

Community attitudes towards Australian Fisheries Management

Market research report

**Report prepared by Essence Communications for the
Department of Agriculture**

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1 Executive summary

In June 2015, a total of n=27 focus groups were conducted across Australia and an online survey was completed by n=1722 community members, with the specific objective of understanding the community's attitudes towards the management of Australian fisheries.

1.1 Key findings

There were five key findings from this research:

- 1) **Fisheries management is not an issue that is top of mind for many Australians.**
There is a low level of awareness of fisheries and its role in Australia's economy and this is judged given there are a number of more well known and higher profile primary industries. A lack of engagement means essentially an overall lack of concern for how well fisheries are being managed. However frequent fishers and those in regional and smaller towns are more engaged in fisheries and interested in what is being done to ensure it is sustainable.**Error! Bookmark not defined.**
- 2) **There are both positive and negative perceptions of the fisheries industry.**
The benefits of the fisheries industry to Australia are clear in that it provides jobs for local communities and Australia more broadly but there are also some aspects of the industry that are considered to be negative.
- 3) **Current signals (or a lack thereof) indicate that fisheries are well managed.**
There are few indicators of performance for the fisheries industry to allow the general public to assess how well the industry is being managed. Compliance with the rules by commercial fishers is one aspect however in this case, the suggestion is that no news is good news and if we haven't heard to the contrary, there must be no issues.
- 4) **Sustainability is important to the fisheries industry.**
There is a good understanding of the need for sustainable industries Australia's fisheries industry is considered to be reasonably sustainable. Again due to a lack of familiarity with the industry the general public are unsure about the genuine commitment to sustainability by the industry
- 5) **Scientists are the most trusted authority on fisheries.**
Financial incentive influences level of trust. For this reason the general public assigns different levels of trust to different players in industry, with most believing that all but the scientists carry some form of agenda. Environmentalists are seen as credible because they have no financial interest. However, there is a growing awareness that they may have a specific agenda that is not always as consistent or practical as people might like.

1.2 Conclusions

In response to these key findings, we make eight conclusions:

- 1) The prevailing conclusion from the research is that the Australian public does not have a great deal of knowledge and understanding of either the fisheries market or the issues. In fact, when referring to the mass market of general public in Australia, there is a low level of interest or engagement in the management of Australian fisheries. It is one thing for an issue or an industry to be considered and rejected. However, it is quite a different matter to never be considered at all, which is the fate of fisheries in the eyes of most of the general public.
- 2) While the benefits of the fisheries industry are clear and the community supports the industry in providing jobs and a healthy food source, when they think about it, they can identify many

more potential negative aspects to the industry. While these negative aspects aren't dominating their view of the industry, this places us in a potentially risky position. It is the current lack of engagement in the fishing industry as a whole that makes this obvious imbalance less obvious.

- 3) The somewhat average rating and consistent lack of engagement with the fisheries industry, confirms that overall, the fisheries industry is not high on the agenda for most of the general public. In the absence of any news that suggests otherwise, most people are not concerned about the way in which fisheries are being managed and are comfortable that those in charge are doing their job.
- 4) If people would be interested in more information about fisheries management, there is a clear preference for information to be provided by a position that is unbiased, unpoliticised and not financially motivated. This may well prove to be a scientist to offer the factual information but could equally be a personality of sorts that can offer the opportunity for 'Australian' positioning.
- 5) Sustainability is a key driver and widely regarded as the objective which should fisheries management should aim for. It leads a segmentation that helps us consider our communication approach and suggests four key segments:
 - No news is good news: 30 per cent
 - Whatever: 28 per cent
 - Cynical and Negative: 22 per cent
 - Non Interventionists: 20 per cent
- 6) Consumption of fish appears not to influence perceptions of the management of fisheries. There is the opportunity to consider some compelling messaging for this cohort despite the general apathy of most consumers. For those who regularly consume fish, country of origin labeling allows them to choose Australian-made, support their country and provides a level of comfort and confidence in the safety of the product they consume.
- 7) The general community is keen to see the 'Australian' fishing industry - they want a reason to believe in Australian fisheries and they want to feel proud of the industry. They do not want to feel like a great Australian natural resource is in jeopardy. However, despite their wishes, there is little they feel they know or can do to stand up and support the industry.
- 8) As such, the most popular types of messages reinforce the opportunity for an industry-wide approach, speaking with one voice, and building a profile, awareness, understanding and pride in the industry and in Australia's amazing oceans.

We need to give them reasons to rally and feel better about the industry. These reasons need to be both factual and emotional. They need to be armed with an engaging and well-articulated story about an industry that is united, all of which is underpinned by a compelling communications approach.

2 Introduction

In 2012/13 a Fisheries Research and Development Corporation (FRDC) project (*Let's Talk Fish: Assisting Industry to understand and inform conversations about the sustainability of wild-catch fishing*) examined the role of community values, facts, emotions and communications concerning social licence in the seafood industry.

A recent desktop review undertaken on behalf of the department identified that there is a scarcity of market research available to better understand perceptions of fisheries management, specifically in the area of sustainability.

This market research project sought to fill that gap and determine current attitudes, perceptions and expectations of Australians towards the sustainable management of Australia's fisheries and seafood industries. As an important primary industry in Australia, and as stated by Senator the Hon. Richard Colbeck, Parliamentary Secretary to the Minister for Agriculture, in recent responses to various campaigns, *'Fisheries are a public resource and the Australian Government is accountable for the sustainable management of all fisheries'*¹. This research sought to better understand how well this balance is managed and why segments of the community believe the public resource is not being managed in a sustainable manner.

- Specifically it aimed to determine the current knowledge, awareness, understanding and attitudes towards the sustainable management of Australian fisheries, including the seafood industry and commercial, recreational and indigenous sectors.
- Gauge the understanding of, and level of trust in, the role of the Australian Government in management of the above.
- Identify key drivers, motivators and influences on community perceptions, specifically opportunities and messages that trigger a reframing of attitudes.
- As a result of understanding the evidence base through addressing the above information gaps, there is a need to outline the fundamental requirements of a communications plan that seeks to challenge the status quo of attitudes and perceptions. Such a plan would identify:
 - A compelling overarching narrative that unites across the sector and varying jurisdictions
 - Priority target audiences
 - Specific key messages, by segment and cohort
 - Preferred information sources or channels
 - Appropriate imagery, tone and manner, including 'face' of the campaign

Given the objectives, the research methodology focused on a combined qualitative and quantitative approach:

¹ Colbeck, R. Department of Agriculture Response to the Environment Tasmania campaign, www.agriculture.gov.au

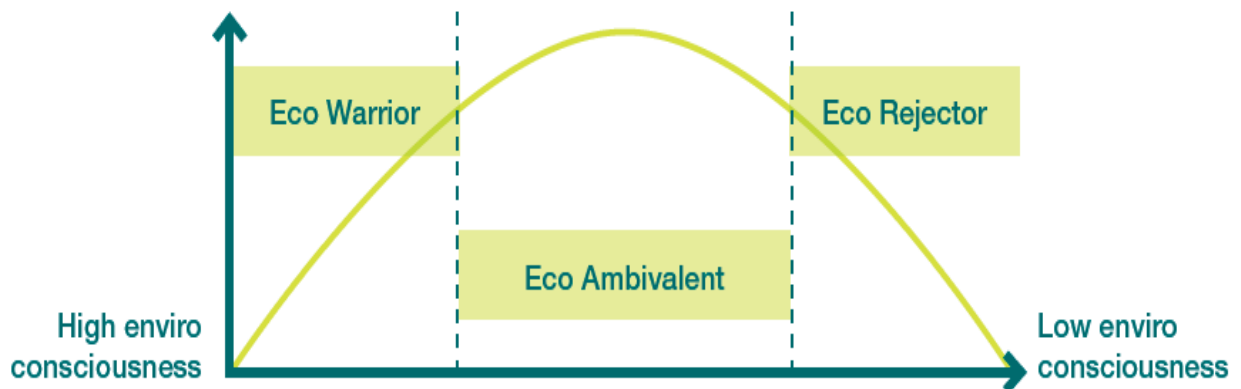
- Qualitative program
 - Stakeholder research comprising n=20 in-depth interviews with a range of stakeholders considered as ‘significant others’ that could offer a view of the environment in which we propose to be communicating and the opportunity for key messaging.
 - Community research comprising n=27 focus groups with community members focusing on the true ‘mass market’ of Australia as outlined below.
- Quantitative program
 - Community research using an online survey which delivered a sample size of n=1,700 respondents including:
 - n=1,500 respondents including fishers/non fishers, seafood consumers/non seafood consumers.
 - A boost of n=200 fishers in non-metro areas.

The following report outlines the key findings from the qualitative research with the community research. Reports from the quantitative program and the stakeholder in-depth interviews have been submitted separately.

2.1 Specification

Given the objectives of this research program, the research specification focused on recruiting the true ‘mass market’ of Australia. In designing a research sample to reflect the broader community, there often appears a bell curve that reflects the distribution of the population in terms of their attitudes towards a particular issue or topic. We understand the bell curve to apply equally to the area of sustainability and for how individuals define their level of environmental interest. We noted the need for the research to ascertain a ‘mass market’ view of fisheries which we find primarily sits within the largely ambivalent majority in the middle of this bell curve. On either side we know that there is a more engaged group of those who are either extremely positive or extremely negative towards fisheries.

The recommended specification reflected the curve below, with the bulk of the focus groups made up of ‘eco ambivalent’ participants. By definition, ‘eco ambivalents’ are people who are neither highly environmentally-conscious nor rejecters of environmental causes.

Figure 1 Research sample bell curve

In addition to the mass market sample, hard core fishers were included in the specification as were 'recreational fishers,' that is people who fish two to three times per year. The research in fact identified that in reality, people who fish two to three times a year are fishing too infrequently to reflect the 'true' cohort of a recreational fisher. It indicated that the views of these participants were much more consistent with those of the eco ambivalent member of the general public.

In addition, the research sample included a cohort who is a slightly more interested 'ambivalent' in the form of the 'environmentally aware.' These people are still not considered eco-warriors rather this cohort is an armchair activist, or a 'clicktivist'. The term 'clicktivist' refers to people whose activism is restricted to supporting causes online. This cohort is interested in environmental issues but not genuinely active and engaged.

The full sample included n=27 groups in total including:

- Metropolitan: n=18 groups
- Regional: n=9 groups (n=3 on-line)
- Recreational fishers: n=10 groups (n=1 online)
- Stakeholders: n=20 interviews
- Seafood eaters: n=17 groups (n=1 on-line)
- Occasional or non seafood eaters: n=9 groups
- Age 25-39 years: n=7 groups (in addition to n=9 groups of recreational fishers)
- Age 40-54 years: n=8 groups (in addition to n=9 groups of recreational fishers)

3 Key findings

The research identified five key findings relevant to the overarching objectives of the program:

- 1) For the vast majority of Australians fisheries management is not an issue that is top of mind.
- 2) The general public acknowledges that there are both positive and negative aspects of the fisheries industry.
- 3) Overall the fisheries industry is seen to be managed well.
- 4) Scientists are the most trusted authority on fisheries.
- 5) Sustainability is considered to be a very important goal, valued and understood by all.

Fisheries management is not an issue that is top of mind for many Australians

3.1 Fisheries management is not an issue that is top of mind for many Australians

For the vast majority of the general public, within the very broad context of the management of Australia's natural resources, fisheries is not top of mind. Similarly, the management of Australian fisheries is not identified, nor spontaneously arises as something they should be concerned about. Respondents were asked to identify those resources in Australia that are naturally occurring but that we also harvest and which support jobs and industries and the most common reference was to the mining industry.

There is a low level of awareness of fisheries and its role in Australia's economy

On the continuum of primary industries that are important to Australia, there are a number of primary industries that sit in the 'well known' end including meat, dairy, eggs and mining. Seafood is placed within this mix but towards the middle with it being mentioned spontaneously in each group although more often it was after those already raised. While there is some uncertainty, most believe that Australians generally enjoy eating fish and more broadly, seafood and suggest there would be reasonable demand in the marketplace. There is some awareness that a fish export market exists with Japan in particular being nominated as an export market. However, respondents were unsure of the extent of both the level of consumption of fish in Australian and the extent of the export trade and therefore the overall size and importance of the industry with most people placing it as a 'mid size' industry.

"I don't know but I constantly hear about mining so my impression is that mining is bigger."

There are a number of more well known and higher profile primary industries

In comparison to other primary industries, seafood is seen as having less volume and influence. There are clearly more well-known primary industries such as meat or mining that have created a brand for themselves and attracted the attention of the Australian media and community over the past five to ten even twenty years. Within this more competitive landscape seafood is considered to have a relatively low profile that is compounded by fisheries being considered somewhat invisible and lacking any real 'public face.'

“At least with cattle you see how many heads you have and that sort of thing and look at how much is left. You can’t really do that with the fishing industry.”

A lack of engagement means an overall lack of concern

Given this lack of exposure the majority of participants believe that they would *‘know more about the fishing industry’* if there were any problems or issues. Their default position reflects this level of ambivalence and suggests that while it must be doing ok, given that it is a government managed resource, there is always room for improvement.

Overall however, the management of Australian fisheries is not an issue that concerns most people. Once raised, there is potential for the discussion about fisheries to be biased towards negativity as participants consider all the potential reasons why they should or shouldn’t be concerned. However, with a fleeting reflection, most come to the conclusion that it is topic that is generally not of great concern to them or to the average Australian.

“Yeah I guess I’ve never really thought about it.”

Frequent fishers and those in regional and smaller towns are more engaged in fisheries

It should be noted that there are some cohorts that are more connected and engaged with fishing as a pursuit. These people fish more frequently and are more likely to live in coastal towns or smaller cities, such as Hobart, Adelaide or Perth, rather than in the larger cities of Melbourne, Sydney or Brisbane. In these towns and smaller cities, fishing is considered to be more important to the culture rather than the economy because fishing is an important past time.

This finding reflects previous research and the quantitative research findings that show that residents in towns and smaller cities often tend to feel closer to nature, often feeling a responsibility to look after the ocean and its inhabitants. It is this cohort that has a higher level of concern for fisheries and their sustainability. They raised the issue of super trawlers unprompted as evidence of the reduced availability of fish and in contrast to the majority of the population, feel that over-fishing is a widely-known issue. Their key proof point is the difficulty they now face in catching fish because they believe that there are now fewer fish to catch.

“I am noticing declines in our local stocks off our beaches. Even going off shore in a boat you are not getting the same quality and quantity and sizing that you used to get.”

Conclusion

The prevailing conclusion from the research is that the Australian public does not have a great deal of knowledge and understanding of either the fisheries market or the issues.

“With anything commercial there is always danger, but for me I just don’t know enough of the facts to form a real opinion. I don’t know enough to feel neither here nor there about it.”

It is one thing for an issue or an industry to be considered and rejected. However, it is quite a different matter to never be considered at all, which is the fate of fisheries in the eyes of most of the general public.

3.2 There are both positive and negative perceptions of the fisheries industry

The benefits of the fisheries industry to Australia are clear

Despite having a low understanding of fisheries and how they operate and are managed in Australia, the general public can see two main benefits of the fisheries industry to Australia.

- Employment opportunities:
 - First and foremost, the broad range of employment opportunities generated by the fishing industry is seen as a positive aspect. They perceive there to be a considerable supply chain to get the fish from the water to the table and can see job opportunities across the breadth of the value chain from commercial fishers to restaurants.

“It is an industry and they have to make money and there are jobs at stake, catching the fish and selling it.”
- Healthy food source:
 - Fish is also widely recognised as a healthy food source with some understanding of the health benefits of eating fish regularly. There was also broad agreement that there is a variety of different fish products available for consumption increasing the opportunity to eat more fish as part of a normal diet. There was somewhat of a suggestion that fish is not necessarily part of a normal meal plan and not always easy to prepare and cook making it less likely to be chosen as a default meal option. There were some mentions of mercury levels in particular fish however these were few and far between.

There are also some aspects of the industry that are considered to be negative

Conversely the general public could cite the various negative aspects of the fishing industry including:

- Over-fishing:
 - While the general public is unsure if the waters are being stripped of their stocks, many recreational fishers feel that there are currently fewer fish as a result of recent fishing trips where the catch was less than what they are ‘used to’. For this group, this is proof that the industry is not being well-managed. One participant referenced a three day fishing competition that he recently attended where not a single fish was caught by any entrant and this was taken as a sign that the oceans are being over-fished.

“A three day competition and no one caught a fish... that doesn’t sound good.”
- Exported fish:
 - While not 100 per cent confident, the general public feels that the best quality fish product is often exported overseas and is not made available to be bought by Australians. This is particularly troubling for some who view the fish from the ocean to be an Australian resource owned by Australians and therefore should be available to Australians.
- Accessibility and price:
 - For some, fish is prohibitively expensive which means they are unable to buy it on a regular basis. Others also feel that finding high quality seafood at a store near their home

is a challenge. Fish sold at supermarkets was not considered to be as high quality as fresh fish at a fish monger and there was considerable cynicism towards frozen fish in the frozen section of supermarkets. Country of origin in both instances contributed to this cynicism.

“You see those labels that say ‘thawed for your convenience.’”

- Confusion over labeling:

- The main area of confusion for participants was fish labeling on a number of different levels. They sought to confirm the type of fish, the country of origin and for indicators that provided proof a sustainable product or not. For those more engaged in the topic, they claim that despite their best attempts to research the product they were buying or read the labels, they were often still unable to work out which products were caught in a sustainable manner.

“You see that some of the tuna is dolphin friendly but then you hear that that’s there’s something else wrong with that stuff anyway.”

- Destruction of the ecosystem:

- There is a sense among the public that some of the fishing practices are negatively affecting the ecosystem. Commercial fishers overfishing and using dragging nets are believed to cause damage to not just the environment but the entire ecosystem with the suggestion that there is often a level of disregard for the environment and marine life that is left behind.

“They take all the fish and sometimes the poor old dolphin gets caught in the net.”

- Commercial interests at all costs:

- Most people have a somewhat negative perception of commercial fishers and believe their primary focus is on making money and they are only interested in short-term profits. While they have few proof points to support this, their sense is that commercial fishers are not necessarily committed to a sustainable fisheries industry despite acknowledging that they should be in order to remain employed and to continue their business opportunities long into the future. In line with this, participants believe that while commercial fishers are more likely to not behave in a sustainable way, they are not as harshly treated or tightly managed as recreational fishers.

“No one is checking every container that comes through so I suspect there is the legislation there to do it and bag sizes and all that kind of thing but probably radically under resourced.”

- Lack of visibility:

- As outlined above there is a general lack of engagement with the fishing industry which is largely a result of the industry operating essentially ‘out there’ unseen in the waters surrounding Australia or on the coast. Many participants consider that the industry is not one that they have an affinity with – there is little to connect them to it unlike other industries like lamb or beef which are more evident and present in Australia’s landscape.

“They’re not cute and cuddly... They’re not any page news.”

- Bycatch:
 - Bycatch is a complex issue and one that participants struggled to reconcile entirely. Many were concerned about the unnecessary harm to other sea life as a result of the fishing industry and they unanimously support measures to reduce bycatch. However, by and large most participants, recognise that some bycatch is unfortunately inevitable through the process of commercial fishing. They would prefer not to say what the ‘acceptable number’ is for sea life (dolphins in particular) that are caught in the process, they concede that there is likely to be some by catch.

“I’m sure there is some collateral damage in other industries but I suppose you just don’t hear about it.”

Conclusion

While the benefits of the fisheries industry are clear and the community supports the industry in providing jobs and a healthy food source, when they think about it, they can identify many more potential negative aspects to the industry. While these negative aspects aren’t dominating their view of the industry, this places us in a potentially risky position. It is the current lack of engagement in the fishing industry as a whole that makes this obvious imbalance less obvious.

3.3 Current signals (or a lack thereof) indicate that fisheries are well managed

Despite a general lack of engagement with fisheries management overall there is a sense from the general public that the industry is being managed well.

There are few indicators of performance for the fisheries industry

While the general public is not seeking out information about the fisheries industry they do see a number of signals as indicators of whether or not fisheries are being well managed:

- If they hear about it - social media or the news
 - If there is bad news, people expect to hear about it on social or traditional media. For many, they assume that an absence of stories about fisheries is an indication that the industry is being well-managed.

“As long as there’s enough fish and no news is good news – the industry must be doing OK”

- A key performance indicator used to assess the state of fisheries is how well commercial fishers are complying with the rules. The community expects that it is this type of thing they might hear about in the news – that a commercial fisher has been caught doing the wrong thing and the government has reprimanded them.
- Local fisherman’s tales of the old days
 - Despite life in 2015 being markedly different to life 20 or 30 years ago, many people use their fishing experience from decades earlier as a benchmark against which to compare their current fishing experiences. They naturally assume that the way things were done in the past is superior to current practices. Further, there is no reference to any previous over-fishing from decades ago impacting the current situation.

- Inability to catch a fish
 - For fishers, their gauge of how well the fisheries industries is being managed is linked to their personal experience, namely whether they regularly catch anything when they fish or return home empty handed.

“Yeah, it’s not like back in the old days when we’d come home with heaps and heaps of fish.”
- Availability of local fresh fish
 - Many lament that despite Australia being an island nation, it can be difficult to source locally-caught fresh fish which indicates to some that the fisheries industry could be better managed.

“The bay is right there – wouldn’t you expect to be able to get fresh fish locally? Off the pier?”
- Litter in the water
 - Litter in the water is a visible sign for those who are regularly out on the water that fisheries are not being managed effectively. They believe that effective management means that policing will enforce the fishing rules and more broadly the rules that apply to the fishing environment such as dumping rubbish.
- The taste of fish
 - Despite the subjective nature of taste, for some the taste of fish is an indicator of the quality of fish and marine health more broadly. While participants did not necessarily judge the overall fisheries industry on this basis, they suggested it might become relevant should the quality of fish and poor taste be deemed to be an ongoing problem.
- Regulatory and environmental bodies
 - The general public assumes that there are regulatory and environmental bodies which oversee or police the fisheries industry. Not only does the existence of such bodies indicate that the industry is being well-managed but evidence points that demonstrate these bodies are doing what they’re supposed to be doing when it comes to compliance and enforcement of the rules, are considered equally important.

“There’d be government organisations taking care of it, I’d think...”
- Super trawlers
 - For the minority who mentioned super trawlers, their presence was visible proof that the industry was being poorly managed. The trawlers were only discussed in a negative light with the suggestion that the ‘system’ had allowed them to operate reflecting a poor decision made by the relevant regulatory bodies.

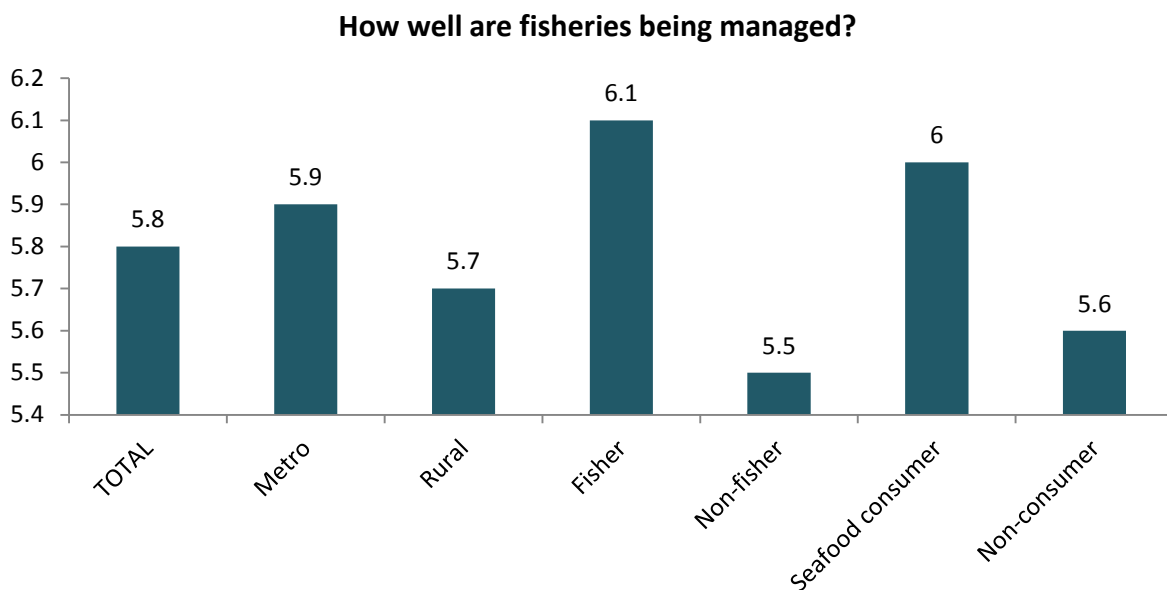
There is moderate agreement that fisheries are being well managed

Overall and in the absence of any information that tells them otherwise, people believe that fisheries are must generally be well managed. As outlined in the quantitative report, respondents to the online survey were asked to rate their level of agreement with the following statement: *Australian fisheries are currently being managed well by government*. There was moderate agreement with this

statement with the average rating of 5.8 out of a possible 10, with 10 being the highest possible score.

However different cohorts rate fisheries management differently. Fishers and seafood consumers who clearly have a higher level of interaction with the fishing industry and marketplace are the most positive about fisheries management, giving scores of 6.1 and 6 respectively. The non-fishing cohort is the least engaged with a score of 5.5 out of 10. (Further details and explanation of these figures are available in the quantitative research report).

Figure 2 Views on fisheries management



Despite a low level of understanding of fisheries in Australia, there was widespread consensus that fisheries in Australia are being better managed than fisheries in other parts of the world, particularly in Asia.

“I think it is not too badly regulated to be honest, I don’t know the whole details but I know that we haven’t destroyed our fisheries.”

Conclusion

The somewhat average rating delivered through the online survey results and the consistent lack of engagement with the fisheries industry demonstrated in the groups, confirms that overall, the fisheries industry is not high on the agenda for most of the general public. In the absence of any news that suggests otherwise, most people are not concerned about the way in which fisheries are being managed and are comfortable that those in charge are doing their job.

3.4 Sustainability is important to the fisheries industry

There is a good understanding of the need for sustainable industries.

There is growing support for sustainable practice across the full spectrum of service, business and behaviours within the Australian community. The concept of sustainability and working to ensure the ongoing availability of a resource is particularly well known in many areas of primary industries. Participants refer to a global view of sustainability and not depleting our resources more broadly.

They refer to a philosophy which is holistic not reductionist – that everything impacts everything else and there is a need to be wise about how resources are used.

They consider that minimising or at least being aware of what has been imported contributes to ensuring the sustainability of local markets. They believe that only taking what is needed from the pool of resources helps to ensure a sustainable supply chain – they don't want to be seen as greedy when it comes to natural resources in particular which are considered to be everyone's resource.

The general community is becoming more acutely aware of the need to take a long-term view to manage resources for future generations and ensure a sustainable food chain. However many had never consciously considered fisheries as a renewable resource that naturally replenishes itself with or without human intervention. This is in comparison to other industries where the lifecycle is perhaps more obvious and more visible to the community.

While participants for this research were deliberately recruited to be eco-ambivalent there was still a strong awareness and understanding of the importance of a sustainable industry. When asked to discuss the sustainability aspects of the fisheries industry in particular, participants agree it is very important.

“When you think about it, sustainability is the most important thing we need to do... but you don't often think about it...”

This philosophy is however tempered by the practical realities of modern life.

“We're unsustainable as a society.”

“I'll make responsible choices if they're really easy to make... 'I want to shop responsibly, but it comes down to the dollar...”

Participants generally like to think of themselves as better at living a sustainable life than they concede they actually are. Comfort, convenience, and budget come before sustainability for most community members who 'try to do the right thing' but often find reasons why they can't. This was highlighted in the discussions with recreational fishers in particular where very few (if any) indicated they were using sustainable bait – or even admitted to knowing what is and what isn't deemed to be sustainable bait.

The groups that were more environmentally aware considered themselves more knowledgeable about the environment and how Australia fares in the sustainability stakes. However, they too conceded they were not as actively sustainable as they could be. For many, the concept of the 'armchair clicktivist' rang true. These participants appear to intellectualise the industry, commenting on what they feel they know and have read, often without much actual interaction.

“How to keep the ocean as healthy and as sustainable as possible. We are now currently depleting the ocean of all its natural life and making so many species of aquatic life extinct. Preservation should be the main focus of the fishing/seafood industries.”

'Clicktivists' like the idea of living a more sustainable life. They like the notion of purchasing fish that is Australian only, or canned tuna that is stamped 'dolphin friendly.' These are the sorts of actions they are likely to undertake to remain in congruence with their desire for sustainability.

Australia's fisheries industry is considered to be reasonably sustainable

Generally, the public has little concept of how sustainable the fisheries industry is or is not, reflecting their lack of understanding of the broader issue of fisheries management. Whilst they don't know if the Australian fisheries industry is sustainable, they are certain that the global industry is not. Asia in particular is seen to be managed poorly when it comes to sustainability and potentially in terms of their understanding of sustainable practices.

"We would be streets ahead of Asia."

There was acknowledgement that Australia may be doing better than Asia but may not be world leaders in fisheries management.

"I think we're probably pretty good at this stuff."

"Not as good as Norway."

"Maybe not leading the world but we'd definitely be up there."

There is uncertainty around a genuine commitment to sustainability by the industry

The general community has a sense that efforts to ensure a sustainable fisheries industry have improved. They believe that in the past it may not have been managed very well but it is now 'changing ways' and the industry has an incentive to be sustainable long in to the future. This appears to more of an assumption in light of the focus on sustainability in general and in most industries rather than any clear indicators that it is happening specifically in the fisheries industry.

"I think commercial fishers want there to be a fishing industry in the future as well.

They have a responsibility to have an industry that prospers and people have jobs."

The general public considers recreational fishers are aware of the need for and care about sustainability and believe they behave responsibly when it comes to supporting the fishing environment. They feel that recreational fishers are protective of their past-time and want to ensure they can continue to enjoy fishing and want to see the fishing industry managed in a balanced and appropriate manner.

There is small but growing noise around farmed fish being more sustainable but worse for the environment. While this appears to be largely uninformed, there is some discussion about the farms' overuse of antibiotics, waste and chemicals which negatively impact the waterways and environment.

While not spontaneously mentioned, participants broadly accepted that there are 'different rules' for indigenous fisheries management. Given the relatively small size of the fishing that occurs in indigenous communities in comparison to the commercial industry, they do not see this as an issue needing to be factored into the sustainability discussion.

3.5 Scientists are the most trusted authority on fisheries

In both the quantitative and qualitative research the general public was asked to assess the trustworthiness of the different stakeholders in the industry. The results from the quantitative and qualitative research were consistent and showed that the choices reflect a strong preference for those deemed to have an independent position with no or limited financial or other incentive that might influence their view.

Financial incentive influences level of trust

Below is the table which depicts the 'trust ladder' from the focus groups. The higher placed a stakeholder group, the most trusted they are by the general public. When considering the assessment of trust, money is deemed to be the corrupting influence. There is a high degree of scepticism and cynicism for information or advice from people considered to have a vested financial interest in the issue at hand.

As shown below scientists and environmental groups were therefore perceived to have the least financial interest in the fisheries discussion and identified as the most trustworthy sources. However as explained below there is a sense that environmentalists are not without bias.

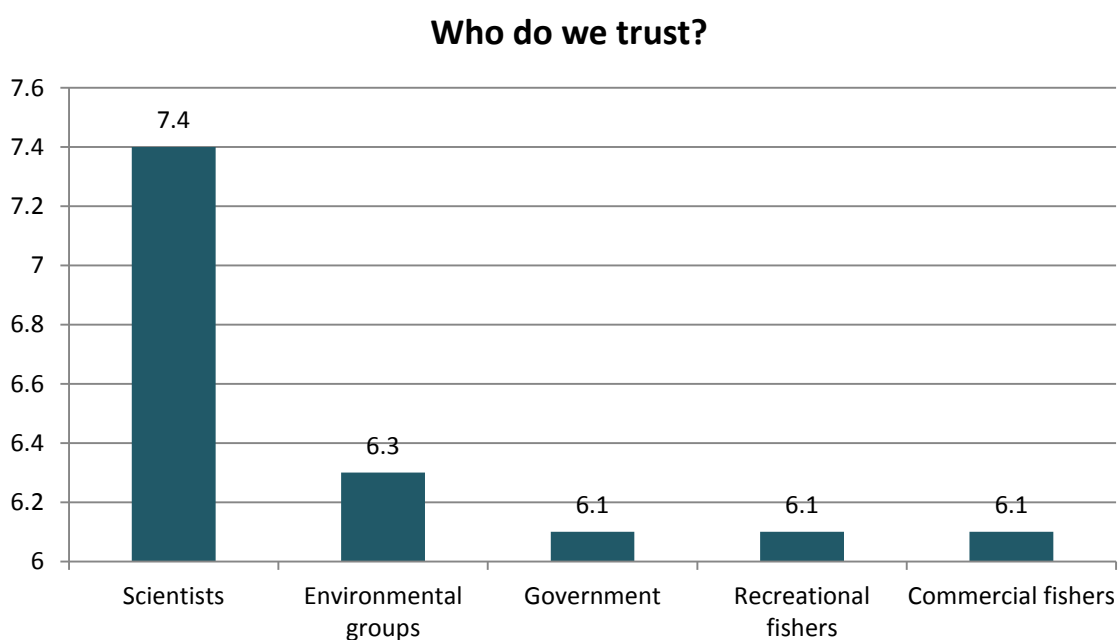
Qualitative trust rankings

- 1) Scientists
- 2) Environmental groups
- 3) Government departments
- 4) Recreational fishers
- 5) Consumers
- 6) Commercial fishers
- 7) Media
- 8) Government – politicians

The quantitative research highlighted the substantial difference in trust assigned to each of these spokespeople with scientists proving to be much more trustworthy in comparison to all other sources. While the qualitative work indicated that environmental groups were considered somewhat more trustworthy than the next three sources, the quantitative results would suggest the gap is not so large however we believe that there is divided opinion about the bias of environment groups which has influenced the rating.

In the quantitative survey only five sources were ranked:

Figure 3 Quantitative trust rankings



- Scientists
 - Overall, the general population views scientists as the most credible group when information regarding fisheries is presented. There is a strong sense that fisheries management requires a scientific approach to best understand what is happening in the oceans. Scientists are believed to have the best opportunity to source and also access information about fisheries particularly in terms of long term themes and analysis of trends.
 - They also view scientists as relatively untouched when it comes to the potential to be corrupted by financial reward and they find this quite reassuring. They understand scientists to have a strong ethical approach to their studies and expect that most are unlikely to ‘fudge the numbers’, to fabricate evidence or to manipulate data towards a particular outcome or to support a particular position as a result of financial or political incentive to do so.
 - There is a level of independence associated with scientists and their commitment to the greater good is well regarded.

“They are doing the data and analysis, and they are not in it for themselves – they are in it for everyone”

“They are neutral, we have to accept what they are telling us”

“They are the intelligence gatherers”

“They are more interested in the facts”
- Environmental groups
 - After scientists the next most trusted groups were the environmental groups. There was some affinity with environmental groups with participants largely believing their commitment to the cause was to be commended. They were generally perceived to have the environment’s best interest at heart and could be trusted to provide truthful information to the general public about what is best for the environment.
 - As we know, the emotional nature of the environmentalists communication approach is an engaging one and one that community in most cases is easily convinced by as a result of their commitment to the environment over financial interests.

“Their priority is not usually financially driven”

 - Having said that, some believe that the environmentalist view may be the ‘soft’ approach which may not always support progress or the economy. They consider that the environmental view is one side to the story that needs to be taken into account as part of the broader discussion and not viewed in isolation. The high level of emotion attached to the environmentalists message resonates however the community has a greater interest in a view balanced by science and data as clear evidence points for an area that they currently know little about.
 - In addition, some perceive the radical environmentalist to be an extreme view and these were placed much lower on the trust ladder.

“They are very one-sided in terms of policy and a lot of things that they would recommend are just not sustainable”

- Government departments

- Whilst initially the groups universally placed government departments towards the bottom, they were moved up the ladder to third in ranking as the discussion ensued. While some actually place them on the second level with environmentalists, most consider them to be the key arbiter of balance. Government departments are considered to be trying to strike the optimal balance between all stakeholders – it is recognised that there are a number of players in the industry and particularly in the environment versus economy debate, they believe government departments seek to find the middle ground.
- When pressed, participants suggest that government departments err on the side of the commercial fisher (and support jobs rather than the environment) as a result of bigger policy approaches.
- It is largely understood that government fulfils a regulatory role in the fisheries industry – to police illegal fishing practices and ensure compliance with commercial fishers however there is considerable confusion on jurisdictions and governance between state and federal.

“Is it DPI?”

“I’m not sure – I do know that I speak mostly to the WA Department of Fisheries when I have a question. There’s a number you can call and they give you great information about what you can and can’t do.”

- Most consider fisheries to be state-based regulation and to be managed locally but expect that the Federal Government has some sort of overarching presence. Whoever manages it, the view is that they are much tougher on recreational fishers than commercial fishers.

- Recreational fishers

- Recreational fishers were nominated as the next most trustworthy source by both recreational fishers and those who do not fish. Recreational fishers are considered to have a higher degree of knowledge of the fisheries industry than the lay person based on their interest in fishing and are therefore considered somewhat credible. Having said that, by definition, a ‘recreational’ fisher is not able to provide the independent and most up to date information and insights into what is happening in the industry more broadly. Their interest is particularly narrow and considered to be focused on the hobby and the enjoyable aspects of fishing as compared to its ability to provide a sustainable food source for Australians.

“I am going to trust the recreational person and charter boat operator over commercial, (the recreational fisher) wants to feed his family for the next month.”

- Consumers

- Despite their self-confessed lack of knowledge, interest or awareness of fisheries management, in the qualitative research, consumers rated themselves as fifth on the ladder of trust. They believe that other consumers can be relatively trusted to provide an accurate view on what is happening at the ‘pointy end’ of the industry rather than how it is being managed in the ‘back end’. This essentially means that they believe they are reliable sources of information about the consumption of fish such as how much it costs and what is available and where.

“I want to know why we can’t get decent fresh fish from our local shops. What happened to the day when you went to a coastal town and you could buy off the docks?”

- Regional and coastal cohorts were divided about the role of the consumer. As a potentially more engaged audience, they are less likely to believe that the consumer knows more about the fisheries industry than commercial fishers for example.
- Commercial fishers
 - Sixth on the ladder of trust were commercial fishers. It should be noted that most metropolitan groups placed commercial fishers higher up, on the same level as environmentalists and government. However, the final position of commercial fishers in balance was sixth, to take into account the lower rankings given by regional groups. The sixth place ranking reflects that there is a growing awareness that industries of all kinds are more interested in sustainable practices to ensure a future and this largely affects the way the providers or stakeholders can conduct their business.
 - The majority of the general public perceive there to be some level of disconnect between sustainable practices and profitability and that for this reason commercial fishers can’t necessarily be trusted to provide a balanced view on how fisheries are being managed. Younger females in particular were more likely to believe that commercial fishers were only interested in profit, with little regard to the environment.

“I would like to think that commercial fishers are trying to do the right thing because their lives are on the line.”

“Maybe they all work together, I’d like to think that’s what happens.”

“You’re kidding aren’t you? The only reason they’re not going for it full on is because they’re not allowed! It’s just about the dollar.”

- Media
 - There is a high level of recognition that ‘you can’t always trust what you hear in the news’ yet despite that, the media is often nominated by the general community as the primary source for what they do know about a topic. When compared to sources that are closer to the topic of fisheries and closer to the actual industry, the media comes in around seventh. Most people recognise it’s a channel as compared to a reliable source and discredit the mainstream media in particular with over-sensationalising an issue.

“They talk sensationalism over truth”

“I’m not so naïve to believe everything I read, I take it with a grain of salt, even those that are pushing a barrow for conservation”

- Politicians
 - Politicians were considered to be the least trustworthy in the ladder of trust and in comparison to the other sources identified in the mix. They are clearly seen to have a political interest relevant to the government of the day and believed to have an agenda that influences what they say about a certain issue. This is particularly relevant to fisheries where the need for factual information is high and more reliably delivered by experts in the field.

“You can’t trust any of them [politicians]”

“The state doesn’t want to know about it and the federal government doesn’t care.”

Conclusion

The lack of engagement and understanding of the fisheries industry resulted in the development of the trust ladder largely on the basis of a hypothesis: if you were interested in knowing how fisheries are being managed, who would be the most trusted source of information? Having said that, the trust ladder was consistent across all groups, with a clear preference for information to be provided by a position that is unbiased, unpoliticised and not financially motivated such as a scientist.

“If I had a spare three hours I might look at who thinks what about something but it comes down to time. I will read a story and if I see something interesting I might read another... Or maybe not. I’m just not that interested in it.”

4 Segmentation

We use a segmentation tool to better understand and predict why people feel or behave the way they do. Ideally, a good segmentation should demonstrate the general mindset of individuals, and could also be used to forecast how they might respond to future themes.

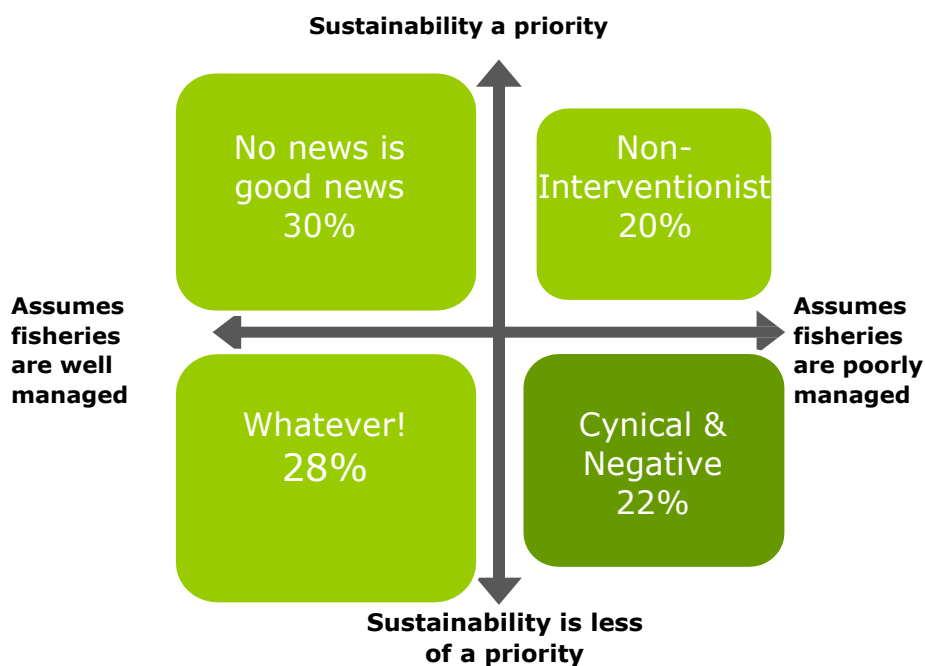
We use the two main factors as our two key axes across which the general community can be segmented on the basis of the research analysis and in this case, our analysis identified that the two most significant factors that influence attitudes and behaviour are:

- their expectation of whether or not they perceive that Australian fisheries are being managed well
- the importance and priority they place on sustainability.

As outlined above, despite a lack of indicators to genuinely inform the general public about the fisheries industry and how well it is being managed, most people form an opinion when asked. The first axis therefore highlights the underlying expectation of how fisheries are being managed based on a range of often random information sources which influence their interest in the topic and their response to our information about the topic. People generally have a view around how government is performing and default to this position on topics they may not have reasonable knowledge of.

Similarly, the importance of sustainability strongly influences views about fisheries management and those that consider it to be a higher priority than others are also more likely to have a greater interest in what's happening in the fisheries industry. With these two axes in mind, the following segmentation is produced – the quantitative study provided an opportunity to obtain an indication of market size of each segment as shown below:

Figure 4 Segmentation of the community



The likely feelings, attitudes and beliefs of each segment are explained below.

4.1 No news is good news (30 per cent)

The 'No news is good news' segment prioritises sustainability and has a more positive assessment of government in fisheries therefore believing them to be managed well. This segment is relatively easy going when it comes to fisheries and what's happening in the industry and is the largest segment within the community at thirty per cent.

The majority of this segment is made up of fishers and has a higher number of seafood eaters compared to other segments.

- Feelings
 - “I think it is heavily regulated and I am sure I have seen stuff in the news over the years, all sorts of rules”
- Attitudes
 - “I think they're doing a pretty good job to be honest. They have to manage fish stocks and also it is an industry that has to make money, there are jobs at stake, keeping something sustainable. They're doing a good job, I think.”
- Behaviours
 - Two thirds are fishers with a bias towards seafood consumption.
 - 28% experts or believe they 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.
 - Interested to find out more.

4.2 Whatever (28 per cent)

Only slightly smaller in size is the 'Whatever' segment that has more of an ambivalent attitude towards government and therefore assumes fisheries are being managed well but they also see sustainability as a lower priority. Both these factors create a somewhat disengaged audience when it comes to fisheries management creating a 'whatever' attitude. The majority of this segment are non-fishers and non consumers of seafood.

- Feelings
 - “I am more likely to buy something that is more healthy than more sustainable... I would assume they have it sorted anyway, that's their job.”
- Attitudes
 - “I will go for something that is better without even giving it a thought if it is sustainable. I make my decision on the meat or fish on the quality of the taste.”
- Behaviour
 - Two thirds are non-fishers.
 - Non consumers of seafood.
 - Two thirds self-assess they know very little or nothing.
 - Neutral response to the majority of propositions.

4.3 Cynical & negative (22 per cent)

Just under a quarter of the population has a more cynical approach to the way in which government manages fisheries – and manages anything really. There are equally cynical about the opportunities for sustainability and see it as a lower priority. This segment has a skew towards older members of the community in rural areas.

- Feelings
 - “When I was younger there was plenty of fish to go around and it’s not like that anymore. Hard to catch a fish now”
- Attitudes
 - “The only person that I will believe is the CSIRO. If they put out a factual statement because I know they won’t lie I will believe it. Until then I don’t care what they put on TV, when I go fishing or crabbing I’m telling you, there is nothing out there!”
- Behaviour
 - Older rural skew.
 - Two thirds non fisher.
 - Believe government is not credible.
 - Believe management of fisheries is poor.

4.4 Non Interventionist (20 per cent)

The final segment prioritises sustainability and therefore believes in the non-interventionist approach which encourages people to live sustainably through their own choices rather than regulation and legislation. They are more likely for this reason to view government negatively and assess them as doing a poor job – essentially on the basis of a fundamental difference in philosophy around sustainability. This segment is more likely to have more environmentally aware ambivalents.

- Feelings
 - “I wouldn’t say that because I fish I am more interested in the management of fisheries –it’s because of my general love of the ocean.”
- Attitudes
 - “I think people see it comes nicely packaged in a thing and we don’t have to think about where it comes from. And that’s wrong.”
- Behaviours
 - Younger, male, eat seafood.
 - Tend to disagree that government is credible.
 - Prefer less regulation and for people to be naturally oriented to live a sustainable life.
 - Likely to contain more ‘clicktivists’ and more environmentally aware ambivalents.
 - Some presence of more active environmentalists in this group.

4.5 Geography

Geography, namely rural versus metromarkets was the most relevant psychographic or demographic differentiator in these groups.

Regional markets (including small metropolitan cities such as Perth and Adelaide) were more likely to have a greater understanding of fisheries and management than their bigger-city counterparts in Melbourne, Sydney and Brisbane. This meant that the regional markets had stronger opinions on the issues and were both more positively and negatively disposed to the issues.

Regional markets were more likely to be hard-core fishers and were closer to the 'foodbowl'. They were more likely to know and understand the complexities of fisheries management than metropolitan markets and have had either direct or indirect experience in some way with the fisheries industry. They were likely to both support and denigrate commercial fishing when in a town where they are a large employer. There is a conflict that they struggle with where the local economy is clearly a priority yet the protection of the local environment is also highly valued.

With more engagement with the topic of fisheries, regional markets were also both more and less likely to support environmental groups. They're more likely to have a view on the positive or negative influence these groups have on the industry and how they affect the way in which decisions are made at a policy level or how the community perceives the industry.

4.6 Consumption of fish

Over half of the population eat fish at least once a week

The quantitative report shows that 51 per cent of the community consume fish at least one day a week and provides more detail on the reasons why some people (18 per cent) don't eat fish – the main ones being high cost and a dislike for it. However the qualitative work showed little to suggest that people would consume either more or less fish on the basis of their perceived management of fisheries.

The quantitative analysis shows that there are fish consumers in every cohort of the segmentation supporting this finding and that their reasons for eating fish – and not eating fish – are generally independent of their perceptions of either sustainability, or fisheries management.

A small number of non-interventionists claimed to consume only fish they have caught, or had stopped purchasing fish altogether on the basis of sustainability.

Local fish is believed to be safer to consume

Locally caught fish is considered important for consumers with most having a keen interest in purchasing local fish, not for reasons of sustainability, but because they see it as being safer. Australians want to buy Australian caught fish. They want to buy Australian made both to support the industry and to protect their and their families health. They believe that Australia has high standards when it comes to food safety and with the 'berry' issue (where a major recall was issued after 8 people contracted Hepatitis A after consuming contaminated imported berries) being topical at the time of the research, many participants were aware that other countries do not have the same regulations nor the same level of rigor in enforcing the regulations.

In saying this, the general public believe it is often difficult to buy Australian made because it is expensive and supply is limited. Even more concerning for them is the country of origin labelling which they see as confusing making it difficult to determine the real country from which it was sourced.

We suspect there is also confusion about the expectation of supply when it comes to country of origin. That is, that fast food meals promoting fish, for example, Red Rooster's promotion of flathead

in its meals, would most likely be considered to be locally sourced based on the marketing approach, when often this food is imported.

People also note that unlike other primary industries, there is no encouragement from the industry to support the local industry. References to other industry campaigns such as pork, lamb, cage-free eggs, mandarins and avocados demonstrate an awareness of the role this type of activity has in encouraging consumers to have confidence in the product.

“In comparison to other primary stuff such as meat, vegetables other things we farm, it is hard to gauge.”

Conclusion

Consumption of fish appears not to influence perceptions of the management of fisheries however for those regularly consume fish, country of origin labeling allows them to choose Australian-made, support their country and provides a level of comfort and confidence in the safety of the product they consume.

4.7 Compelling messages

A range of messages or propositions were tested to best determine those that are the most compelling or impactful in raising awareness of the management of fisheries in Australia, in both the quantitative and qualitative research. The findings from the quantitative study were very consistent with the qualitative fieldwork. The messages with the highest level of resonance generally reflect:

- An interest in seeing action taken to penalise commercial fishers for non-compliance and/or to help the environment
- A need to reflect the pride we have in the natural Australian resource of the ocean
- A desire for more factual information including specific measures or details that prove exactly how or why an action is happening.

The most popular types of message therefore reinforce the opportunity for the fisheries industry to have an industry-wide approach, speaking with one voice, and building a profile, awareness, understanding and pride in the industry.

Below the messages are divided into those that the community agree with, those that they somewhat agree with and those that they generally disagree with.

Table 1 Messages that resonated

Proposition	The general public's response: HIGH level of agreement
Commercial fishers should be prosecuted if they do not comply with strict regulations.	Strong agreement with this statement although skepticism about if it actually happens
Officers should regularly board commercial fishing boats to monitor operations.	Strong agreement with this statement although skepticism about if it actually happens.
How we manage fisheries now determines how healthy our oceans will be in the future.	The health of the ocean strikes a chord and provides something to aim for. There is potential to build pride off the back of this concept.
Australia should comply with worlds best practice standards.	People generally find statements like this easy to agree with.
If we manage a renewable resource properly today, then we continue to have that resource in the future.	Many had never consciously considered that fisheries were renewable, in comparison to other industries. Interesting and thought provoking concept, again showing potential to build support and pride on industry achievements.
Australia is one of the few places in the world with a diverse marine ecosystem and we need to look after it.	This statement is popular because it acknowledges why sustainable practices are so important, and again reinforces the pride in Australia's natural assets.

Table 2 Messages that somewhat resonated

Proposition	The general public's response: MEDIUM level of agreement
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.	The concept of a quota is a good 'reason to believe' and there are plenty who are unaware of it. Rated higher in qualitative research when able to be discussed.
The government should regulate specific actions (eg allowing only certain types of fishing equipment) to limit the capture of non-target species.	Specific actions always positive, although the examples could ironically be more specific. Rated higher in qualitative research when able to be discussed.
The government should be doing more to ensure the fishing industry is sustainable.	This is an easy statement to agree with.
The fishing industry is important to the Australian economy.	Easy to agree with, but they do not know how important.
Recreational fishing is an important part of Australian culture.	This is an easy statement to agree with.
There's too much illegal fishing in Australian waters.	This is an easy statement to agree with.
Decades of mismanagement has taught us the importance of being conservative when it comes to the environment.	Widely agreed, and a mea culpa always appealing but it does not offer a path for the future.
Industry knows that looking after the resources today will mean they have jobs and an industry tomorrow.	Did well in qualitative groups where there was more balanced debate about commercial fishers more generally. Lower rating overall in quant, but note appeal in certain cohorts.
The government cares more about the economy than the environment when it comes to fisheries.	It is easy to agree with this statement.
Fisheries management should ensure balance between people who fish for recreation, and those who fish commercially.	There is a prevailing sense that the recreational fisher is being more harshly dealt with, monitored and fined than the commercial sector.
Cameras should be installed on board commercial fishing boats to remotely monitor compliance.	People struggle with the operational aspects of how this could be implemented. They feel that it is too easy to get around a security camera.

Table 3 Messages that failed to resonate

Proposition	The general public's response: LOW level of agreement
Australia has stronger fisheries regulations than elsewhere.	The statement fared better in qualitative research when it was able to be discussed. This statement was seen as truthful.
The global fishing industry is sustainable.	People felt that this was not the case.
The Australian fishing industry is unsustainable.	This statement opposition as a blanket statement.
Australia's approach to fisheries management is based on scientific evidence.	This statement fared better in qualitative research when it was able to be discussed. There is high trust in scientific evidence.
Australia's approach ensures any risks to the environment are at an acceptable level.	People admit that they do not know enough about this. It is an easy statement to disagree with.
The government has good control over what happens with our fisheries.	This statement invites opposition as it is a blanket statement.
Fishing stocks have steadily increased since 2000.	This statement invites opposition as it is a blanket statement. There was however, some agreement in qualitative research groups.
Australia uses a risk based approach to minimise by-catch.	People admit that they do not know enough about this. It is an easy statement to disagree with.
Fisheries are being managed well in Australia.	This statement invites opposition as it is a blanket statement.

There are some variations to this assessment based on a person's attitude towards sustainability and their perception of how fisheries is currently being managed as outlined in the quantitative report:

- By and large the 'No news is good news' segment rated all statements more positively with the enforcement of quota systems supported as well as a risk management approach. They agree with the need for a scientific data and that overall fisheries are being managed well.
- The 'Cynical and Negative' segment obviously disagree more so with positive statements about fisheries in particular they do not believe that fishing stocks have increased since 2000. They are significantly more concerned about the health of the oceans into the future and strongly believe that commercial fishers should be prosecuted if they do wrong thing.
- The 'Non-interventionist' segment is the least supportive of the quota system and more likely to disagree with statements that involve any type of regulatory action.
- The 'Whatever' segment is largely ambivalent about the majority of statements rating everything similarly in terms of their agreement or disagreement.

Conclusion

The general community are keen to see the 'Australian' fishing industry - the most popular types of message reinforce the opportunity for an industry-wide approach, speaking with one voice, and building a profile, awareness, understanding and pride in the industry and in Australia's amazing oceans.

4.8 The implications

With these key findings, the segmentation and the preference towards certain key messaging, there are a number of implications to consider moving forward.

Balancing the downside

As outlined above, when considering the potential downside of the fisheries industry, community members can articulate the negative aspects and they generally accept that there would be some

aspects of the industry that present a less than positive picture. The exact details of this downside however were difficult to pinpoint. It should be remembered that discussion creates unease about what people do not know and we saw this occurring in the focus groups as participants realised their current lack of knowledge about the industry. They tend to find those downsides perhaps more quickly than what they might in a normal situation.

Overall, the general public prefers sustainable practices, has a desire to limit pollution and does not want to see entire species wiped out. They are uncomfortable with the idea of large super trawlers taking so many fish out of the ocean at one time and want fairer controls between large and small enterprises. In turn, they are prepared to tolerate higher prices in exchange for these controls and guarantees.

A small proportion of 'collateral damage' is considered acceptable to deliver this and when we discuss the issue of bycatch it tends to wash over with relatively little concern. This is consistent with the general public's lack of awareness or interest in the industry currently and the real story behind such issues. Whilst they have some tolerance and acceptance for some collateral damage, they're not sure what can be done about it and expect that the industry should be actively planning and strategising to avoid such downsides, even if this is at a higher cost.

The environmentally aware were, not surprisingly less willing to compromise on what might be an acceptable fallout from delivering a viable and sustainable fisheries industry. They would of course prefer to see an approach that completely avoids any type of damage in any way.

Amongst the general public however the general discussion reverted to what one gains in exchange for the potential downside of economic activity. The seafood industry is largely 'invisible', meaning it is hard to visualise the advantages to justify the downside.

"Overall we're not seeing enough upside to justify the downside."

Whereas, other industries which have a more evident upside produce a greater willingness among the public to compromise.

"I just think other industries have pumped up their own tyres up a lot better than the fishing industry has. We support our famers but the fishing industry we don't think like that."

Other industries have also engaged the 'hearts and minds' of the public, building the industry into one of national pride (Meat and Livestock, bananas, avocados). The seafood industry feels neither large enough, transparent enough or known enough indicating that a pride strategy which offers a layer of insulation has not been put into place.

Genuinely interested in finding out more?

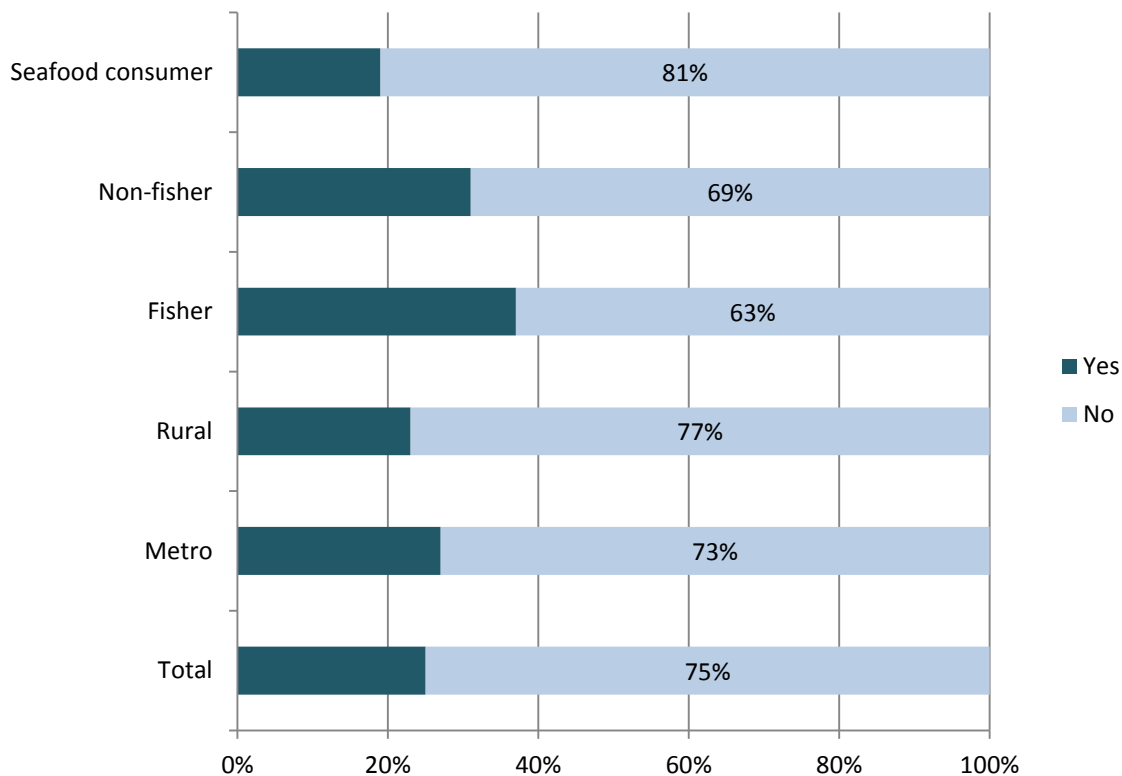
As has been noted previously, the majority of participants are largely unaware about fisheries management. They are not necessarily engaged enough to seek more information about the topic.

"With any of these messages, I would like to think that I did care, but at the end of the day I really don't care unless it really personally affects me or it is so bad there are no fish in the ocean.... That one piece of salmon is \$500! I am really just cruising along thinking someone else is looking after it."

In saying that, there were certain segments or cohorts who expressed more interest than others in finding out more. In the quantitative research, we further tested this notion by offering participants

the opportunity to click on a webpage for more information. As shown in the graph below, a quarter of the total sample clicked the link, further suggesting that most people are not very interested in the topic. Some cohorts, namely fishers and seafood consumers showed a greater willingness to learn more.

Figure 5 Percentage of survey participants who clicked for more information



The role of a communication campaign

The concept of finding out more information sparks a discussion about what particular aspect people want to know more about. For some, knowing more is always a benefit and a right, and an obligation for government to meet.

“I think that having more information is always better. Then the choices you make become informed choices. If everybody participates in that it becomes shared social responsibility, it engages people at a broader level and it also like really positively affects different industries and stuff.”

“I suppose it’s good to have the information there – but I don’t really care until it interests me.”

For other people, discussions about governments communicating about their work raises questions as to whether it is appropriate to use funds to mount a campaign to raise awareness amongst the general public of a topic in which they have demonstrated little interest.

“I don’t care if I see messages out there about how we do a great job of managing the industry. I’d go good on you, that’s your job!”

“If they’re going to spend money, they should spend it on policing”

However, there was a consensus among participants that compared to other industries, the fisheries industry is largely invisible, and lacks a profile. There is absolutely no doubt that people want to have pride in all things Australian and to buy Australian fish products. And having a greater understanding of the role the fisheries industries plays in Australia and what it means to Australian is considered a worthy cause.

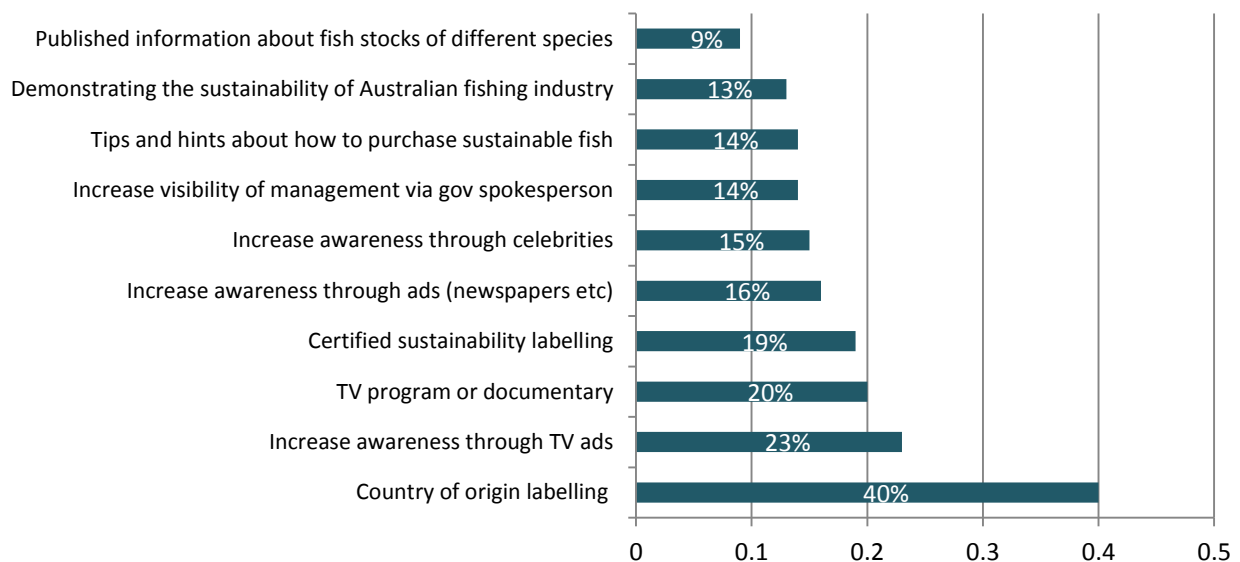
It is also clear that the ‘spokesperson’ for a communication campaign of this nature is not always best delivered by government. Industry is seen to have a key role in supporting and promoting industry and have a more powerful voice when it comes to talking about their own products.

The importance of country of origin labeling

Clearly country of origin labeling provides a level of comfort and empowerment for Australians. When asked what information would be of most use in the quantitative study, respondents clearly identified the importance of country of origin labeling. This is an area of great interest for many products and services and there is a growing expectation and almost a ‘right’ to know what they’re buying and from where it comes. However buying Australian is not always easy and consumers would be keen to see more facts and information that would help them differentiate the Australian products from others to allow them to make the conscious choice of Australian made.

There is a specific emotional connection too that is relevant with the general public eager to support home-grown industries and Australian-made.

Figure 6 Valuable information



The focus on sustainability

The general public also wants to buy sustainably sourced products so they feel they are supporting the environment. Again, while there is a high level of ambivalence towards environment, most people want to do the ‘right’ thing and have a preference for a more sustainable and environmentally friendly option.

Like buying Australian, despite their best efforts it is not easy to be able to choose a more sustainable product because it is not always clear which products are sustainable.

“Realistically I am not going to change my seafood purchasing habits. But if there was something really simple... or two products that were similarly priced and one had a logo that was reputable or certified or something, I'd do that.”

The need for an emotional connection through pride

The general public wants to share their pride in the natural resource and clean ocean imagery of the seafood industry. However, there is currently no unifying theme or call to action to support.

Whilst the general public is not particularly interested in fisheries management, when engaged on the topic, they want to hear detailed information and that specific actions are being taken to manage the sustainability of the industry. This includes penalising those who do not comply, not just recreational fishers, but also commercial fishers. People are interested in and comforted by actions that demonstrate policing and protection. Their interest in hearing about policing efforts is an example of an emotive 'hearts and minds' style of communication being more compelling than facts and science.

“I want to hear about positive solutions and the impact that fisheries management is having on the re-stocking or rehabilitation of marine ecosystems. We all love to hear about Australian innovation and R&D, so why not?”

“All in industry are working together to ensure the sustainability of our fisheries.”

“Tips and education so we can make better more informed choices and contribute to making the industry sustainable.”

“Maybe like a heart foundation tick with some sort of recognition of sustainable practices.”

5 Conclusions

In summary, there are eight key conclusions:

- 1) The prevailing conclusion from the research is that the Australian public does not have a great deal of knowledge and understanding of either the fisheries market or the issues. In fact, when referring to the mass market of general public in Australia, there is a low level of interest or engagement in the management of Australian fisheries.
It is one thing for an issue or an industry to be considered and rejected. However, it is quite a different matter to never be considered at all, which is the fate of fisheries in the eyes of most of the general public.
- 2) While the benefits of the fisheries industry are clear and the community supports the industry in providing jobs and a healthy food source, when they think about it, they can identify many more potential negative aspects to the industry.
While these negative aspects aren't dominating their view of the industry, this places us in a potentially risky position. It is the current lack of engagement in the fishing industry as a whole that makes this obvious imbalance less obvious.
- 3) In the absence of any clear indicators, the general public believes that the industry is largely well managed however there is always plenty of room for improvement. The somewhat average rating delivered through the online survey results and the consistent lack of engagement with the fisheries industry demonstrated in the groups, confirms that overall, the fisheries industry is not high on the agenda for most of the general public.
In the absence of any news that suggests otherwise, most people are not concerned about the way in which fisheries are being managed and are comfortable that those in charge are doing their job.
- 4) If people would be interested in more information about fisheries management, there is a clear preference for information to be provided by a position that is unbiased, unpoliticised and not financially motivated. For this reason the general public assigns different levels of trust to different players in industry, with most believing that all but the scientists carry some form of agenda. This may well suggest that scientists should present the factual information about the fisheries industry but could equally be a personality of sorts that can offer the opportunity for 'Australian' positioning.
Environmentalists are seen as credible because they have no financial interest. However, there is a growing awareness that they may have a specific agenda that is not always as consistent or practical as people might like.
- 5) Sustainability is a key driver and widely regarded as the objective which should fisheries management should aim for. The majority of people recognise their behaviour does not always measure up to their desires and beliefs. In noting this behavior, this leads to a segmentation that suggests four key segments:
 - a) No news is good news: 30 per cent
 - b) Whatever: 28 per cent
 - c) Cynical and Negative: 22 per cent
 - d) Non Interventionists: 20 per cent
- 6) Consumption of fish appears not to influence perceptions of the management of fisheries. Indeed, there is little relationship between whether people eat fish and the basis of their perception as to how well managed fisheries are. There is the opportunity to consider some

compelling messaging for this cohort despite the general apathy of most consumers. For those who regularly consume fish, country of origin labeling allows them to choose Australian-made, support their country and provides a level of comfort and confidence in the safety of the product they consume.

- 7) The general community is keen to see the 'Australian' fishing industry - they want a reason to believe in Australian fisheries and they want to feel proud of the industry. They do not want to feel like a great Australian natural resource is in jeopardy. However, despite their wishes, there is little they feel they know or can do to stand up and support the industry.
- 8) As such, the most popular types of message reinforce the opportunity for an industry-wide approach, speaking with one voice, and building a profile, awareness, understanding and pride in the industry and in Australia's amazing oceans.

We need to give them reasons to rally and feel better about the industry. These reasons need to be both factual and emotional. They need to be armed with an engaging and well-articulated story about an industry that is united, all of which is underpinned by a compelling communications approach.