a State Park in June 2004, to protect the area's spectacular features and rich biodiversity. The Park is under the management of Sabah Parks and it is planned that entry fees will be introduced in the near future. Whilst it would have been possible to follow the fee structure that is in place at Tunku Abdul Rahman Marine Park, informal feedback from current users of TSMP suggested that these fees would be too high because of the current lack of visitor facilities in TSMP and on-going issues such as fish-bombing and litter.

In order to be better able to judge the appropriate fee level to set for Tun Sakaran Marine Park, Sabah Parks requested that the Semporna Islands Darwin Project initiate a survey amongst visitors to assess their 'Willingness-to-pay' for visiting the Park. This was carried out as a collaborative effort with Sabah Parks.

The survey also includes a section on potential visitor interest in community-based activities that could be offered to visitors, such as overnight 'homestay' or visits to see 'alternative activities'. This information was needed for the SIDP programme looking into alternative livelihoods.

Summary

- The aim of this survey was to obtain feedback from visitors about their experiences in the Tun Sakaran Marine Park and to find out what they would be willing to pay for entrance and diving, on the basis that the fees would go directly to promote conservation.
- The survey was carried out on the popular tourist islands of Mantabuan and Sibuan and at Pom Pom Resort adjacent to the Park. 250 visitors were interviewed over a period of about 4 weeks. Whilst a larger sample size would have been useful, the results still provide a valuable insight into visitor experiences, perceptions and willingness-to-pay.
- 27 countries were represented in the survey. 23% of the total whose nationality was provided were from Malaysia, and the next most represented were from the UK (16%) and China (12%).
- 74% of respondents said that this was their first visit to the Tun Sakaran Marine Park and 14% said it was their second visit. The remaining 12% had been more often.
- 168 respondents (67%) said that they were scuba diving in Tun Sakaran Marine Park. Of this total 24 said that they also went snorkelling. A further 54 respondents (21%) said they had just gone for snorkelling (no diving) and 14 (5%) had been to the Park specifically for a picnic and day out.
- When asked about alternative activities, 70% of respondents said they were interested in a half-day visit to a giant clam farm and underwater trail, 68% in overnight homestay accommodation in a Bajau village, and 60% in a one day trip incorporating a visit to a seaweed farm or giant clam farm, local-style lunch and island tour, together with pottery or other craft demonstration. 50% of visitors were interested in a half-day visit to a seaweed farm.

- 156 of the respondents were scuba divers and of this total 42% said they learnt to dive in 2011 and 74% of these new divers did their training in Malaysia - most of them in Semporna. 13% of respondents learnt to dive in 2010 and a total of 33% from 2000-2009. These divers trained in a range of localities around the world, including Thailand, Philippines, Australia, Egypt and the UK.
- 92% of the divers said that they would be making between 1-10 dives in the Park during their trip. Of the remaining 8%, most were expecting to make between 10-30 dives during their stay.
- One third of the divers said that their diving experience was excellent and half said it was good, with only 16% rating it average and no-one saying it was poor or very poor.
- Half of the respondents thought the reefs were healthy and 36% thought they were average. Only 5% considered them very healthy while at the opposite extreme, 4% said they were in an unhealthy/poor condition. There did not appear to be any major correlation between a diver's experience and his/her evaluation of the reef.
- 94% of respondents said that they were concerned about environmental issues; only 6% said they were not.
- Respondents were invited to comment on any subject they felt was important regarding their visit to the Tun Sakaran Marine Park. The issues raised were lack of facilities, rubbish on the islands and in the sea (mentioned by 30 respondents) and fish bombing and damaged reefs. Positive comments were made about the beautiful islands, natural environment and marine life.
- Regarding entry to the Park, the fee which the majority (i.e. more than 50%) of Malaysians were willing-to-pay was just under RM10, while for other nationalities it was about RM16.
- Regarding entry + diving in the Park, the fee which the majority (i.e. more than 50%) of respondents was willing-to-pay was just over RM20, regardless of nationality.
- It is recommended that a single fee is introduced that covers all activities in TSMP. This would follow the system that has been running successfully for many years in Australia for the Great Barrier Reef Marine Park and at Bunaken National Park in Indonesia and a number of other MPAs.
- The recommended daily rate (environmental management charge) for all activities based on this WTP survey and the MPAs mentioned above is RM20 for non-Malaysians and RM10 for Malaysians.
- The recommended annual rate (environmental management charge) for all activities is RM60 for non-Malaysians and RM30 for Malaysians.

Methods

Prior to the start of the survey a letter (Annex 1) was circulated to tour operators to explain why and when the interviews would be taking place, and to request their compliance and assistance.

Information was collected through the use of a questionnaire (Annex 2) that was designed to obtain general information about the visitors and their experience, as well as their Willingness-to-Pay for entry and diving. Questions were kept to a minimum and were as straightforward as possible in order to encourage people to participate. The questionnaire was developed by SIDP in collaboration with Sabah Parks and several drafts produced prior to the final version.

The survey was targeted specifically at visitors to Tun Sakaran Marine Park and the interviews were carried out on the popular tourist islands in the Park (Mantabuan and Sibuan), and at Pom Pom Resort adjacent to the Park. Generally, visitors were approached during the time that they were resting between dives and were willing to spare 10-15minutes to complete the survey.

Visitors were approached individually and asked if they would contribute to the survey. If they agreed they then had the option of filling in the form themselves, or giving verbal answers to the interviewer who filled in the form according to their responses. The questions were in English but the interviewers translated to/from Bahasa Malaysia if needed.

Every effort was made to get the visitors to answer all questions, but there are some gaps. These have been taken into account for the analysis, and sample numbers (n) are given for each question.

Field Survey Team

Jamie Valiant Ng
Maznah Binti Laggu
Mohd. Ali Bin Atak
Yusri Pahapat
A. Rashid Bin Sirukam
Hashim Matusin (Practical Student from University Malaysia Sabah)

1. Survey results

1.1. Respondent profile

a) Nationality

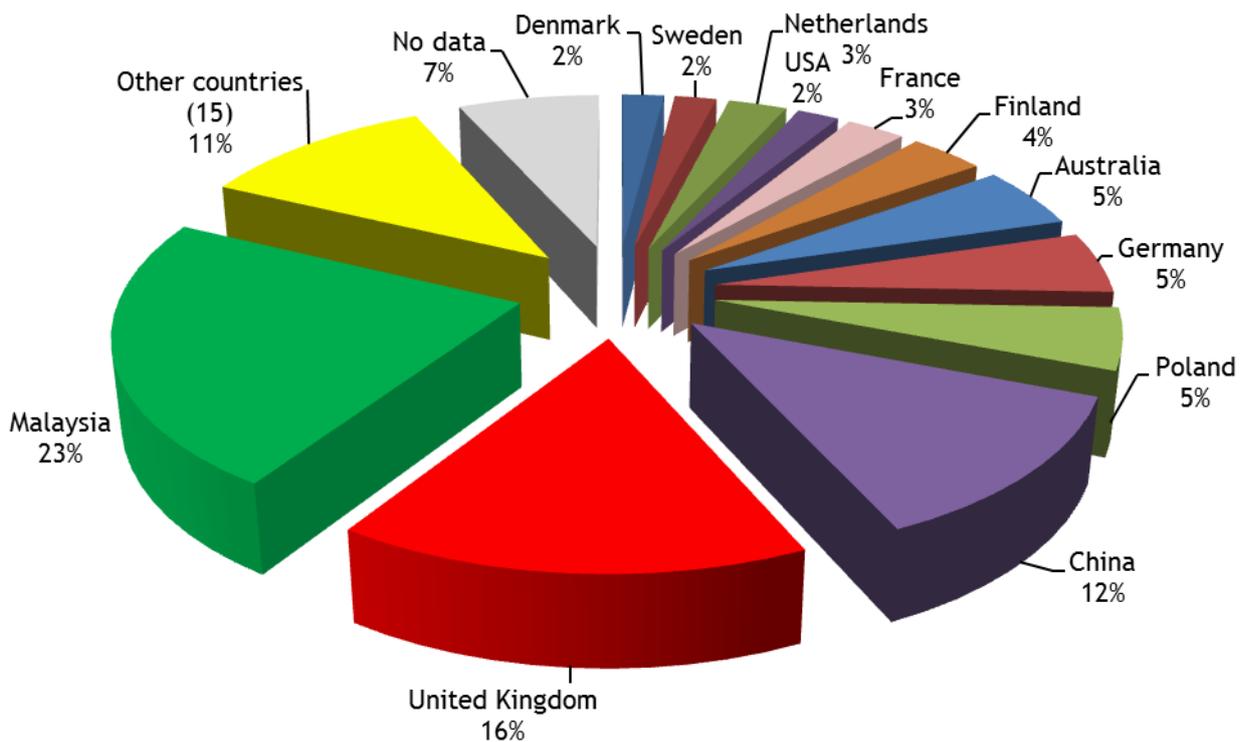
The results (Table 1 & Figure 1) show that 27 nationalities were represented in the survey. No information on nationality was available from 17 respondents.

23% of the total whose nationality was known were from Malaysia, and the next most represented were from the UK (16%) and China (12%) (Figure 1).

Table 1.
Number of respondents by country of origin (n=250).

Australia	13
Austria	3
Belgium	1
Canada	3
China	31
Czech Republic	3
Denmark	5
Finland	9
France	7
Germany	13
Hong Kong	2
Iraq	1
Japan	2
Malaysia	57
Netherlands	7
New Zealand	1
Norway	1
Poland	13
Romania	1
Slovenia	2
Spain	2
Sweden	5
Switzerland	2
Thailand	1
UK	40
Ukraine	3
USA	5
No data	17

Figure 1. Breakdown of visitors by country



Number of visits	Number of visitors
First visit	177
2	33
3	15
4-9	5
10-15	5
20	1
60	1

Table 2.
Previous visits to Tun Sakaran Marine Park based on responses from 238 visitors (no data from 12 respondents).

74% of respondents replied that this was their first visit to the Tun Sakaran Marine Park and 14% said it was their second visit. The remaining 12% had been more often, with one respondent reporting that he/she had visited 60 times.

c) Number of days visiting TSMP

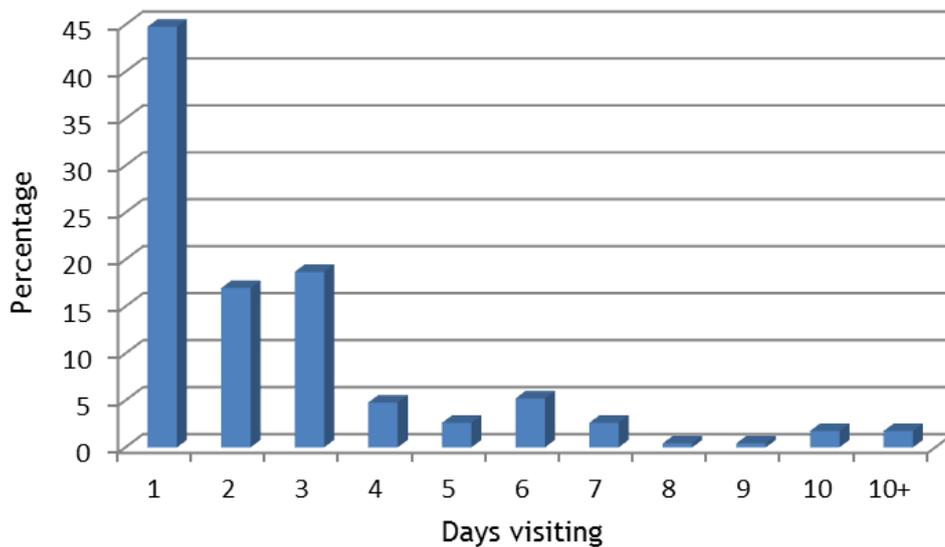


Figure 2. Number of days that respondents (n=236) reported they were visiting Tun Sakaran Marine Park on this trip.

44% of respondents said that they were visiting the Park for just one day, while 17% reported that their visits would be for 2 days, and 19% reported they would be visiting for 3 days. Longer visits were less common although 4 respondents were visiting for 20 days and one for 25 days.

d) Concern about environmental issues

94% of respondents who answered this question (n=243) said that they were concerned about environmental issues, only 6% said they were not.

1.2. Places visited and activities undertaken

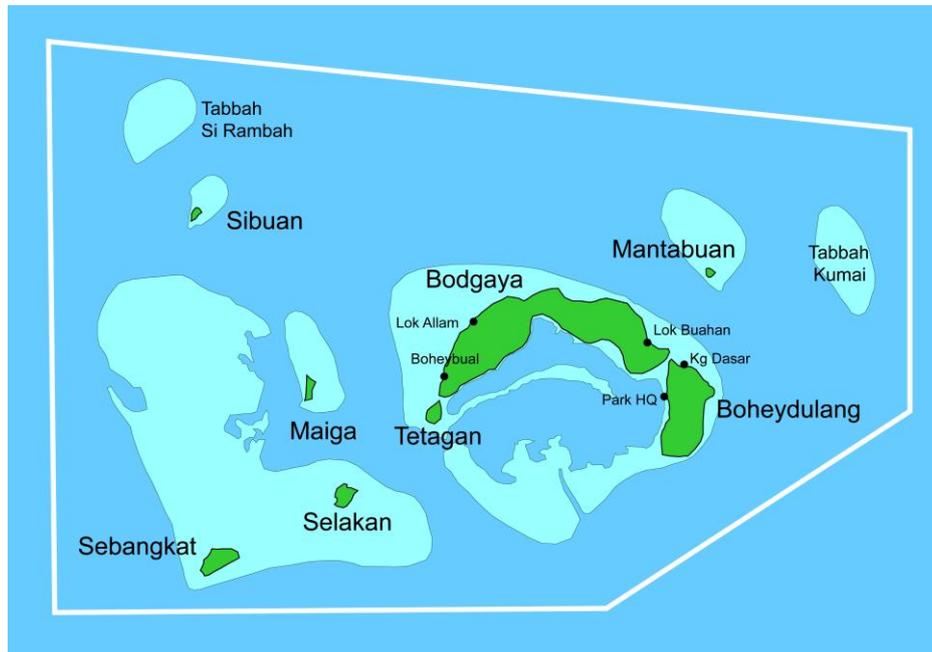


Figure 3. Map of Tun Sakaran Marine Park.

	N ^o	%
Boheydulang	3	1.3
Mantabuan	23	9.8
Mantabuan, Sebangkat	1	0.4
Sibuan	156	66.7
Sibuan, Boheydulang	4	1.7
Sibuan, Maiga	2	0.9
Sibuan, Maiga , Sebangkat	7	3.0
Sibuan, Maiga, Sebangkat, Mantabuan, Boheydulang	1	0.4
Sibuan, Maiga, Selakan	1	0.4
Sibuan, Mantabuan	28	12.0
Sibuan, Mantabuan, Maiga, Sebangkat	2	0.9
Sibuan, Mantabuan, Maiga	1	0.4
Sibuan, Mantabuan, Boheydulang	1	0.4
Sibuan, Sebangkat Reef	1	0.4
Sibuan, Sebangkat, Mantabuan, Boheydulang	1	0.4
Sibuan, Tabbah Si Rambah	2	0.9

Table 3. Places visited by respondents (n=234)

Sibuan is currently by far the most frequently visited location, either on its own, or in combination with other islands such as Maiga. Mantabuan is also popular.

168 respondents (67%) said that they were scuba diving in Tun Sakaran Marine Park (Table 4). Of this total 24 said that they also went snorkelling. A further 54 respondents (21%) said they had just gone for snorkelling (no diving) and 14 (5%) had been to the Park specifically for a picnic and day out.

Table 4. Activities undertaken by visitors (n=245)

Activity	%
scuba	67
snorkelling	21
Picnic	5
Photography	3

1.3. Interest in alternative activities

a) Half-day visit to a seaweed farm

As shown in Figure 4, 50% of visitors were interested in visiting a seaweed farm, while 19% were unsure and 31% were not interested.

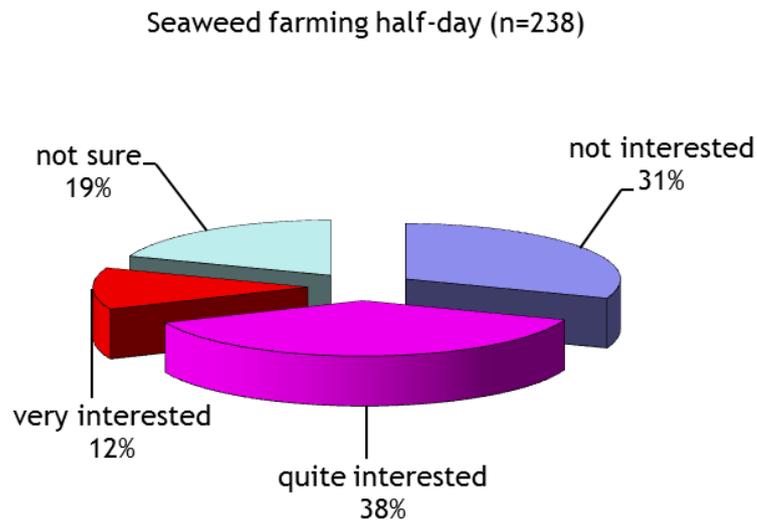


Figure 4. Level of interest in visit to seaweed farm

b) Half-day visit to giant clam farm and underwater trail

There was quite a high level of interest in visiting a giant clam farm and underwater trail, with 70% of respondents saying they interested. The remaining 30% were either not sure or not interested.

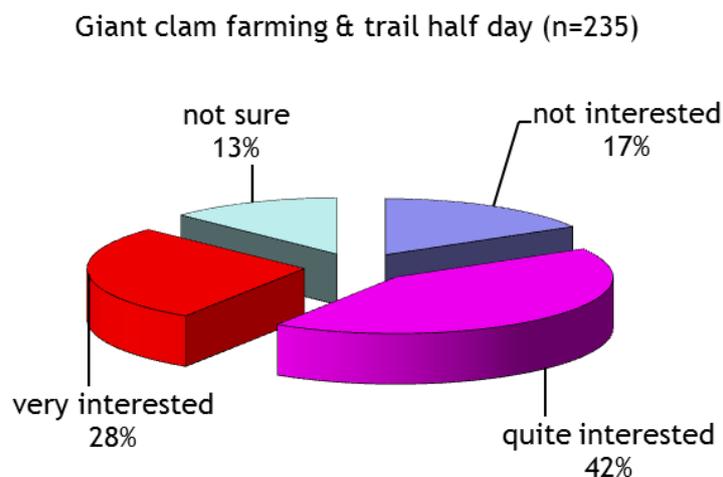


Figure 5. Level of interest in visit to giant clam farm and underwater trail.

c) One day visit to seaweed farm or giant clam farm, local-style lunch on island, tour of island, pottery or other craft demonstration.

Over 60% of respondents said that they were interested in a one day visit, while 16% were unsure and 23% were not interested.

One day visit to seaweed farm or giant clam farm, local-style lunch on island, tour of island & crafts (n=233)

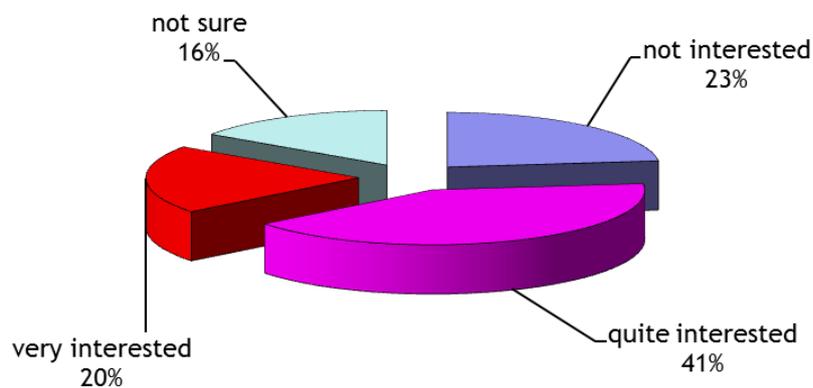


Figure 6. Level of interest in one day visit to local island.

d) Overnight stay in homestay accommodation in Bajau village

68% of respondents said that they were interested in homestay accommodation, while 11% were unsure and 21% were not interested.

Overnight stay in homestay accommodation in Bajau village (n=234)

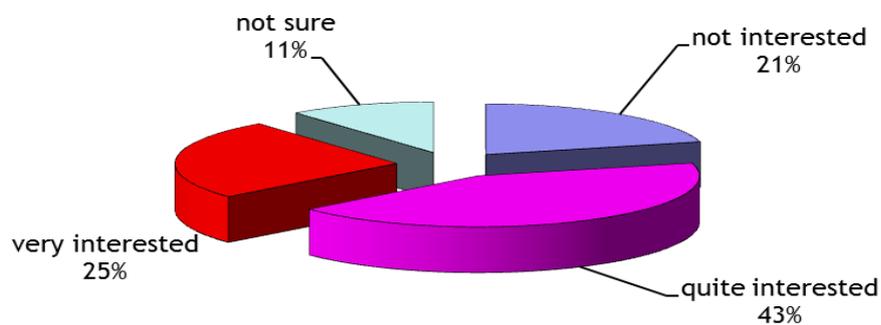


Figure 7. Level of interest in homestay accommodation in Bajau village

1.4. Diver experience and dive operators

The information in this section is based on the 156 respondents who said that they were divers.

66 respondents (42%) said they learnt to dive in 2011 and of these new divers, 49 (74%) did their training in Malaysia - most of them in Semporna.

13% of respondents learnt to dive in 2010 and a total of 33% from 2000-2009. These divers trained in a range of localities around the world, including Thailand, Philippines, Australia, Egypt and the UK.

Year trained	%
2011	42
2010	13
2000-2009	33
1990-1999	11
Pre 1990s	2

Table 5. Diver experience

Divers who trained in 2011 had done a maximum of 35 dives, although those who had trained in Semporna had done only between 1-10.

92% of respondents said that they would be making between 1-10 dives in the Park during their trip. Of the remaining 8%, most were expecting to make between 10-30 dives during their stay.

Blue Sea Divers	2
Borneo Speedy	6
Borneo Unlimited Marine Seasports (BUMS)	25
Dive Semporna	44
North Borneo	51
Pom Pom Island	3
Scuba Junkie	11
Singamata	15
Sipadan Scuba	1

Table 6. Number of respondents from each dive operator/ resort

1.5. Rating of quality and health of reefs in TSMP

a) Overall quality of underwater diving experience in TSMP

One third of the people interviewed said that their diving experience was excellent and half said it was good, with only 16% rating it average and no-one saying it was poor or very poor.

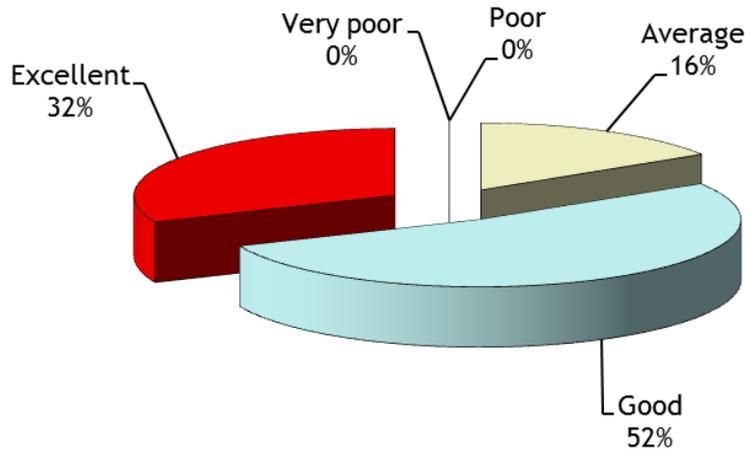


Figure 8. Respondent's rating of underwater diving experience (n=162)

b) Overall health of the coral reefs and marine life observed while diving/snorkelling in TSMP

Half of the respondents thought the reefs were healthy and 36% thought they were average. Only 5% considered them very healthy while at the opposite extreme, 4% said they were in an unhealthy/poor condition.

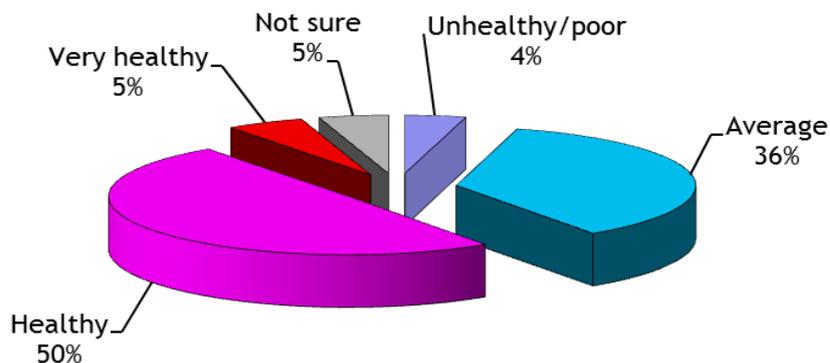


Figure 9. Respondent's rating of the condition of the reefs (n=171)

When people rated the reefs in terms of their health, we assumed they made their judgement against an 'expected standard' based on coral reefs they had seen in other places or images they had seen in books or on television.

In order to see if experience made a difference, the ratings given by new divers trained in 2011 were compared with those who had been trained two or more years ago (2009 - 1971).

As shown in Figure 11, there are some relatively minor differences in the two sets of data. Most of the more experienced divers thought the reefs were 'average' (40%) or healthy (36%). A similar proportion of the new divers (34%) also thought that the reefs were healthy, but more categorised them as either 'very healthy' or 'unhealthy' rather than 'average'. 10% of the new divers were not sure about making a judgement.

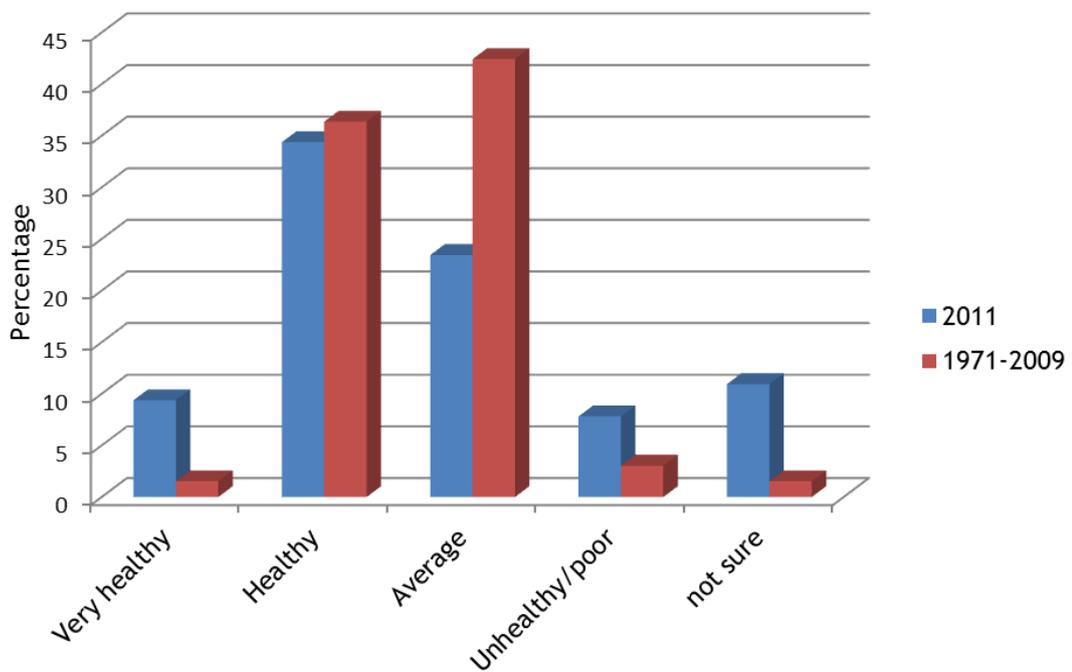


Figure 10. Assessment of reef health by new divers (trained in 2011, n=66) and more experienced divers (trained in 1971-2009, n=70).

1.6. Additional comments

Respondents were invited to comment on any subject they felt was important regarding their visit to the Tun Sakaran Marine Park. The comments have been divided into broad subject areas and are shown below:

Facilities

- Need to provide public jetty (3 people made this comment)
- Need facilities on the island.
- No food - wish good food and restroom.
- Set up toilet and wash room (4 people made this comment)

Rubbish

Thirty people complained specifically about the amount of rubbish / trash plastic bags and bottles and said that something should be done to clean up the sea and islands. A selection of the comments is included below:

- A lot of trash on the Sibuan Island and on the sea. Someone should clean it up.
- A lot of trash floating in the sea No one seems to keep the sea clean.
- More rubbish collection from the sea and island is needed.
- Beach and Reef Clean ups.
- More rubbish collection points in Semporna to stop rubbish floating on reefs.
- Get government funding to remove litter and provide better litter disposal for residents and educate.
- Sibuan - teaching the locals about keeping the island clean (for them and tourists).
- Litter on the beach at Sibuan could be cleared. Maybe by each dive boat taking a bit away each (even though it is probably the current that has brought it ashore).
- Conduct reef clean up dives around islands. Rubbish collection point for Bajau people on Island.
- Maybe do free dive for people to help clear the rubbish on the reef and sea bed.
- I think that the beaches and coral could be cleaned and rubbish to make for better viewing and to preserve the ocean life. I would pay more conservation fee if this was carried-out.

Fish bombing / damaged reefs

Eight people raised the issue of 'dynamite' fishing (i.e. fishing using explosives but the respondents were unaware of the actual materials used). Typical comments are shown below:

- Many reefs are destroyed because of dynamite fishing.
- Coral very damaged by dynamite. Saw dead floating fish on reef.
- You really can see how much is destroyed.
- More patrol boats to catch all the dynamite fishermen particularly at Mantabuan and Bohayan. Reef awareness days in local schools.

Conservation and protection

- Should have no fishing zone. Sabah Parks boats to patrol area.
- Close some reefs to allow recovery. Stop photography or impose limits.
- There wasn't enough regulation to protect marine life - people are touching corals and one shell was collected.
- Better to completely protect such an area and brief divers strictly.
- Tourism tax paid directly to the Bajau Laut people to encourage them to protect and benefit from the environment rather than fish. The more they protect the corals the more money they bring in.
- Must put deposit and make sure place is clean and clear. Then only can get back their deposit.
- If you are going to charge to enter the Park it would be best if money would be used to keep islands clean, also Homestay! Please do not change/ charge too much.
- Cheaper conservation fees for people staying longer.
- Not enough big fishes.

Mainly positive feedback

- Very nice place.
- A lot of fish, coral.
- Colourful coral. Many different kind of fish. Turtles.
- Great numbers of fish, turtles. Shame about plastic and rubbish.
- It's very good now, but I hope no hotel on this Island, natural is good.
- Don't change anything of the nature as well the tourists. It's perfect the way it is.
- Great combination with seeing the village on the islands and doing the dives.
- Interested to climb Boheydulang Hill.
- Awesome.
- Very beautiful.
- Beautiful Island.
- Keep the natural environment.
- Best island I have ever been to.
- Few people are here which is quite nice.
- Very good because first time saw natural fish
- This island give a passion to the image of Sabah generally and Semporna specifically. Hopefully TSMP can make lots of improvement regarding snorkeling and diving activity in this island.

1.7. Willingness-to-pay (WTP)

All visitors were asked what they would be willing to pay per day to enter the Park *without diving*. In addition, those interested in diving were asked specifically how much they would be willing to pay per day for entry that *included* diving. [Note: four WTP fees of RM1 or RM2 were included in the RM zero category].

a) WTP for entry to Tun Sakaran Marine Park

Malaysian respondents were willing-to-pay less than other nationalities, for example only 47% said they were willing to pay RM10, in contrast with 72% of other nationalities. 27% said they were not willing to pay a fee for entry, in contrast with about 20% of other nationalities.

In summary, the fee which the majority (i.e. more than 50%) of Malaysians were willing-to-pay was just under RM10, while for other nationalities it was about RM16.

When all respondents were combined, the majority (over 50%) were willing-to-pay about RM15.

Willing-to-pay up to	% of respondents Willing-to-pay		
	Malaysian n=54	Other nationalities (n=187)	All (n=241)
RM 0	100	100	100
RM 5	72.5	81.8	79.5
RM 10	46.6	72.2	66.2
RM 20	22.5	38.5	34.7
RM 30	20.6	20.3	20.2
RM 40	15	10.1	11.1
RM 50	13.1	6.4	7.8
RM 60	3.8	1.6	2
RM 70	3.8	0.5	1.2
RM 80	1.9	0	0.4
RM 90	1.9	0	0.4
RM 100	1.9	0	0.4

Table 7. Willingness-to-pay for entry to Tun Sakaran Marine Park

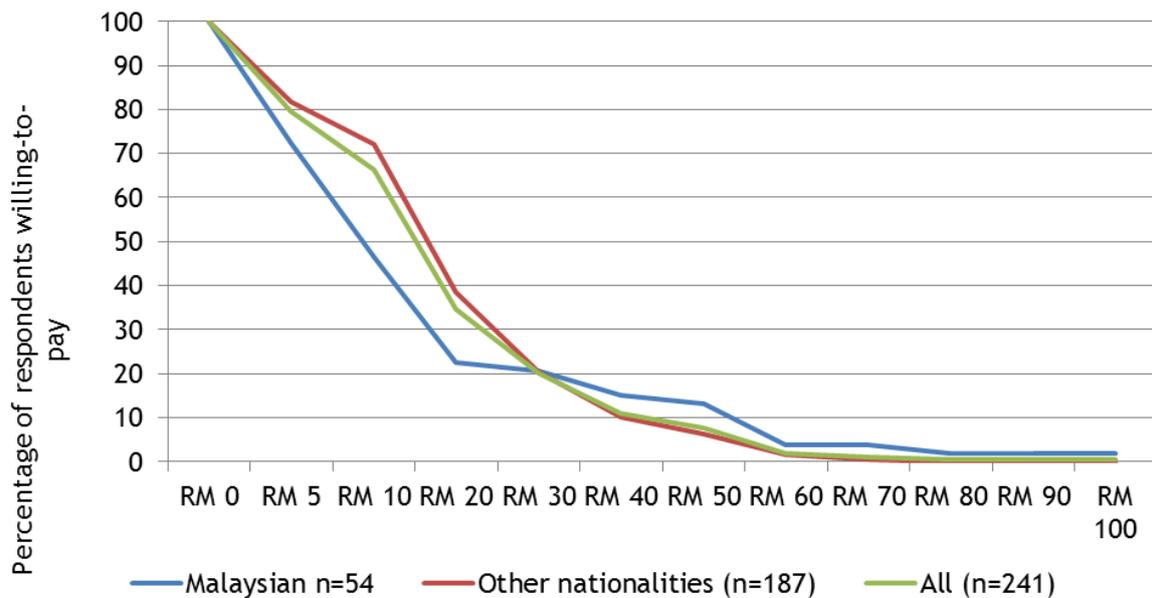


Figure 11. Willingness-to-pay for entry to Tun Sakaran Marine Park

b) WTP for diving in Tun Sakaran Marine Park

The results from the 3 categories is fairly similar and does not show the lower willingness-to-pay offered by Malaysians for entry into the Park.

In summary, the fee which the majority (i.e. more than 50%) of respondents was willing-to-pay was just over RM20, regardless of nationality.

Just under 20% said they were not willing-to-pay anything for diving.

RM	% of respondents Willing-to-pay		
	Malaysian (n=32)	Other nationalities (n=159)	All (n=191)
RM 0	100.0	100.0	100.0
RM 5	84.4	80.5	81.2
RM 10	65.6	73.6	72.3
RM 20	53.1	54.7	54.5
RM 30	37.5	37.7	37.7
RM 40	31.2	28.3	28.8
RM 50	28.1	23.9	24.6
RM 60	6.2	15.7	14.1
RM 70	6.2	12.6	11.5
RM 80	6.2	10.7	9.9
RM 90	6.2	9.4	8.9
RM 100	6.2	8.8	8.4
RM 150	3.1	2.5	2.6
RM 200	0	2.5	0.5
RM 250	0	0.6	0.5

Table 8. Willingness-to-pay for entry to Tun Sakaran Marine Park

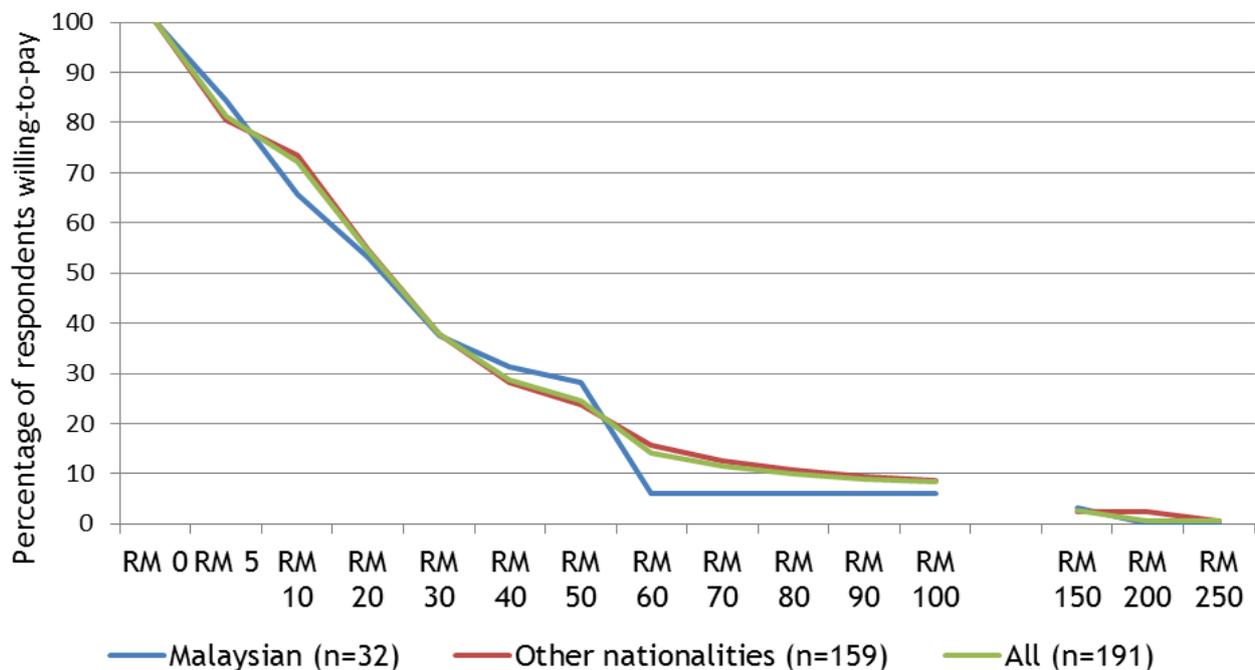


Figure 12. Percentage of respondents willing to pay different rates for diving.

2. Discussion and conclusions regarding entry and diving fee

Entry to some marine protected areas (MPAs) is free, but it is more common for a charge to be made, in order to help the MPA towards financial sustainability. The rate varies greatly across the world, from under US\$1 to over US\$100 (e.g. Galápagos). It is quite common for there to be different rates according to the category of person visiting and the activity they are undertaking. For example, foreign visitors may be charged more than locals, and children or students may be offered special rates. Scuba divers and snorkellers are sometimes charged an extra fee, and this may be justified if there is a need to control numbers or if the diving and snorkelling offers something truly remarkable.

One consideration when deciding the amount to be charged is people's 'willingness-to-pay' (WTP). The principle here is that if a site is very special and/or very well managed, then visitors may be prepared to pay quite a significant sum to enter the MPA. A number of studies have also shown that people are willing-to-pay higher sums if they know that the money collected is going directly to support conservation or community livelihood initiatives in the protected area. Studies in the Philippines in 2000 showed that WTP at 3 popular dive sites was between US\$ 3.29-5.34 (RM 12 - 20).

Currently in Sabah, the following rates apply:

		Non-Malaysians	Malaysians
Tunku Abdul Rahman Park	Snorkelling, picnic, trekking	RM 10/day	RM2/day
	Diving	RM 50/day or course	RM 20/day or course
Sipadan	Diving	RM 40/day	RM 40/day

Should a separate charge be made for diving?

It is worth seriously considering and reviewing whether a separate charge should be made for divers, or can be justified. Provided they are properly briefed, divers are unlikely to cause any more environmental damage than people who go snorkelling. In fact, snorkellers can cause more damage because they are in shallow water amongst some of the best coral areas and may kick or rest on the reef.

Having a single fee that covers all activities in TSMP would follow the system that has been running successfully for many years in Australia for the Great Barrier Reef Marine Park. Here there is an '*Environmental Management Charge*' of Au\$4.50 per day (about RM 12), with a maximum of Au\$ 12 (about RM 33) on any one trip (i.e. if the visitor is on a live-aboard or staying on an island in the Park for 7 days, he/she still only pays Au\$ 12).

A single fee is also charged at the well-know Bunaken National Park in Indonesia (see box on next page). The daily entry fee for this Park is US\$6 (RM20) or US\$17 (RM52) for a full year.



BUNAKEN NATIONAL PARK ENTRANCE FEE:

All visitors to the Bunaken National Park (divers and non-divers) are required to pay an entrance fee, in accordance with North Sulawesi Provincial Government Provincial Law Number 9/2002. The entrance fee for foreign visitors is Rp 50,000 per daily ticket (approximately US\$6), or Rp 150,000 (approximately US\$17) for a waterproof plastic entrance tag valid for the full calendar year.

Entrance tags and tickets can be purchased direct from all NSWA members, or from ticket counters on Bunaken Island and on Siladen Island. They must be carried at all times that guests' are within the park boundaries, and tags can easily be affixed to guests' diving or snorkeling gear or on backpacks. Enforcement of the entrance fee system is conducted via spot checks by park rangers on land and at sea.

The entrance fee system has been adapted from the well-known Bonaire Marine Park system, and the proceeds from the sales of the entrance tags are managed by the Bunaken National Park Management Advisory Board (BNPMAB), a multi-stakeholder board that NSWA is a member of. The system has been very successful in raising over \$250,000 for conservation programs in the Bunaken Marine Park since its inception in 2001.

Please read: [The Bunaken Entrance Fee - Questions and Answers](#)

Proposed rates for Tun Sakaran Marine Park

It is important that the entrance (or environmental management) fee for TSMP is set at a level that is fair and reasonable, and that visitor satisfaction is high. Currently, the TSMP is only just 'getting off the ground' in terms of management and it is evident that there are still issues such as, rubbish, fish blasting and lack of facilities. It would be preferable to charge low to moderate fees in the first instance, but with an option to increase them later, for example if visitor numbers need to be controlled. If it is too high at the outset, people may feel aggrieved and either not visit or try and avoid paying.

This current survey suggests that 50% of Malaysians would be willing-to-pay just under RM10 for entry to the Park, while other nationalities were willing to pay up to RM16. Regarding entry + diving in the Park, the fee which the majority (i.e. more than 50%) of respondents was willing-to-pay was just over RM20, regardless of nationality.

The original suggestion to charge RM50 for diving in line with TARP would seem to be inappropriate, and indeed this fee seems very high when compared to the 'world class diving' at Sipadan where the fee is only RM40. Also, as noted above, there is a strong argument for having a 'combined' entry ticket that covers all activities.

There are also sound reasons for having a maximum 'trip' fee (as in the Great Barrier Reef) or a fee that is valid for a year (e.g. Bunaken, Bonaire).

Proposed environmental management
charge for TSMP
Daily rate, including diving and snorkelling

	Non-Malaysian	Malaysian
Adult	RM 20	RM 10
Youth (aged 5-16yrs)	RM 5	RM 2
Child (under 5)	No charge	No charge

The suggested rates above are for a one-day visit, but there are other options to consider. For example, it might be appropriate to offer a 3-day, 7-day or 14-day pass at different rates. Another option is to follow the entry fee system developed in Bonaire in the Caribbean where the price for a 'tag' ticket is US\$ 25 (RM 60) and this is valid for one calendar year. Bunaken (Sulawesi) has adopted a similar scheme (see box on previous page) and currently charges Rp 150,000 per year to foreigners (approximately US\$ 17 or RM 52), but offers an optional one-day ticket (US\$6 or RM 20 per day).

The advantage of the 'tag system' is that it is a one-off payment, so avoiding the necessity of collecting fees every day. Another advantage is that the tag has to be attached to the visitor's dive gear or bag, so it is very obvious if someone tries to avoid paying. It appears that the tags have become 'collectors items' (new ones are designed each year) and that visitors like having them as souvenirs, so in most cases people are willing to pay this amount. One potential disadvantage of the tag system is that after visitors have left they may try and sell their tags to other visitors. However, there are measures that can be introduced to make it more difficult to cheat the system.

It is suggested that consideration is given to developing and carrying out a trial 'tag' system for TSMP. If planning began now, a trial could begin in 2012. In the meantime, it would be sensible to introduce a daily entry fee, which could be done quite quickly.

Proposed environmental management
charge for TSMP
Annual rate, including diving and snorkelling

	Non-Malaysian	Malaysian
Adult	RM 60	RM 30
Youth (aged 5-16yrs)	RM 15	RM 6
Child (under 5)	No charge	No charge

In the longer term, if facilities such as buoys and pontoons are provided in TSMP, it may be considered appropriate to charge a special 'reef usage fee' for snorkellers and divers.

It is also anticipated that a separate charge would be made for entry into special areas such as seaweed farming demonstration sites and the giant clam hatchery, or the use of facilities such as anchor points.

ANNEX 1



Lot 45 &46,
Level 1-5
Block H Signature Office
KK Times Square Coastal Highway
88100 Kota Kinabalu, SABAH.
Tel: 088-486430, 486430, 486432
Fax: 088-486435, 486434, 486436



**SEMPORNA ISLANDS
DARWIN PROJECT**
Kompleks Taman-Taman Sabah,
Jalan Bubul, Batu 1.5,
P.O Box 163
91307, Semporna, SABAH.
Tel: 089-781976
Fax: 089-784277

27th March 2011

AS IN DISTRIBUTION LIST

Dear Sir / Madam,

Re: Willingness-To-Pay Study for Tun Sakaran Marine Park

Tun Sakaran Marine Park was gazetted as a State Park in June 2004, to protect the area's spectacular features and rich biodiversity. The Park is under the management of Sabah Parks and, in the near future, a conservation fee will be introduced for entry and for diving. These fees will contribute directly to protection and improved management of the Park.

Before the fees are decided, Sabah Parks and the Semporna Islands Darwin Project are conducting a survey amongst visitors to assess their 'Willingness-to-pay' for visiting the Tun Sakaran Marine Park. We would therefore like to ask for your support and cooperation while we carry out this important survey.

We will be conducting the survey over the next few weeks both on the islands and in Semporna. This is an important opportunity for everyone to contribute and we look forward to meeting your staff and interviewing the visitors.

If you have any questions about this survey please do not hesitate to contact Sabah Parks Tun Sakaran Marine Park Complex on 089-782014 or Jamie Ng on 016-848-4196 during office hours.

Thank You,

Yours Sincerely,

KUYUN SIDAU

Senior Assistant Park Manager
Superintendent Park
Tun Sakaran Marine Park
Project

Yours Sincerely,

JAMIE NG

Community Officer
Semporna Islands Darwin

s.k Head of Section
Marine Parks Section

ANNEX 2



Tun Sakaran Marine Park (TSMP) Visitor survey

Thankyou for taking part in this survey.
As a visitor to the TSMP your views are very important and will help us make decisions about the future of the Park.

I. Please tell us about you and your visit

Q1. Please mark on the map the islands or reefs that you visited in TSMP

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	
1															1
2			Tabbah Si Ramboah												2
3			Sibuan												3
4											Mantabuan			Tabbah Kumai	4
5							Bodgaya								5
6					Matga										6
7					Selakan							Boheydulang			7
8															8
9		Sebangkat													9
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	

Q2. What activities did you take part in during your visit to TSMP
(Please tick ALL that apply)

- SCUBA diving
 Snorkelling
 Picnic
 Other: what was the activity? _____

Q3. How many times have you visited TSMP, including this trip?

Q4. How many days are you visiting TSMP on this trip?

Q5. What is your nationality? _____

Q6. If the following options were available in the Park, how interested would you be in participating in them (proceeds from your visit would go directly to local communities in the Park)

e) ½ day visit to a seaweed farm

not interested quite interested very interested not sure

f) ½ day visit to giant clam farm and underwater trail

not interested quite interested very interested not sure

g) 1 day visit to seaweed farm or giant clam farm, local-style lunch on island, tour of island, pottery or other craft demonstration

not interested quite interested very interested not sure

h) Overnight stay in homestay accommodation in Bajau village

not interested quite interested very interested not sure

Q7. Do you consider yourself to be concerned about environmental issues?

No Yes

II. If you dived in the Tun Sakaran Marine Park please answer the following questions

Q8. Which year did you learn to dive? _____

Q9. Where did you do your dive training? Country _____

Location _____

Q10. Approximately how many dives have you done since you learnt to dive _____

Q11. Approximately how many dives did you do in TSMP? _____

Q12. What is the name of the operator(s) you dived with in TSMP:

Q13. Please rate the overall quality of your underwater diving experience in TSMP

Excellent

Good

Average

Poor

Very Poor

Q14. Please rate the overall health of the coral reefs and marine life that you observed while diving in TSMP

Very healthy

Healthy

Average

Unhealthy / poor

Not sure

We welcome any comments you have about diving in the Park – please write them here.

Tun Sakaran Marine Park was established in 2004 to protect the coral reefs and unique wildlife of the area. We are assessing the willingness of visitors to support the Park by paying a conservation fee for entry and for certain recreational activities.

The conservation fee will contribute towards:

- Protecting wildlife and the environment
- Improving services for visitors
- Supporting awareness and outreach programmes
- Promoting sustainable livelihoods

Following your visit to TSMP, please tell us what maximum daily conservation fee you would pay to support these programmes and help ensure:

- The unique wildlife and features of the islands and reefs are protected.
- Local people can live and work in harmony with nature.
- Visitor experience is enhanced and made more rewarding.

Please answer the questions on the following page

For ALL visitors

I would be willing to pay the following **conservation fee for entry (per day), NOT including diving**

- RM 0 _____
- RM 5 _____
- RM 10 _____
- RM 20 _____
- RM 30 _____
- RM 40 _____
- RM 50 _____
- RM 60 _____
- RM 70 _____
- RM 80 _____
- RM 90 _____
- RM 100 _____
- Other: please state amount _____

*Please
select one
amount only*

ADDITIONAL question for DIVERS

I would be willing to pay the following **conservation fee (per day) to INCLUDE diving**

- RM 0 _____
- RM 5 _____
- RM 10 _____
- RM 20 _____
- RM 30 _____
- RM 40 _____
- RM 50 _____
- RM 60 _____
- RM 70 _____
- RM 80 _____
- RM 90 _____
- RM 100 _____
- Other – please state amount _____

*Please
select one
amount only*

Thank you for completing this questionnaire!