

essence.

**Community attitudes
towards Australian
Fisheries Management**

Department of Agriculture

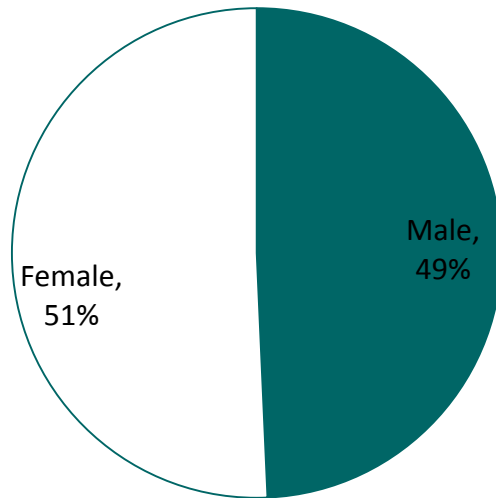
Quantitative research debrief

June 2015

- Methodology
- Demographics
- Key findings
 1. Knowledge and awareness
 2. Attitudes towards fishing/seafood industry
 3. Media consumption and communication
 4. Interest in finding out more
 5. Segmentation
- Conclusions

- 12 minute online survey with respondents aged 18 years and over.
- Random sample of n=1,500 included fishers/non fishers, seafood consumers/non seafood consumers. A boost of 200 fishers in non-metro areas was also included for a total sample size of 1,700.
- No quotas on age, gender, ethnicity/ cultural background and household composition (eg: married with children at home, single, etc). These were allowed to fall out naturally in the sample.
- The sample was post-weighted by gender and age group to match ABS statistics.

Gender & Cultural Background



	Total
Anglo-Australian background	65.0%
Indigenous or Torres Strait Islander background	0.5%
Country outside of Australia (English-speaking background)	15.0%
Country outside of Australia (non-English speaking background)	15.6%
Prefer not to say	3.8%

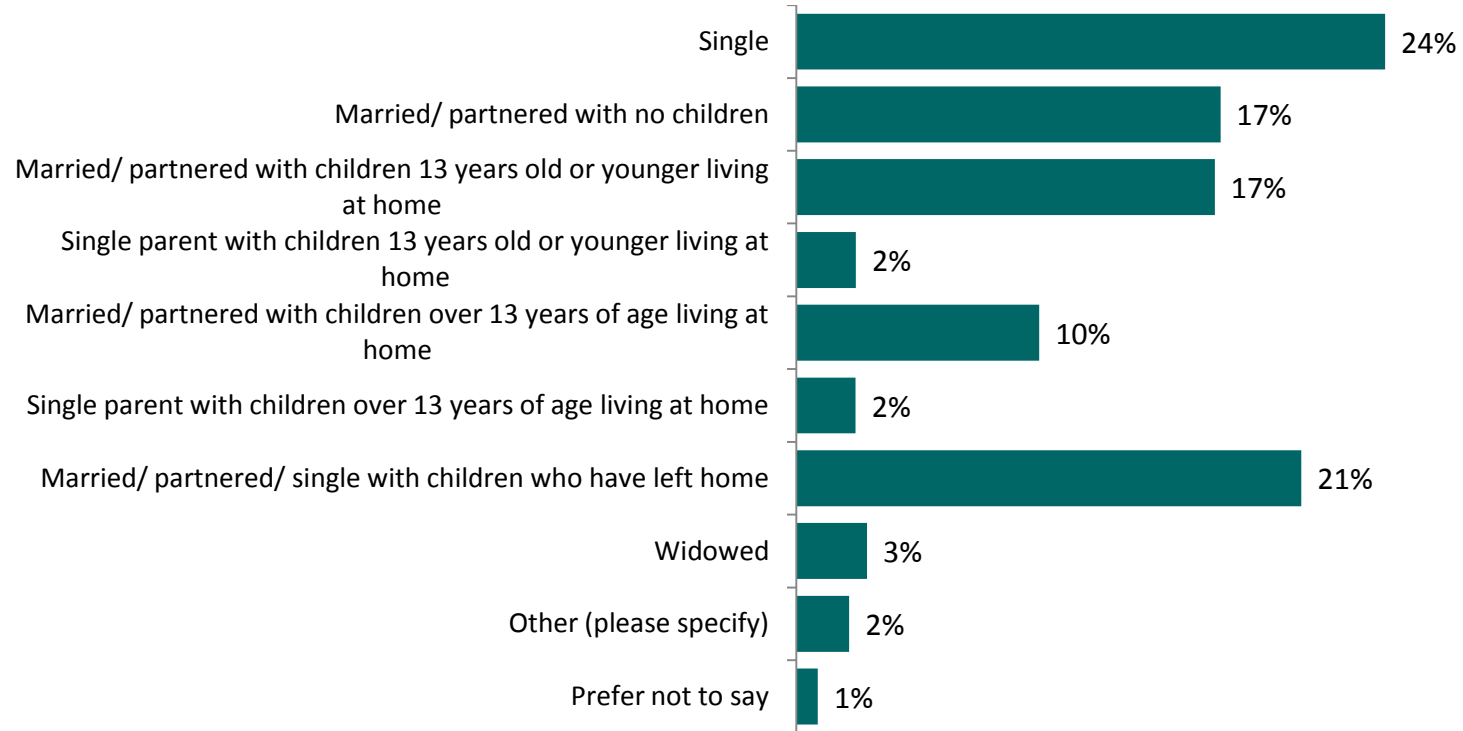
Gender was evenly split and nearly two thirds of the sample was from an Anglo-Australian background.

Source: A1. What is your gender?

A5. Which of the following statements best describes you?

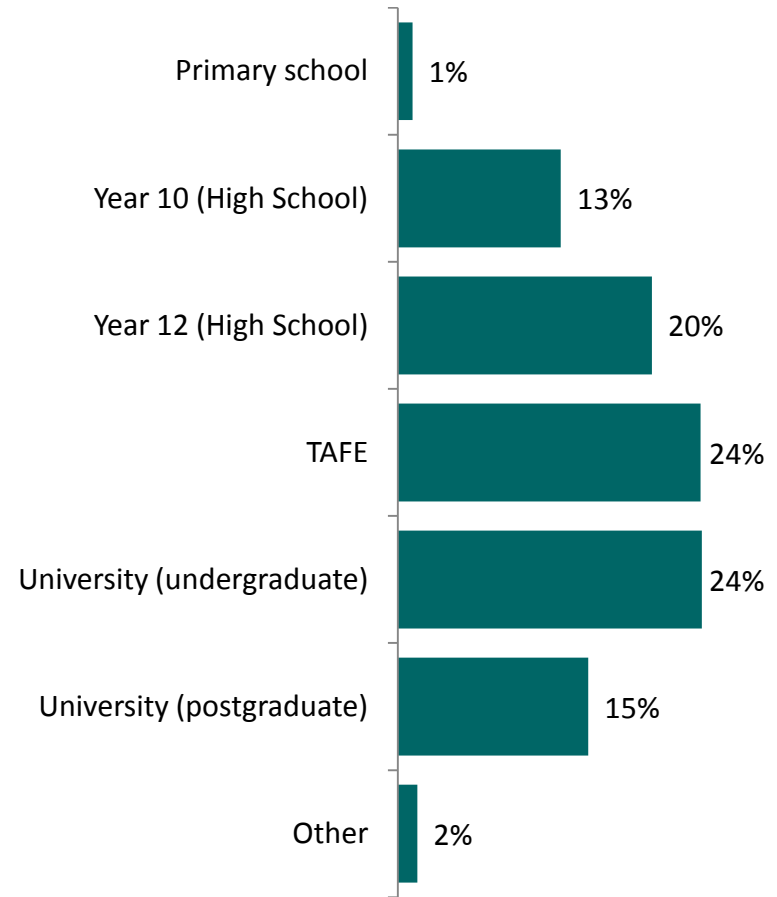
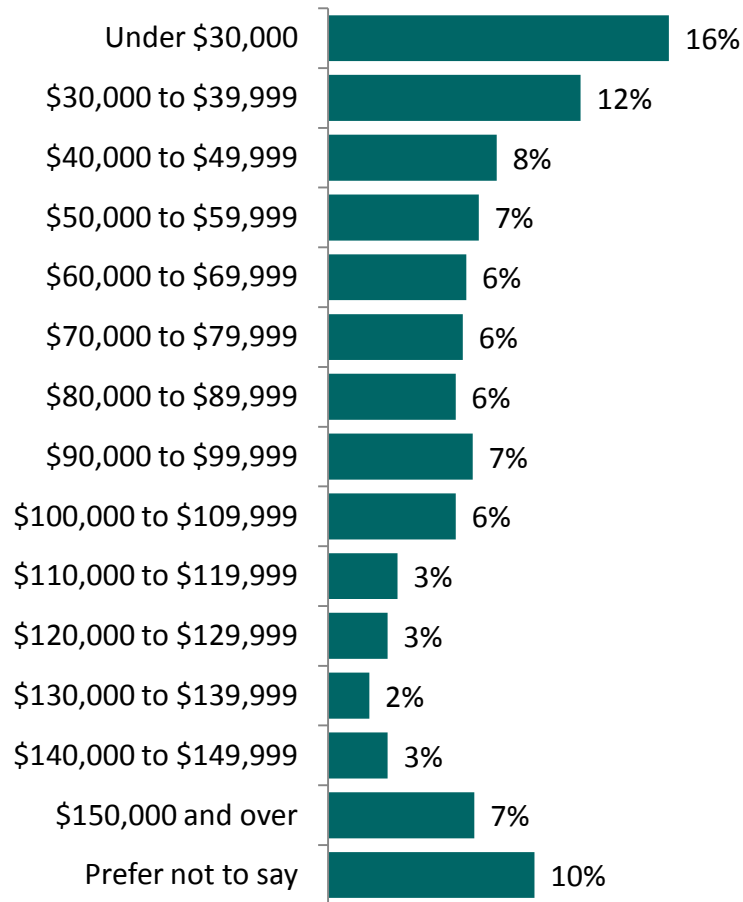
Base: All Respondents n=1,722. Data weighted to ABS population statistics.

% of respondents nominating current household situation



Two thirds of respondents reported not having dependent children living at home

Household income & Education level



Most respondents reported an annual household income before tax of less than \$100,000. TAFE and university undergraduates accounted for half of the sample.

Source: A3. Which of the following best describes your combined annual HOUSEHOLD income before tax?

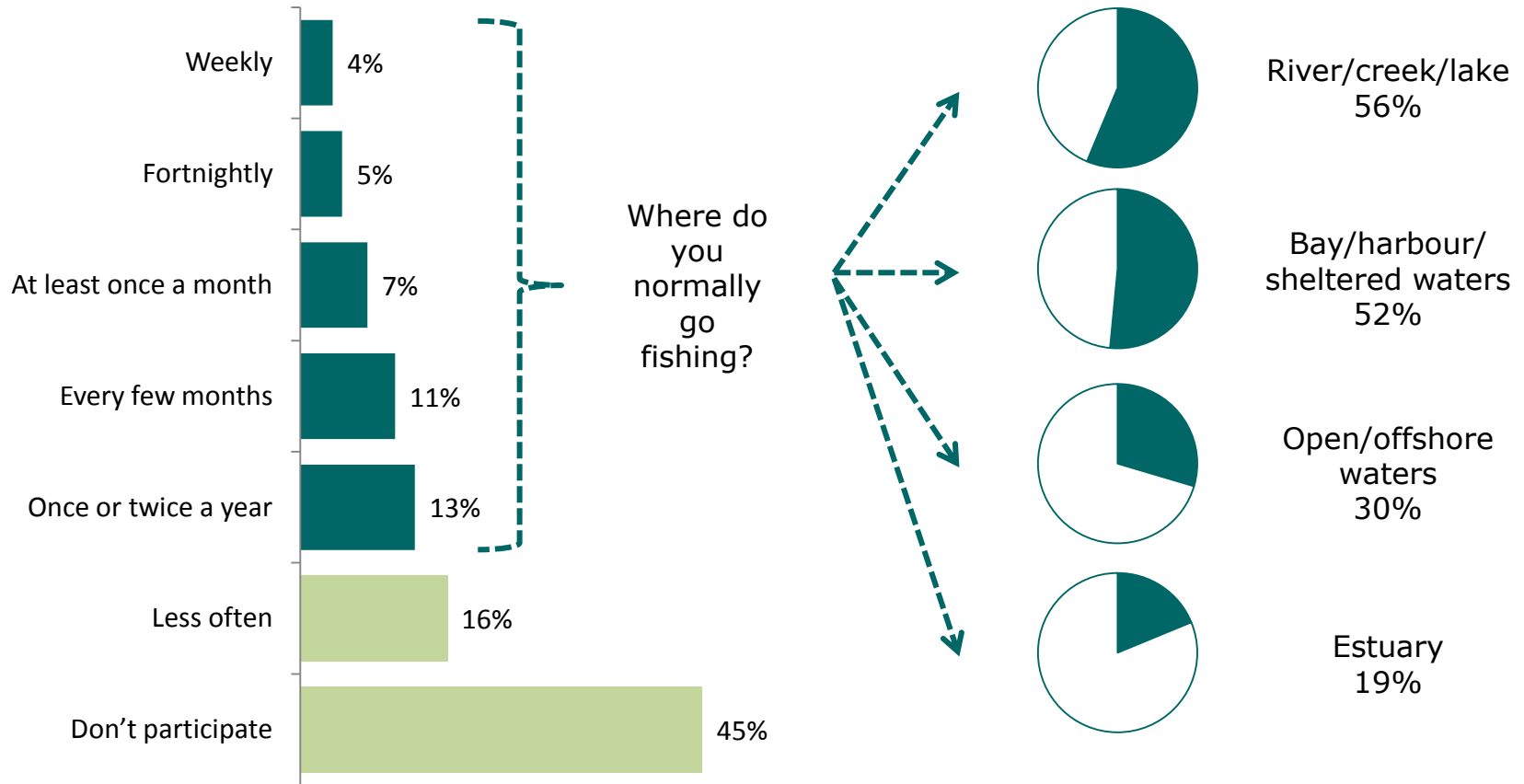
A4. What is the highest level of education you have completed?

Base: All Respondents n=1,722. Data weighted to ABS population statistics.

Key Findings

1. Knowledge about the industry is low, whilst the Government is seen as the custodian of the marine environment, credibility lies with scientists. According to respondents the key issues faced by the industry were dominated by comments relating to sustainability and overfishing.
2. Moderate agreement that the Government is currently managing fisheries well. Those who fish, along with seafood consumers, generally view the Government's management more favourably. There is scope for improvement by ensuring:
 - Australia's management approach ensures any risks to the environment are at an acceptable level
 - Australia's approach to fisheries management is based on scientific evidence
3. A segmentation was conducted identifying four general cohorts in the population:
 - No news is good news (30%)
 - Whatever (28%)
 - Cynical & Negative (22%)
 - Non-Interventionist (20%)

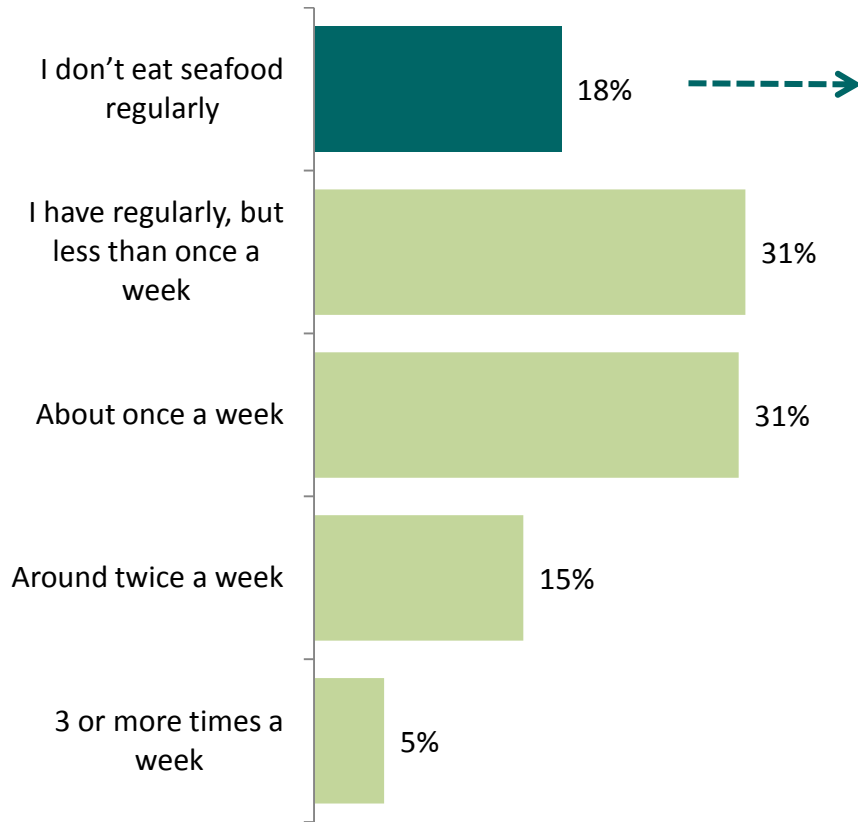
Fishing participation



39% of respondents participated in fishing at least once in the past 12 months. Of those that did, more than half fished in rivers/creeks/lakes or bays/harbours/sheltered waters.

Source: S5. In the last 12 months, how frequently have you participated in fishing?
S6. When you go fishing, where do you normally go
Base: All Respondents n=1,722. Data weighted to ABS population statistics.

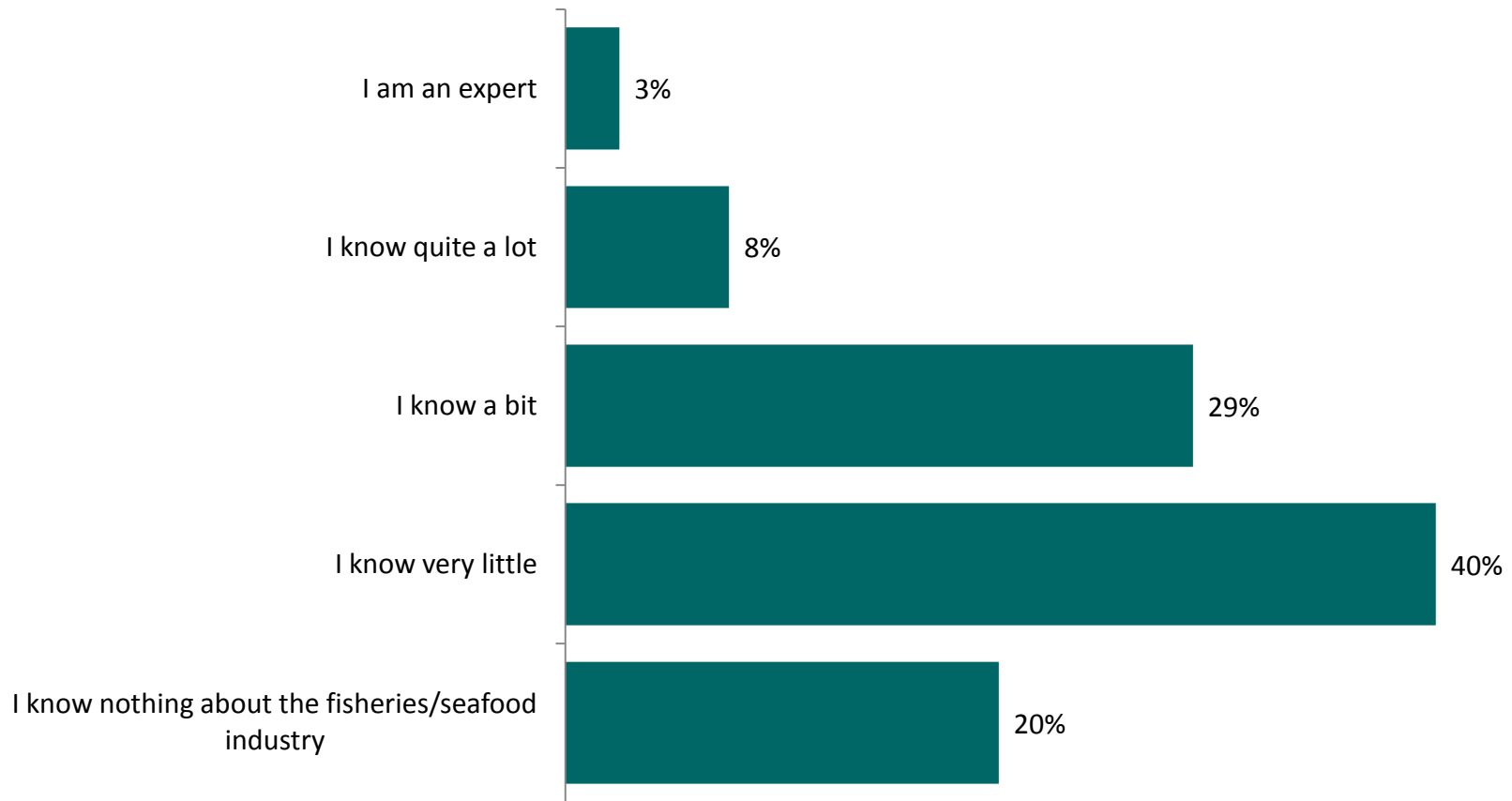
Seafood consumption



Why don't you eat seafood regularly?

- Cost (25%)
- Dislike/hate it (22%)
- Taste/smell (10%)
- Vegetarian/Vegan (9%)
- Allergies/intolerances (8%)
- Not considered (7%)
- Rest of family dislike (5%)
- Unsure how/difficult to prepare (3%)
- Quality (2%)
- Availability/convenience (2%)
- Country of origin (2%)
- Preference for other foods (2%)

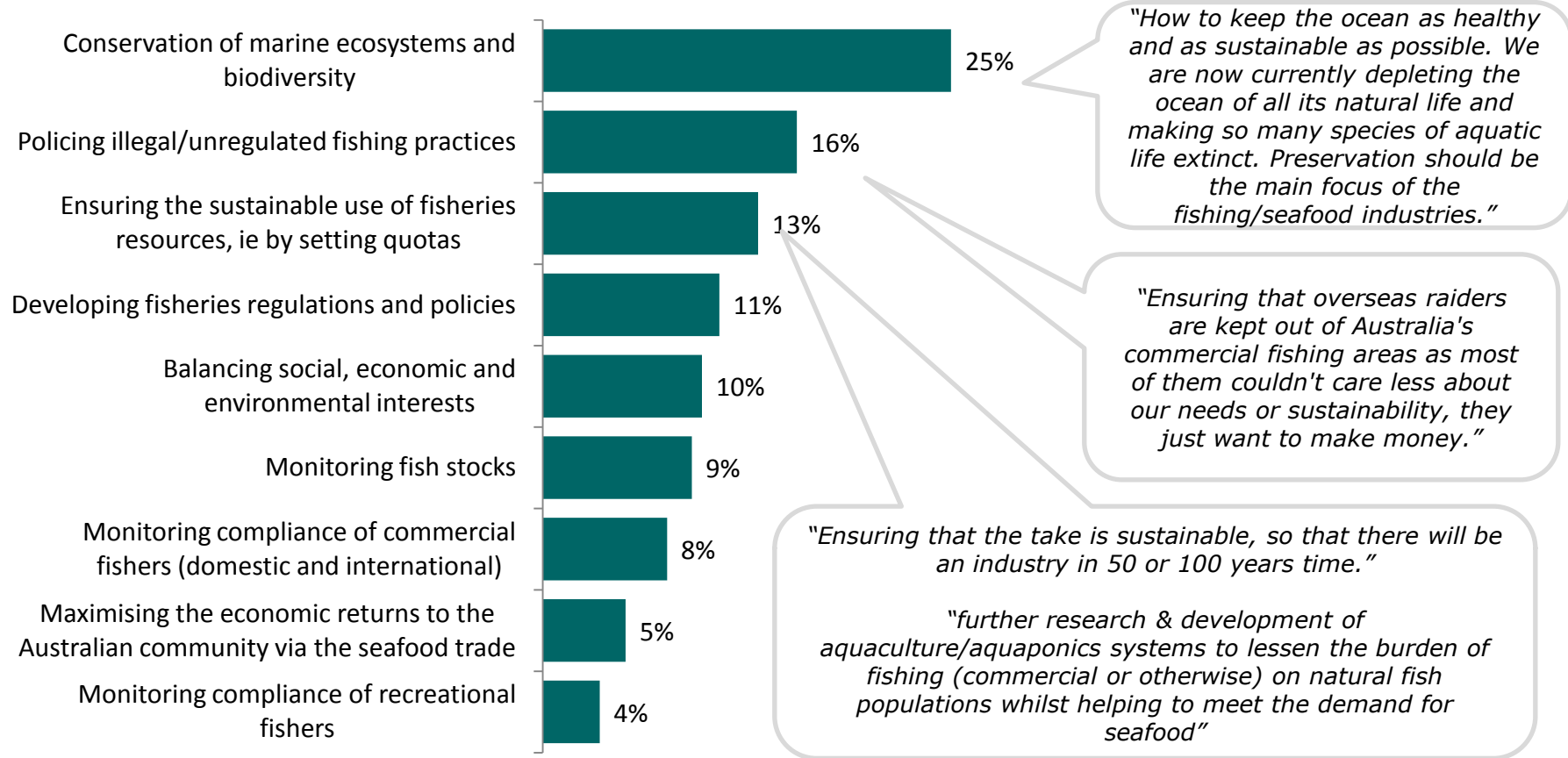
51% of respondents consumed seafood at least once a week. Of those who didn't regularly consume it, cost and/or a dislike for it were the main reasons. Interestingly, country of origin labelling only received several mentions compared to 40% who preferred it as a communication strategy when prompted.



Knowledge about fisheries and the seafood industry is generally low with only 11% claiming to know quite a lot or being an expert. Naturally, those who participated in fishing claimed a much higher level of knowledge (23%).

Source: B1. How would you describe your level of **knowledge** about Australia's fisheries/seafood industry?
Base: All Respondents n=1,722. Data weighted to ABS population statistics.

Key functions of Government

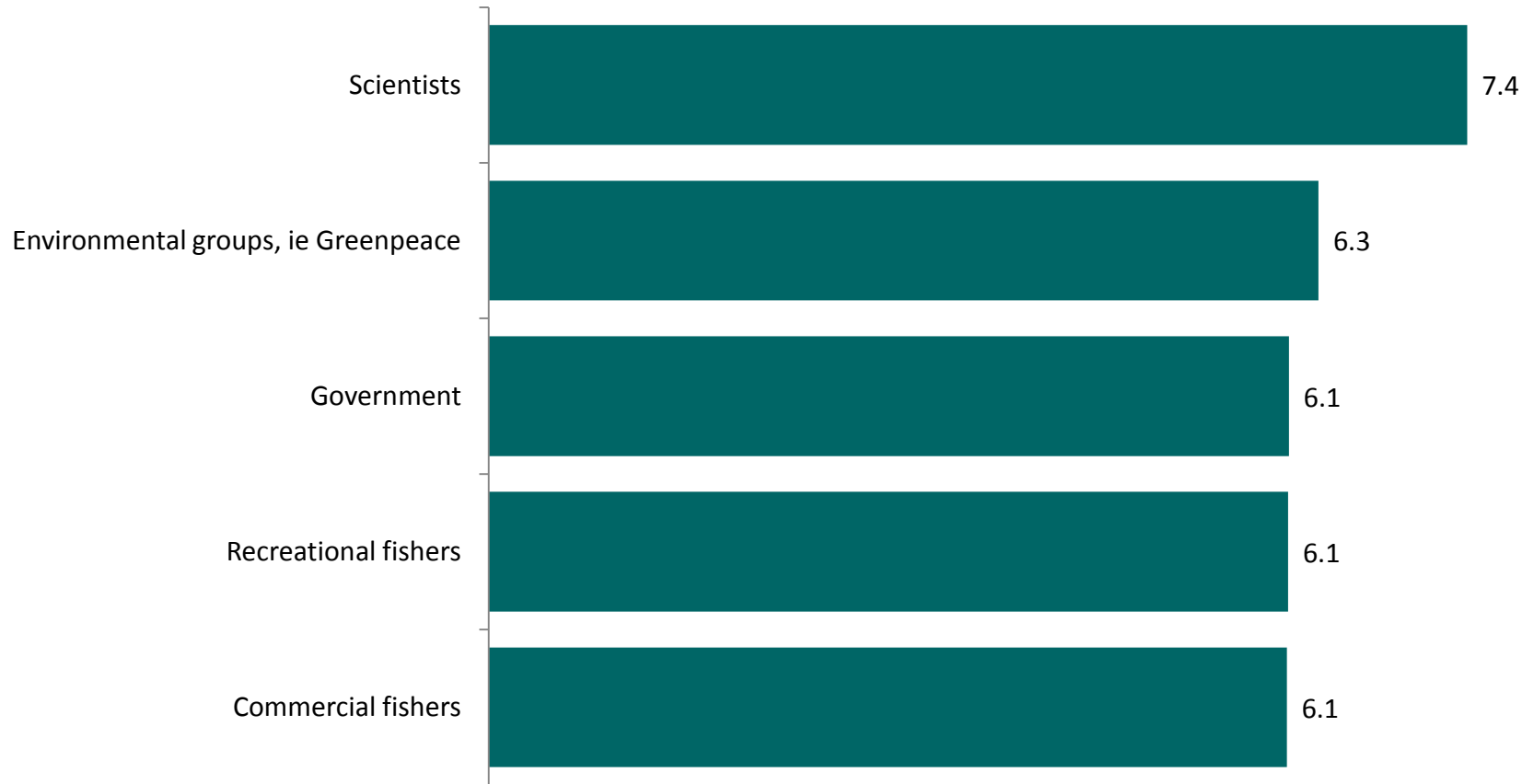


The key functions of Government were seen as conservation (25% of respondents ranking it most important), policing of illegal/unregulated practices (16%) and ensuring the sustainable use of resources (13%). This is supported by the comments made by respondents regarding what they believed to be the key issues relating to the industry.

Source: B2. The Government is responsible for a number of key functions in regards to fisheries management. Please rank the following from most important (1) to least important (9)?

B4. What do you believe are the key issues related to the fishing and seafood industries?

Base: All Respondents n=1,722. Data weighted to ABS population statistics.

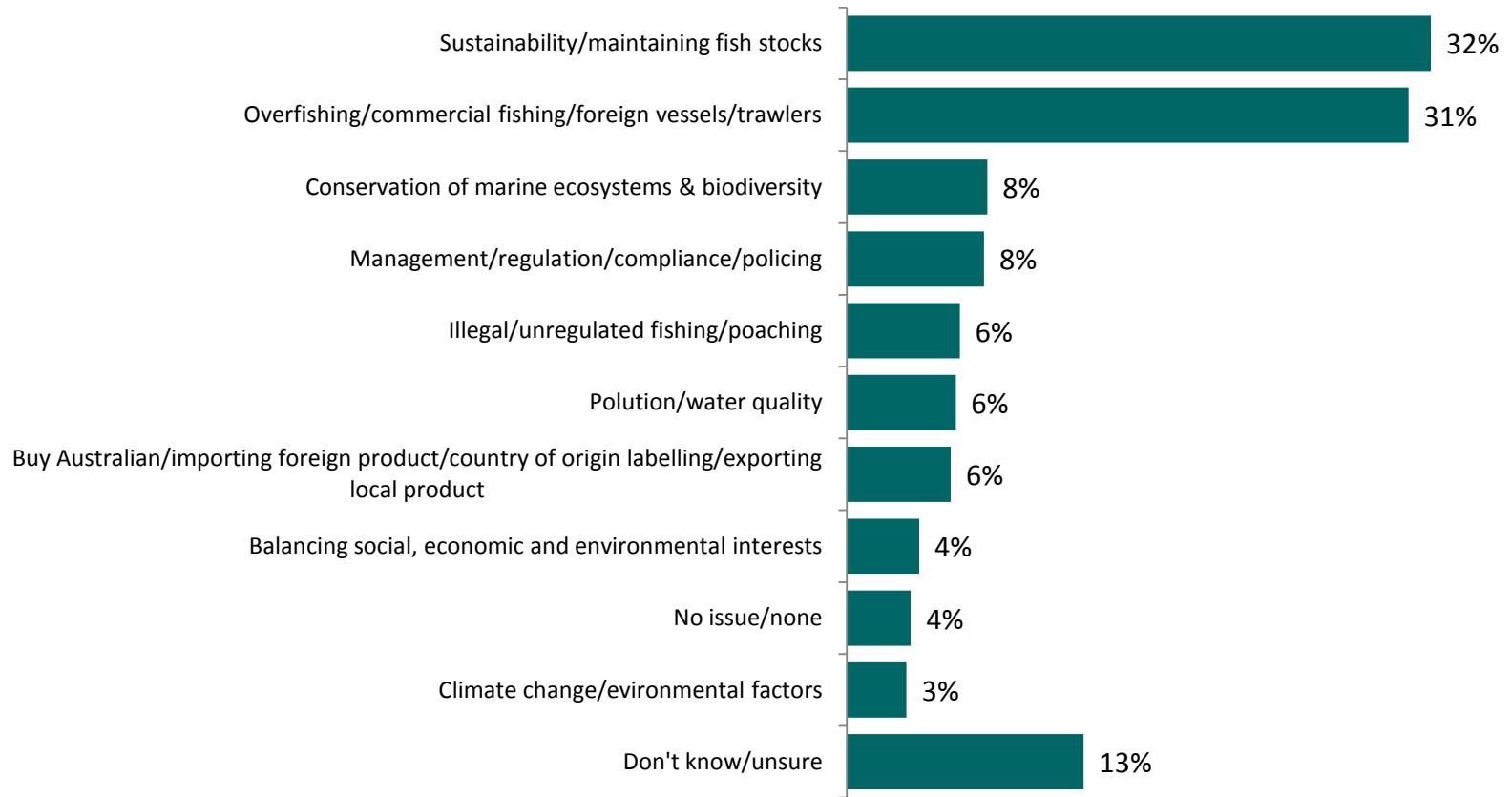


The general population view scientists as the most credible when information regarding fisheries is presented. The remaining groups were seen as only moderately credible with credibility scores around 6.

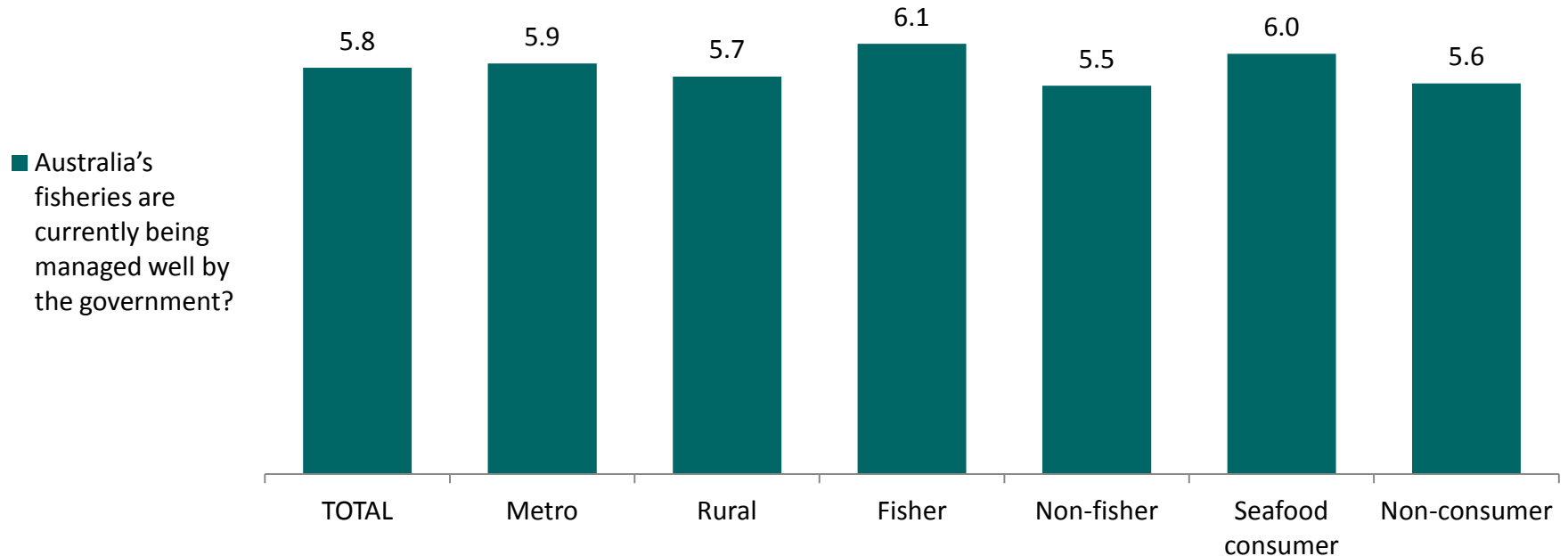
Source: B3. There are a range of different people who might talk about or present information about fish and/or fisheries. Using a 0 to 10 scale, where 0 means Not Credible and 10 means Extremely Credible, please rate the **credibility** of each of the following groups.

Base: All Respondents n=1,722. Data weighted to ABS population statistics. Don't know/ NA removed from analysis.

Key issues related to the industry



Nearly a third of respondents believed that sustainability/maintaining fish stocks (either through a quota system, minimising undersized catch or through developing aquaculture) was a key issue facing the industry. Respondents were also passionate in voicing their disapproval of overfishing at the hands of commercial operators, including the invasion by foreign vessels.



There is moderate agreement that the Government is currently managing fisheries well. Those who participate in fishing, along with seafood consumers, generally view the Government's management more favourably.

Source: C1. Australia's fisheries are currently being managed well by the government?
Base: All Respondents n=1,722. Data weighted to ABS population statistics. Don't know/ NA removed from analysis.

Attitudes towards industry management



In terms of attitudes towards the management of the fisheries industry, respondents were in strong agreement that how we manage fisheries today would determine how healthy our oceans will be in the future.

There was also agreement on:

- Minimising capture of non-target species
- Balancing recreational and commercial interests
- Addressing illegal fishing in our waters
- Quota system
- Being conservative with the environment

Source: C2. Below is a list of statements relevant to the fishing and seafood industries. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, please rate the extent to which you agree with each statement.
Base: All Respondents n=1,722. Data weighted to ABS population statistics. Don't know/ NA removed from analysis.

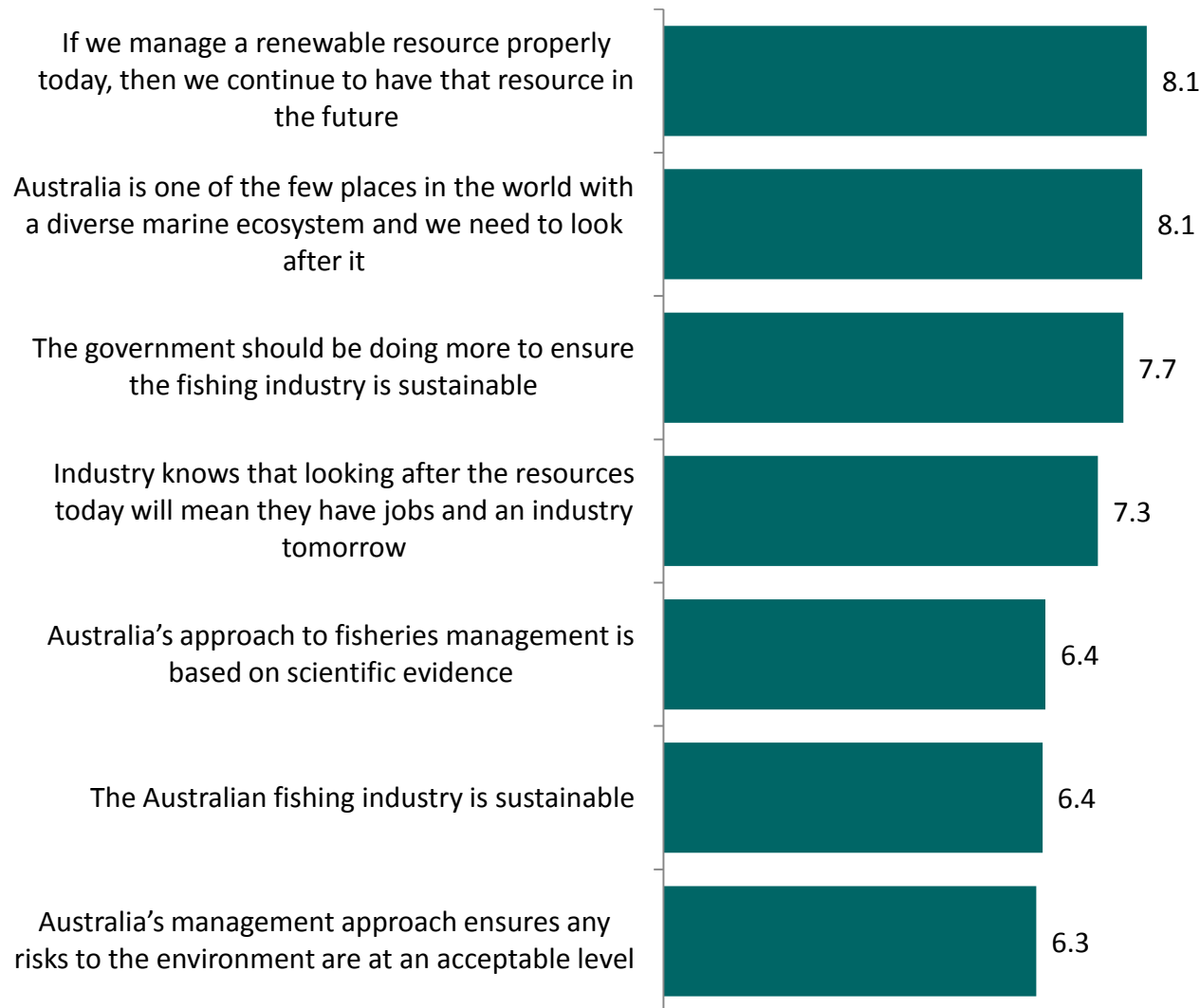
Attitudes towards industry compliance



All statements relating to compliance had strong levels of agreement amongst respondents. This is supported by respondent comments regarding perceived overfishing by commercial fishers.

Source: C2. Below is a list of statements relevant to the fishing and seafood industries. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, please rate the extent to which you agree with each statement.
Base: All Respondents n=1,722. Data weighted to ABS population statistics. Don't know/ NA removed from analysis.

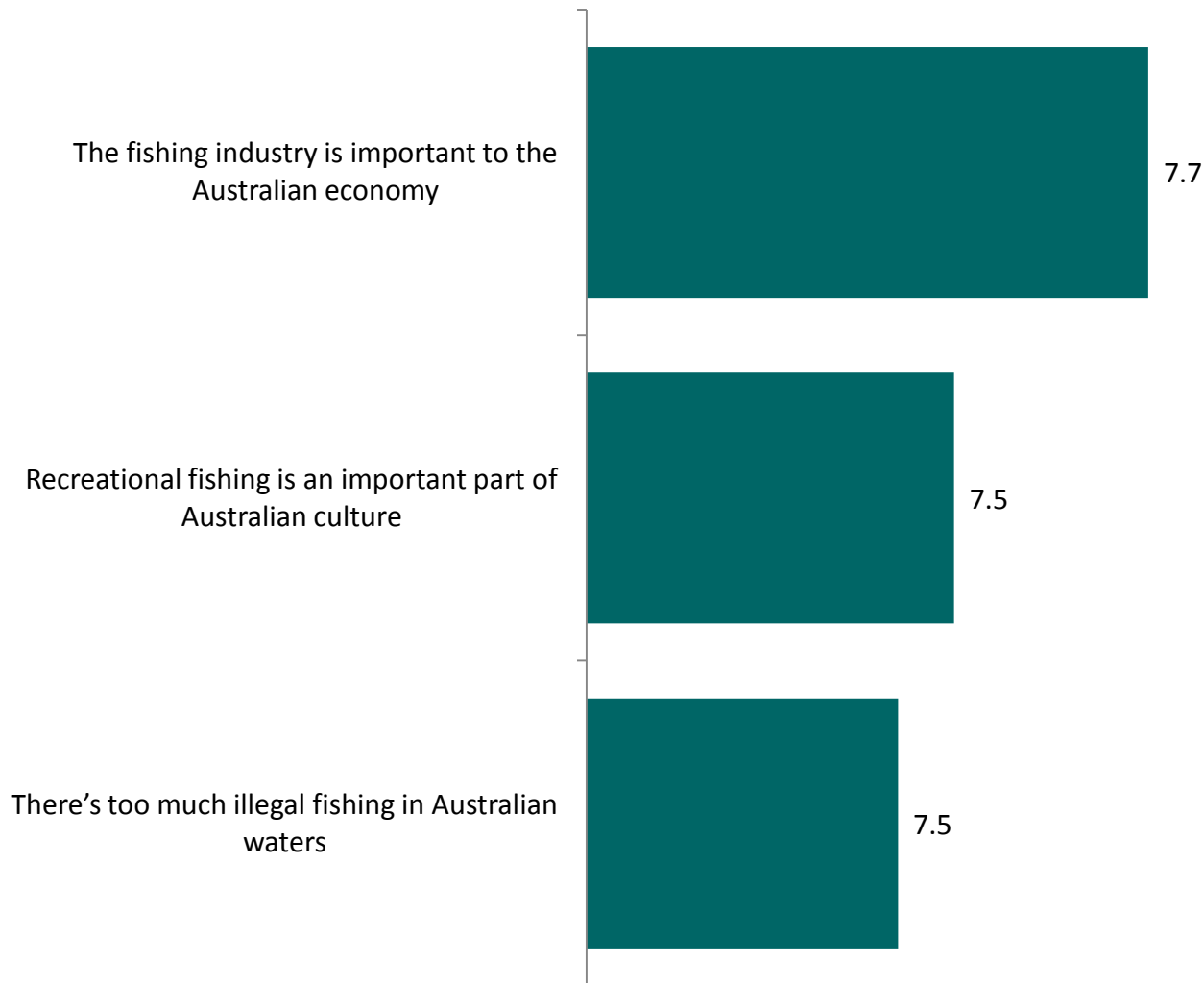
Attitudes towards sustainability



Sustainability was also identified as a key issue faced by the industry according to the general population. They recognise that Australia has a unique resource (in the marine ecosystem) and efforts should be made to ensure its viability into the future.

On face value it appears there is less support or belief that the Australian fishing industry is sustainable.

Source: C2. Below is a list of statements relevant to the fishing and seafood industries. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, please rate the extent to which you agree with each statement.
Base: All Respondents n=1,722. Data weighted to ABS population statistics. Don't know/ NA removed from analysis.



The general consensus is that whilst the fishing industry is important to the economy, having enough fish stocks for recreational anglers is also important.

Illegal fishing in Australian waters (whether by foreign trawlers or domestic operators) remains an issue.

Source: C2. Below is a list of statements relevant to the fishing and seafood industries. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, please rate the extent to which you agree with each statement.
Base: All Respondents n=1,722. Data weighted to ABS population statistics. Don't know/ NA removed from analysis.

What is this?

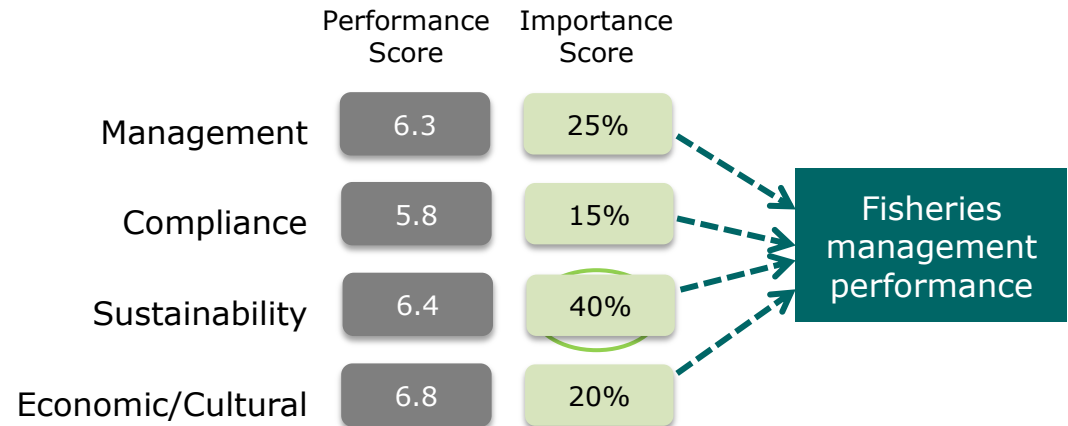
- The primary objective of driver analysis is to identify and prioritise the key drivers (propositions) of fisheries management performance. Driver analysis uses a statistical technique called Multiple Regression to determine how each proposition (management, compliance, sustainability and economy/culture) contributes to overall fisheries management performance.

What does this measure?

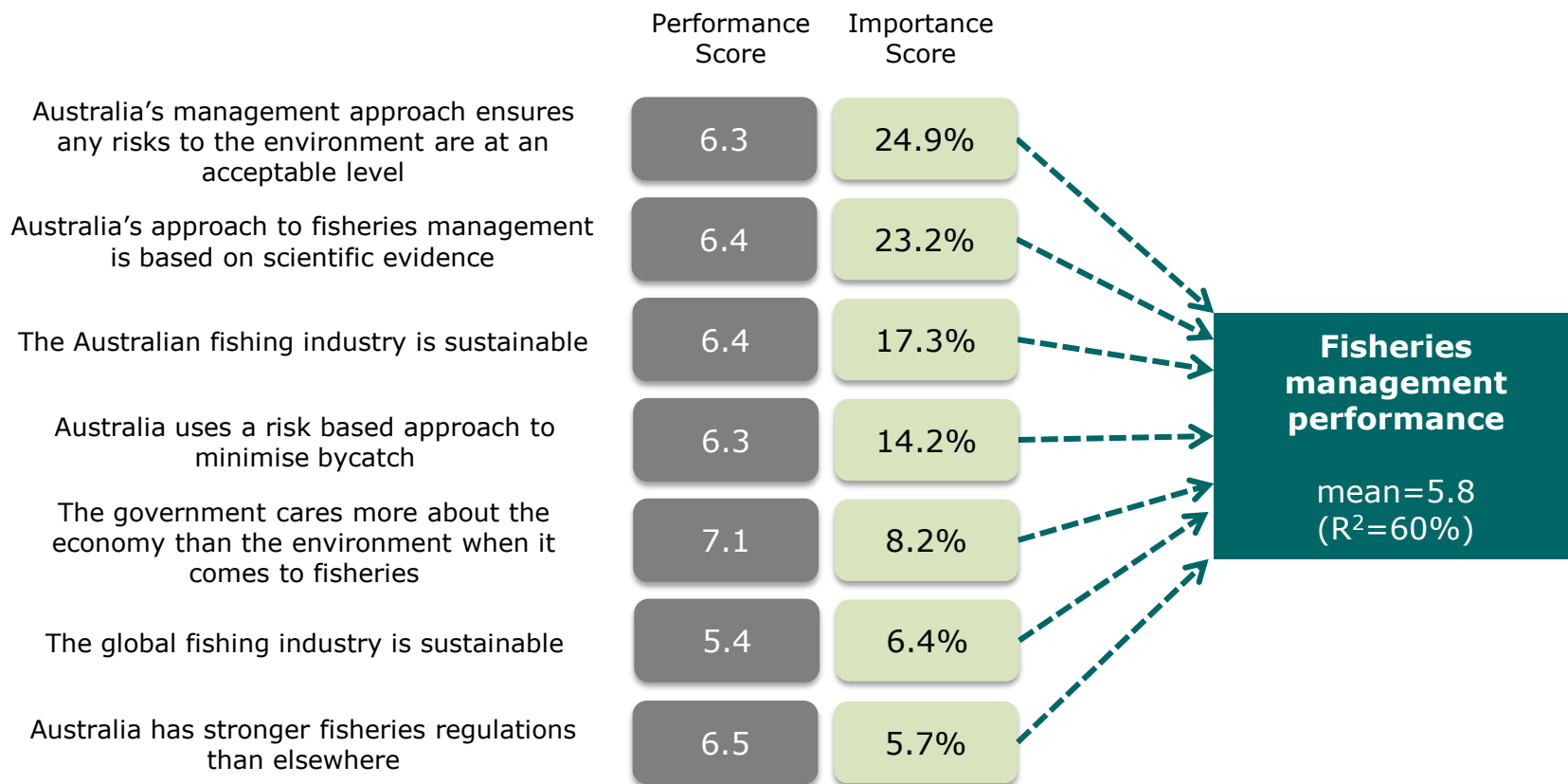
- The **importance score** represents the relative importance of each of the propositions in contributing to overall fisheries management performance.
- The **performance score** is the mean rating score (out of 10) for each of the propositions, as rated by the participants. This shows us how each proposition performs.
- R^2 tells us the proportion of variation in management performance that is accounted for by each of the propositions used in the study. The higher the value, the more robust the model.

How can we use this?

- For example, the adjacent model shows **sustainability** is the most important driver of fisheries management performance as perceived by respondents



Key drivers of fisheries management



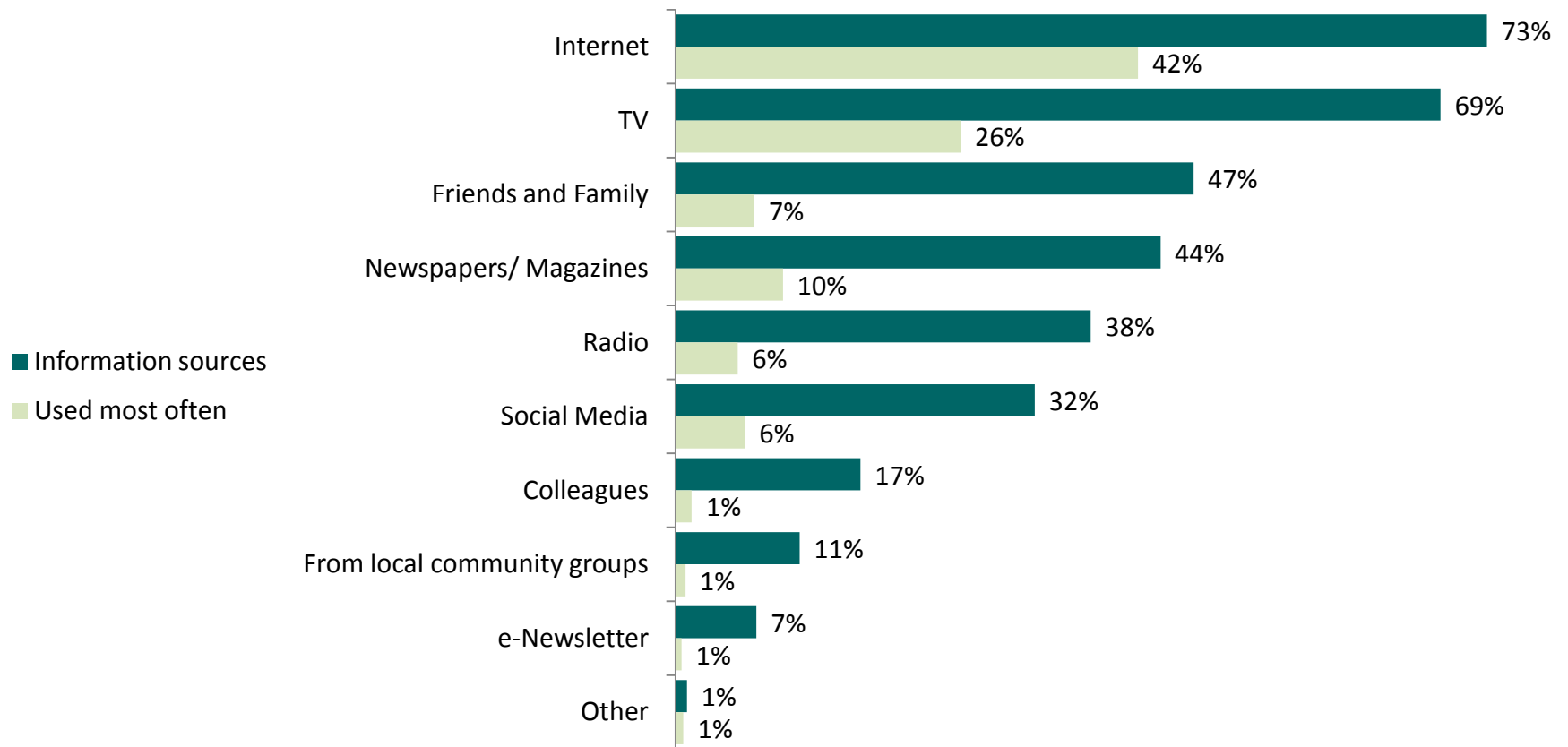
Seven key drivers of fisheries management performance were identified in the analysis. Respondents who agreed/disagreed with these statements tended to also agree/disagree that fisheries are currently being well managed. Prioritising these key propositions will be the most effective way to influence public perception of fisheries management.

Source: C1. On a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, please rate the extent to which you agree with the following statement. Australia's fisheries are currently being managed well by the government?

C2. Below is a list of statements relevant to the fishing and seafood industries. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, please rate the extent to which you agree with each statement.

Base: All Respondents n=1,722. Data weighted to ABS population statistics. Don't know/ NA removed from analysis.

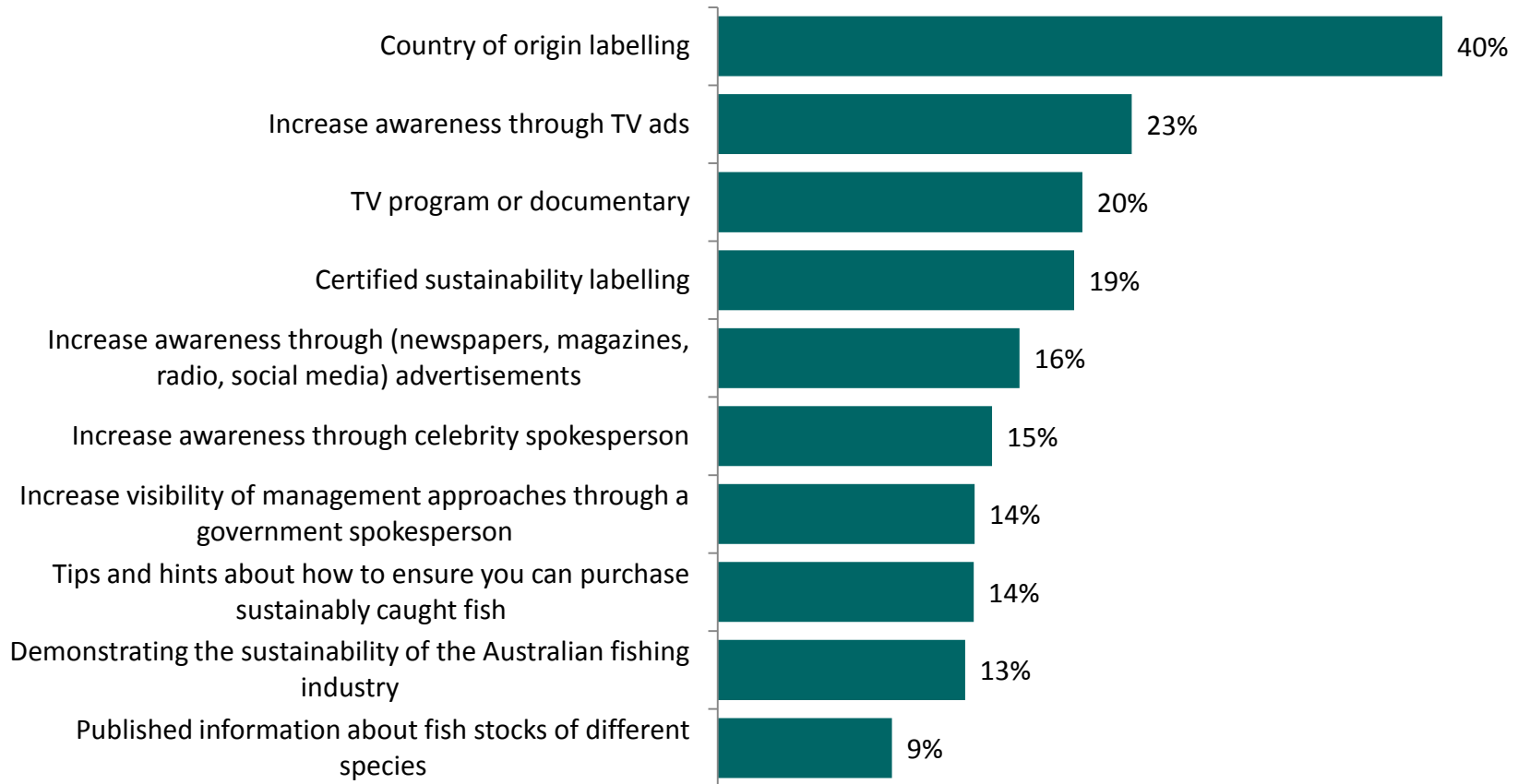
Information sources



The internet and TV were the most commonly used sources of information with the internet being the source used most often. Nearly half of the sample still utilise friends and family and print media as viable sources of information.

Source: D1. Which of the following information sources do you generally use?
D2. And which of these sources do you use most often?
Base: All Respondents n=1,722. Data weighted to ABS population statistics.

Preferred communication strategies

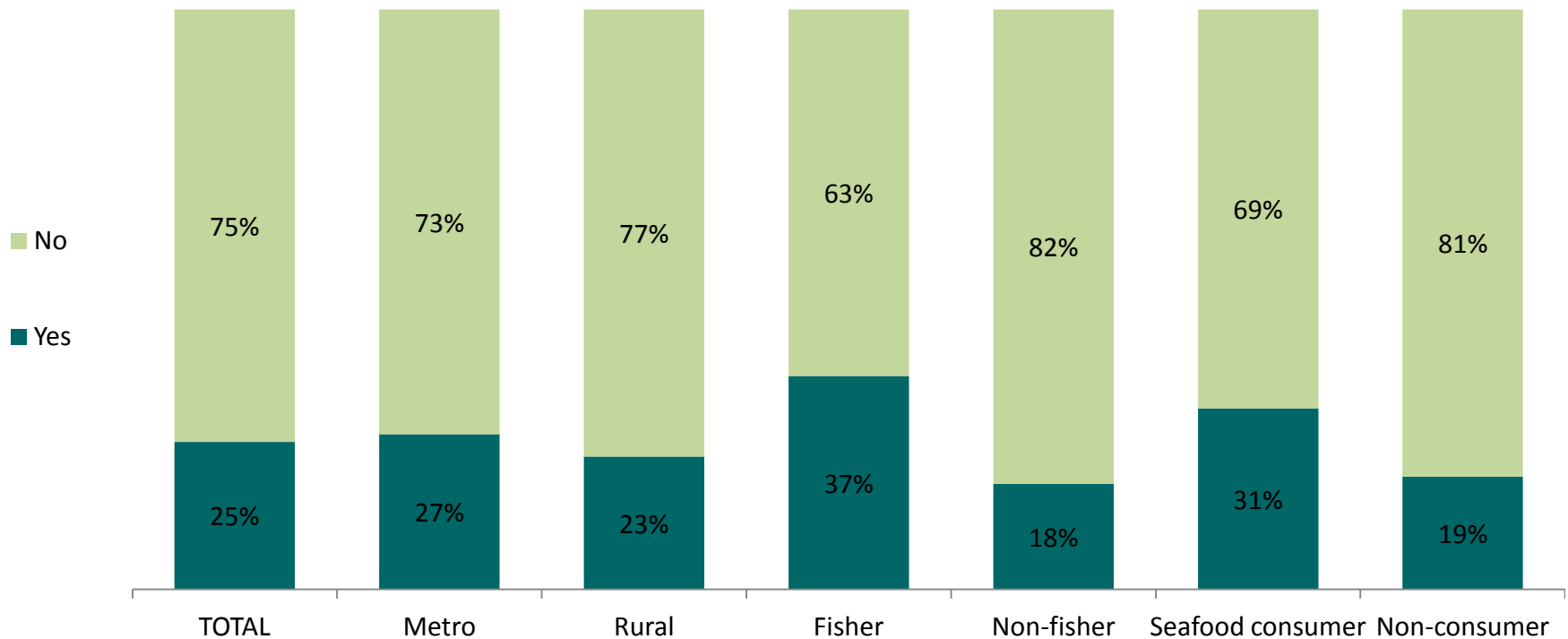


Country of origin labelling is by far the most preferred communication strategy relating to the fishing and seafood industry with 40% of respondents ranking it as the most preferred. This is followed by increasing awareness of the local industry through TV ads, TV program or documentary and certified sustainability labelling on all seafood sold in retail outlets.

Source: D3. Below is a list of potential communication methods relating to the fishing and seafood industry. Please rank your **top 5** from most preferred (1) to least preferred (5)?

Base: All Respondents n=1,722. Data weighted to ABS population statistics.

Interested in finding out more



Only a quarter of all respondents are interested in finding out more about fisheries management. Whilst there were no differences between metro and regional respondents, those who fished and /or consumed seafood were significantly more interested in finding out more about fisheries management.

Source: E1. Are you interested in finding out more information about fisheries management?
Base: All Respondents n=1,722.

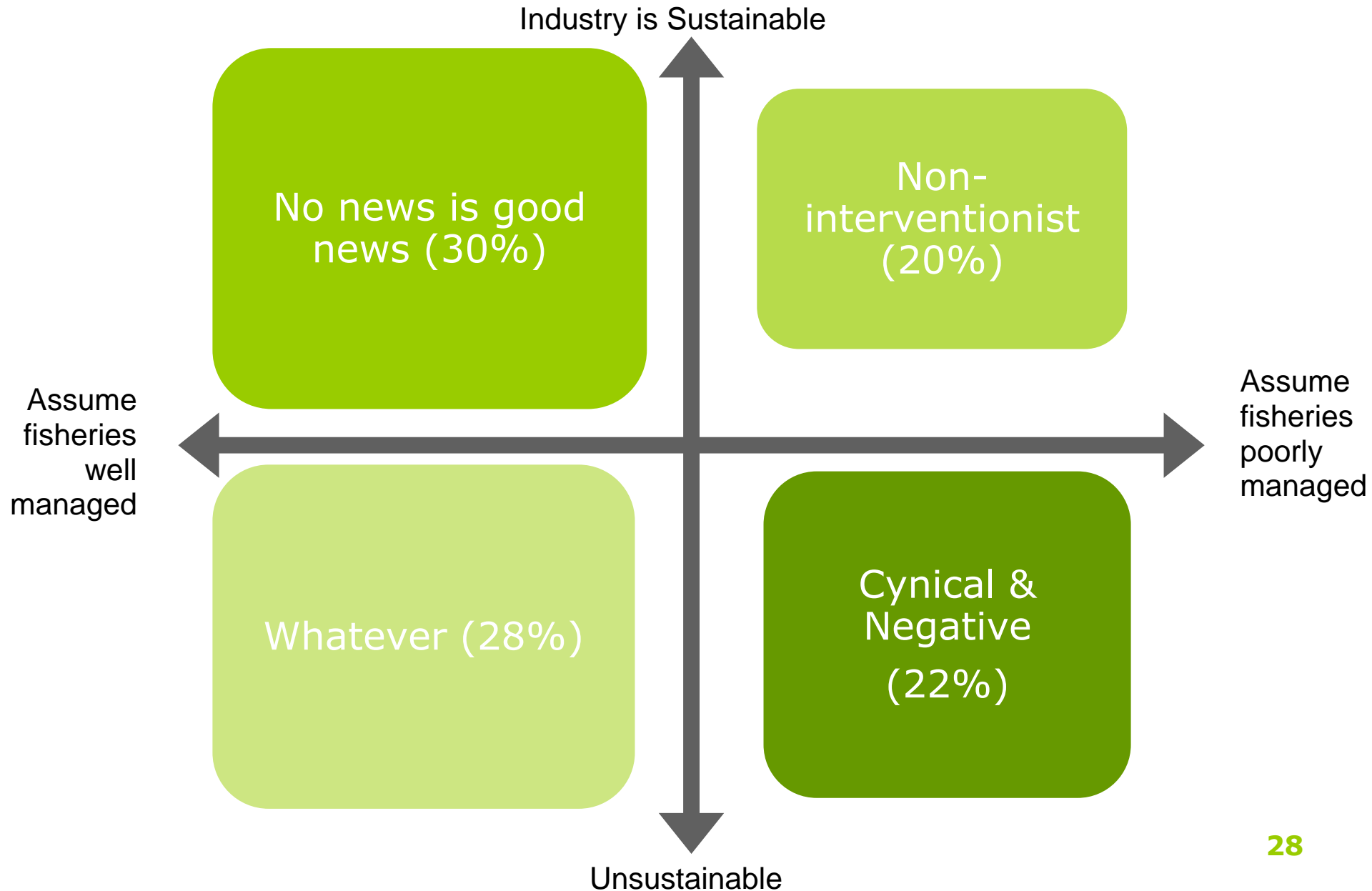
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Segmentation

- The objective of segmentation is to identify broad respondent groups based on similar attitudes and/or behaviours and subsequently profile these segments according to characteristics that allow them to be easily identified.
- Segments generated should be:
 - **Homogeneous within:** Respondents in any given segment will be as similar as possible based on their attitudes/behaviours.
 - **Heterogeneous between:** Respondents in different segments will be as different as possible. That is, their attitudes/behaviours are very different.
 - **Substantial:** All segments must be large enough to ensure that any marketing activity directed towards them is cost effective.
 - **Operational:** Members of any given segment must be identifiable using variables already known to the department (focussing on demographic, attitudinal and behavioural variables) so that marketing activities may be easily targeted.
- Cluster analysis is most commonly used for segmentation - individuals are statistically grouped into clusters (members of the same cluster are more alike than they are to members of other clusters). Cluster analysis searches for the “natural” structure among observations based on their segmentation dimensions.
- A TwoStep cluster methodology was used to segment the sample using attitudinal statements and behavioural questions from the questionnaire. The process involved:
 - 1. pre-clustering the respondents into many small sub-clusters (based on the included questions);
 - 2. cluster the sub-clusters resulting from pre-cluster step into the desired number of clusters.

- Of the 1,722 respondents sampled, only 950 were utilised in the segmentation as respondents were required to answer all questions in order to be considered for the analysis. There were also 79 respondents who were identified as providing 'invalid data', ie their responses to all 26 attitudinal statements were the same. These were therefore excluded from the segmentation.
- Segments were then profiled using remaining survey questions (including demographics).
- Four general cohorts were identified as follows:
 - No news is good news (30%)
 - Whatever (28%)
 - Cynical & Negative (22%)
 - Non-Interventionist (20%)

Fisheries Segmentation



Indicative
segment size

30%

Profile

- Two thirds fished at least once in past 12 months. Bias towards seafood consumption
- 28% **believe** they are experts/know a lot
- Believe in role of Government, and believe them to be credible – positive on all counts!
- Highly favourable view of how fisheries are being managed and agree broadly with most positive statements
- Interested to find out more

Indicative
segment size

28%

Profile

- Two thirds non-fishers
- Generally non-consumers of seafood
- Two thirds self assess that they know very little/nothing
- Neutral on proposition statements

Indicative
segment size

22%

Profile

- Older, rural skew
- Two thirds non-fisher
- Believe Government not credible
- Believe management of fisheries is poor

Indicative
segment size

20%

Profile

- Younger, male skew
- Seafood consumers
- Tend to disagree that Government is credible
- Prefer to see less regulation, and people naturally oriented to living a sustainable life
- Likely to contain more 'clicktivists', and then more environmentally aware ambivalent
- Some presence of more active environmentalists in this cohort

Most compelling messages by segment

	TOTAL	Whatever	Non-interventionist	Cynical & Negative	No news is good news
Australia's management approach ensures any risks to the environment are at an acceptable level	6.4	6.5	5.5	4.9	8.0
Fisheries are being managed well in Australia	6.1	6.4	5.3	4.4	7.7
The government has good control over what happens with our fisheries	6.0	6.2	5.3	4.0	7.6
Australia has stronger fisheries regulations than elsewhere	6.5	6.5	5.7	5.1	7.9
Fishing stocks have steadily increased since 2000	5.7	6.0	5.4	3.8	7.0
The global fishing industry is sustainable	5.7	6.0	5.4	3.4	7.1
The Australian fishing industry is sustainable	6.5	6.6	5.7	5.1	7.8
Australia's approach to fisheries management is based on scientific evidence	6.5	6.4	5.4	5.4	7.9
Australia uses a risk based approach to minimise bycatch	6.3	6.2	5.2	5.5	7.7
The government should set and manage a quota system that limits how much fish can be taken each year. Once the quota is reached, fishing ceases.	7.4	6.7	5.4	8.7	8.4
How we manage fisheries now determines how healthy our oceans will be in the future	8.0	7.6	5.7	9.5	8.7
Decades of mismanagement has taught us the importance of being conservative when it comes to the environment	7.2	6.8	5.4	7.9	8.3
Fisheries management should ensure balance between people who fish for recreation, and those who fish commercially	7.6	7.1	5.8	8.4	8.5

Red: score under-indexes compared to total, **Green:** score over-indexes compared to total

Source: C2. Below is a list of statements relevant to the fishing and seafood industries. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, please rate the extent to which you agree with each statement.

Base: All Respondents n=1,722. Data weighted to ABS population statistics. Don't know/ NA removed from analysis.

Most compelling messages by segment

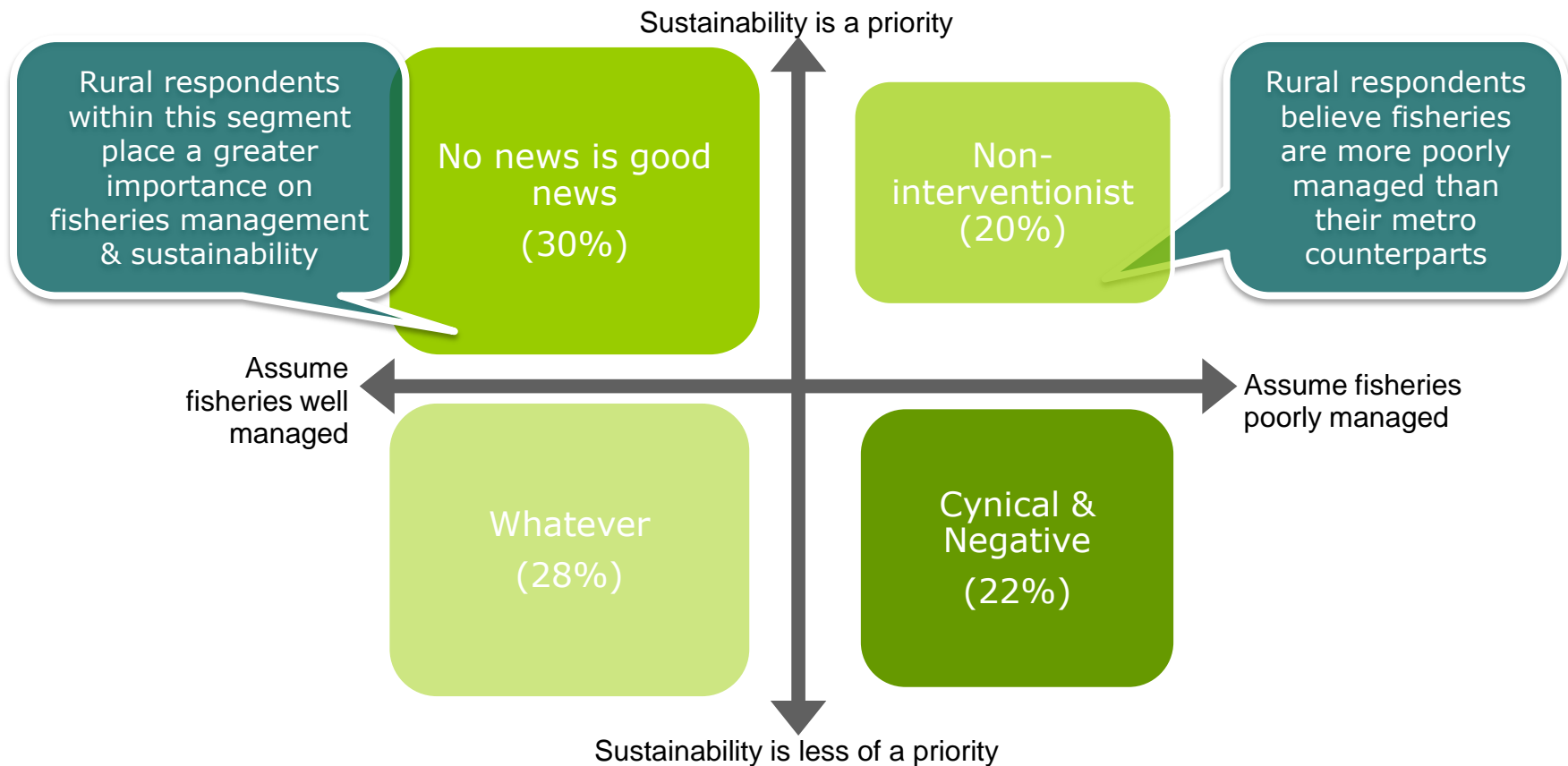
	TOTAL	Whatever	Non-interventionist	Cynical & Negative	No news is good news
The government should regulate specific actions (eg allowing only certain types of fishing equipment) to limit the capture of non-target species	7.5	7.0	5.5	8.8	8.5
There's too much illegal fishing in Australian waters	7.4	6.9	5.7	8.8	8.1
Commercial fishers should be prosecuted if they do not comply with strict regulations	8.1	7.8	6.0	9.5	8.9
Officers should regularly board commercial fishing boats to monitor operations	7.8	7.2	5.7	9.2	8.7
Cameras should be installed on board commercial fishing boats to remotely monitor compliance	7.3	6.6	5.7	8.4	8.2
Australia should comply with worlds best practice standards	7.9	7.5	6.0	9.0	8.6
Australia is one of the few places in the world with a diverse marine ecosystem and we need to look after it	7.9	7.4	5.8	9.1	8.7
If we manage a renewable resource properly today, then we continue to have that resource in the future	7.9	7.6	6.0	9.1	8.7
The government should be doing more to ensure the fishing industry is sustainable	7.7	7.2	5.8	9.0	8.4
The fishing industry is important to the Australian economy	7.7	7.4	6.1	8.3	8.6
Recreational fishing is an important part of Australian culture	7.5	7.2	5.9	8.1	8.5
Industry knows that looking after the resources today will mean they have jobs and an industry tomorrow	7.2	7.1	5.8	7.2	8.3
The government cares more about the economy than the environment when it comes to fisheries	7.1	6.5	5.7	8.3	7.6

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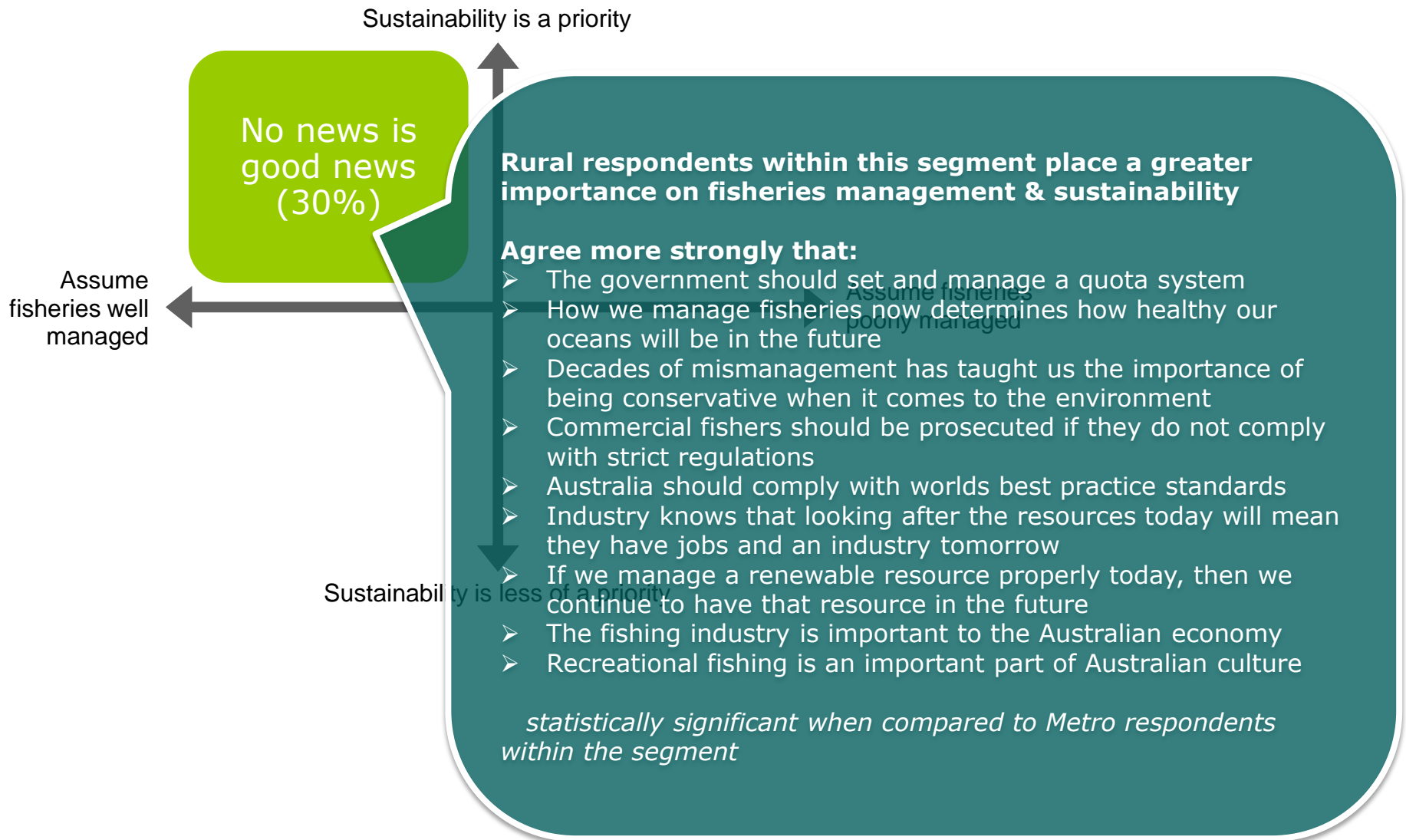
Base: All Respondents n=1,722. Data weighted to ABS population statistics. Don't know/ NA removed from analysis.

Rural skew within segments



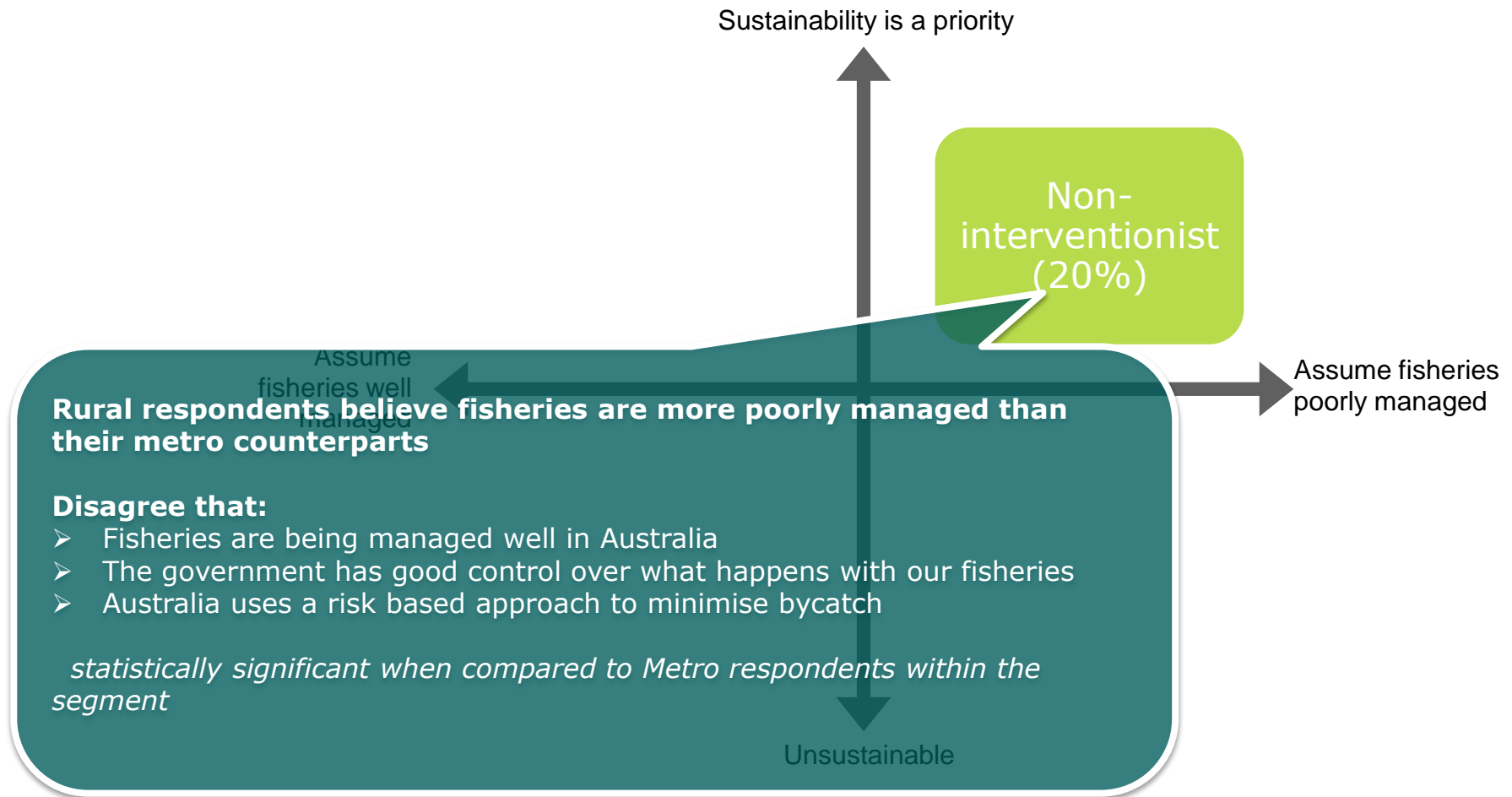
Qualitative research identified that regional markets were more likely to have a greater understanding of fisheries and management – and were both positively and negatively disposed to the issues. Looking at metro and rural respondents within each of the segments confirmed these findings with the 'no news is good news' and 'non-interventionist' segments highlighting differences across this demographic.

Rural skew within segments



Source: C2. Below is a list of statements relevant to the fishing and seafood industries. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, please rate the extent to which you agree with each statement.
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Rural skew within segments



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