



Department for Environment and Water Marine Parks Knowledge Research

July 2024 | Ref 12550

MCGREGOR **TAN**
RESEARCH. STRATEGY. SOLUTIONS.

Contents

| | | | |
|-----------------------------------|----|--------------------------------|----|
| Methodology | 3 | Appendix 1: Respondent Profile | 55 |
| Executive Summary | 4 | Appendix 2: Sampling Tolerance | 58 |
| | | Appendix 3: Survey Tool | 60 |
| Segments | 7 | | |
| Awareness and Knowledge | 9 | | |
| Activities and Visitation | 12 | | |
| Support | 16 | | |
| Attitudes and Perceptions | 19 | | |
| Fisher Behaviour | 24 | | |
| Accessing Information – Fishers | 29 | | |
| Landscape Region Heatmap Analysis | 35 | | |

Methodology

This research project was conducted by McGregor Tan from Wednesday 1st May to Thursday 23rd May 2024.



Objective

This research project was undertaken to assess the awareness, usage, and knowledge of South Australia's Marine Parks (MPs) and Sanctuary Zones (SZs) for the purpose of informing the Department for Environment and Water's future communication strategies.

The study was designed to capture the overarching perspective of the South Australian population, as well as the viewpoint of those who participate in fishing activities.



Approach

Market research has been conducted in accordance with ISO 20252.

Research was distributed through McGregor Tan's online panel, the largest panel of South Australians used exclusively for market research purposes.



Sampling

A total sample of n=1725 were surveyed, comprising n=1128 of the general population and n=597 fishers.

For the purpose of this research, fishers were defined as those who indicated that they participate in fishing activities multiple times per week, weekly, fortnightly, monthly, or yearly. This has enabled the research to assess the viewpoints of regular/ frequent fishers as well as occasional/ infrequent fishers, creating a robust evaluation of awareness, knowledge, perceptions and behaviours among the fisher cohort.



Reading the report

Relevant statistically significant findings as well as other observations of interest are analysed in this report.

Because of rounding, answers in single-response questions will not always sum precisely to 100%. In addition, as the base for percentages is the number of respondents answering a particular question (rather than the number of responses) multiple response questions sum to more than 100%.

On 5-point scale questions, the average is a weighted mean, taking into account the proportion of responses in each category and the numerical value of each response.



Executive Summary

Executive Summary

Awareness and knowledge

Overall, seven in ten (70%) South Australians are aware of Marine Parks, 69% are aware of Sanctuary Zones, and just over a quarter (26%) are aware that Marine Parks have 4 different zone types.

Fishers, particularly those accessing fishing locations from watercraft or those who have been fishing for 20 years or more showed higher levels of awareness across pieces of information. Land-based fishers were more likely to not be aware of any information (14%).

Fishers seek information about Marine Parks and Sanctuary Zones from specialised sources, averaging 2.2 sources of information, compared to 1.7 for non-fishers, who often come across information from traditional sources.

Visitation

Almost two thirds (64%) of South Australians have visited at least one marine park in the past 3 years, with Encounter MP (metro) having the highest visitation overall, however, Lower Yorke Peninsula MP has the highest visitation among fishers.

Over four in five (83%) participate in general recreation activities along SA's coastlines, with over half participating in fishing activities (52%) and watercraft activities (51%) and just over two in five who snorkel/ dive (41%).

Almost one in five (17%) have been involved in organised activities at Marine Parks, with involvement being higher among fishers, with over two in five (42%) being interested in becoming involved in the future.

Support

Over four in five (84% to 87%) indicated support for Marine Parks and Sanctuary Zones in SA, respondent's local coastal areas, and coastal areas they visit.

Over four in five support Marine Parks and Sanctuary Zones across all three locations tested, however, fishers exhibited slightly less support than non-fishers in supporting marine parks across all locations (87% and 90% respectively) and in supporting Sanctuary Zones across all locations (86% and 90% respectively).

Fishers who reported negative attitudes toward Marine Parks were significantly less likely to support Marine Parks or sanctuary zones, along with fishers who access their fishing locations via boat or other watercraft.

Executive Summary (cont.)

Attitudes and perceptions

Over half (52%) have maintained a positive attitude toward Marine Parks since 2012, with fishers more likely to have experienced a positive attitudinal shift. Only 4% currently have a negative attitude toward Marine Parks, with this finding being higher among regional respondents (7%).

Almost four in five (79%) identified the primary purpose of SA's Marine Parks to be protecting and conserving plants and animals. Fishers are more likely to view Marine Parks as restrictive, associating them with exclusion and the prevention of fishing (6%). This perception could lead to resistance or negative attitudes towards Marine Parks within the fishing community.

More than half recognised Marine Parks in SA for conserving marine life, maintaining fish populations, and advancing marine research and education.

Fisher behaviour

Over three in five (63%) fishers had never seen or been approached by an MP compliance vessel or park ranger.

An increased number of interactions with MP/PIRSA vessels makes it more likely a fisher will check for Sanctuary Zone locations more often,

Checking for Sanctuary Zones more frequently increases fishers' knowledge of the Sanctuary Zone locations over time.

Ramp signs are most commonly used to avoid fishing in Sanctuary Zones, although those with high levels of confidence about locations are more likely to use GPS/ chart plotters.

Accessing information

Frequent use of the PIRSA Fishing App maps is minimal, with only 12% of fishers in SA using them 'often' to check their position relative to Sanctuary Zones.

Over a third (35%) never use the App, with nine in ten of these fishers being unaware of the App or that it has maps available on it. Three in five (60%) of those who were previously unaware of the App/ its mapping feature indicated likelihood of using it.

Over half (55%) agree that information about marine park zones are easily accessible. Over half (51%) of fishers have seen information about Marine Parks and Sanctuary Zones from signs, either at boat ramps or elsewhere along the coast.

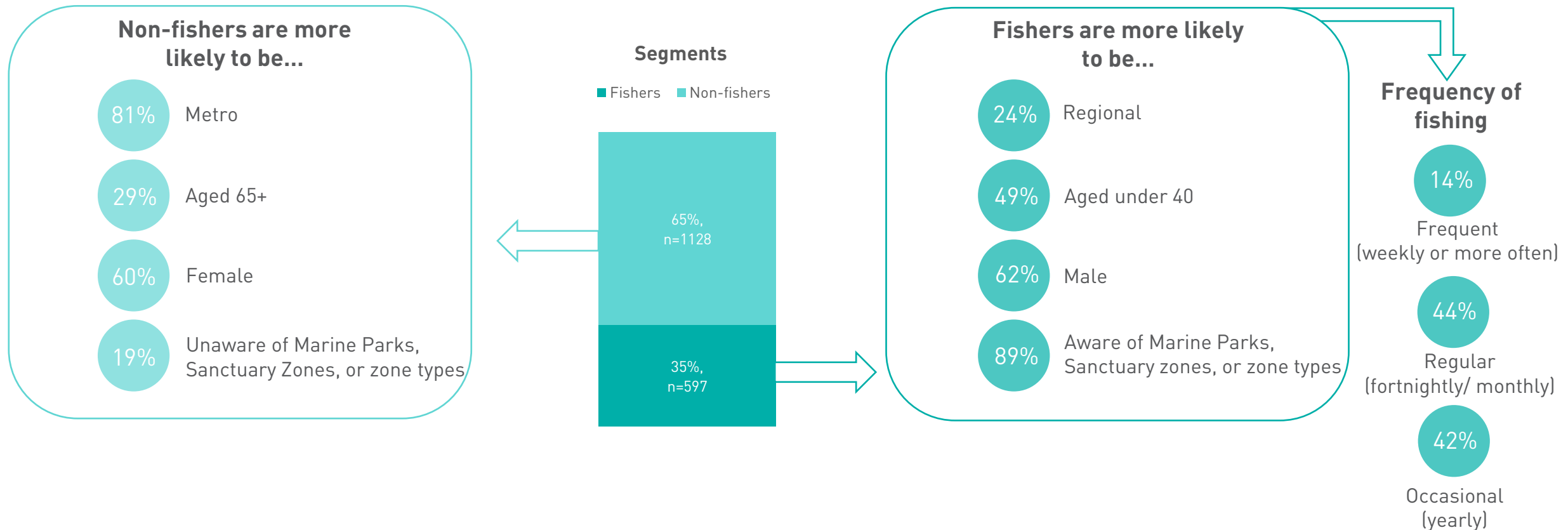
Almost half (48%) of fishers held a preference for signs and information at boat ramps, while two in five (40%) preferred fishing and boating apps to keep up to date with and access information about Marine Parks



Segments

Fishers and non-fishers

Comparing survey data between fishers and non-fishers will help identify knowledge gaps and differences in perceptions about Marine Parks. Furthermore, segmenting fishers into frequent/regular and occasional fishing behaviors can provide deeper insights into varying levels of awareness, knowledge, and compliance behaviors. This Approach enables the development of more tailored and effective management strategies and highlights specific community engagement needs that can guide targeted educational and policy-making efforts to enhance marine conservation.





Awareness and Knowledge

Baseline awareness of Marine Parks is strong

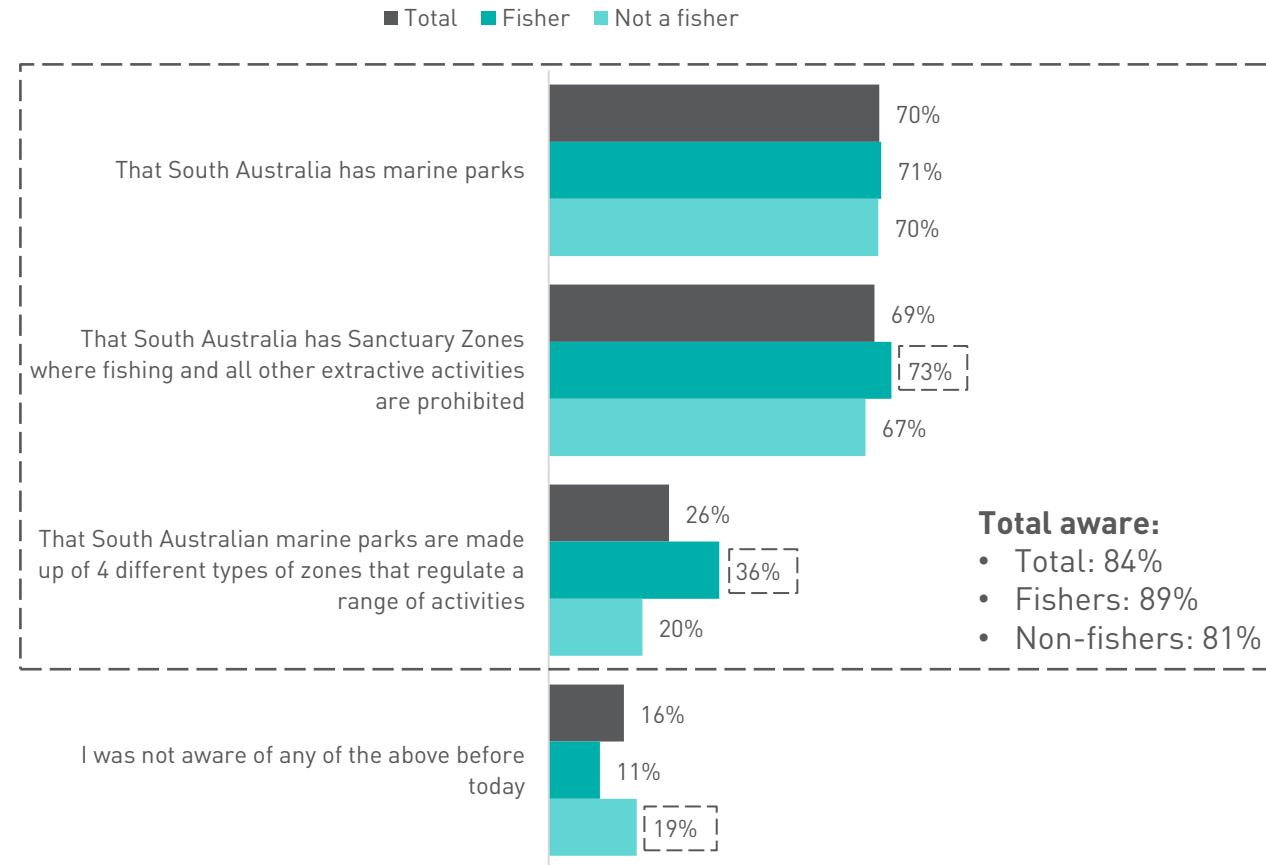
Awareness that South Australia has Marine Parks is strong across South Australia, across both fishers and non-fishers. Fishers are marginally more likely to be aware of Sanctuary Zones, although non-fishers also display a strong level of awareness.

Lower levels of awareness can be seen for zone types across both cohorts (26% non-fishers and 36% fishers).

Those in regional South Australia showed greater awareness in all three areas, as did those aged 55+, fishers who have been fishing for 20 years or more and water-based fishers.

Of just the fisher's cohort, those who have had their boat licence for 0-5 years were significantly less likely to be aware that South Australia has Marine Parks (61%), alongside those who have been fishing for less than 10 years (57%) who also were less likely to be aware of Sanctuary Zones (64%). Additionally, those fishing from land were more likely to be unaware of any of the information (14%).

Awareness by segments



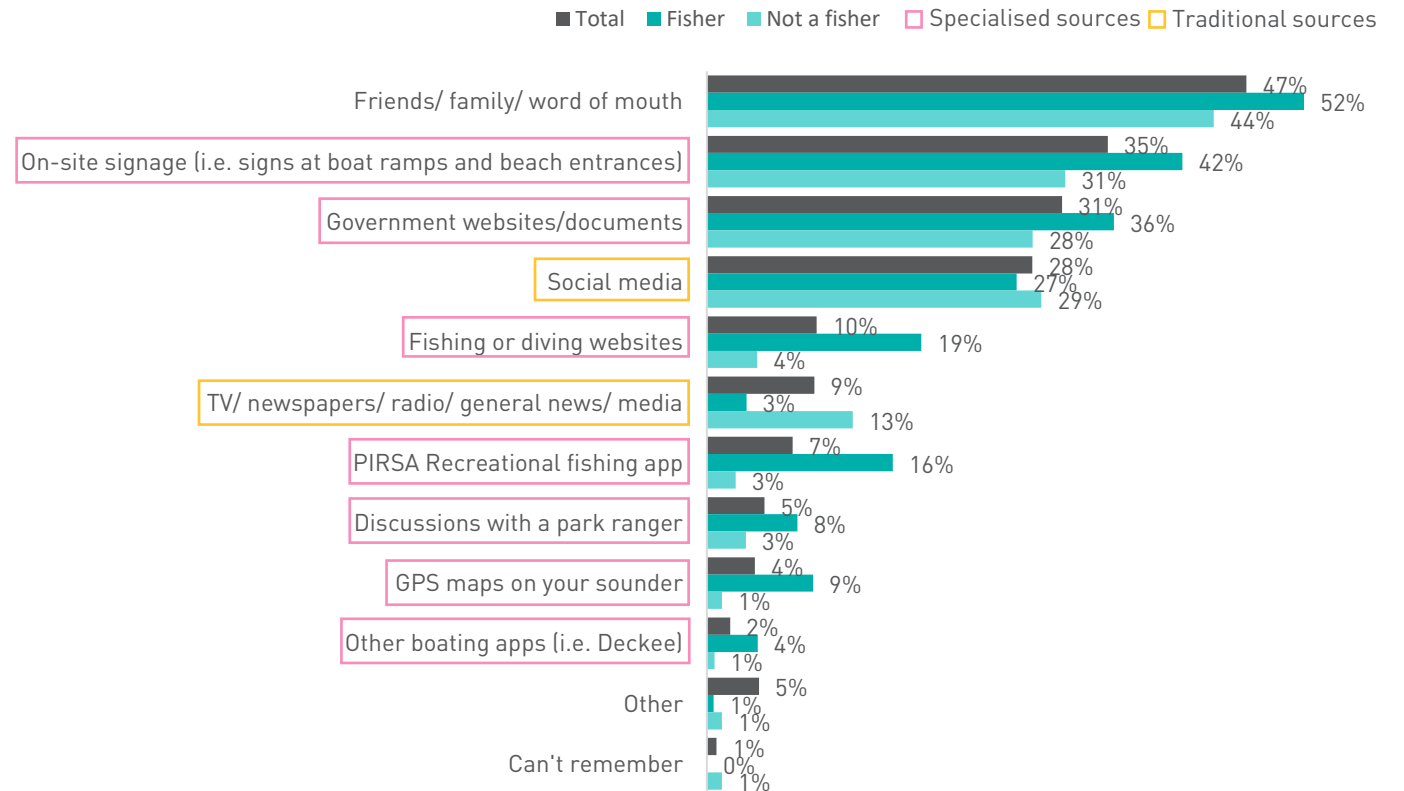
While word of mouth is strongest overall, fishers seek specialised sources (75%), while non-fishers may come across information through traditional sources (40%)

On average, fishers had 2.2 sources of information, compared to 1.7 sources for non-fishers.

Fishers aged 18-24 are more likely to source knowledge from the GPS maps on their sounder (20%), while non-fishers of the same age range primarily pick up knowledge from what they see on social media (48%). Non-fishers 65+ gained knowledge from TV/ news/ radio/ media (22%).

Those who have been fishing for 20 years or more had a higher incidence of gaining knowledge from government websites/ documents (41%), and fishers who access locations from a combination of land and water are more likely to gain knowledge from Sounder GPS maps (15%), and other boating Apps such as Deckee (9%).

Source of knowledge about Marine Parks/ sanctuary zones





Activities and Visitation

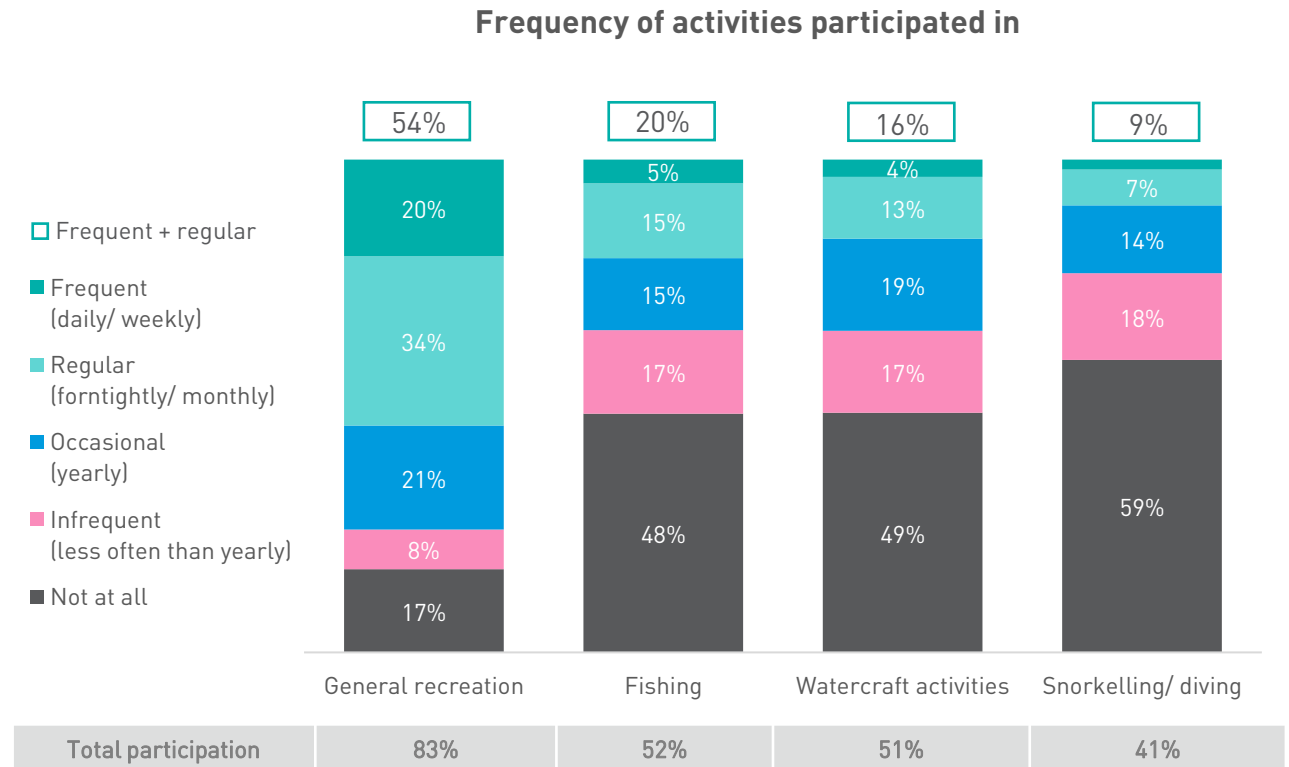
Over four in five participate in general recreation activities along SA's coastlines

Fishers and those aged 18-39 have a higher incidence of participating in all activities.

Those who participate in fishing (42%), snorkelling/ diving (43%), or watercraft activities (43%) frequently/ regularly are more likely to be aware of MP zone types, while awareness for Sanctuary zones was highest among those undertaking watercraft activities (75%) or general recreation activities frequently/ regularly (72%).

Frequent/ regular fishers are more likely to be those who:

- Have participated in fishing for under 10 years
- Have held a boat licence for 5 years or less
- Access fishing areas primarily from the land or a combination of land and water



Lower Yorke Peninsula MP has the highest visitation among fishers, Encounter Bay with non-fishers

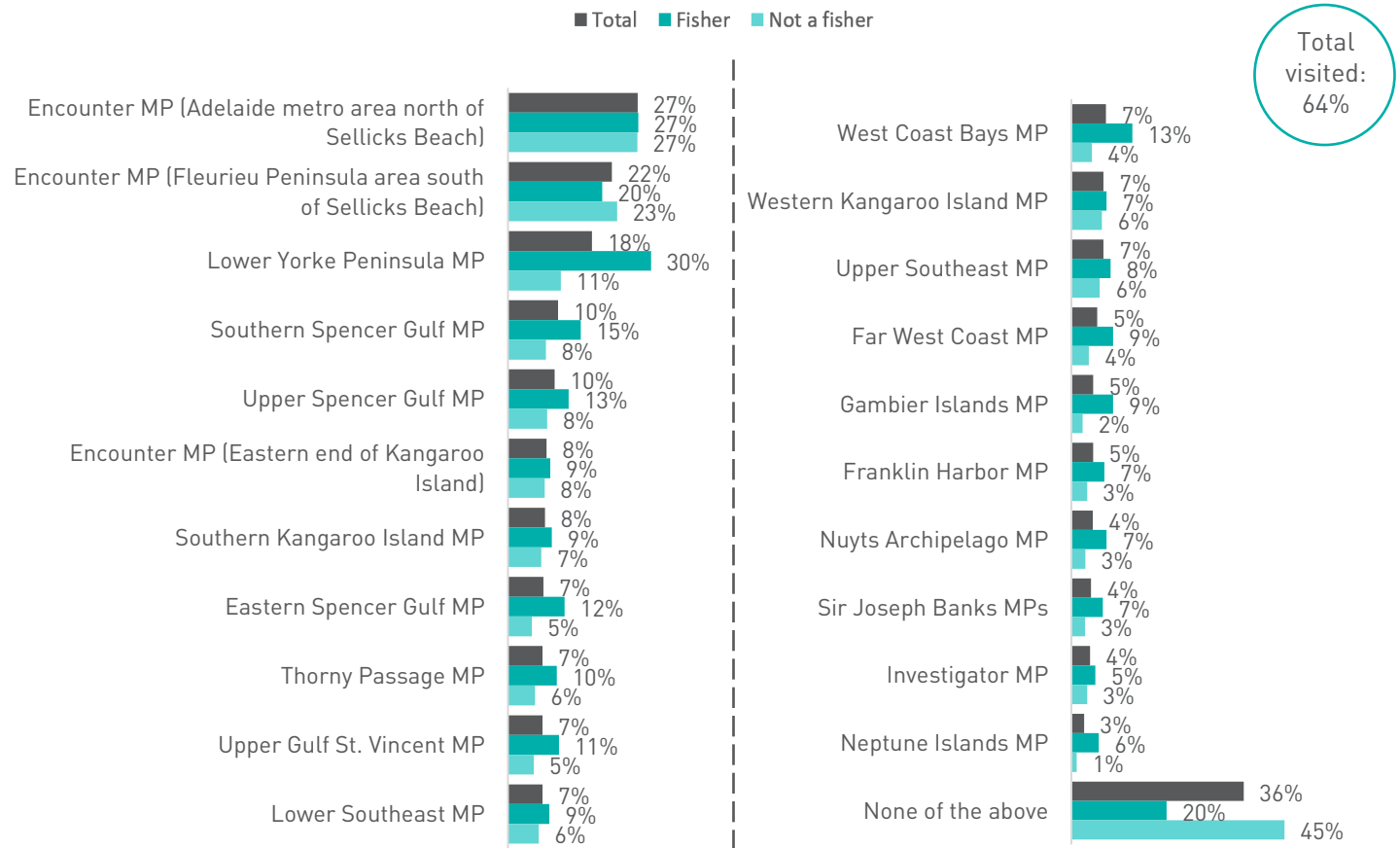
Almost two-thirds (64%) have visited at least one marine park in the past 3 years. Eight of every ten fishers (80%) have been to at least one marine park the past 3 years, while 55% of non-fishers have done the same.

Over the past 3 years, fishers in South Australia have visited an average of 2.6 Marine Parks, while non-fishers have visited 2.

Encounter Marine Park (Adelaide metropolitan area north of Sellicks Beach) also shows high frequent usage (26% daily-monthly) and a notable yearly visitation rate (29%).

Lower Yorke Peninsula Marine Park also has a high yearly visitation rate (24%).

Visitation to Marine Parks in the past 3 years

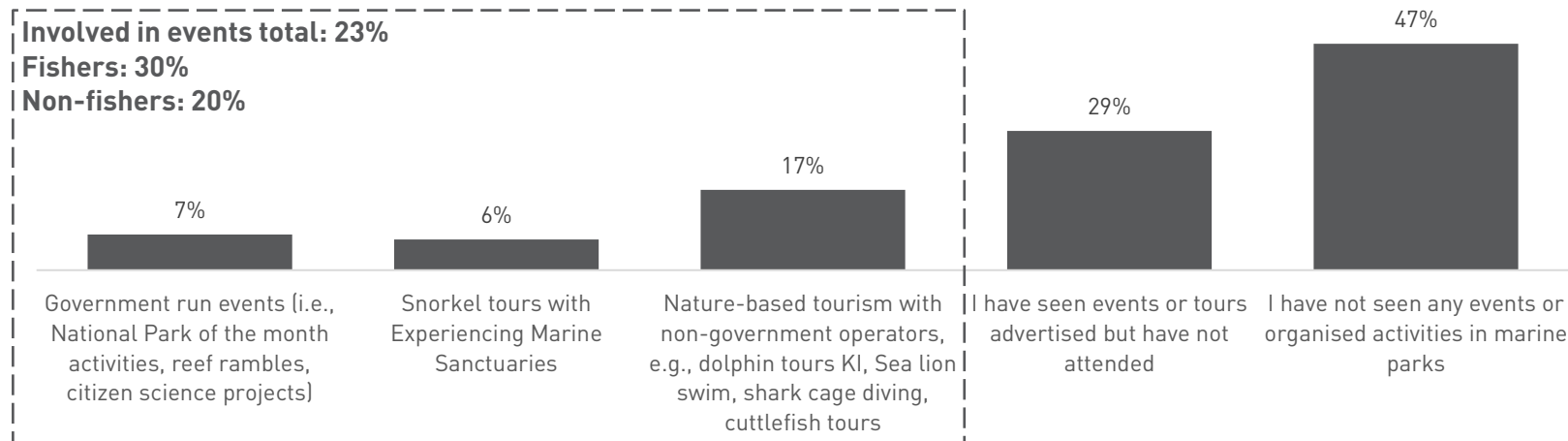


Almost one in five have been involved in organised activities at Marine Parks, with involvement being higher among fishers

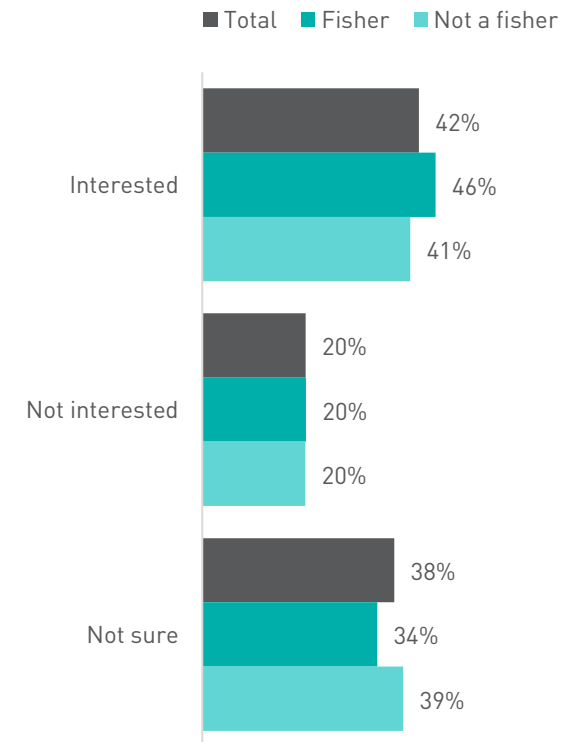
Over half (52%) have seen events/ tours advertised or attended events/ tours. Interest in being involved in organised activities in Marine Parks is relatively strong with just over two in five (42%) indicating interest, slightly higher among fishers compared to non-fishers (46% and 41% respectively).

Metro-based South Australians are more likely to be interested in future organised activities (46%), along with those under 40 (56%), females (46%), and frequent/ regular fishers (50%).

Seen/ been involved with organised activities at Marine Parks



Interest in involvement with organised activities at SA Marine Parks

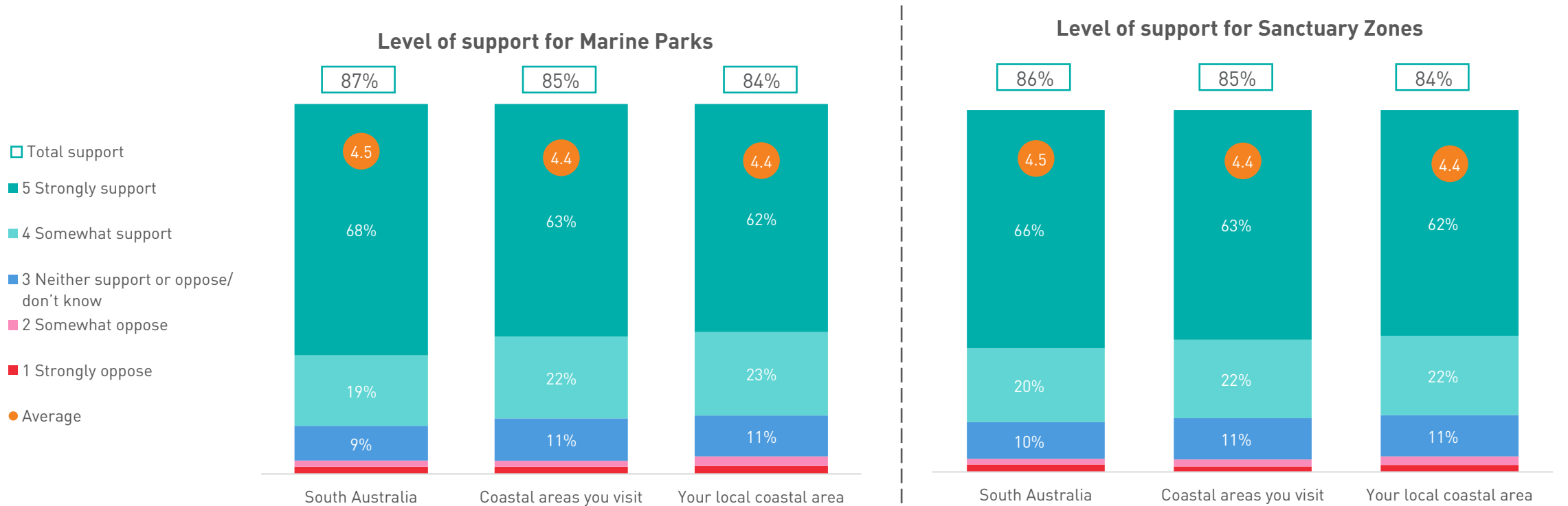




Support

There are high levels of support for Marine Parks and sanctuary zones

Those who have visited Marine Parks in the past 3 years, particularly those who visited Encounter metro and Encounter Fleurieu Marine Parks, were more likely to support all Marine Parks and Sanctuary Zones in SA, coastal areas they visit, or their local coastal area. Additionally, those aged 55-64 had a higher incidence of support, along with those aware of Marine Parks Sanctuary Zones, or zone types and those participating in general recreational activities.



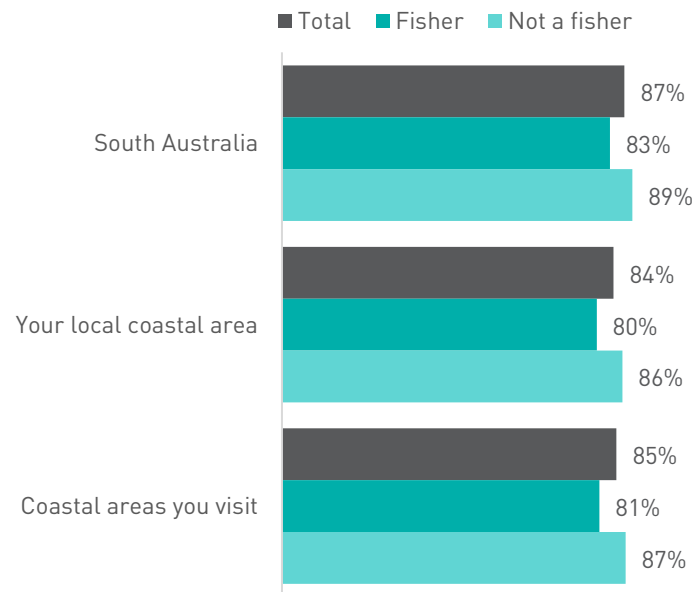
Overall, support for Marine Parks and Sanctuary Zones was high among both fishers and non-fishers, although fishers exhibited slightly less support in comparison

Fishers exhibited slightly less support than non-fishers in supporting marine parks across all locations (87% and 90% respectively) and in supporting Sanctuary Zones across all locations (86% and 90% respectively).

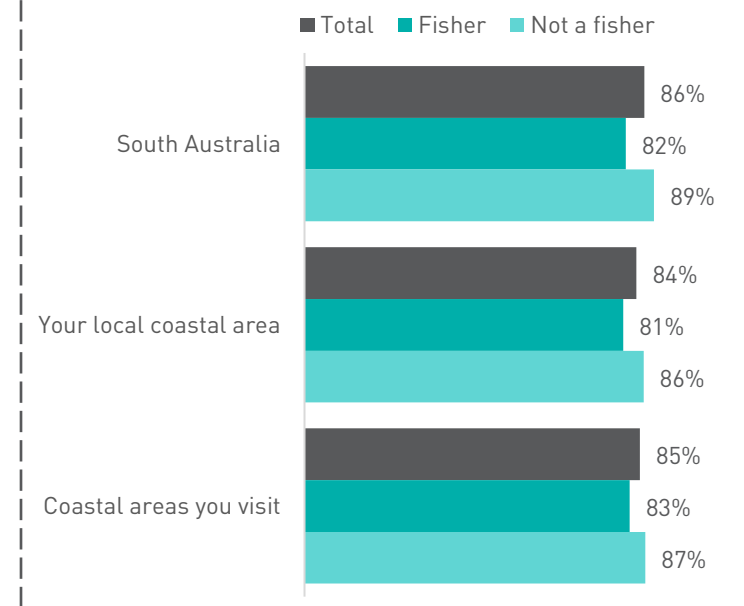
Fishers who reported negative attitudes toward Marine Parks were significantly less likely to support Marine Parks or sanctuary zones (both 44%, n=41), along with fishers fishing from boats or other watercraft (74% and 70% respectively).

Overall, support for marine parks and sanctuary zones was higher among females and those aware of marine parks or sanctuary zones, and lower among regional respondents.

Total support for Marine Parks by segments



Total support for Sanctuary Zones by segments



| | | |
|--|-----|-----|
| Net support for marine parks - Fishers | 87% | 86% |
| Net support for marine parks - Non-fishers | 90% | 90% |

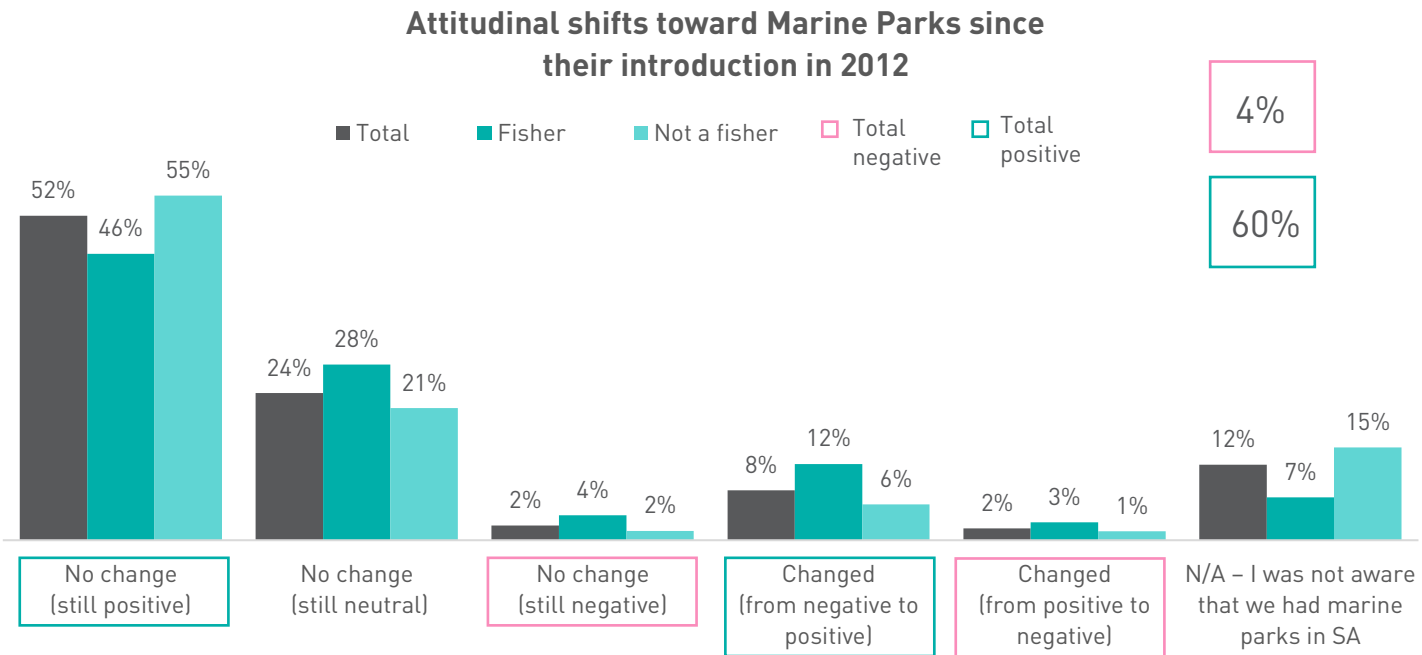


Attitudes and Perceptions

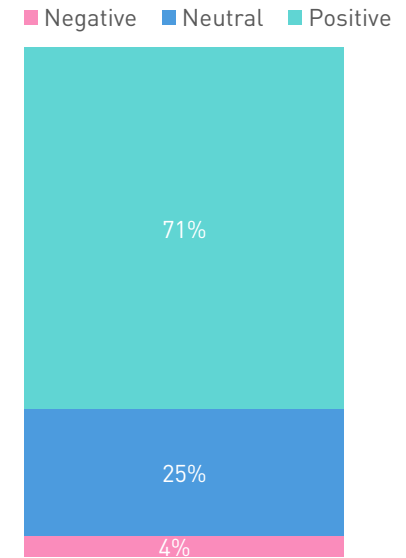
While attitudes remain largely unchanged, the general sentiment toward Marine Parks is overall positive

Overall, 60% of respondents had a positive attitude to marine parks. Those who had visited marine parks were more likely to have a positive attitude towards them (66%). There were a greater number of fishers and respondents from the metro area who had changed their attitude to a positive one.

Negative attitudes were low overall at 4%, although slightly higher among regional respondents (7% compared to 3% metro).



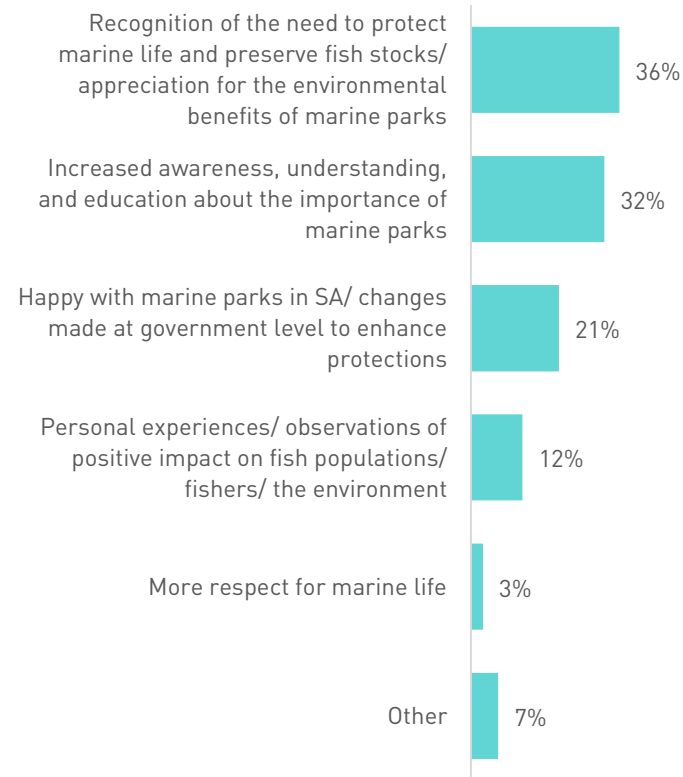
Attitudes among those aware of Marine Parks in SA



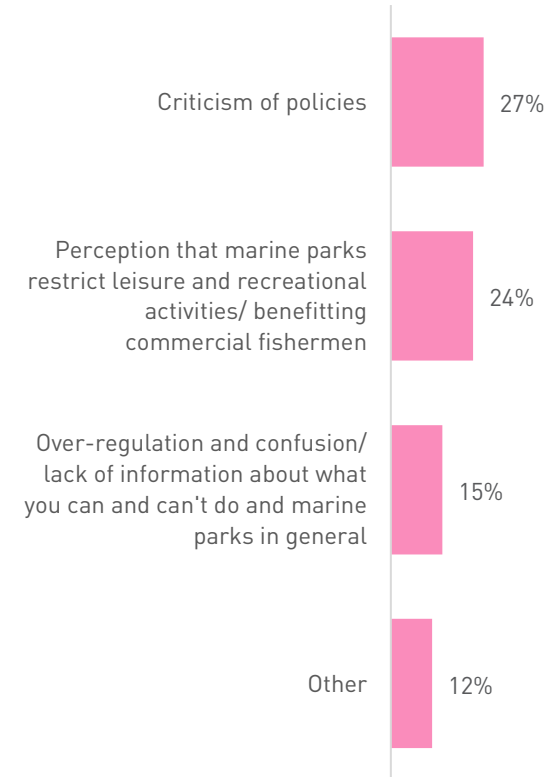
Changes in beliefs around the value that Marine Parks offer to the wider community by preserving marine life lead to positive attitudinal shifts

Those whose attitudes changed positively have increased their awareness and understanding of the role and need of marine parks, while those changing to a negative attitude, although minimal, were critical of policies or found marine parks to be restrictive or difficult to understand what is allowed.

Reasons for attitudes changing from negative to positive (n=138)

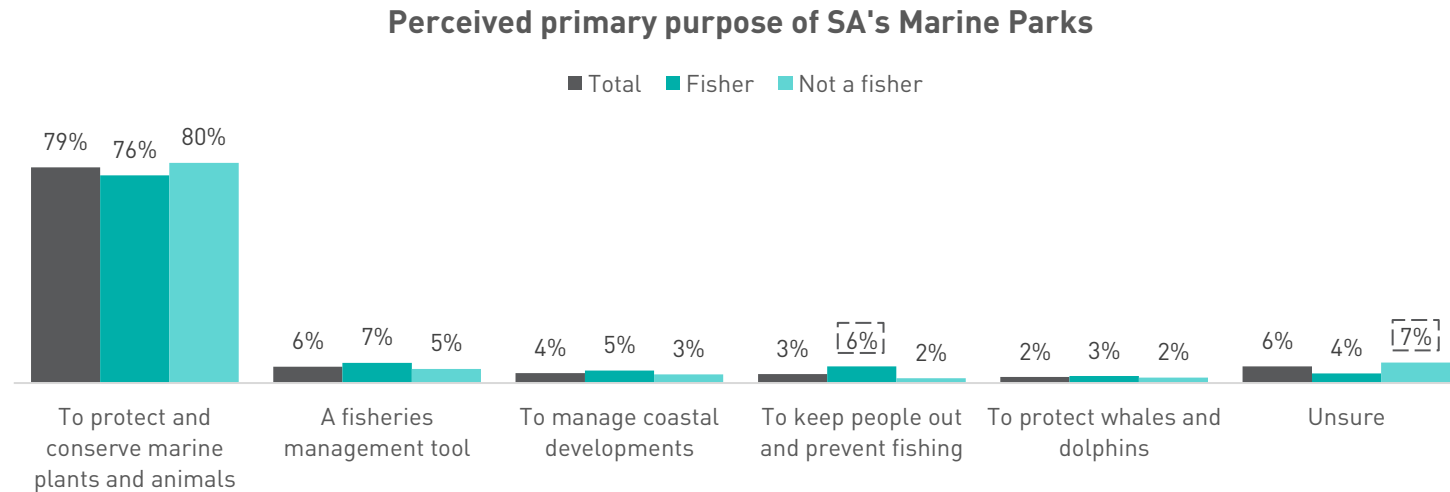


Reasons for attitudes changing from positive to negative (n=33)



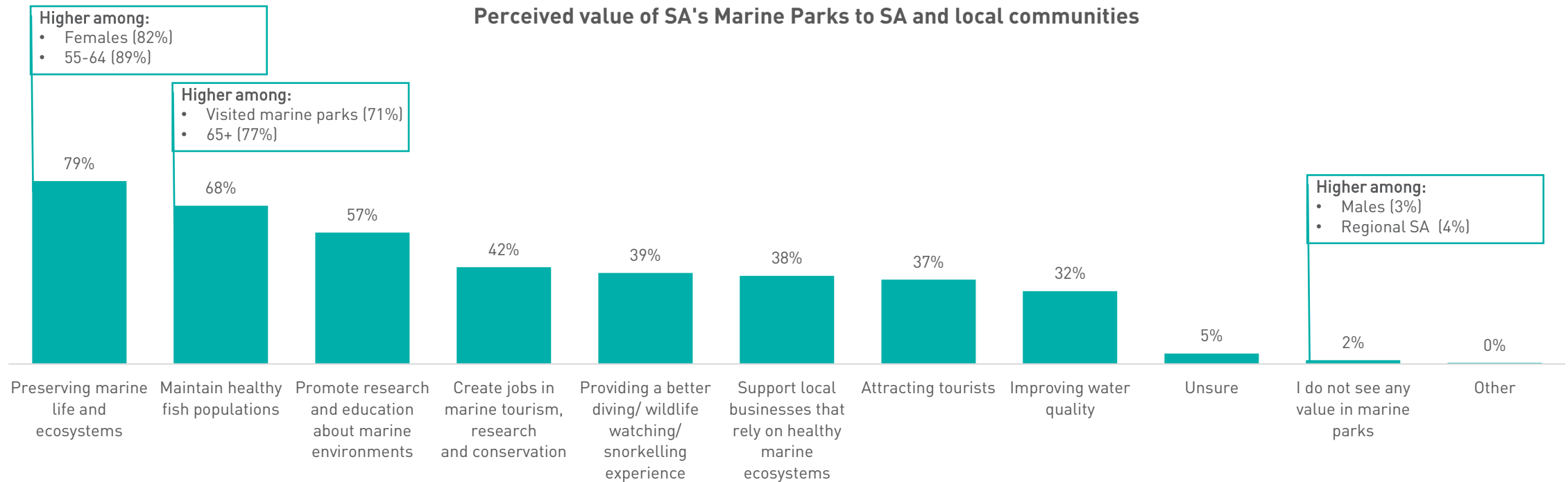
Almost four in five correctly identified the primary purpose of SA's Marine Parks as being protecting and conserving plants and animals

Fishers are more likely to associate Marine Parks with the prevention of fishing (6%). Non-fishers are more likely to be unsure (7%), particularly from those who had not previously been aware of Marine Parks, sanctuary zones or zone types (21%), 18-24-year-olds (11%) and those who have been fishing for 10 year or less (8%).



More than half recognised Marine Parks in SA for conserving marine life, maintaining fish populations, and advancing marine research and education

Across the different benefits, non-fishers were consistently more likely to rate each attribute as valuable, nominating 4.3 attributes on average compared to 3.5 for fishers. Younger respondents and those living in regional SA were significantly less likely to be able to recognise the value of marine park to SA and local communities compared to older and metro-based respondents.





Fisher Behaviour

Almost two in five have seen or been approached by MP compliance vessels or park rangers in the past 3 years

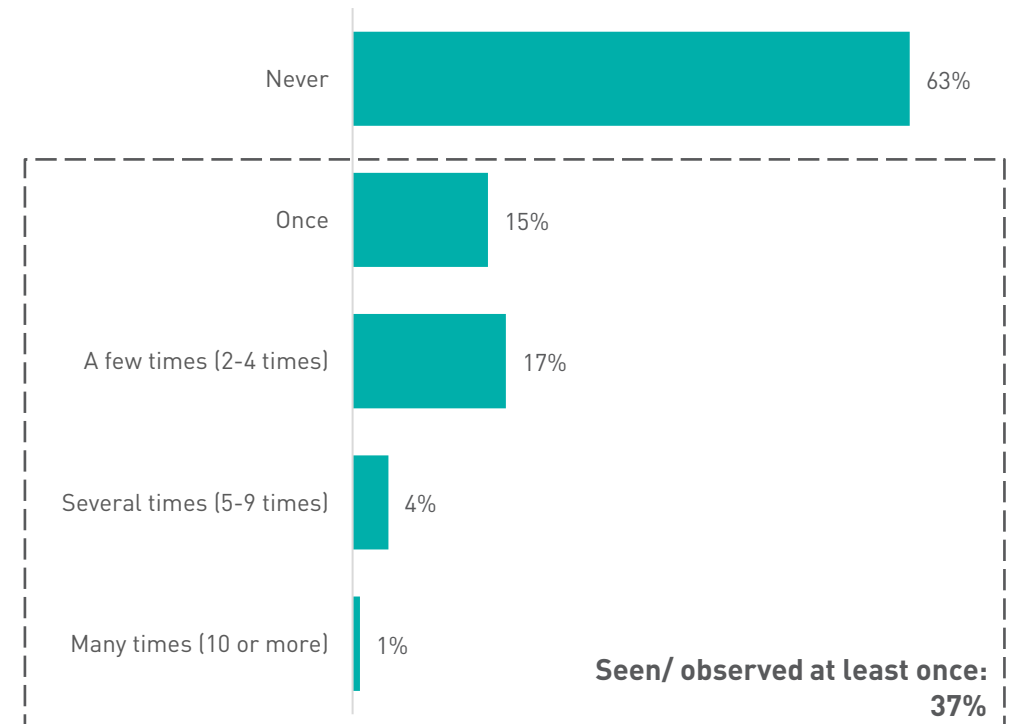
Those who most regularly access fishing areas from a boat/ other watercraft (51%) or a combination of land and water (46%) were more likely to have been approached/ observed a compliance vessel or MP park ranger at least once. In comparison, those fishing on the land were more likely to report never seeing or being approached by them (71%).

18-24 year olds had a higher incidence of being approached/ observing them at least once (54%).

It is important to note that further interpretations of this data should consider comments such as the below, which indicate confusion among some fishers regarding the difference between PIRSA fisheries officers and marine park compliance vessels and park rangers.

“The last time I saw a fisheries officer while fishing was 7 years ago, they increased the parks by a massive amount and decreased the number of fisheries officers. It’s impossible to police.”

Frequency of being approached by or observing marine park compliance vessels park rangers in the past 3 years



Seven in ten reported not 'always' checking for sanctuary zone locations at new fishing spots

Always checking for Sanctuary Zone locations was higher among:

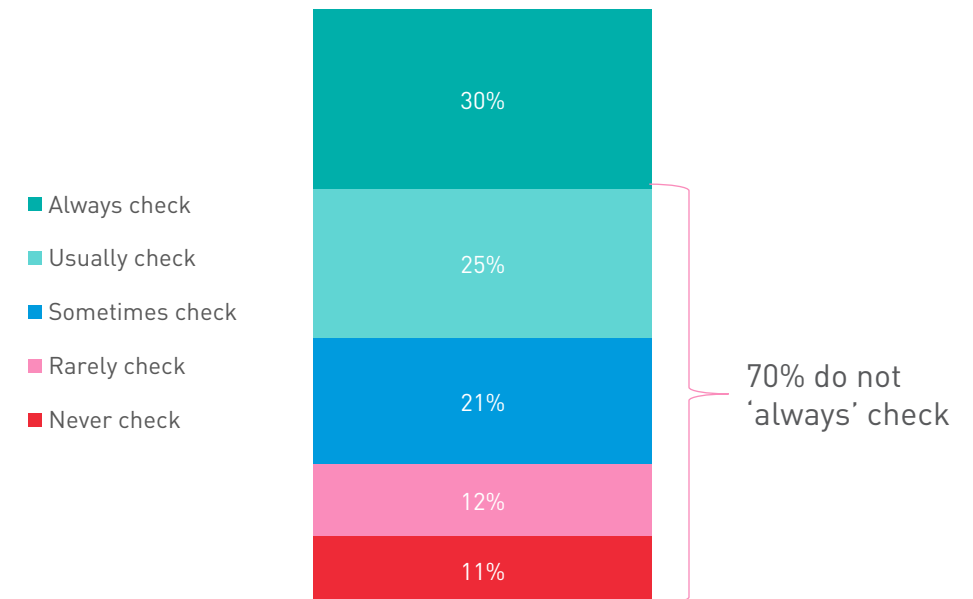
- Those fishing at Encounter MP (Fleurieu Peninsula): 43%
- Those fishing at South Kangaroo Island MP: 51%
- Fishers aware of Marine Parks, Sanctuary Zones, or zone types: 33%
- Those fishing for 20+ years (39%)

Those who have reported being approached at least once by marine park compliance vessels/ park rangers (or possibly PIRSA vessels) were significantly less likely to 'never' check for Sanctuary Zone locations (16%). Conversely, those who have 'never' been approached by a marine park compliance vessel/ park ranger were significantly more likely to 'never' check for a sanctuary zone locations.

There were also some age group differences in checking behaviour, with those aged 65+ having a higher incidence of 'always checking' (51%) compared to 31-39-year-olds who 'sometimes check' (37%), and 18-24-year-olds who 'rarely check'.

There were no differences in results by how fishers access fishing locations.

Frequency of checking for Sanctuary Zone locations at new fishing spots

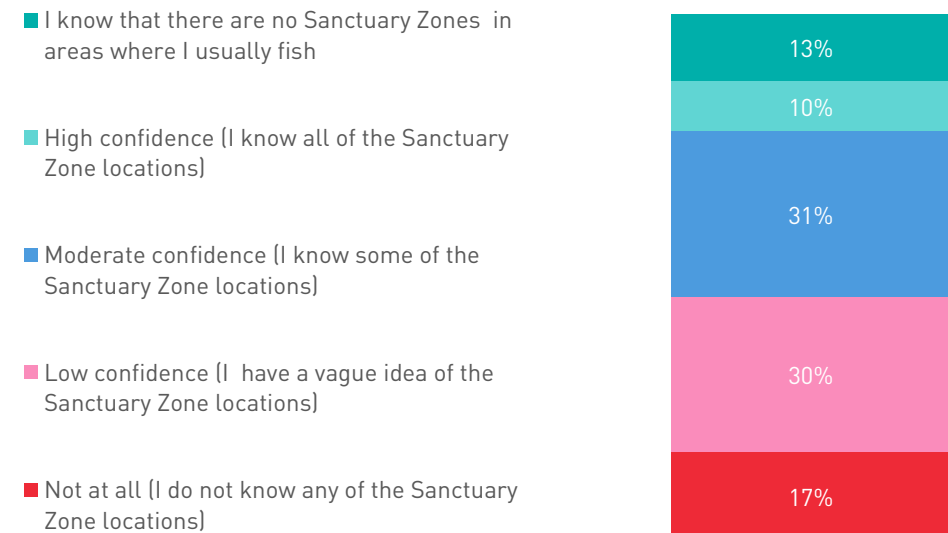


Knowledge of the locations of Sanctuary Zones is relatively soft, with the majority having only moderate to no knowledge

Those fishing primarily from land are more likely to be unaware of any Sanctuary Zone locations (22%), indicating a knowledge gap between fishers who access fishing locations from land versus from water, which further validates lower awareness levels for marine parks and sanctuary zones reported among land-based fishers.

Those aware of Marine Parks, Sanctuary Zones, or zone types were significantly more likely to indicate a moderate level of knowledge about Sanctuary Zone locations (34%).

Self-reported knowledge of Sanctuary Zone locations by checking

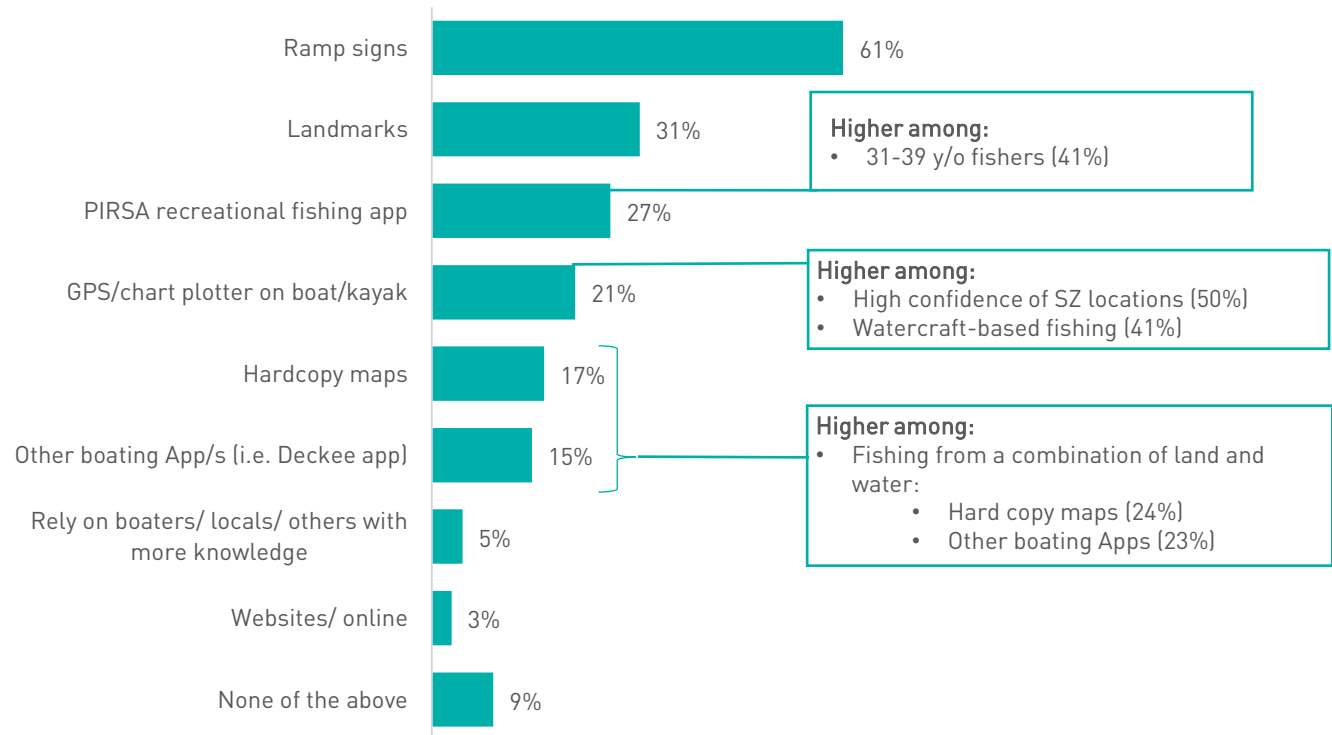


Ramp signs are most commonly used to avoid fishing in Sanctuary Zones, although those with high levels of confidence about locations are more likely to use GPS/ chart plotters

On average, fishers use 1.9 methods to avoid fishing in Sanctuary Zones (SZ). This finding was higher among fishers who had been approached by or observed marine compliance vessels or park rangers (4.3 methods on average compared to 1.7 among those who had never been approached/ observed by compliance vessels or park rangers while fishing).

There were no significant differences by years of experience in fishing.

Methods used to avoid fishing in sanctuary zones





Accessing Information - Fishers

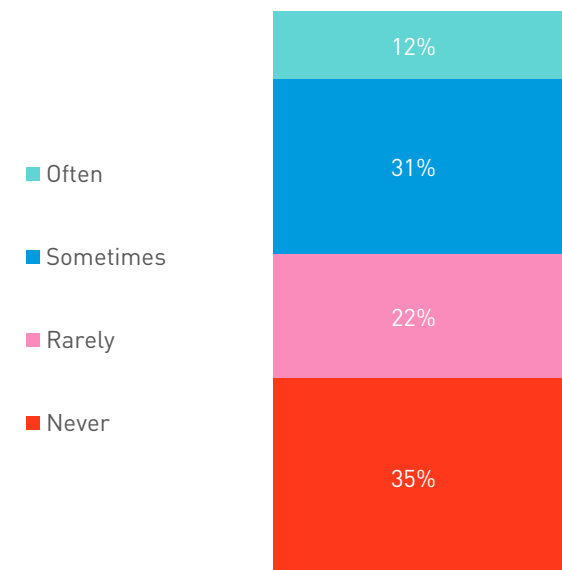
Frequent use of the PIRSA Fishing App maps is minimal, with only 12% of fishers in SA using them 'often' to check their position relative to Sanctuary Zones

Using the App 'often' was higher among:

- 31-39 year olds (21%)
- Fishing from a combination of watercraft and land (17%)

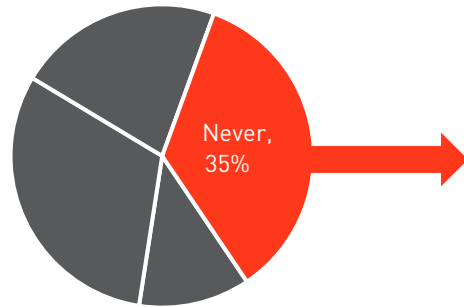
Half (50%) of fishers aged 55 or older were more like to 'never' use the PIRSA Fishing App maps, compared to almost half (46%) of those 18-24-year-old counterparts who reported 'sometimes' using the App. Regional respondents were also more likely to 'never' (48%).

Frequency of checking position using PIRSA Fishing App maps



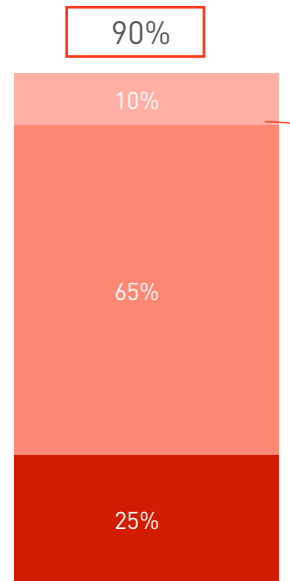
Over a third never use the App, with nine in ten of these fishers being unaware of the App or that it has maps available on it

Of those who were unaware of the App or it's map feature, three in five were likely to start using it (60%). There were no significant differences by age or how fishing locations are accessed.



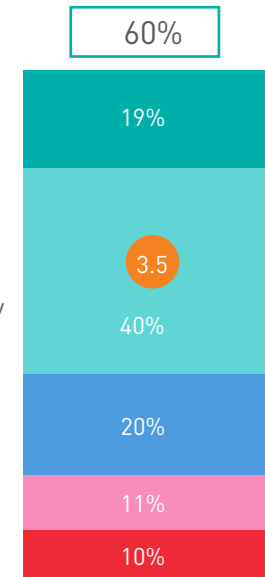
Reasons for never using PIRSA Fishing App (n=209)

- Total unaware of App
- I am aware the feature is available on the PIRSA Recreational Fishing App but don't use it
- I wasn't aware of the free PIRSA Recreational Fishing App
- I didn't know the PIRSA Recreational Fishing App had this feature



Likelihood of using PIRSA Fishing App maps now aware (n=188)

- Total likely
- 5 Very likely
- 4 Somewhat likely
- 3 Neither likely nor unlikely
- 2 Somewhat unlikely
- 1 Not at all likely
- Average



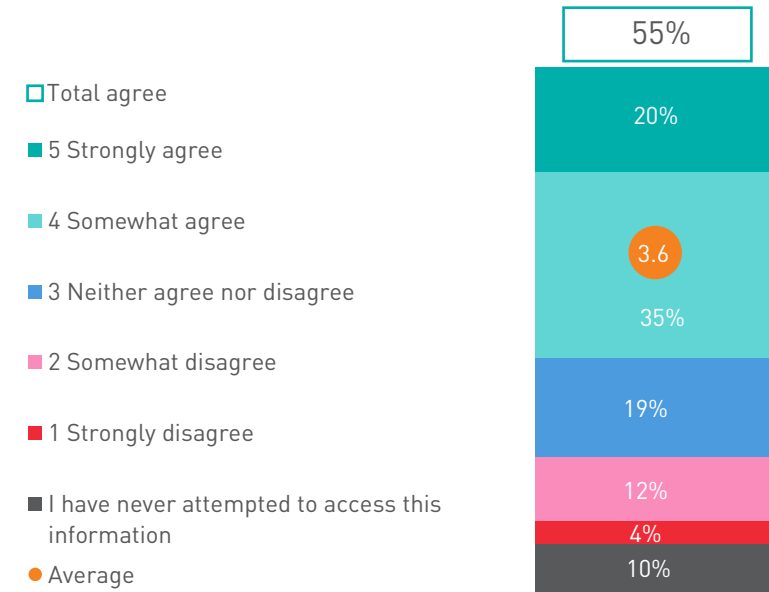
Over half agree that information about marine park zones are easily accessible

Those who engage in fishing from both land and water are more inclined to strongly agree that marine park information is easily accessible (27%).

Agreement about the accessibility of Marine Park information is notably higher among those who have visited Marine Parks in the past three years (59%) and those who are aware of Sanctuary Zones (59%).

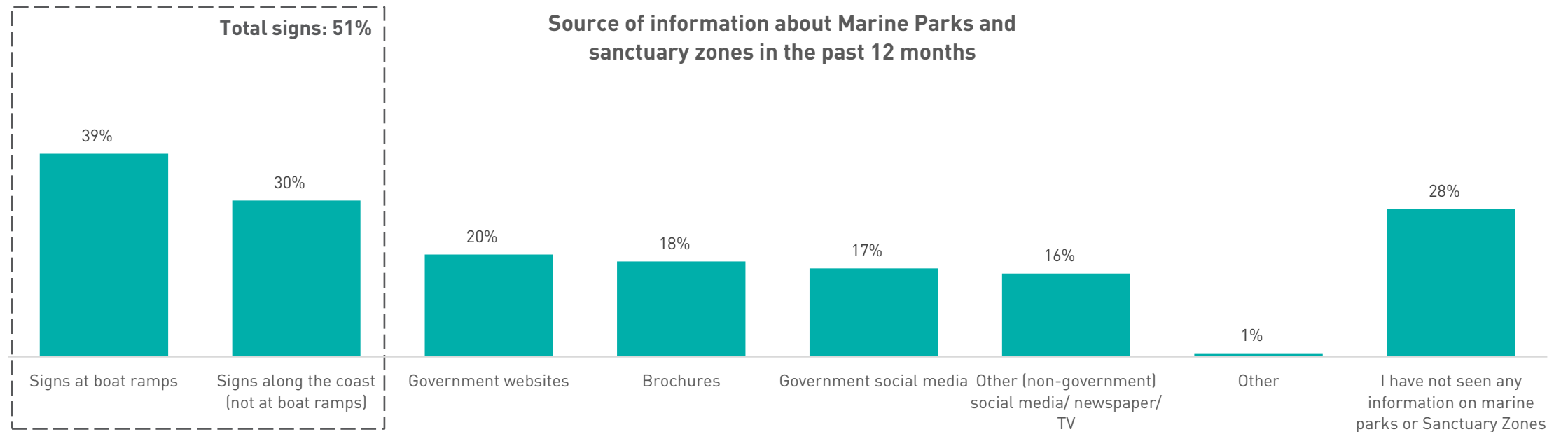
Individuals aged 55-64 are more likely to strongly disagree with the accessibility of marine park information (12%).

Agreement with information about marine park zones and their locations and permitted activities being easily accessible



Over half of fishers have seen information about Marine Parks and Sanctuary Zones from signs, either at boat ramps or elsewhere along the coast

In-situ signage is the most effective method to communicate information, while websites, brochures and social media also provide important touchpoints. This mix of sources has resulted in the majority of fishers (72%) having seen information in the past 12 months.

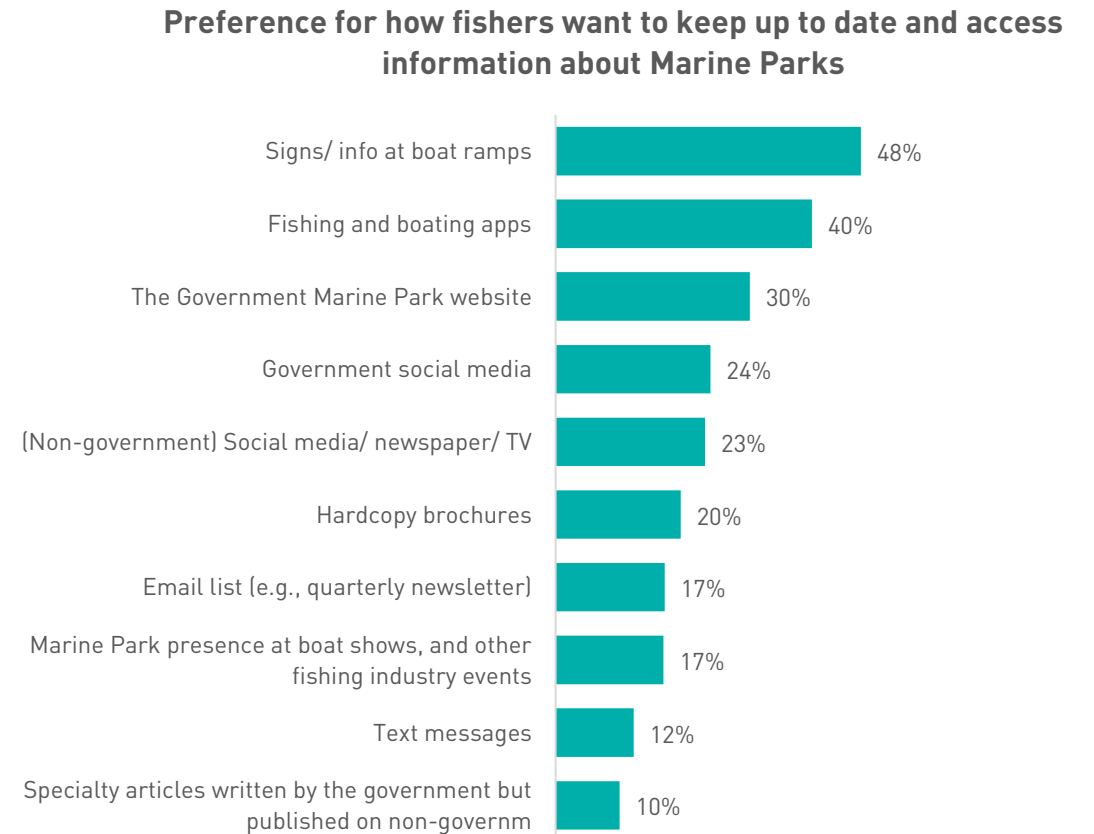


Signs and information at boat ramps is the preferred method to keep up to date with and access information about Marine Parks

There is some support for direct communications (26%), with 17% supporting an email list with quarterly updates, while 12% nominated text messages.

Fishers ages 18-24 were significantly less likely to indicate a preference for signs/ information at boat ramps (32%), while fishers aged 65+ had a significant preference for hardcopy brochures (34%).

There were no significant differences in preference by how fishers access their fishing areas.





Landscape Region Heatmap Analysis

Most fishers across landscape regions access their fishing areas by land, while access by watercraft is more prominent among those in Eyre Peninsula

| | | Landscape region | | | | | | | | | |
|-------------------------|---|------------------|------------------------|----------------------------|----------------------------------|-----------------------|------------------------|---------------------------|------------------------|-----------------------------------|---------------------------|
| | | Total (n=597) | Green Adelaide (n=286) | Hills and Fleurieu (n=165) | Murraylands and Riverland (n=35) | Eyre Peninsula (n=36) | Limestone Coast (n=20) | Northern and Yorke (n=39) | Kangaroo Island (n=11) | South Australian Arid Lands (n=2) | Alinytjara Wilurara (n=3) |
| Accessing fishing areas | From the land (including jetties, rock walls, beaches etc.) | 54% | 55% | 58% | 60% | 42% | 55% | 54% | 45% | 0% | 33% |
| | From a combination of land and water (roughly 50% each) | 30% | 31% | 30% | 26% | 28% | 30% | 28% | 27% | 50% | 67% |
| | From a boat or other watercraft | 15% | 14% | 12% | 14% | 31% | 15% | 18% | 27% | 50% | 0% |

*Low bases excluded from commentary

Awareness for zone types

| | | Landscape region | | | | | | | | | |
|-----------|--|------------------|------------------------|----------------------------|-----------------------------------|-----------------------|------------------------|---------------------------|------------------------|------------------------------------|---------------------------|
| | | Total (n=1725) | Green Adelaide (n=912) | Hills and Fleurieu (n=455) | Murraylands and Riverland (n=104) | Eyre Peninsula (n=92) | Limestone Coast (n=64) | Northern and Yorke (n=70) | Kangaroo Island (n=15) | South Australian Arid Lands (n=10) | Alinytjara Wilurara (n=3) |
| Awareness | That South Australia has Marine Parks | 70% | 69% | 69% | 71% | 78% | 81% | 73% | 100% | 50% | 100% |
| | That South Australia has Sanctuary Zones where fishing and all other extractive activities (e.g., collection of plants and animals, mining) are prohibited | 69% | 69% | 67% | 69% | 75% | 78% | 74% | 93% | 60% | 67% |
| | That South Australian Marine Parks are made up of 4 different types of zones that regulate a range of activities | 26% | 23% | 26% | 29% | 32% | 27% | 39% | 47% | 40% | 67% |
| | I was not aware of any of the above before today | 16% | 16% | 17% | 18% | 11% | 6% | 19% | 0% | 30% | 0% |

*Low bases excluded from commentary

Higher source of awareness from PIRSA App among those Eyre Peninsula

| | | Landscape region | | | | | | | | | |
|---------------------|--|------------------|------------------------|----------------------------|----------------------------------|-----------------------|------------------------|---------------------------|------------------------|-----------------------------------|---------------------------|
| | | Total (n=1429) | Green Adelaide (n=751) | Hills and Fleurieu (n=374) | Murraylands and Riverland (n=84) | Eyre Peninsula (n=82) | Limestone Coast (n=58) | Northern and Yorke (n=55) | Kangaroo Island (n=15) | South Australian Arid Lands (n=7) | Alinytjara Wilurara (n=3) |
| Source of awareness | Friends/ family/ word of mouth | 47% | 47% | 47% | 46% | 44% | 48% | 42% | 67% | 71% | 0% |
| | On-site signage (i.e. signs at boat ramps and beach entrances) | 35% | 34% | 36% | 42% | 32% | 33% | 36% | 53% | 14% | 33% |
| | Government websites/documents | 31% | 32% | 28% | 31% | 33% | 28% | 35% | 53% | 14% | 0% |
| | Social media | 28% | 30% | 30% | 26% | 21% | 28% | 22% | 27% | 0% | 33% |
| | Fishing or diving websites | 10% | 9% | 13% | 8% | 5% | 5% | 11% | 7% | 0% | 33% |
| | TV/ Newspaper/ Radio | 9% | 10% | 8% | 10% | 9% | 10% | 13% | 13% | 0% | 0% |
| | PIRSA Recreational fishing App | 7% | 7% | 7% | 10% | 15% | 3% | 9% | 7% | 29% | 33% |
| | Discussions with a park ranger | 5% | 5% | 4% | 10% | 6% | 7% | 9% | 0% | 0% | 0% |
| | GPS maps on your sounder | 4% | 4% | 4% | 4% | 7% | 2% | 5% | 13% | 0% | 0% |
| | Other boating Apps (i.e. Deckee) | 2% | 3% | 2% | 0% | 1% | 3% | 2% | 0% | 0% | 0% |

*Low bases excluded from commentary

Always checking for Sanctuary Zone locations when fishing at new locations was higher among those in Murraylands and Riverland and Eyre Peninsula

| | | Landscape region | | | | | | | | | |
|--|-----------|------------------|------------------------|----------------------------|----------------------------------|-----------------------|------------------------|---------------------------|------------------------|-----------------------------------|---------------------------|
| | | Total (n=597) | Green Adelaide (n=286) | Hills and Fleurieu (n=165) | Murraylands and Riverland (n=35) | Eyre Peninsula (n=36) | Limestone Coast (n=20) | Northern and Yorke (n=39) | Kangaroo Island (n=11) | South Australian Arid Lands (n=2) | Alinytjara Wilurara (n=3) |
| Frequency of checking for Sanctuary Zone locations | Never | 11% | 11% | 12% | 11% | 14% | 20% | 10% | 9% | 0% | 0% |
| | Rarely | 12% | 15% | 10% | 3% | 8% | 15% | 10% | 0% | 0% | 67% |
| | Sometimes | 21% | 26% | 19% | 11% | 19% | 10% | 18% | 18% | 50% | 0% |
| | Usually | 25% | 21% | 30% | 31% | 19% | 35% | 33% | 9% | 0% | 0% |
| | Always | 30% | 28% | 29% | 43% | 39% | 20% | 28% | 64% | 50% | 33% |

*Low bases excluded from commentary

Moderate to low confidence is consistent across landscape regions, although not knowing any Sanctuary Zone locations was higher among those in the Limestone Coast

| | | Landscape region | | | | | | | | | |
|--|--|------------------|------------------------|----------------------------|----------------------------------|-----------------------|------------------------|---------------------------|------------------------|-----------------------------------|---------------------------|
| | | Total (n=597) | Green Adelaide (n=286) | Hills and Fleurieu (n=165) | Murraylands and Riverland (n=35) | Eyre Peninsula (n=36) | Limestone Coast (n=20) | Northern and Yorke (n=39) | Kangaroo Island (n=11) | South Australian Arid Lands (n=2) | Alinytjara Wilurara (n=3) |
| Frequency of checking for Sanctuary Zone locations | Not at all (I do not know any of the Sanctuary Zone locations) | 17% | 17% | 15% | 14% | 19% | 25% | 18% | 9% | 0% | 33% |
| | Low confidence (I have a vague idea of the Sanctuary Zone locations) | 30% | 31% | 33% | 20% | 22% | 30% | 31% | 9% | 0% | 0% |
| | Moderate confidence (I know some of the Sanctuary Zone locations) | 31% | 31% | 29% | 31% | 36% | 20% | 38% | 55% | 50% | 0% |
| | High confidence (I know all of the Sanctuary Zone locations) | 10% | 8% | 12% | 6% | 6% | 10% | 10% | 18% | 50% | 67% |
| | I know that there are no Sanctuary Zones in areas where I usually fish | 13% | 13% | 12% | 29% | 17% | 15% | 3% | 9% | 0% | 0% |

*Low bases excluded from commentary

Signage was the most used method for avoiding sanctuary zones across landscape regions

| | | Landscape region | | | | | | | | | |
|--|---|------------------|------------------------|----------------------------|----------------------------------|-----------------------|------------------------|---------------------------|------------------------|-----------------------------------|---------------------------|
| | | Total (n=436) | Green Adelaide (n=199) | Hills and Fleurieu (n=126) | Murraylands and Riverland (n=26) | Eyre Peninsula (n=27) | Limestone Coast (n=14) | Northern and Yorke (n=31) | Kangaroo Island (n=10) | South Australian Arid Lands (n=1) | Alinytjara Wilurara (n=2) |
| Methods used to avoid fishing in Sanctuary Zones | Ramp signs | 61% | 62% | 59% | 73% | 48% | 43% | 74% | 70% | 0% | 50% |
| | Landmarks | 31% | 33% | 39% | 15% | 7% | 14% | 29% | 20% | 0% | 50% |
| | PIRSA recreational fishing App | 27% | 28% | 25% | 23% | 30% | 21% | 29% | 10% | 0% | 50% |
| | GPS/chart plotter on boat/kayak | 21% | 24% | 17% | 12% | 41% | 21% | 13% | 10% | 100% | 50% |
| | Hardcopy maps | 17% | 15% | 21% | 23% | 19% | 7% | 16% | 10% | 0% | 0% |
| | Other boating App/s (i.e. Deckee App) | 15% | 17% | 17% | 12% | 19% | 14% | 3% | 0% | 0% | 0% |
| | Rely on boaters/ locals/ others with more knowledge | 5% | 4% | 6% | 0% | 4% | 21% | 3% | 0% | 0% | 0% |
| | Websites/ online | 3% | 4% | 1% | 8% | 4% | 7% | 3% | 0% | 0% | 0% |
| | None of the above | 9% | 9% | 10% | 8% | 7% | 21% | 3% | 30% | 0% | 0% |

*Low bases excluded from commentary

Most have never been approached by or observed a marine park compliance vessel or park ranger at a boat ramp or when fishing from shore

| | | Landscape region | | | | | | | | | |
|---|---------------------------|------------------|------------------------|----------------------------|----------------------------------|-----------------------|------------------------|---------------------------|------------------------|-----------------------------------|---------------------------|
| | | Total (n=597) | Green Adelaide (n=286) | Hills and Fleurieu (n=165) | Murraylands and Riverland (n=35) | Eyre Peninsula (n=36) | Limestone Coast (n=20) | Northern and Yorke (n=39) | Kangaroo Island (n=11) | South Australian Arid Lands (n=2) | Alinytjara Wilurara (n=3) |
| Frequency of being approached by/ observing | Never | 63% | 58% | 66% | 71% | 64% | 70% | 69% | 82% | 0% | 67% |
| | Once | 15% | 18% | 16% | 6% | 11% | 15% | 10% | 0% | 0% | 0% |
| | A few times (2-4 times) | 17% | 17% | 18% | 17% | 17% | 5% | 18% | 18% | 100% | 33% |
| | Several times (5-9 times) | 4% | 6% | 1% | 6% | 6% | 10% | 3% | 0% | 0% | 0% |
| | Many times (10 or more) | 1% | 1% | 0% | 0% | 3% | 0% | 0% | 0% | 0% | 0% |

*Low bases excluded from commentary

Most have a positive attitude toward marine parks across landscape regions

| | | Landscape region | | | | | | | | | |
|----------------------------|--|------------------|------------------------|----------------------------|-----------------------------------|-----------------------|------------------------|---------------------------|------------------------|------------------------------------|---------------------------|
| | | Total (n=1725) | Green Adelaide (n=912) | Hills and Fleurieu (n=455) | Murraylands and Riverland (n=104) | Eyre Peninsula (n=92) | Limestone Coast (n=64) | Northern and Yorke (n=70) | Kangaroo Island (n=15) | South Australian Arid Lands (n=10) | Alinytjara Wilurara (n=3) |
| Attitude change since 2012 | Changed (from positive to negative) | 2% | 2% | 1% | 5% | 5% | 2% | 3% | 7% | 0% | 0% |
| | Changed (from negative to positive) | 8% | 9% | 6% | 7% | 9% | 6% | 4% | 0% | 10% | 33% |
| | No change (still negative) | 2% | 2% | 2% | 4% | 2% | 3% | 3% | 7% | 0% | 33% |
| | No change (still neutral) | 24% | 23% | 22% | 19% | 28% | 31% | 34% | 27% | 30% | 33% |
| | No change (still positive) | 52% | 51% | 56% | 58% | 47% | 50% | 44% | 53% | 30% | 0% |
| | N/A – I was not aware that we had Marine Parks in SA | 12% | 12% | 14% | 8% | 9% | 8% | 11% | 7% | 30% | 0% |

*Low bases excluded from commentary

Preserving marine life and ecosystems was the primary value identified across landscape regions

| | | Landscape region | | | | | | | | | |
|---------------------------------|--|------------------|------------------------|----------------------------|-----------------------------------|-----------------------|------------------------|---------------------------|------------------------|------------------------------------|---------------------------|
| | | Total (n=1725) | Green Adelaide (n=912) | Hills and Fleurieu (n=455) | Murraylands and Riverland (n=104) | Eyre Peninsula (n=92) | Limestone Coast (n=64) | Northern and Yorke (n=70) | Kangaroo Island (n=15) | South Australian Arid Lands (n=10) | Alinytjara Wilurara (n=3) |
| Perceived value of Marine Parks | Preserving marine life and ecosystems | 79% | 81% | 78% | 84% | 75% | 72% | 66% | 73% | 60% | 67% |
| | Maintain healthy fish populations | 68% | 68% | 71% | 71% | 71% | 66% | 63% | 67% | 30% | 67% |
| | Promote research and education about marine environments | 57% | 59% | 59% | 62% | 52% | 45% | 43% | 47% | 20% | 0% |
| | Create jobs in marine tourism, research and conservation | 42% | 44% | 44% | 43% | 29% | 31% | 26% | 47% | 20% | 33% |
| | Providing a better diving/ wildlife watching/ snorkelling experience | 39% | 41% | 40% | 42% | 38% | 23% | 26% | 40% | 10% | 0% |
| | Support local businesses that rely on healthy marine ecosystems | 38% | 38% | 42% | 46% | 29% | 33% | 19% | 40% | 20% | 0% |
| | Attracting tourists | 37% | 37% | 39% | 37% | 38% | 27% | 27% | 40% | 20% | 0% |
| | Improving water quality | 32% | 35% | 33% | 29% | 20% | 22% | 16% | 27% | 0% | 0% |
| | Unsure | 5% | 4% | 5% | 3% | 7% | 6% | 10% | 7% | 30% | 0% |
| | I do not see any value in Marine Parks | 2% | 1% | 1% | 3% | 4% | 5% | 6% | 7% | 0% | 0% |

Highest levels of support for marine parks seen in Green Adelaide, Hills and Fleurieu and Murraylands and Riverland

| | | Landscape region | | | | | | | | | |
|--------------------------------------|-------------------------|------------------|------------------------|----------------------------|-----------------------------------|-----------------------|------------------------|---------------------------|------------------------|-------------------------------------|---------------------------|
| | | Total (n=1725) | Green Adelaide (n=912) | Hills and Fleurieu (n=455) | Murraylands and Riverland (n=104) | Eyre Peninsula (n=92) | Limestone Coast (n=64) | Northern and Yorke (n=70) | Kangaroo Island (n=15) | South Australia n Arid Lands (n=10) | Alinytjara Wilurara (n=3) |
| Total support for Marine Parks in... | South Australia | 87% | 89% | 87% | 89% | 79% | 81% | 77% | 87% | 80% | 67% |
| | Your local coastal area | 84% | 86% | 84% | 88% | 79% | 80% | 71% | 80% | 80% | 67% |
| | Coastal areas you visit | 85% | 87% | 86% | 88% | 78% | 78% | 71% | 80% | 80% | 33% |

Slightly lower support for Sanctuary Zones among those in Eyre Peninsula and Limestone Coast, but high results overall

| | | Landscape region | | | | | | | | | |
|--|-------------------------|------------------|------------------------|----------------------------|-----------------------------------|-----------------------|------------------------|---------------------------|------------------------|------------------------------------|---------------------------|
| | | Total (n=1725) | Green Adelaide (n=912) | Hills and Fleurieu (n=455) | Murraylands and Riverland (n=104) | Eyre Peninsula (n=92) | Limestone Coast (n=64) | Northern and Yorke (n=70) | Kangaroo Island (n=15) | South Australian Arid Lands (n=10) | Alinytjara Wilurara (n=3) |
| Total support for Sanctuary Zones in.... | South Australia | 86% | 87% | 87% | 88% | 78% | 80% | 86% | 87% | 60% | 33% |
| | Your local coastal area | 84% | 85% | 85% | 88% | 79% | 75% | 83% | 87% | 80% | 67% |
| | Coastal areas you visit | 85% | 86% | 85% | 89% | 78% | 73% | 84% | 87% | 80% | 33% |

*Low bases excluded from commentary

Agreement with information about marine park zones being easily accessible slightly higher among Green Adelaide and Hills and Fleurieu Landscape Regions

| | | Landscape region | | | | | | | | | |
|--------------------|---|------------------|------------------------|----------------------------|----------------------------------|-----------------------|------------------------|---------------------------|------------------------|-----------------------------------|---------------------------|
| | | Total (n=597) | Green Adelaide (n=286) | Hills and Fleurieu (n=165) | Murraylands and Riverland (n=35) | Eyre Peninsula (n=36) | Limestone Coast (n=20) | Northern and Yorke (n=39) | Kangaroo Island (n=11) | South Australian Arid Lands (n=2) | Alinytjara Wilurara (n=3) |
| Level of agreement | Total disagree | 16% | 16% | 10% | 14% | 31% | 25% | 23% | 27% | 50% | 33% |
| | Neither agree nor disagree | 19% | 15% | 25% | 20% | 17% | 25% | 15% | 27% | 0% | 67% |
| | Total agree | 55% | 58% | 57% | 54% | 44% | 45% | 49% | 36% | 50% | 0% |
| | I have never attempted to access this information | 10% | 11% | 8% | 11% | 8% | 5% | 13% | 9% | 0% | 0% |

*Low bases excluded from commentary

Minimal use of the PIRSA fishing App with 57% stating they rarely or never use it to check for restrictions such as Sanctuary Zone locations

| | | Landscape region | | | | | | | | | |
|------------------------|-----------|------------------|------------------------|----------------------------|----------------------------------|-----------------------|------------------------|---------------------------|------------------------|-----------------------------------|---------------------------|
| | | Total (n=597) | Green Adelaide (n=286) | Hills and Fleurieu (n=165) | Murraylands and Riverland (n=35) | Eyre Peninsula (n=36) | Limestone Coast (n=20) | Northern and Yorke (n=39) | Kangaroo Island (n=11) | South Australian Arid Lands (n=2) | Alinytjara Wilurara (n=3) |
| Frequency of using App | Often | 12% | 13% | 14% | 11% | 6% | 15% | 5% | 0% | 0% | 33% |
| | Sometimes | 31% | 33% | 30% | 34% | 28% | 30% | 31% | 18% | 50% | 0% |
| | Rarely | 22% | 23% | 24% | 17% | 11% | 25% | 21% | 9% | 50% | 0% |
| | Never | 35% | 31% | 32% | 37% | 56% | 30% | 44% | 73% | 0% | 67% |

*Low bases excluded from commentary

Among fishers who never use the PIRSA Fishing App to check their position relative to restrictions, nearly two thirds (65%) overall were unaware of the App, while a quarter (25%) were aware of the App but unaware of the mapping feature

| | | Landscape region | | | | | | | | | |
|--|--|------------------|-----------------------|---------------------------|----------------------------------|-----------------------|-----------------------|---------------------------|-----------------------|-----------------------------------|---------------------------|
| | | Total (n=209) | Green Adelaide (n=90) | Hills and Fleurieu (n=53) | Murraylands and Riverland (n=13) | Eyre Peninsula (n=20) | Limestone Coast (n=6) | Northern and Yorke (n=17) | Kangaroo Island (n=8) | South Australian Arid Lands (n=0) | Alinytjara Wilurara (n=2) |
| Reason for never using PIRSA Fishing App | I wasn't aware of the free PIRSA Recreational Fishing App | 65% | 69% | 62% | 69% | 60% | 67% | 53% | 75% | 0% | 0% |
| | I didn't know the PIRSA Recreational Fishing App had this feature | 25% | 22% | 25% | 15% | 30% | 33% | 35% | 25% | 0% | 100% |
| | I am aware the feature is available on the PIRSA Recreational Fishing App but don't use it | 10% | 9% | 13% | 15% | 10% | 0% | 12% | 0% | 0% | 0% |

*Low bases excluded from commentary

Of those who never use the App/ its map feature, three in five (60%), reported being likely to use it now they were aware

| | | Landscape region | | | | | | | | | |
|-----------------------------------|-----------------------------|------------------|-----------------------|---------------------------|----------------------------------|-----------------------|-----------------------|---------------------------|-----------------------|-----------------------------------|---------------------------|
| | | Total (n=188) | Green Adelaide (n=82) | Hills and Fleurieu (n=46) | Murraylands and Riverland (n=11) | Eyre Peninsula (n=18) | Limestone Coast (n=6) | Northern and Yorke (n=15) | Kangaroo Island (n=8) | South Australian Arid Lands (n=0) | Alinytjara Wilurara (n=2) |
| Likelihood of using App now aware | Likely | 60% | 54% | 76% | 64% | 61% | 50% | 60% | 38% | 0% | 0% |
| | Neither likely nor unlikely | 20% | 27% | 15% | 9% | 17% | 17% | 7% | 13% | 0% | 50% |
| | Unlikely | 21% | 20% | 9% | 27% | 22% | 33% | 33% | 50% | 0% | 50% |

*Low bases excluded from commentary

Limited awareness/ involvement with organised events or activities in marine parks across landscape regions

| | | Landscape region | | | | | | | | | |
|---------------------------------|--|------------------|------------------------|----------------------------|-----------------------------------|-----------------------|------------------------|---------------------------|------------------------|------------------------------------|---------------------------|
| | | Total (n=1725) | Green Adelaide (n=912) | Hills and Fleurieu (n=455) | Murraylands and Riverland (n=104) | Eyre Peninsula (n=92) | Limestone Coast (n=64) | Northern and Yorke (n=70) | Kangaroo Island (n=15) | South Australian Arid Lands (n=10) | Alinytjara Wilurara (n=3) |
| Involvement in organised events | Nature-based tourism with non-government operators | 17% | 18% | 13% | 18% | 27% | 9% | 13% | 33% | 0% | 0% |
| | Government run events | 7% | 9% | 6% | 2% | 4% | 8% | 6% | 7% | 20% | 0% |
| | Snorkel tours with Experiencing Marine Sanctuaries | 6% | 8% | 5% | 4% | 7% | 5% | 3% | 7% | 0% | 33% |
| | I have seen events or tours advertised but have not attended | 29% | 30% | 28% | 27% | 34% | 25% | 29% | 40% | 10% | 0% |
| | I have not seen any events or organised activities in Marine Parks | 47% | 45% | 52% | 49% | 35% | 53% | 54% | 27% | 70% | 67% |

*Low bases excluded from commentary

Highest interest in events and organised activities among those in Green Adelaide and Hills and Fleurieu landscape board

| | | Landscape region | | | | | | | | | |
|----------------------------------|----------------|------------------|------------------------|----------------------------|-----------------------------------|-----------------------|------------------------|---------------------------|------------------------|------------------------------------|---------------------------|
| | | Total (n=1725) | Green Adelaide (n=912) | Hills and Fleurieu (n=455) | Murraylands and Riverland (n=104) | Eyre Peninsula (n=92) | Limestone Coast (n=64) | Northern and Yorke (n=70) | Kangaroo Island (n=15) | South Australian Arid Lands (n=10) | Alinytjara Wilurara (n=3) |
| Interest in organised activities | Interested | 42% | 46% | 44% | 37% | 38% | 23% | 21% | 33% | 20% | 33% |
| | Not sure | 38% | 36% | 38% | 37% | 38% | 39% | 43% | 40% | 50% | 33% |
| | Not interested | 20% | 18% | 17% | 27% | 24% | 38% | 36% | 27% | 30% | 33% |

*Low bases excluded from commentary

Information about marine parks/sanctuary zones was most commonly observed on signs at boat ramps or along the coast

| | | Landscape region | | | | | | | | | |
|---|--|------------------|------------------------|----------------------------|----------------------------------|-----------------------|------------------------|---------------------------|------------------------|-----------------------------------|---------------------------|
| | | Total (n=597) | Green Adelaide (n=286) | Hills and Fleurieu (n=165) | Murraylands and Riverland (n=35) | Eyre Peninsula (n=36) | Limestone Coast (n=20) | Northern and Yorke (n=39) | Kangaroo Island (n=11) | South Australian Arid Lands (n=2) | Alinytjara Wilurara (n=3) |
| Source of information about Marine Parks or Sanctuary Zones in the past 12 months | Signs at boat ramps | 39% | 35% | 41% | 43% | 50% | 25% | 46% | 73% | 0% | 33% |
| | Signs along the coast (not at boat ramps) | 30% | 30% | 32% | 37% | 39% | 25% | 15% | 36% | 0% | 0% |
| | Government websites | 20% | 24% | 20% | 14% | 14% | 10% | 10% | 9% | 0% | 0% |
| | Brochures | 18% | 20% | 20% | 11% | 8% | 15% | 15% | 36% | 0% | 33% |
| | Government social media | 17% | 20% | 18% | 9% | 11% | 10% | 8% | 9% | 50% | 0% |
| | Other (non-government) social media/ newspaper/ TV | 16% | 16% | 15% | 9% | 22% | 25% | 23% | 18% | 0% | 0% |
| | I have not seen any information on Marine Parks or Sanctuary Zones | 28% | 29% | 26% | 29% | 28% | 35% | 28% | 27% | 50% | 33% |

*Low bases excluded from commentary

Fishers prefer getting Marine Parks information from signs at boat ramps or fishing and boating apps, although Apps currently have lower usage

| | | Landscape region | | | | | | | | | |
|--|---|------------------|------------------------|----------------------------|----------------------------------|-----------------------|------------------------|---------------------------|------------------------|-----------------------------------|---------------------------|
| | | Total (n=597) | Green Adelaide (n=286) | Hills and Fleurieu (n=165) | Murraylands and Riverland (n=35) | Eyre Peninsula (n=36) | Limestone Coast (n=20) | Northern and Yorke (n=39) | Kangaroo Island (n=11) | South Australian Arid Lands (n=2) | Alinytjara Wilurara (n=3) |
| Preference for keeping up to date with and accessing info about Marine Parks | Signs/ info at boat ramps | 48% | 43% | 48% | 49% | 67% | 25% | 69% | 64% | 0% | 67% |
| | Fishing and boating Apps | 40% | 41% | 38% | 37% | 53% | 40% | 36% | 27% | 50% | 67% |
| | The Government Marine Park website | 30% | 35% | 31% | 31% | 22% | 5% | 23% | 18% | 0% | 33% |
| | Government social media | 24% | 27% | 24% | 23% | 19% | 30% | 15% | 9% | 0% | 0% |
| | (Non-government) Social media/ newspaper/ TV | 23% | 23% | 22% | 9% | 31% | 40% | 28% | 27% | 0% | 0% |
| | Hardcopy brochures | 20% | 19% | 19% | 26% | 22% | 15% | 18% | 27% | 0% | 67% |
| | Email list (e.g., quarterly newsletter) | 17% | 15% | 18% | 29% | 19% | 5% | 15% | 18% | 50% | 33% |
| | Marine Park presence at boat shows, and other fishing industry events | 17% | 17% | 23% | 9% | 8% | 20% | 10% | 0% | 0% | 0% |
| | Text messages | 12% | 11% | 15% | 14% | 6% | 20% | 13% | 0% | 50% | 0% |
| | Specialty articles written by the government but published on non-government websites | 10% | 12% | 10% | 3% | 8% | 5% | 13% | 9% | 0% | 0% |

*Low bases excluded from commentary

A glowing lightbulb is the central focus, resting on a dark wooden surface. The filament is visible and emits a warm, yellow light. In the foreground, another lightbulb is shown in a shallow depth of field, appearing unlit and out of focus. The background is a blurred, light-colored wall. The image is framed by a white diagonal line that separates it from a white background on the right. This white background is further divided by a red diagonal shape on the right side. On the left side of the image, there are teal and light blue geometric shapes.

Appendix 1: Respondent Profile

Respondent Profile

Gender



Female

52%



Male

47%



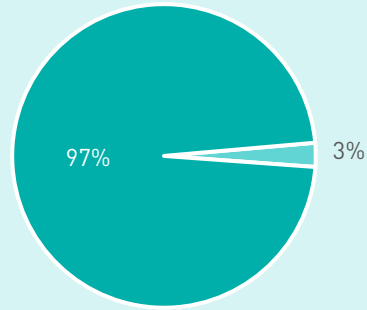
Differently identify

1%

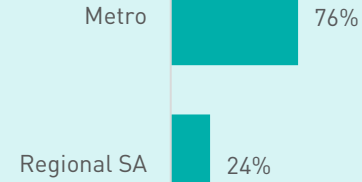


Employment

- Works in a role related to fishing/marine industry
- Works in another industry

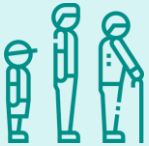
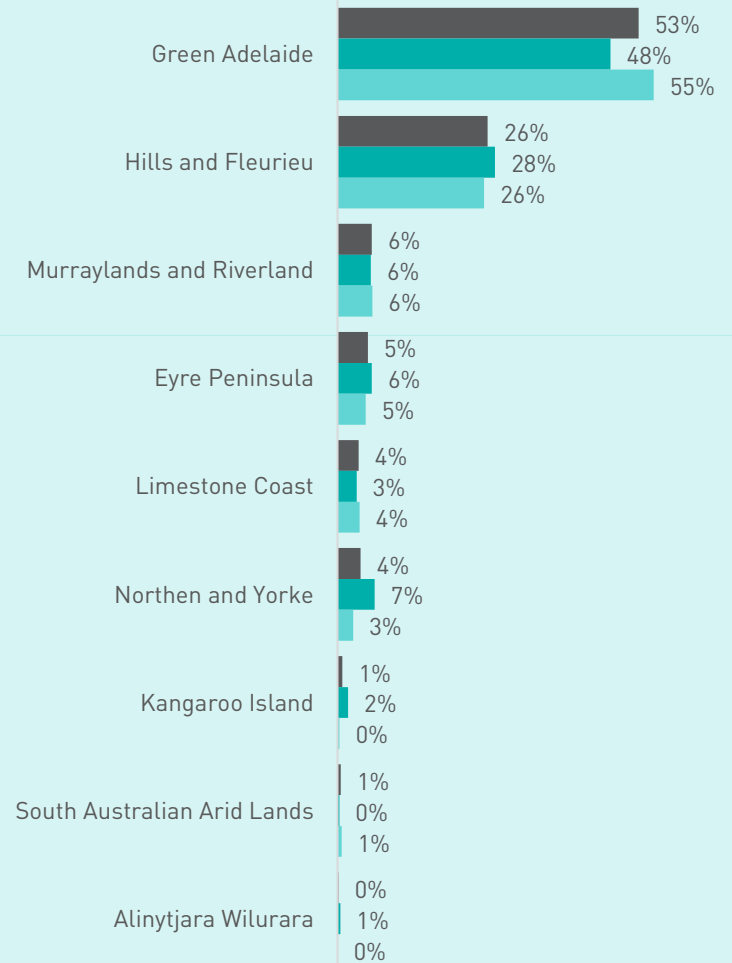


Location

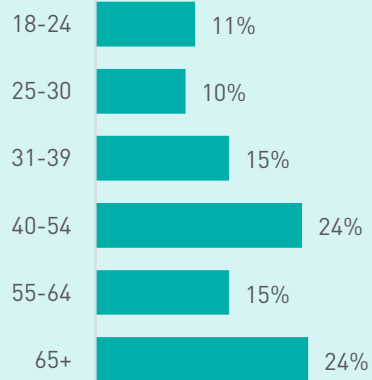


Landscape Boards

■ Total ■ Fisher ■ Not a fisher

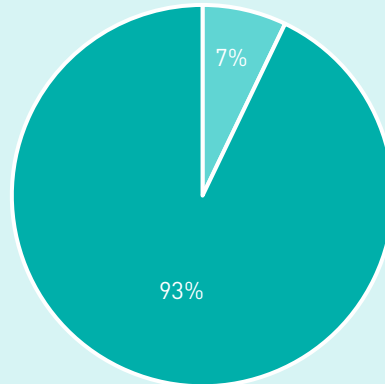


Age Groups

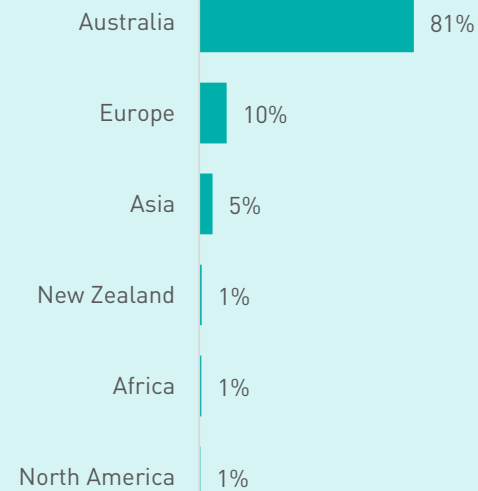


Ethnicity/ cultural background

- Speaks a language other than English at home
- Speaks English at home

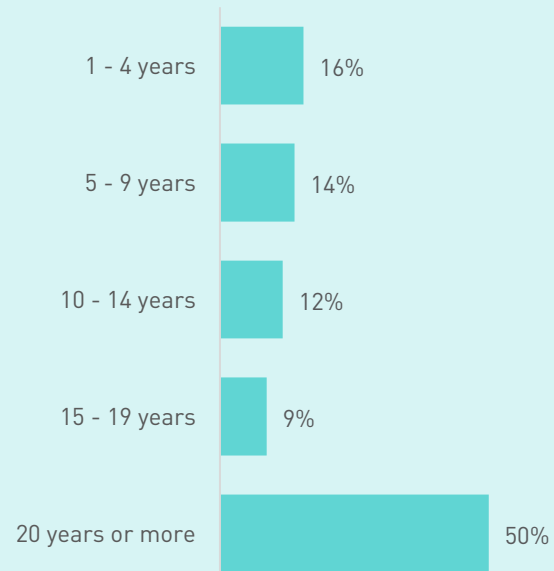


Place of birth

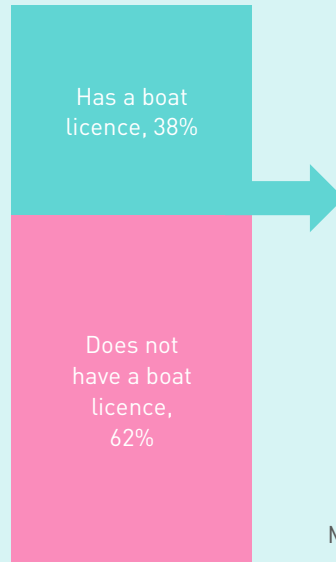


Fisher Demographics

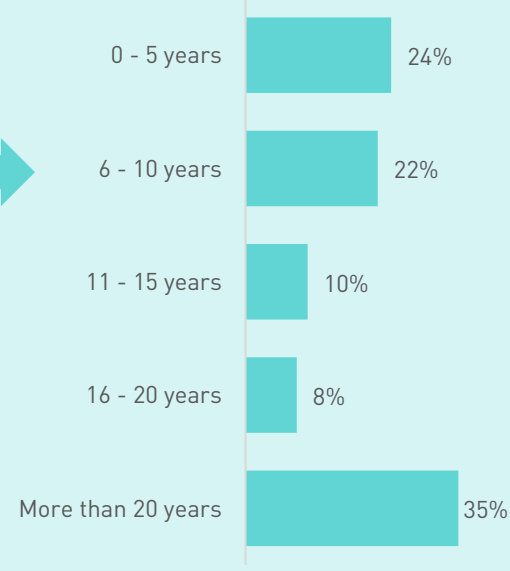
Length of time participating in fishing activities



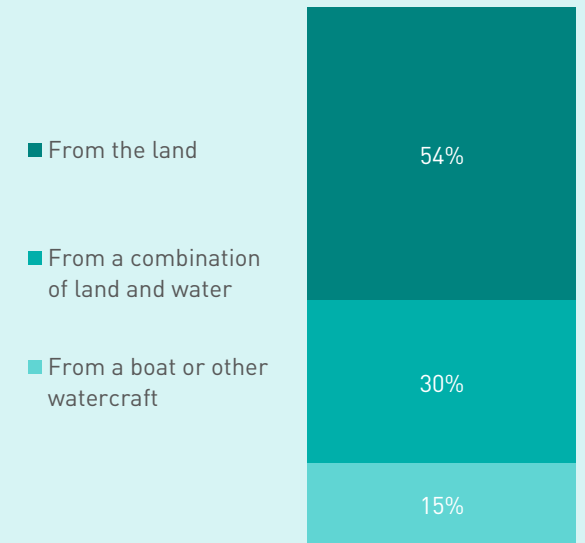
Boat licence



Length of time having boat licence



How fishing areas are most regularly accessed





Appendix 2: Sampling Tolerance

Sampling tolerance

It should be borne in mind throughout this report that all data based on sample surveys are subject to a sampling tolerance.

That is, where an n=400 sample is used to represent the population, the resulting figures should not be regarded as absolute values, but rather as the mid-point of a range plus or minus 5% on a 50:50 response (see sampling tolerance table) i.e. if a response is 55% yes and 45% no – the Yes has a variance between 60%-50% and the No would have a variance between 50%-40% (+ or – 5 percentage points from the mid point).

Only variations clearly designated as significantly different are statistically valid differences and these are clearly pointed out in the report.

Other divergences are within the normal range of fluctuation at a 95% confidence level; they should be viewed with some caution and not treated as statistically reliable changes.

| MARGIN OF ERROR TABLE | | | | | | | | | | |
|-------------------------------|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| (95% confidence level) | | | | | | | | | | |
| SAMPLE SIZE ↓ | Percentages giving a particular answer | | | | | | | | | |
| | 5% 95% | 10% 90% | 15% 85% | 20% 80% | 25% 75% | 30% 70% | 35% 65% | 40% 60% | 45% 55% | 50% 50% |
| 50 | 6 | 9 | 10 | 11 | 12 | 13 | 14 | 14 | 14 | 14 |
| 100 | 4 | 6 | 7 | 8 | 9 | 9 | 10 | 10 | 10 | 10 |
| 150 | 4 | 5 | 6 | 7 | 7 | 8 | 8 | 8 | 8 | 8 |
| 200 | 3 | 4 | 5 | 6 | 6 | 6 | 7 | 7 | 7 | 7 |
| 250 | 3 | 4 | 5 | 5 | 6 | 6 | 6 | 6 | 6 | 6 |
| 300 | 3 | 4 | 4 | 5 | 5 | 5 | 6 | 6 | 6 | 6 |
| 400 | 2 | 3 | 4 | 4 | 4 | 5 | 5 | 5 | 5 | 5 |
| 500 | 2 | 3 | 3 | 4 | 4 | 4 | 4 | 4 | 4 | 5 |
| 600 | 2 | 2 | 3 | 3 | 4 | 4 | 4 | 4 | 4 | 4 |
| 700 | 2 | 2 | 3 | 3 | 3 | 4 | 4 | 4 | 4 | 4 |
| 800 | 2 | 2 | 3 | 3 | 3 | 3 | 3 | 4 | 4 | 4 |
| 900 | 2 | 2 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| 1000 | 1 | 2 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| 1500 | 1 | 2 | 3 | 2 | 2 | 2 | 3 | 3 | 3 | 3 |
| 2000 | 1 | 1 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| 3000 | 1 | 1 | 1 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |



Appendix 3: Survey Tool

Project No: 12550

Department for Environment and Water: Marine Parks

COMMERCIAL IN CONFIDENCE

VERSION 6

| | | |
|--|---------------------------------|--------------------------|
| Sample: n=1500 + n=100 booster | SA Gen. Pop + Fishers (booster) | |
| Online methodology | | |
| Other information | | |
| Representative of Gender and Age 18+; Metro/ regional 80:20 | | |
| Approximate length of survey 10 minutes depending on answers | | |
| Total questions: 31 | 1 screener; 7 demographics | 23 topic-based questions |

Online introduction:

McGregor Tan is conducting a survey about South Australia's coastline and would appreciate your opinions.

S1 D1.... What is the postcode and suburb of where you live?

| | |
|-------------------------|----------------------------|
| Postcode1 | |
| Suburb1 | |
| LocationExpanded | Terminate those outside SA |
| Location | Terminate those outside SA |

D2 (Gender1) Do you identify as... **Select one**

| | |
|----|--|
| 1. | Male |
| 2. | Female |
| 3. | Non-binary / Gender fluid / Differently identify |

D3 (Age) What year were you born? **Enter a number**

| | | |
|---|----------|--------------|
| <i>Hidden: Automatic recode into the following age groups</i> | | |
| 1. | 18 to 24 | 2000 to 2006 |
| 1. | 25 to 30 | 1994 to 1999 |
| 2. | 31 to 39 | 1985 to 1993 |
| 3. | 40 to 54 | 1970 to 1984 |
| 4. | 55 to 64 | 1960 to 1969 |
| 5. | 65+ | 1924 to 1959 |

WATER ACTIVITIES AND FISHER DEMOGRAPHICS

1. **Ask all:** How often do you participate in the following activities in South Australian coastal waters? **(Rotate rows)**

Fishing includes the use of rod and line, pots, crab nets, speargun, hand spear, hand net, hand collection (e.g. shellfish mollusc collection while diving).

Snorkelling/diving refers to these activities for observational purposes only and that no organisms are taken

| | | 1 More often than weekl y | 2 Week ly | 3 Fortn ightly | 4 Month ly | 5 Yearly | 6 Less often than yearly | 7 Not at all |
|----|--|--|-----------------|----------------------|------------------|-------------|--------------------------------------|--------------------|
| A. | Fishing (line, spear etc.) | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| B. | Snorkelling/diving | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| C. | Boating, kayaking, jet ski, yachts | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| D. | General recreation (Surfing, stand-up paddle board, swimming, picnics, walking, beach combing, kite surfing, etc.) | 1 | 2 | 3 | 4 | 5 | 6 | 7 |

FISHERS: Codes 1-5 for fishing (B) in Q1

2. **Fishers:** How long have you participated in fishing activities?

| | |
|----|------------------|
| 1. | 1-4 years |
| 1. | 5-9 years |
| 2. | 10-14 years |
| 3. | 15-19 years |
| 4. | 20 years or more |

3. **Fishers:** How do you **most regularly** access your fishing areas? **Select one**

| | |
|----|---|
| 1. | From the land (including jetties, rock walls, beaches etc.) |
| 2. | From a boat or other watercraft |
| 3. | From a combination of land and water (roughly 50% each) |

4. **Fishers:** Do you have a boat licence?

| | |
|----|-----|
| 1. | Yes |
| 2. | No |

5. **Has a boat licence:** How long have you had your boat licence?

| | |
|----|--------------------|
| 1. | 0 - 5 years |
| 2. | 6 - 10 years |
| 3. | 11 - 15 years |
| 4. | 16 - 20 years |
| 5. | More than 20 years |

AWARENESS AND KNOWLEDGE

6. **Ask all:** Before today, were you aware of any of the following? **Select all that apply**

| | |
|----|--|
| 1. | That South Australia has Marine Parks |
| 2. | That South Australian Marine Parks are made up of 4 different types of zones that regulate a range of activities |
| 3. | That South Australia has sanctuary zones where fishing and all other extractive activities (e.g., collection of plants and animals, mining) are prohibited |
| 4. | I was not aware of any of the above before today (Fixed, exclusive) |

7. **Ask all:** What do you think is the **primary purpose** of South Australia's Marine Park? **Select one (Rotated)**

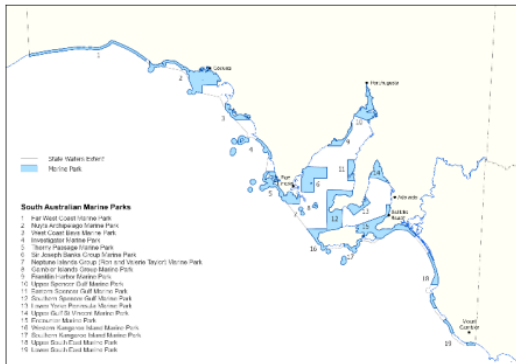
| | |
|----|--|
| 1. | To keep people out and prevent fishing |
| 2. | A fisheries management tool |
| 3. | To protect and conserve marine plants and animals. |
| 4. | To manage coastal developments |
| 5. | To protect whales and dolphins |
| 6. | Unsure (Fixed, exclusive) |
| 7. | Other (specify, fixed) |

8. **Aware of marine parks or sanctuary zones:** Where have you gained your knowledge of marine parks or sanctuary zones? **Select all that apply**

| | |
|-----|--|
| 1. | Discussions with a park ranger |
| 2. | Fishing or diving websites |
| 3. | Friends/family/word of mouth |
| 4. | Government websites/documents |
| 5. | GPS maps on your sounder |
| 6. | On-site signage (i.e. signs at boat ramps and beach entrances) |
| 7. | PIRSA Recreational fishing app |
| 8. | Social media |
| 9. | Other boating apps (i.e. Deckee) |
| 10. | Other (Specify) |

DESCRIPTION: Before you continue, please review the below information. You will need to know this information for future questions, so please read carefully.

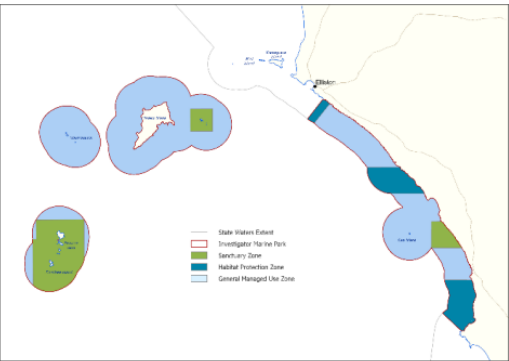
Since 2012 SA has had a network of 19 marine parks that cover 45% of our state waters (see the below map). The primary purpose of marine parks is to protect and conserve marine plants and animals.



Marine parks have four different zone types that regulate a range of activities: General Managed Use Zones, Habitat Protection Zones, Sanctuary Zones and Restricted Access Zones where entry is prohibited (see map below for example).

Fishing is allowed in the majority of state waters; however, **Sanctuary Zones cover about 5% of state waters and exist primarily for conservation.** These Sanctuary zones protect the feeding, breeding, nursery and resting areas for our marine life and **are considered 'no-take' areas where fishing is prohibited so that plants and animals in these areas are not harmed.** These zones can still be enjoyed and visited, much like our national parks.

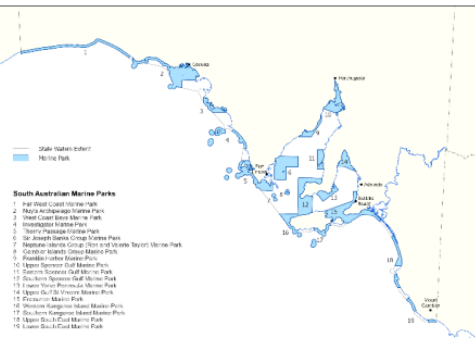
*Restricted access zones are the 4th zone type but is not shown in this map. Restricted access zones make up only 1% of marine parks.



LOCATION BEHAVIOUR

9. **Ask all:** Which of the following marine park locations have you utilised or visited in the past three years?

Use the map to help you answer this question:



| | |
|-----|--|
| 1. | Far West Coast Marine Park |
| 2. | Nuyts Archipelago Marine Park |
| 3. | West Coast Bays Marine Park |
| 4. | Investigator Marine Park |
| 5. | Thorny Passage Marine Park |
| 6. | Sir Joseph Banks Marine Parks |
| 7. | Neptune Islands Marine Park |
| 8. | Gambier Islands Marine Park |
| 9. | Franklin Harbor Marine Park |
| 10. | Upper Spencer Gulf Marine Park |
| 11. | Eastern Spencer Gulf Marine Park |
| 12. | Southern Spencer Gulf Marine Park |
| 13. | Lower Yorke Peninsula Marine Park |
| 14. | Upper Gulf St. Vincent Marine Park |
| 15. | Encounter Marine Park (Adelaide metropolitan area north of Sellicks Beach) |
| 16. | Encounter Marine Park (Fleurieu Peninsula area south of Sellicks Beach) |
| 17. | Encounter Marine Park (Eastern end of Kangaroo Island) |
| 18. | Western Kangaroo Island Marine Park |
| 19. | Southern Kangaroo Island Marine Park |
| 20. | Upper South East Marine Park |
| 21. | Lower South East Marine Park |
| 22. | None of the above (Fixed) |

10. **Fishers:** When fishing at a new location, how often do you check to see if there are any sanctuary zones?

| | |
|----|-----------|
| 1. | Never |
| 2. | Rarely |
| 3. | Sometimes |
| 4. | Usually |
| 5. | Always |

11. **Fishers:** How well do you know the location of sanctuary zones (SZ) in the marine parks where you regularly go fishing?

| | |
|----|--|
| 1. | Not at all (I do not know any of the SZ locations) |
| 2. | Low confidence (I have a vague idea of the SZ locations) |
| 3. | Moderate confidence (I know some of the SZ locations) |
| 4. | High confidence (I know all of the SZ) |
| 5. | I know that there are no SZs in areas where I usually fish |

12. **Fishers aware of sanctuary zones (Q1):** What method/s do you use to avoid fishing in a sanctuary zone? **Select all that apply**

| | |
|----|---------------------------------------|
| 1. | PIRSA recreational fishing app |
| 2. | GPS/chart plotter on boat/kayak |
| 3. | Hardcopy maps |
| 4. | Landmarks |
| 5. | Ramp signs |
| 6. | Other boating App/s (i.e. Deckee app) |
| 7. | None of the above |
| 8. | Other |

13. **Fishers:** In the past 3 years, how often have you been approached by or observed a marine park compliance vessel on the water, or by a park ranger at a boat ramp or while fishing from shore?

| | |
|----|---------------------------|
| 1. | Never |
| 2. | Once |
| 3. | A few times (2-4 times) |
| 4. | Several times (5-9 times) |
| 5. | Many times (10 or more) |

ATTITUDES/ PERCEPTIONS

14. **Ask all:** Has your attitude towards marine parks changed since the introduction of marine parks in 2012? **Select one** Please read each option carefully

| | |
|----|---|
| 1. | Changed from positive to negative |
| 2. | Changed from negative to positive |
| 3. | No change (still negative) |
| 4. | No change (still neutral) |
| 5. | No change (still positive) |
| 6. | N/A – I was not aware that we had marine parks in SA. |

15. **Decline or improvement (codes 1-2 in Q12):** Please provide a reason for why your attitude towards marine parks has seen a **[import response from Q12]** since 2012.

Open text

16. **Ask all:** What value do you think marine parks add to South Australia and the local communities where they are situated? **Select all that apply (Rotated)**

| | |
|-----|--|
| 1. | Attracting tourists |
| 2. | Creating jobs in marine tourism, research, and conservation |
| 3. | Improving water quality |
| 4. | Maintaining healthy fish populations |
| 5. | Preserving marine life and ecosystems |
| 6. | Promoting research and education about marine environments |
| 7. | Providing a better diving/ wildlife watching/ snorkelling experience |
| 8. | Supporting local businesses that rely on healthy marine ecosystems |
| 9. | Unsure (fixed) |
| 10. | Other (specify, fixed) |
| 11. | I do not see any value in marine parks |

17. **Ask all:** To what extent do you support the following on a scale of 1 to 5 where 1 is not at all support and 5 is strongly support **(Select one for each option, rotate)**

| Regarding South Australian <u>MARINE PARKS</u> , do you support..... | 1 Strongly oppose | 2 Somew hat oppose | 3 Neither support or oppose/ don't know | 4 Somew hat support | 5 Strongly support |
|---|-------------------------|-----------------------------|--|------------------------------|--------------------------|
| Having marine parks to protect and conserve marine plants and animals in South Australia? | 1 | 2 | 3 | 4 | 5 |
| Having marine parks to protect and conserve marine plants and animals in your local area? | 1 | 2 | 3 | 4 | 5 |
| Having marine parks to protect and conserve marine plants and animals in areas you visit? | 1 | 2 | 3 | 4 | 5 |

| Regarding SANCTUARY ZONES within South Australian Marine Parks, do you support.... <i>Sanctuary zones are 5% of state waters that are "no take zones" (extraction of plants and animals is prohibited, provides protection from mining)</i> | 1 Strongly oppose | 2 Somewh at oppose | Neither support or oppose/ don't know | 4 Somewh at support | 5 Strongly support |
|--|-------------------|--------------------|---------------------------------------|---------------------|--------------------|
| Having sanctuary zones in marine parks to protect and conserve marine plants and animals in South Australia? | 1 | 2 | 3 | 4 | 5 |
| Having sanctuary zones in marine parks to protect and conserve marine plants and animals in your local area? | 1 | 2 | 3 | 4 | 5 |
| Having sanctuary zones in marine parks to protect and conserve marine plants and animals in areas you visit? | 1 | 2 | 3 | 4 | 5 |

COMMUNICATION/ INFORMATION

18. **Fishers:** How much do you agree or disagree with the following statement: Information about the types of marine park zones, their locations and permitted activities is easily accessible.

| | |
|----|---|
| 1. | Strongly disagree |
| 2. | Somewhat disagree |
| 3. | Neither agree nor disagree |
| 4. | Somewhat agree |
| 5. | Strongly agree |
| 6. | I have never attempted to access this information |

19. **Fishers:** How often do you use the maps in the PIRSA recreational fishing app to check your position relative to restrictions (i.e. Sanctuary Zones) in the area you are fishing in? See below example.



| | |
|----|---|
| 1. | Often |
| 2. | Sometimes |
| 3. | Rarely |
| 4. | Never |
| 5. | I didn't know the PIRSA recreational fishing App had this feature |
| 6. | I wasn't aware of the free PIRSA recreational fishing App |

20. **Fishers not aware of this free app/ feature (codes 5-6 in Q18):** Now that you know that this PIRSA App/ feature exists, how likely are you to use it?

| | |
|----|-----------------------------|
| 1. | Not at all likely |
| 2. | Somewhat unlikely |
| 3. | Neither likely nor unlikely |
| 4. | Somewhat likely |
| 5. | Very likely |

21. **Ask all:** Have you seen or been involved with any organised activities in marine parks? **Select all that apply (Rotated)**

| | |
|----|--|
| 1. | Government-run events (i.e., National Park of the Month activities, reef rambles, citizen science projects) |
| 2. | Snorkel tours with Experiencing Marine Sanctuaries |
| 3. | Nature-based tourism with non-government operators, e.g., dolphin tours KI, Sea lion swim, shark cage diving, cuttlefish tours |
| 4. | I have seen events or tours advertised but have not attended |
| 5. | I have not seen any events but I would be interested in attending |
| 6. | I have not seen any events and would not be interested in attending |
| 7. | Other (specify) |

22. **Fishers:** In the past 12 months, have you seen any information about marine parks and sanctuary zones via any of the following? **Select all that apply (Rotated)**

| | |
|----|---|
| 1. | Brochures |
| 2. | Government websites |
| 3. | Government social media |
| 4. | Signs along the coast (not at boat ramps) |
| 5. | Signs at boat ramps |
| 6. | Other (non-government) social media/ newspaper/ TV |
| 7. | I have not seen any information on marine parks or sanctuary zones (fixed) |
| 8. | Other (specify, fixed) |

23. **Fishers:** Thinking about keeping up to date with and accessing information about marine parks, which information channels would you most prefer to source this from? **Select up to 3 options**

| | |
|-----|--|
| 1. | Signs/ info at boat ramps |
| 2. | Fishing and boating Apps |
| 3. | Hardcopy Brochures |
| 4. | Government social media |
| 5. | The Government Marine Park website |
| 6. | Specialty articles written by the government but published on non-government sites |
| 7. | (Non-government) social media/newspaper/TV |
| 8. | Marine Park presence at boat shows, and other fishing industry events |
| 9. | Text messages |
| 10. | Email list (e.g., quarterly newsletter) |
| 11. | Other (specify) |

DEMOGRAPHICS

D4 **(Employment_Marine)** Do you currently work in any role relating to the fishing or marine industry?

| | |
|----|-----|
| 1. | Yes |
| 2. | No |

D6 **(languages)** Do you speak a language other than English at home?

| | |
|----|-------------------------------------|
| 1. | Yes (specify which language) |
| 2. | No |

D7 **(Born)** Where were you born? **Select one**

| | |
|----|-----------------|
| 1. | Australia |
| 2. | Africa |
| 3. | Asia |
| 4. | Europe |
| 5. | New Zealand |
| 6. | North America |
| 7. | South America |
| 6. | Other (specify) |

MCGREGOR **TAN**
RESEARCH. STRATEGY. SOLUTIONS.

THANK YOU