



National Environmental
Research Program

TROPICAL ECOSYSTEMS *hub*

Interim Report

The Social and Economic Long Term Monitoring Program (SELTMP) 2013

The Great Barrier Reef National Survey



Jeremy Goldberg, Nadine Marshall, Margaret Gooch, Alastair Birtles,
Erin Bohensky, Matt Curnock, Howard Parry-Husbands, Petina Pert,
Samantha Stone-Jovicich, Renae Tobin and Christopher Villani



GREAT BARRIER REEF
foundation



Centre for
Sustainable
Tropical Fisheries
& Aquaculture



Australian Government
Department of the Environment



JAMES COOK
UNIVERSITY
AUSTRALIA



Australian Government
Great Barrier Reef
Marine Park Authority

Reef &
Rainforest
RESEARCH CENTRE

The Social and Economic Long Term Monitoring Program (SELTMP) 2013 The Great Barrier Reef National Survey

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Australian Government

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SELTMP 2013: THE GREAT BARRIER REEF NATIONAL SURVEY

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EXECUTIVE SUMMARY

A nationally representative online survey of 2,002 randomly selected Australians was conducted in 2013 (1,002 individuals in March/April and 1,000 in September).

- The Great Barrier Reef (GBR) is Australia's most inspiring landmark (amongst all the attractions tested in this research). More than 90% of respondents listed the GBR as 'inspiring' during the September survey.
- The strongest associations with the GBR are overwhelmingly positive (>80% of responses): beauty, coral and fish are amongst the most common associations.
- The vast majority of Australians either want to visit the GBR in the future, or have done so already. Approximately 44% of respondents have visited the GBR, while approximately half of respondents have not yet visited but would like to one day.
- When unprompted, respondents think pollution, climate change and people are the three biggest threats to the GBR.
- When provided with a list of threats, respondents think that climate change, marine debris and agricultural runoff are the three biggest threats to the GBR.
- Respondents are proud of the GBR's World Heritage status.
- More than 85% of respondents in the September survey agreed that they "feel proud the GBR is a World Heritage Area."
- There is a widespread responsibility to protect the GBR, although individual responsibility is less than the collective responsibility
- More than 80% of respondents in the September survey agree that "it is the responsibility of all Australians to protect the GBR" while 63% believe it is their own responsibility to protect the GBR.
- The GBR is part of how respondents identity themselves as Australians.
- 74% of respondents in the September survey agree that "the GBR is part of my Australian identity."

EXECUTIVE SUMMARY (CONTINUED)

- Respondents believe that climate change will harm the GBR
- 76% of respondents in the September survey are “concerned about the impacts of climate change on the GBR.”
- Respondents are not overly optimistic about the future of the GBR and nor do they feel overly confident that the GBR is well managed.
- 56% of respondents in the September survey are “optimistic about the future of the GBR.”
- 52% of respondents in the September survey “feel confident that the GBR is well managed.”
- If the health of the GBR declined, respondents would be personally affected.
- 54% of respondents in the September survey would “be personally affected if the health of the GBR declined.”
- Overall national sentiment shows concern for the environment is declining, down from 78% in 2007 to 60% in 2013.
- Global warming/climate change is the most concerning issue for respondents. Further, ecological issues appear to be of greater concern than socio-economic issues.
- Respondents report taking less effort to purchase green products, down from 70% in 2007 to 53% in 2013.
- More than 80% of respondents believe that climate change is an issue and 41% believe it is a serious, urgent issue.
- Governments and individuals are seen as making the biggest difference with respect to protecting the environment.
- The Federal government is seen as being the most responsible for dealing with climate change and greenhouse gas emissions.
- The CSIRO is the most trusted organisation in Australia when it comes to reporting environmental issues.

INTRODUCTION

Australia is a big and diverse country. Home to more than 22 million people, it also houses a wide variety of plant and wildlife, including 19 World Heritage sites such as the Great Barrier Reef (GBR). Long recognised as one of the most iconic and globally significant ecosystems on the planet, the GBR contributes substantially to Australian society, culture and economy. Unfortunately, coral reefs are predicted to undergo drastic changes in coming decades. Projections of coral reef ecosystem status are grim and the outlook for the GBR is poor. Consequently, resource managers and coral reef scientists have spent considerable time and energy trying to understand and enhance the health of the GBR. However, despite an abundance of ecological and economic data associated with the GBR, little is known about what Australians think about the GBR, how connected they are to it, and what attitudes they hold in regard to its management and future.

The social and ecological components of the Great Barrier Reef are inseparable. Understanding how these components interact may contribute to strategic interventions that can halt, reverse, or change a negative impact. However, there has been a considerable lack of attention given to the contextual forces that shape the direct drivers of change along the GBR. In particular, social and cultural attributes such as attitudes, beliefs and values have been given little attention in the scientific literature. Clarifying the role that the GBR plays in our collective social conscious provides a context in which to embed decision-making processes associated with coastal development, resource management and policymaking. As such, the values, beliefs and opinions related to the GBR can be classified as ‘indirect drivers or change’ as they guide and influence the actions taken along the GBR. Example actions may include land use, recreational activities and conservation behaviours. Understanding the national perspective of the GBR is thus a key knowledge gap for resource managers working to protect it. This study addresses this gap via a national survey of 2,002 Australians.

Surveys were conducted online from March 26 to April 2, 2013 and from September 4 – 10, 2013 via Pollinate, a market research firm based in Sydney, Australia. Since 2007, Pollinate has conducted bi-annual surveys of more than 20,000 Australians via its ongoing Green Pulse Omnibus Survey, an ongoing, representative market monitor dedicated to understanding people’s attitude towards the environment and associated consumer behaviours. Pollinate constructed the online survey format in collaboration with Lightspeed Research, a global provider of research panels and products related to advertising, consumer insights and market research. The survey was sent to a nationally representative sample (i.e. in terms of age, gender, location, etc..) of randomly selected people throughout Australia

Below, we present empirical results of several national areas of inquiry, including trust, identity, attitudes, visitation, inspiration, responsibility, pride and threat perceptions. Each plays an indirect role in shaping Australian perceptions and opinions, and thus each is an important factor to consider with respect to conservation and resource management along the GBR.

METHODOLOGY

- Online survey
- 15 - 20 minutes in length
- 2,002 Australians from 14 - 64 years of age
- Sample was recruited from a major panel provider in line with specified quotas (representative of the Australian population)

**March/April
2013**

1,002 surveys

Gender

Male	50%
Female	50%

Age

14-17	8%
18-24	14%
25-34	20%
35-49	32%
50-64	26%

Location

Sydney	21%	Other NSW	12%
Melbourne	18%	Other VIC	6%
Brisbane	9%	Other QLD	11%
Adelaide	6%	Other SA	2%
Perth	7%	Other WA	3%
Darwin	1%	Other NT	1%
TAS	2%		
ACT	1%		

**September
2013**

1,000 surveys

Gender

Male	48%
Female	52%

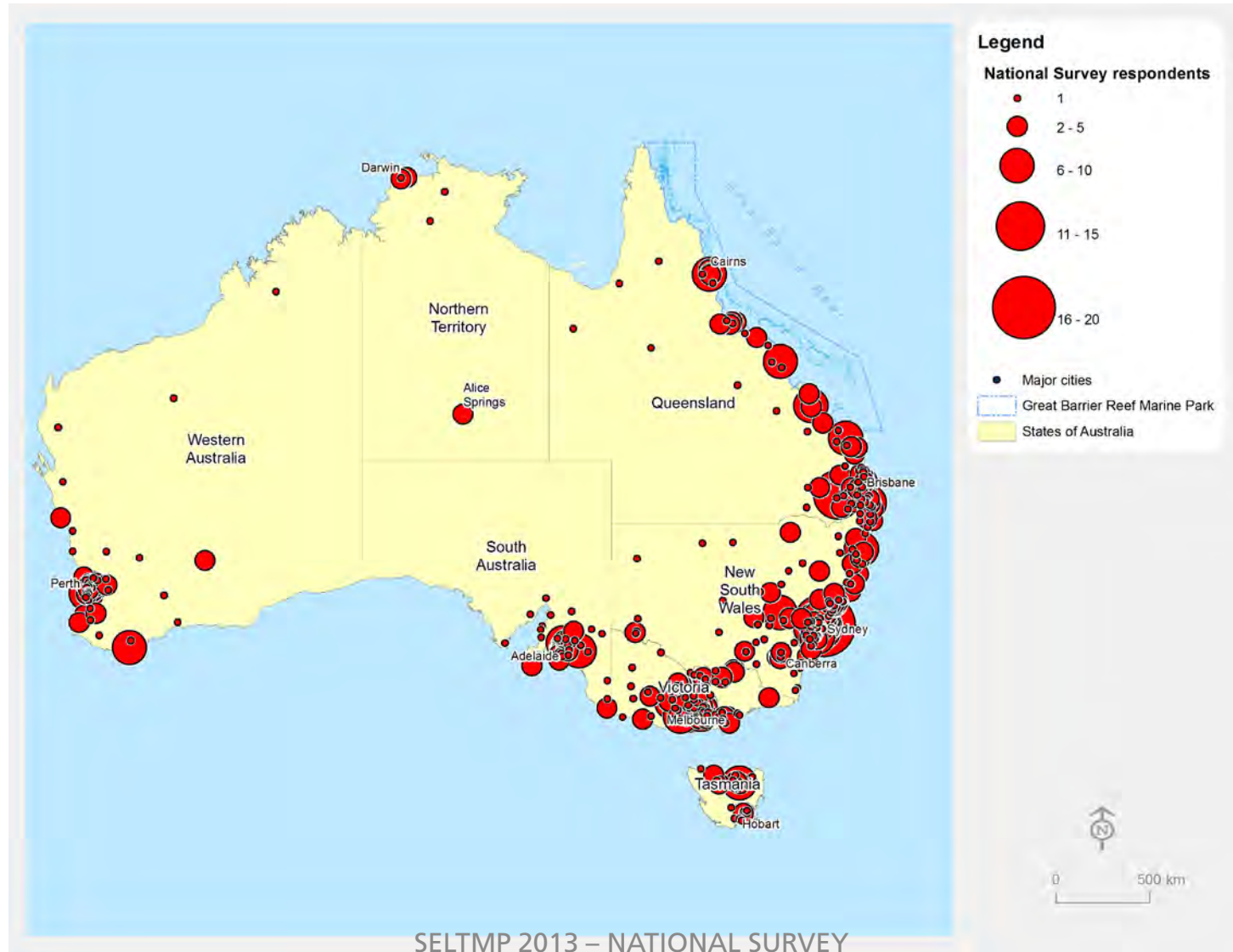
Age

14-17	6%
18-24	13%
25-34	21%
35-49	35%
50-64	26%

Location

Sydney	21%	Other NSW	11%
Melbourne	19%	Other VIC	7%
Brisbane	9%	Other QLD	10%
Adelaide	6%	Other SA	2%
Perth	7%	Other WA	2%
Darwin	1%	Other NT	0%
TAS	3%		
ACT	0%		

SURVEY RESPONDENT LOCATIONS

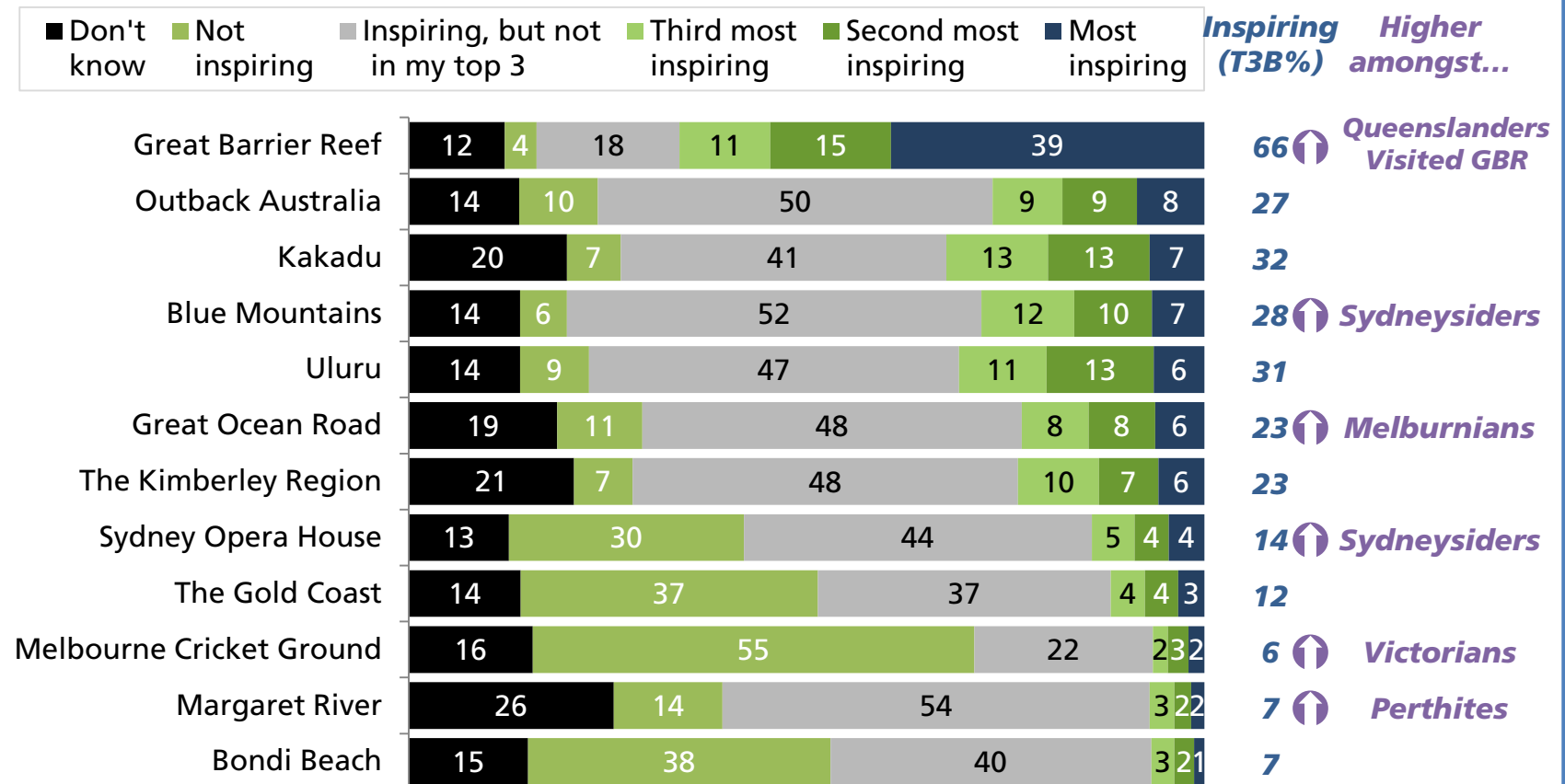


INSPIRATION

MARCH/APRIL 2013

Q: Below is a list of places in Australia that people have said are inspiring. Please rank the following in terms of how inspiring they are to you.

Inspiring Australian attractions (%)



Base: Total sample, Australians aged 14-64 (n=1,002)

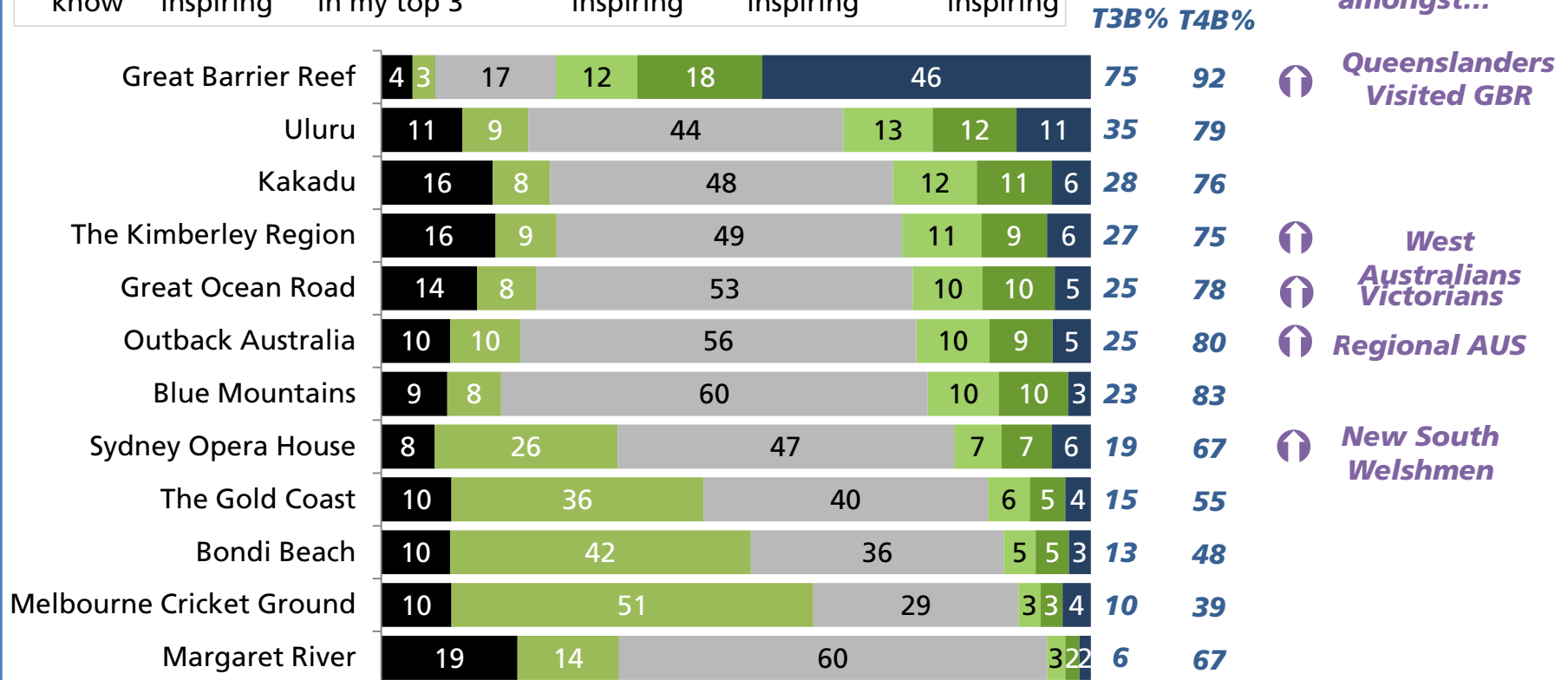
Key message: The GBR is Australia's most inspiring icon.

INSPIRATION SEPTEMBER 2013

Q: Below is a list of places in Australia that people have said are inspiring. Please rank the following in terms of how inspiring they are to you.

Inspiring Australian icons (%)

■ Don't know ■ Not inspiring ■ Inspiring, but not in my top 3 ■ Third most inspiring ■ Second most inspiring ■ Most inspiring

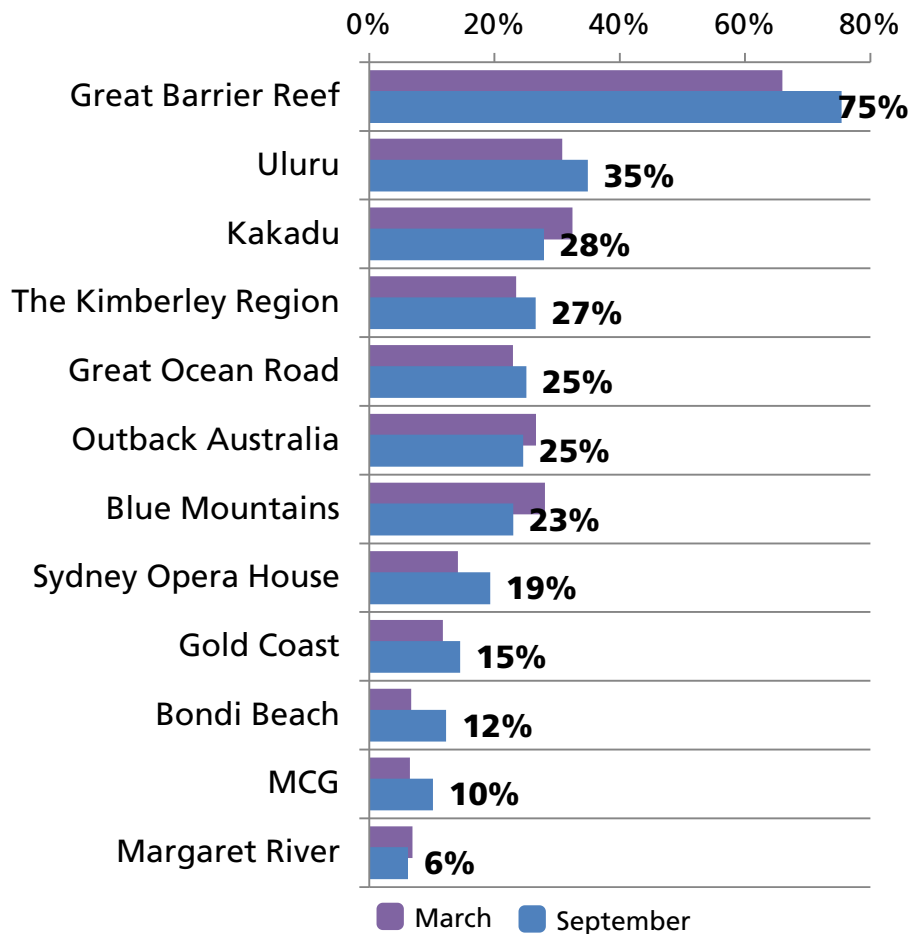


Base: Total sample, Australians aged 14-64 (n=1,000)

INSPIRATION

MARCH/APRIL AND SEPTEMBER, 2013

Total Top Three Comparison
(March vs. September)



Great Barrier Reef inspiration increase is driven by...

Females



Mar 70% | Sept 80% ↑

Regional



Mar 67% | Sept 78% ↑

Queensland



Mar 72% | Sept 85% ↑

New South Wales



Mar 66% | Sept 78% ↑

GBR Catchment Area



Mar 70% | Sept 88% ↑

Concern About Habitat Destruction



Mar 79% | Sept 90% ↑

Base: Total sample, Australians aged 14-64 (March/April, 2013 = 1,002 / September, 2013 = 1,000)

WORD ASSOCIATION

MARCH/APRIL 2013

Q: Please list the first words that come to mind when you think of the Great Barrier Reef.

Spontaneous Great Barrier Reef associations (open-ended responses)



Word cloud – the bigger the word, the more frequently it was mentioned

Base: Total sample, Australians aged 14-64 (n=1002)

“Negative” mentions account for 17%
and they include: endangered, dying, fragile, threat,
pollution, crown of thorns starfish, and bleaching.

WORD ASSOCIATION

SEPTEMBER 2013

Q: Please list the first words that come to mind when you think of the Great Barrier Reef.

September 2013



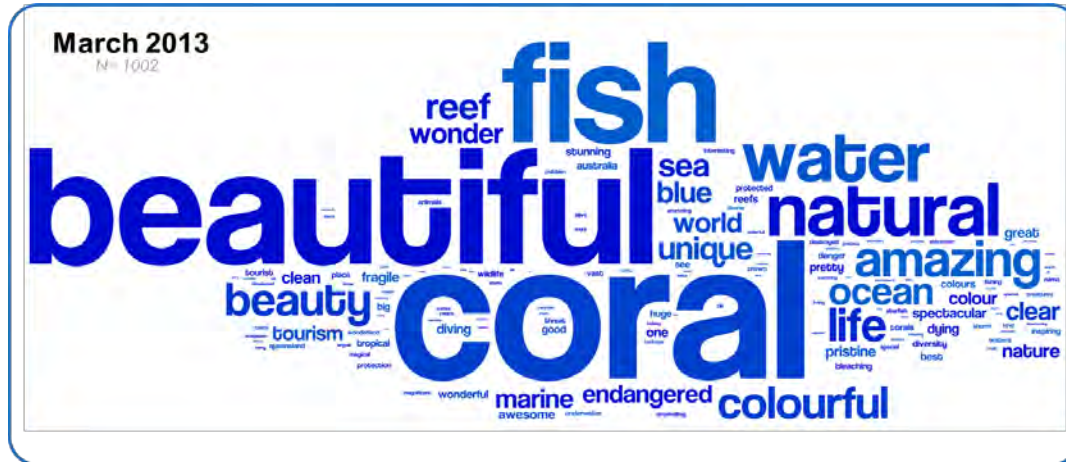
Beautiful	28%
Coral	22%
Amazing	17%
Fish	16%
Water/ocean	13%
Endangered/under threat	12%
Colourful	10%
Natural	8%

"Negative" mentions account for 18%
and they include: endangered, dying, fragile, pollution,
crown of thorns starfish, bleaching

WORD ASSOCIATION

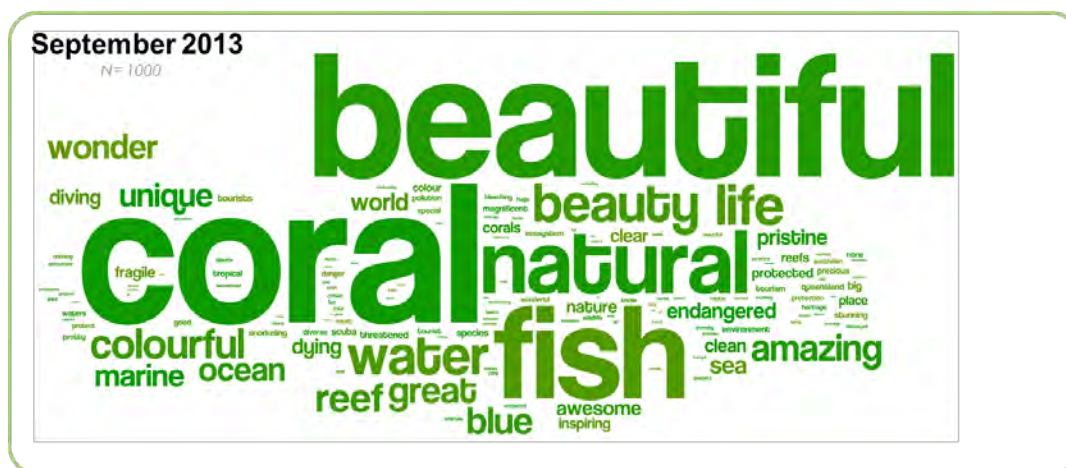
MARCH/APRIL AND SEPTEMBER 2013

Q: Please list the first words that come to mind when you think of the Great Barrier Reef.



Beautiful	26%
Coral	20%
Amazing	14%
Fish	13%
Endangered/under threat	12%
Water/ocean	10%
Natural	9%
Marine life	8%
Colourful	6%

"Negative" mentions account for 19%
and they include: endangered, dying, fragile, pollution, crown of thorns starfish, bleaching



Beautiful	28%
Coral	22%
Amazing	17%
Fish	16%
Water/ocean	13%
Endangered/under threat	12%
Colourful	10%
Natural	8%

"Negative" mentions account for 18%
and they include: endangered, dying, fragile, pollution, crown of thorns starfish, bleaching

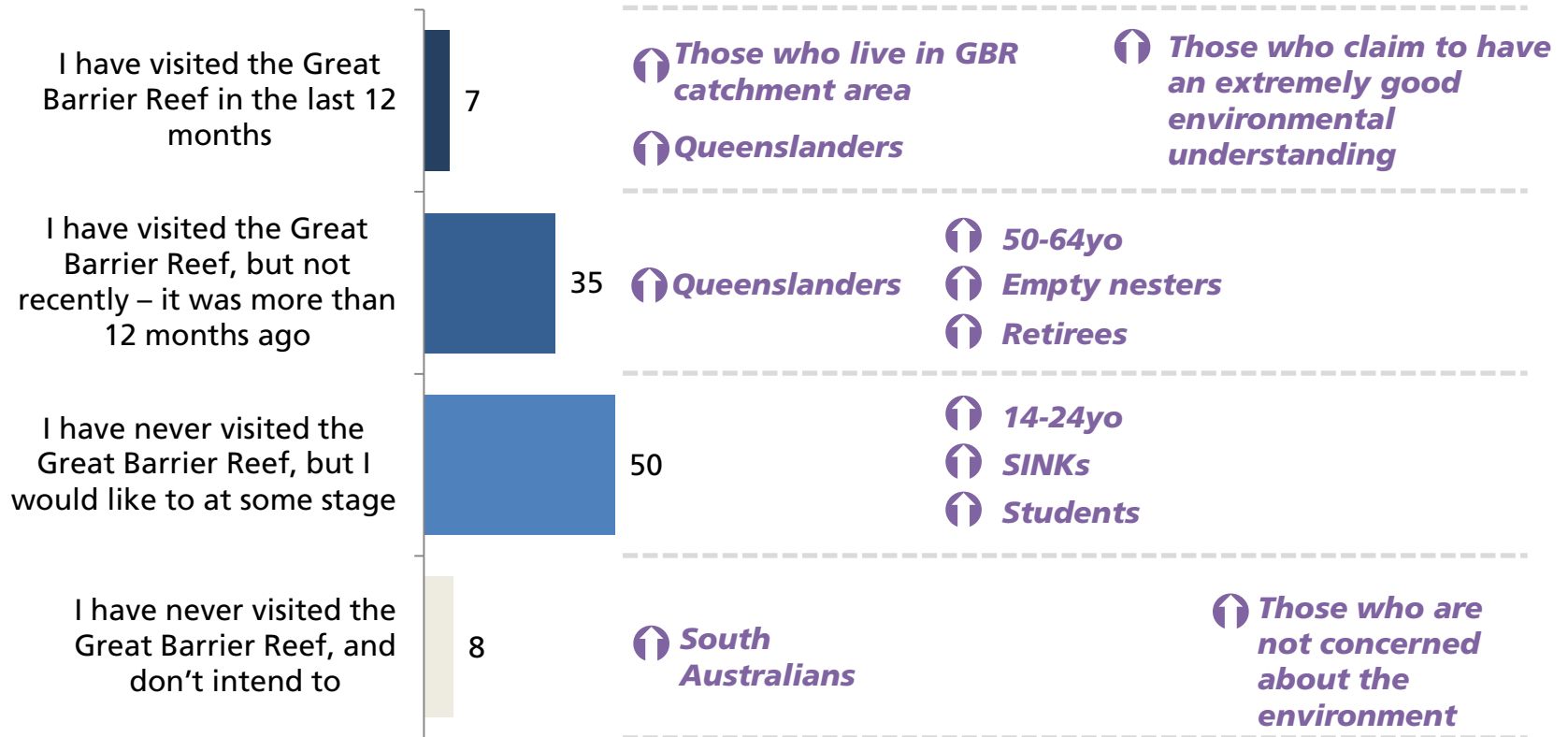
Key message: The strongest associations with the GBR are positive: 'beautiful', 'coral' and 'amazing'.

VISITATION MARCH 2013

Q: Which of the following best applies to you?

Great Barrier Reef visitation (%)

Higher amongst...

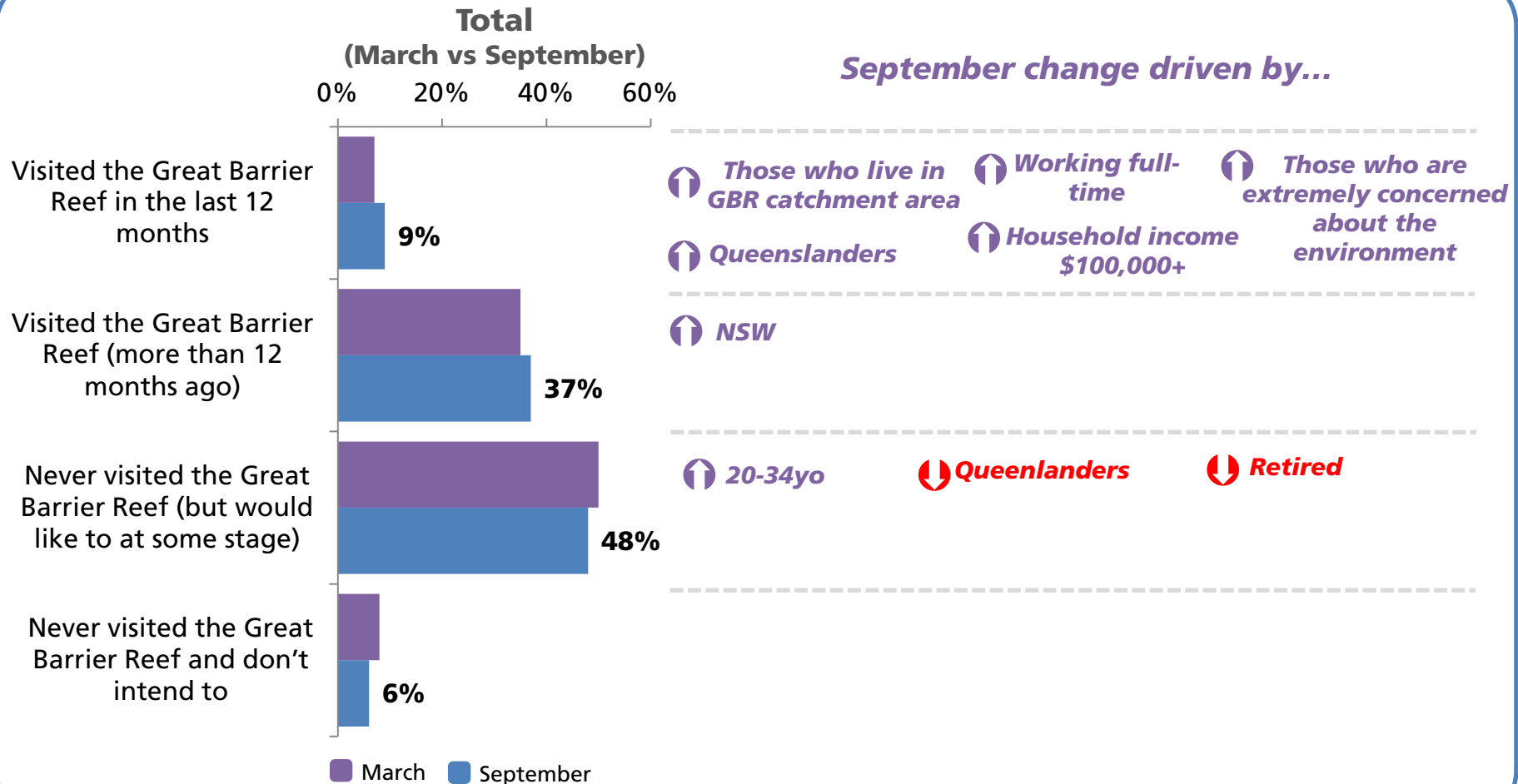


Base: Total sample, Australians aged 14-64 (n=1,002)

Key message: People want to see the GBR.

VISITATION SEPTEMBER 2013

Q: Which of the following best applies to you?



Base: Total sample, Australians aged 14-64 (n=1,000)

Key message: People want to see the GBR.

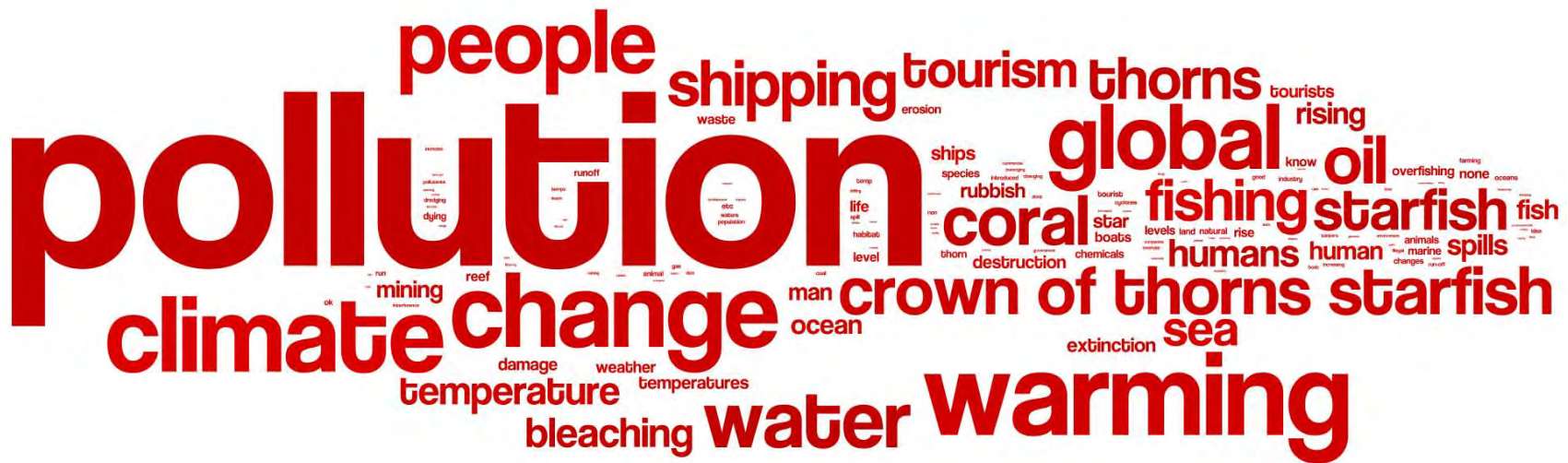
PERCEPTION OF THREATS

MARCH 2013

Q: *What do you think are the three most serious threats to the Great Barrier Reef?*

Spontaneous threats to the Great Barrier Reef: March 2013
(open-ended responses)

NOTE: 17% of people could not identify one threat



Word clouds – the bigger the word, the more frequently it was mentioned
Base: Total sample, Australians aged 14-64 (n=1,002)

PERCEPTION OF THREATS

SEPTEMBER 2013

Q: *What do you think are the three most serious threats to the Great Barrier Reef?*

Spontaneous threats to the Great Barrier Reef: September 2013
(all 3 open-ended responses)

NOTE: 18% of people could not identify one threat



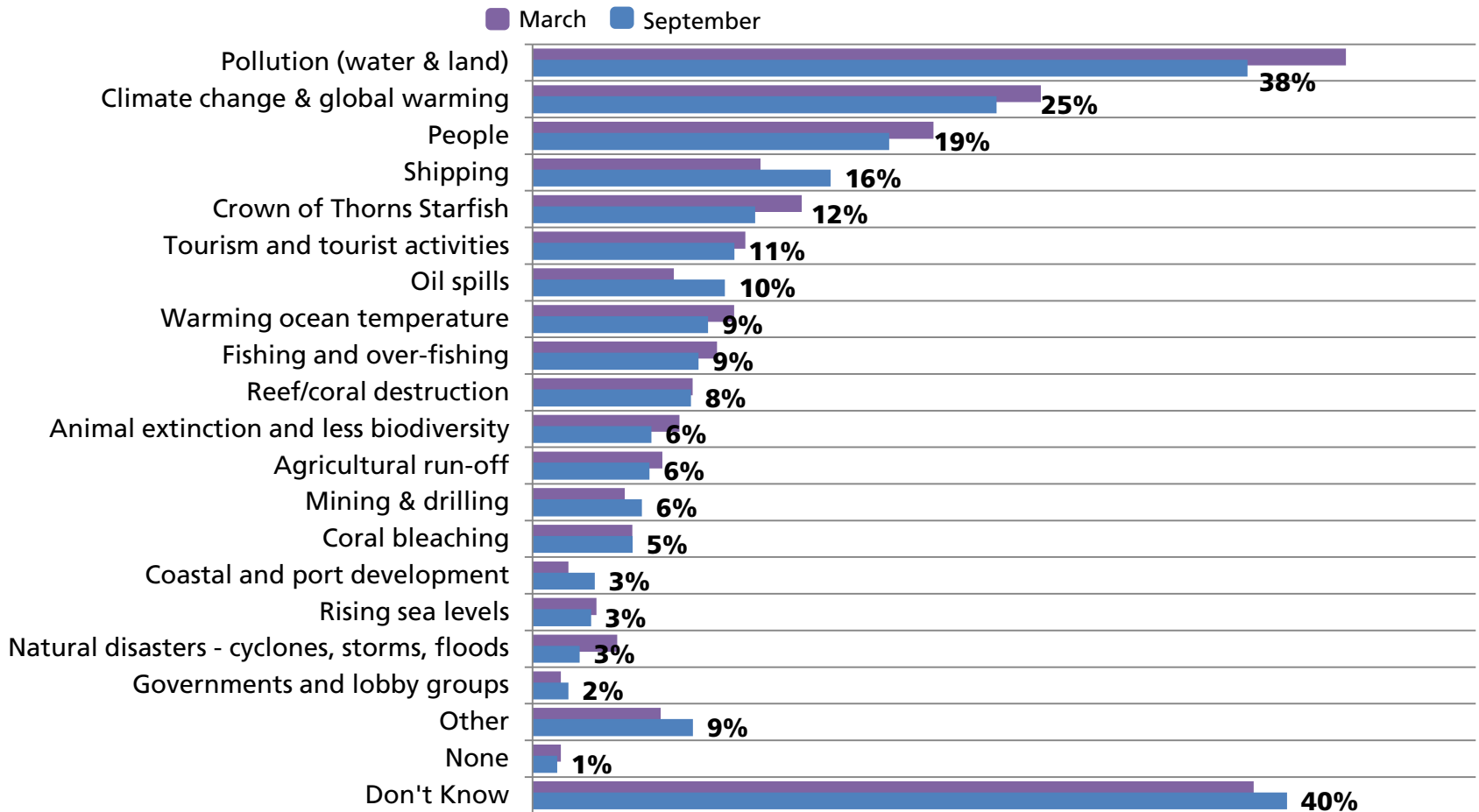
Word clouds – the bigger the word, the more frequently it was mentioned
Base: Total sample, Australians aged 14-64 (n= 1,000)

PERCEPTION OF THREATS

MARCH/APRIL AND SEPTEMBER 2013

Q: What do you think are the three most serious threats to the Great Barrier Reef?

Spontaneous threats to the Great Barrier Reef: March v September (Open-ended responses)



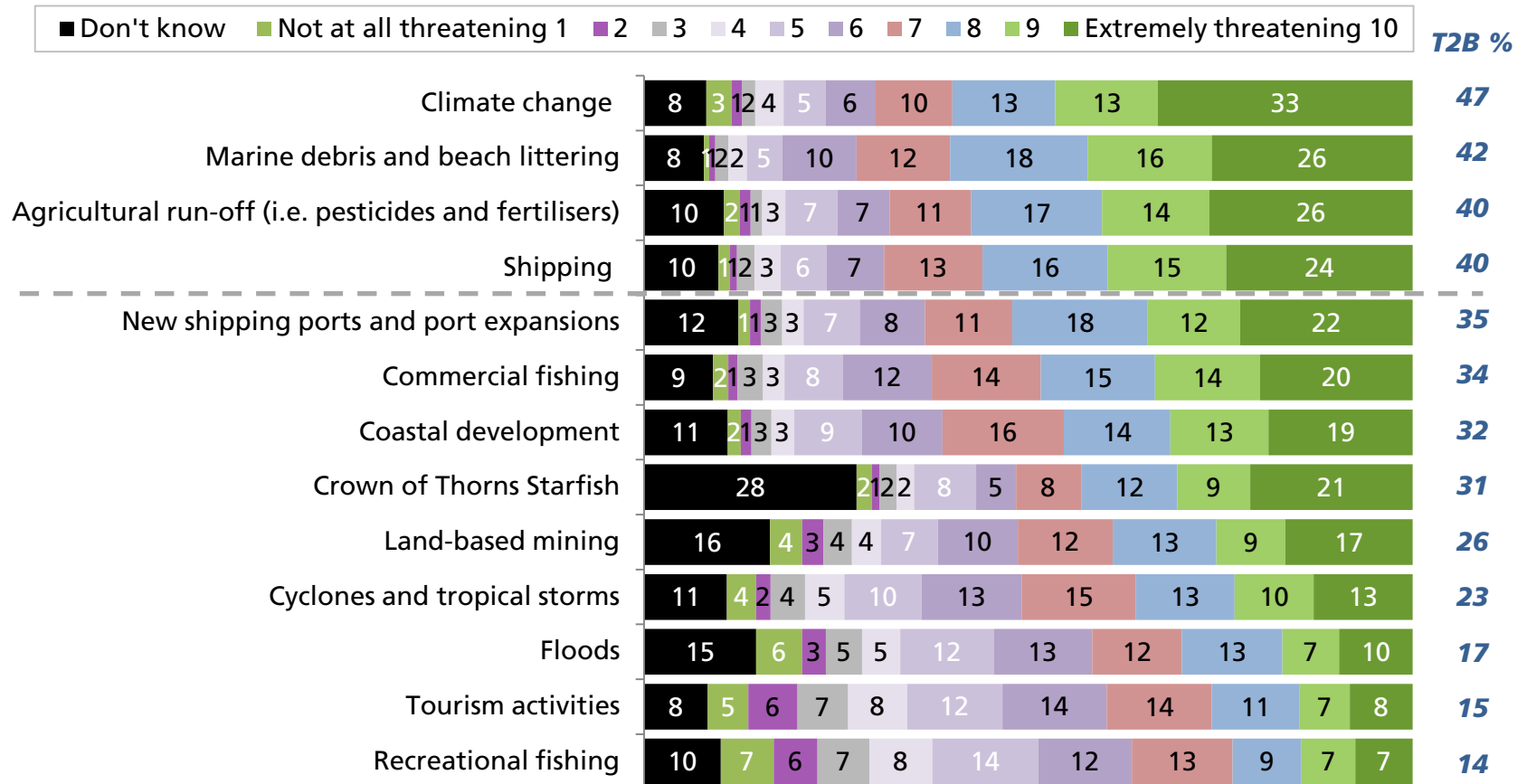
Base: Total sample, Australians aged 14-64 (n= March 1,002 / September 1,000)

PERCEPTION OF THREATS

MARCH/APRIL 2013

Q: Using the scale below, please indicate how threatening you think each of the following is to the Great Barrier Reef.

Perceived threats to the Great Barrier Reef (close ended question)



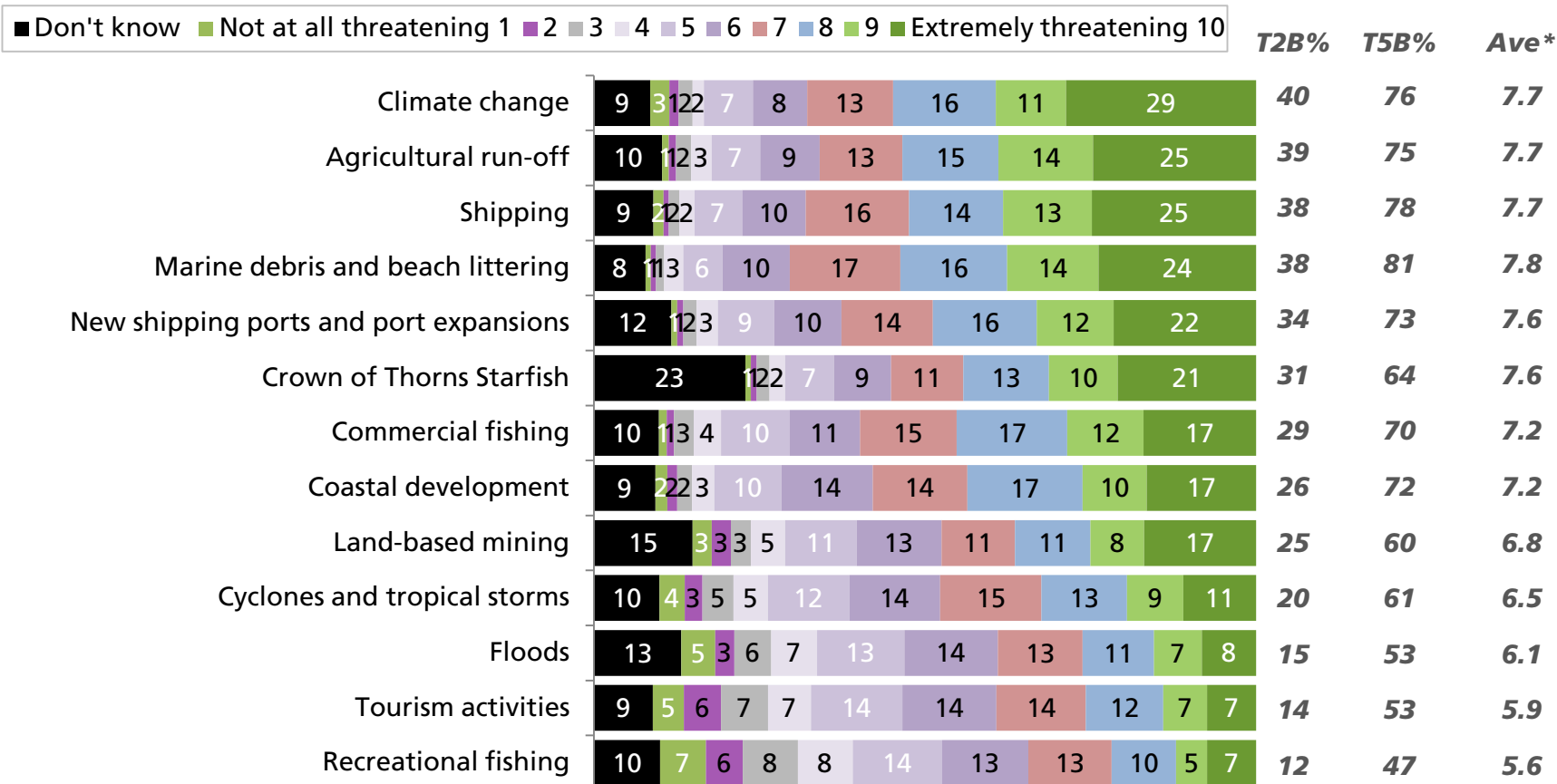
Base: Total sample, Australians aged 14-64 (Mar-13 n=1002)

PERCEPTION OF THREATS

SEPTEMBER 2013

Q: Using the scale below, please indicate how threatening you think each of the following is to the Great Barrier Reef.

Perceived threats to the Great Barrier Reef (close ended question)



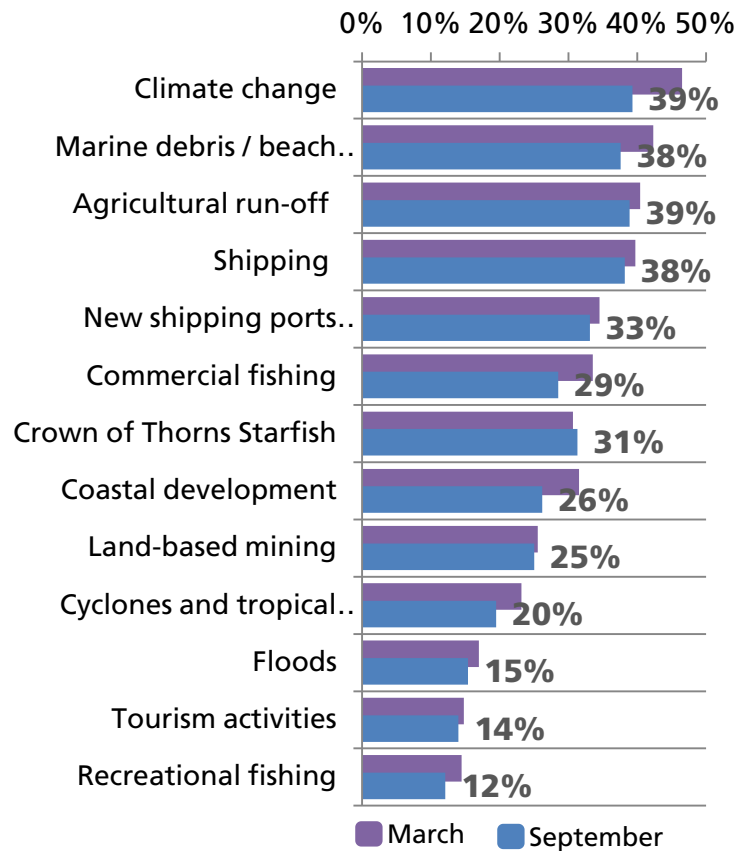
Base: Total sample, Australians aged 14-64 (Sept-13 n=1000); *NOTE: Average excludes "don't know" responses

PERCEPTION OF THREATS

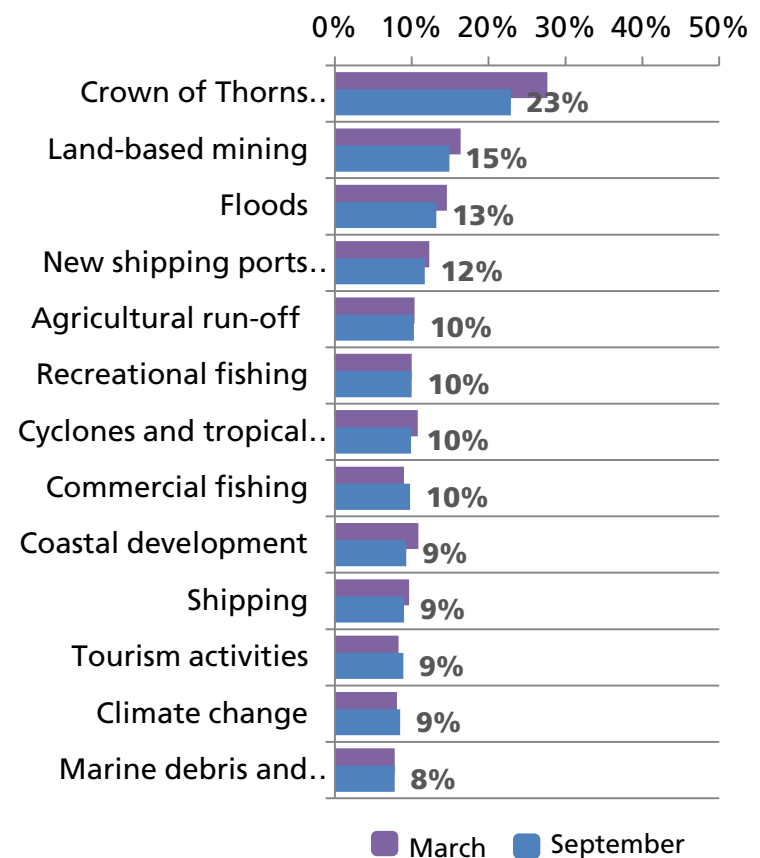
MARCH/APRIL AND SEPTEMBER 2013

Q: Using the scale below, please indicate how threatening you think each of the following is to the Great Barrier Reef.

**Top 2 Box
(March vs. September)**



**Don't Know
(March vs. September)**



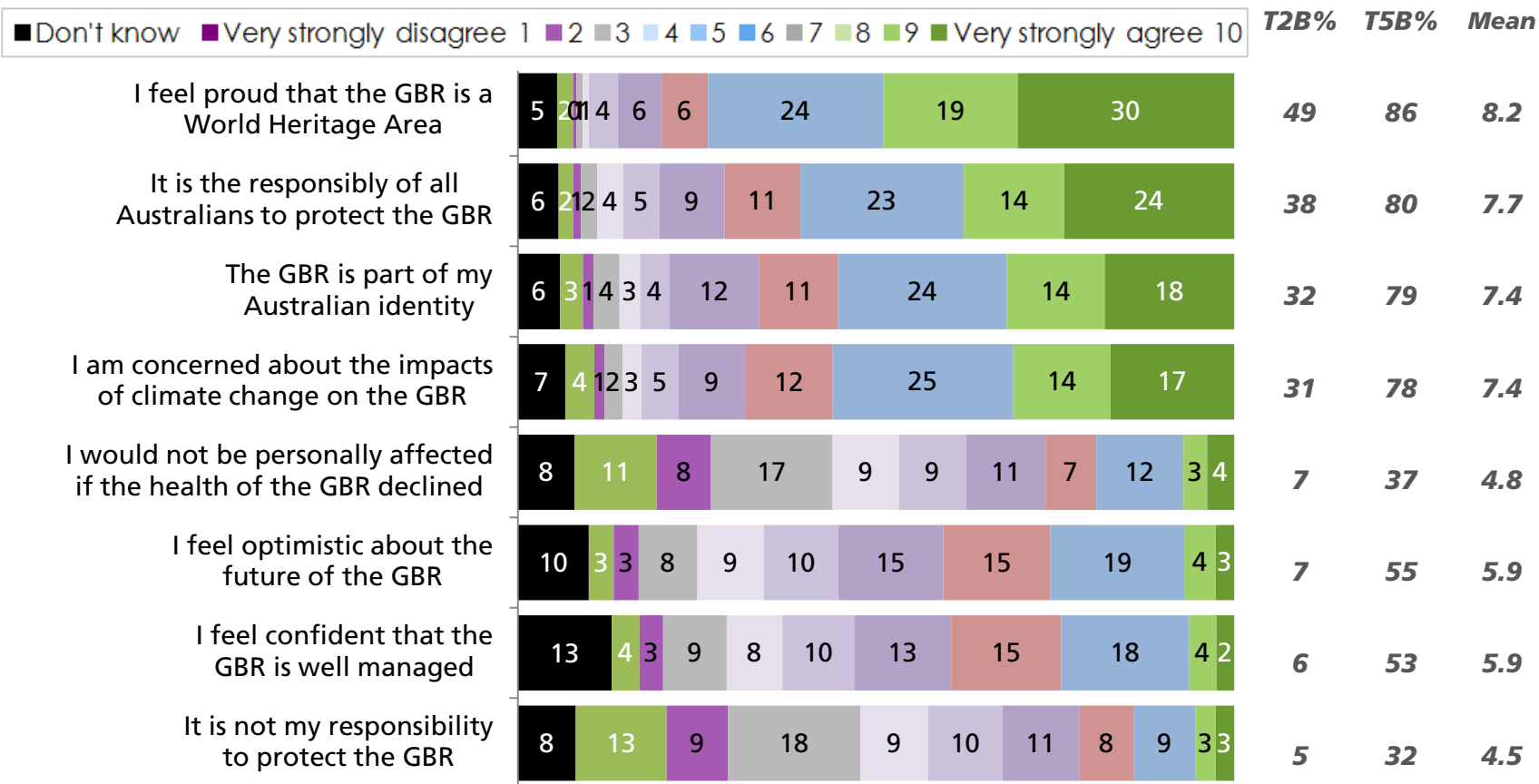
Key message: Climate change is the biggest perceived threat to the GBR.
SELTMP 2013 – NATIONAL SURVEY

ATTITUDES

MARCH 2013

Q: Please indicate how strongly you agree or disagree with each of the following, on the 10-point scale below.

Attitudes towards the Great Barrier Reef



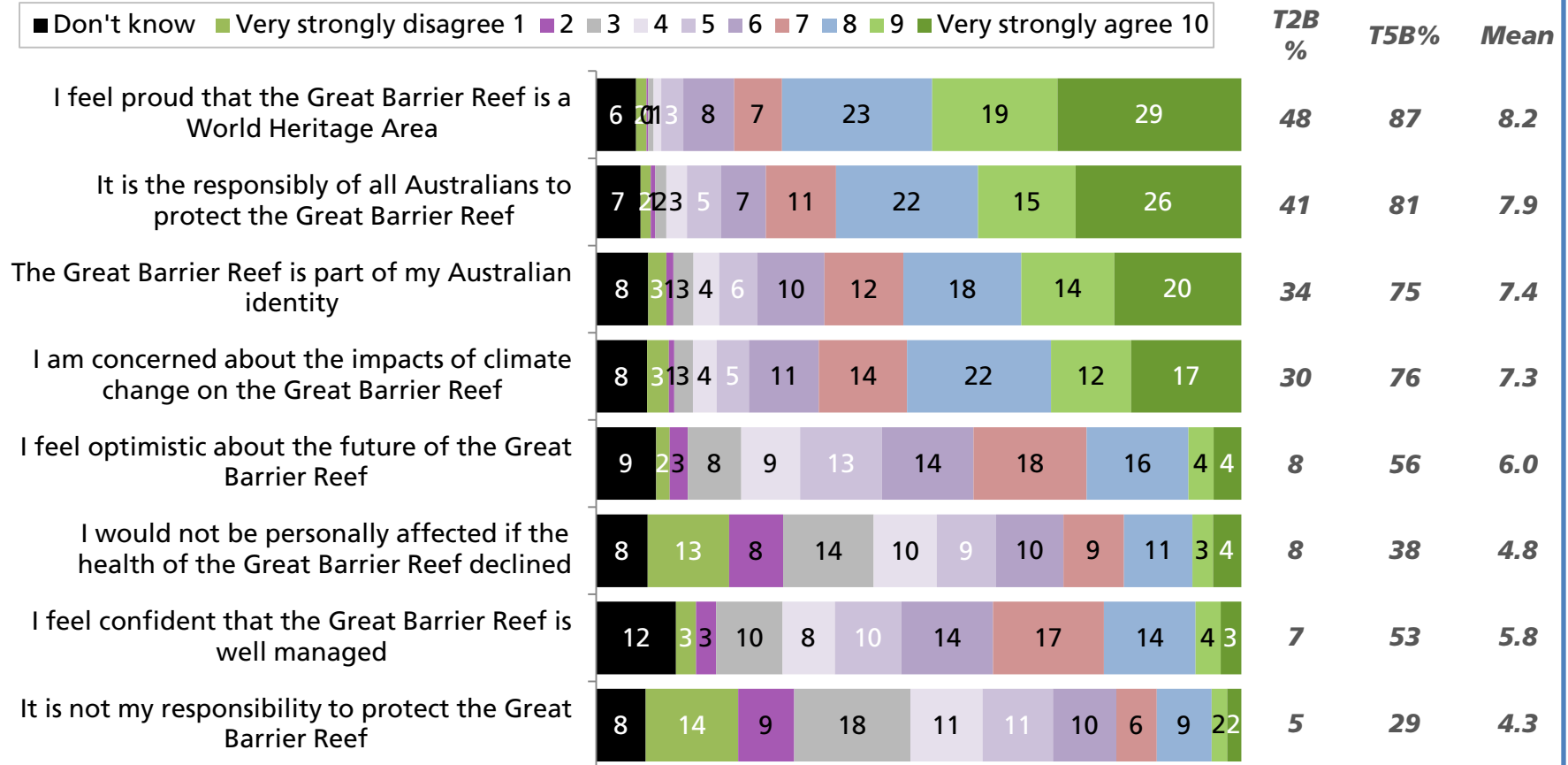
Base: Total sample, Australians aged 14-64 (n=1,002)

Key message: Australians are concerned about and connected to the GBR.
SELTMP 2013 – NATIONAL SURVEY

ATTITUDES SEPTEMBER 2013

Q: Please indicate how strongly you agree or disagree with each of the following, on the 10-point scale below.

Attitudes toward the Great Barrier Reef



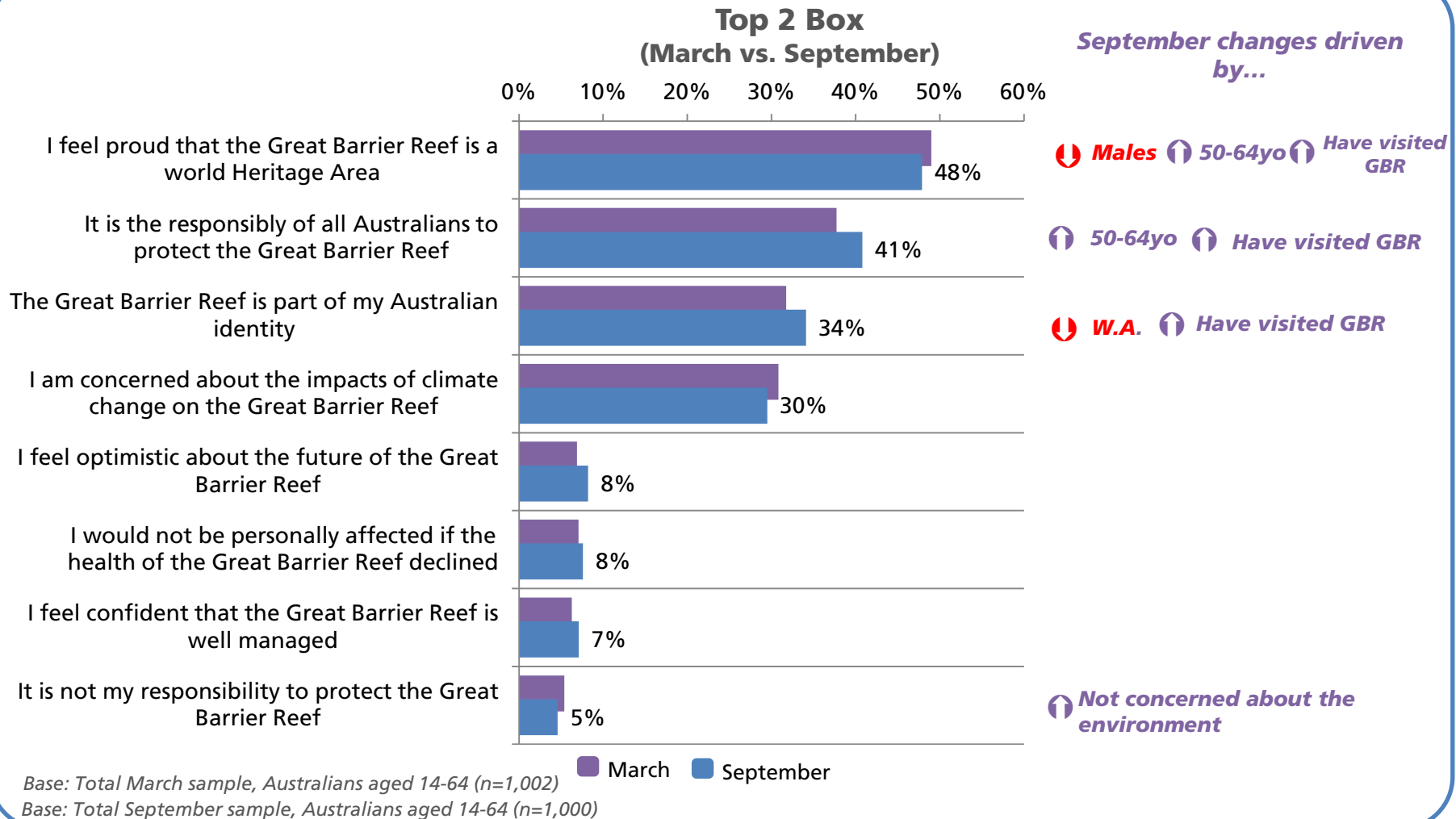
Base: Total sample, Australians aged 14-64 (n=1,000)

Key message: Australians are concerned about and connected to the GBR.
SELTMP 2013 – NATIONAL SURVEY

ATTITUDES

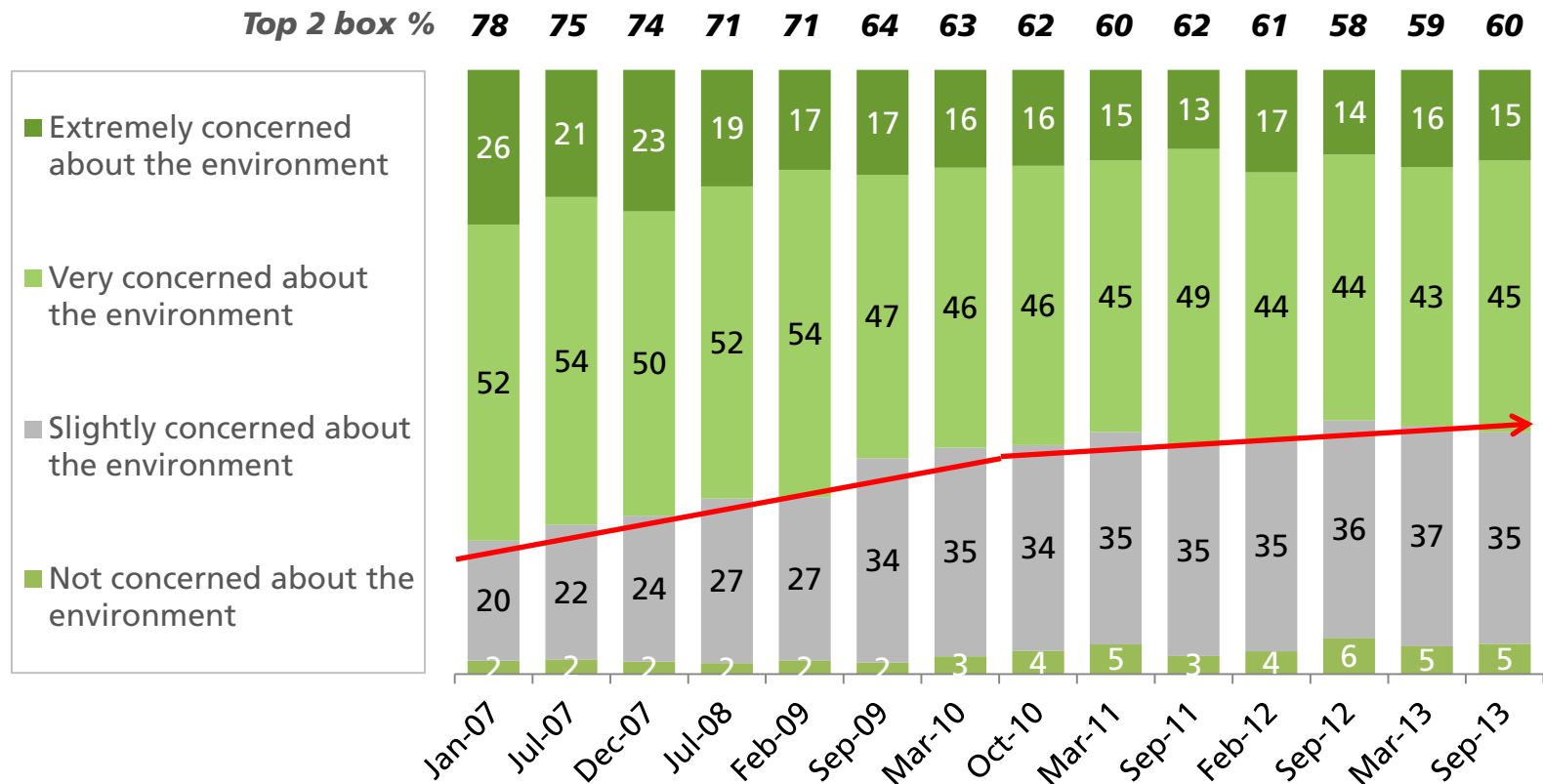
MARCH/APRIL AND SEPTEMBER 2013

Q: Please indicate how strongly you agree or disagree with each of the following, on the 10-point scale below.



CONCERN ABOUT THE ENVIRONMENT

Q: Which of the following statements best describes your concern about the environment? I am ...

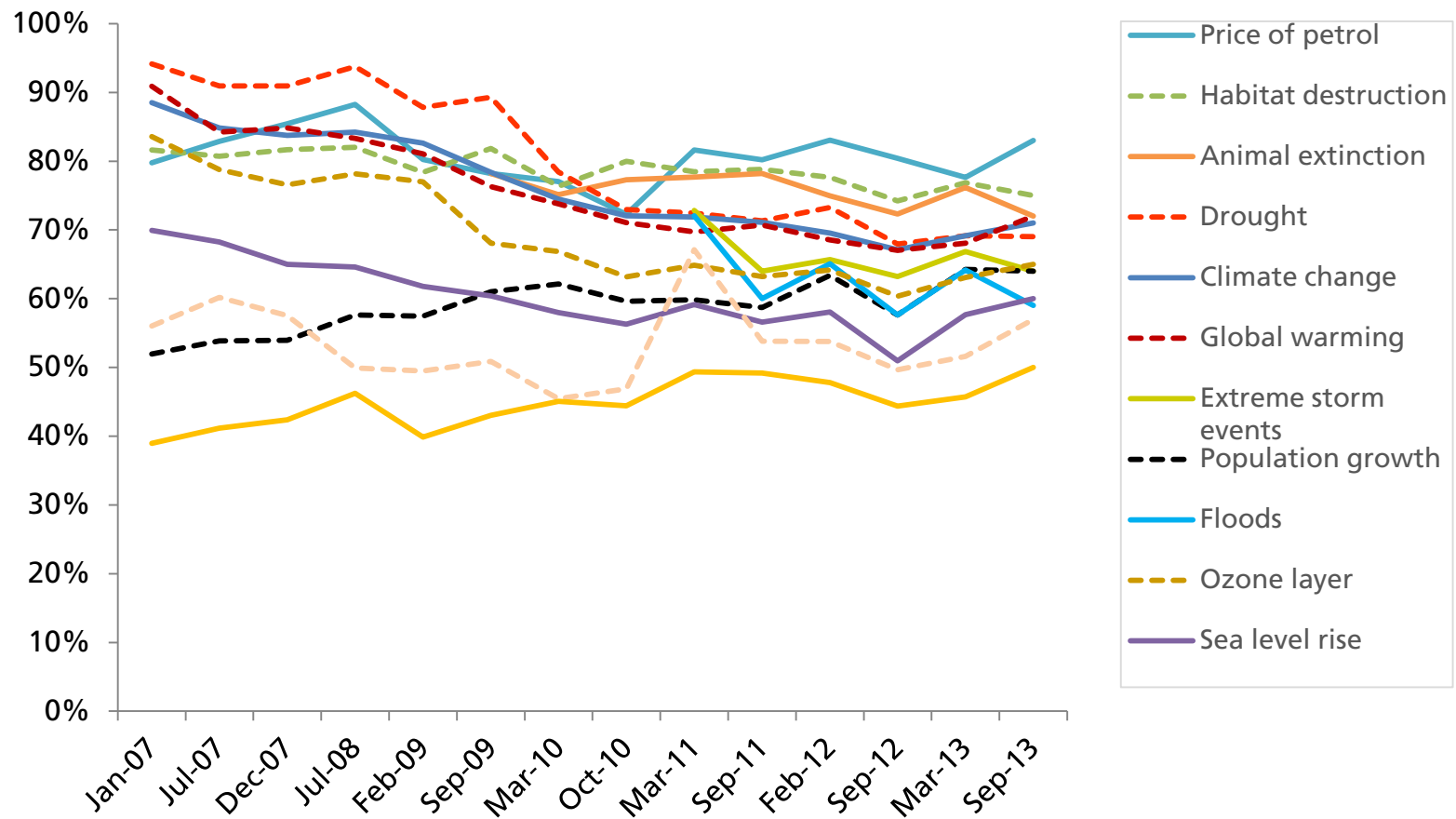


Base: Total sample, Australians aged 14-64 (approx n=1,000 per wave); Source: Pollinate, 2013

Key message: Environmental concern is declining.
SELTMP 2013 – NATIONAL SURVEY

ENVIRONMENTAL ISSUES OF CONCERN

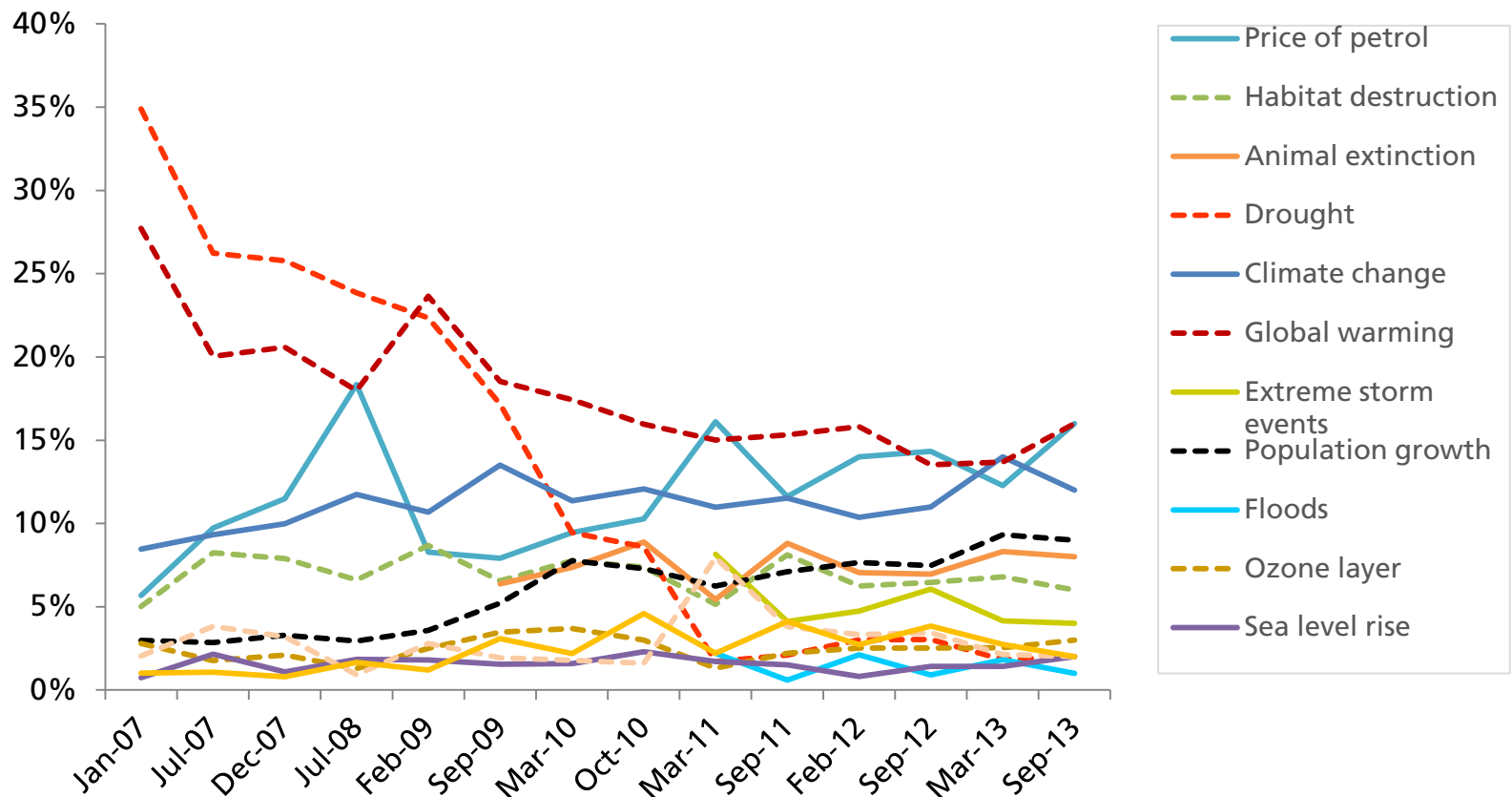
Q: Which of the following issues concern you? (selected issues presented)



Base: Total sample, Australians aged 14-64 (approx n=1,000 per wave); Source: Pollinate, 2013

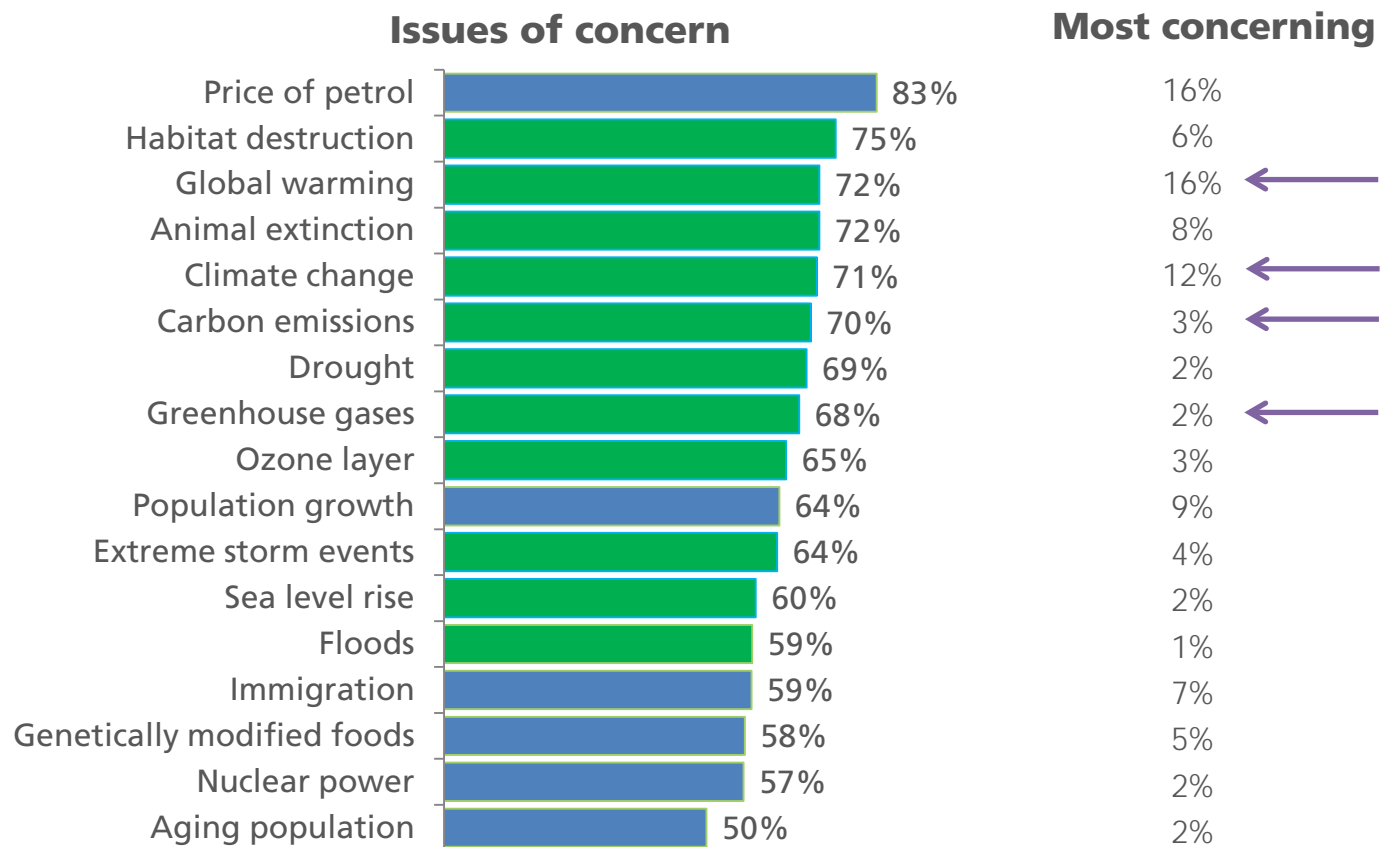
GREATEST ENVIRONMENTAL CONCERN

Q: And of the issues that concern you, which one is of greatest concern to you? (selected issues presented)



Base: Total sample, excluding those who selected 'None of these' at previous question, Australians aged 14-64 (approx n=1,000 per wave);
Source: Pollinate, 2013

GREATEST ENVIRONMENTAL CONCERN

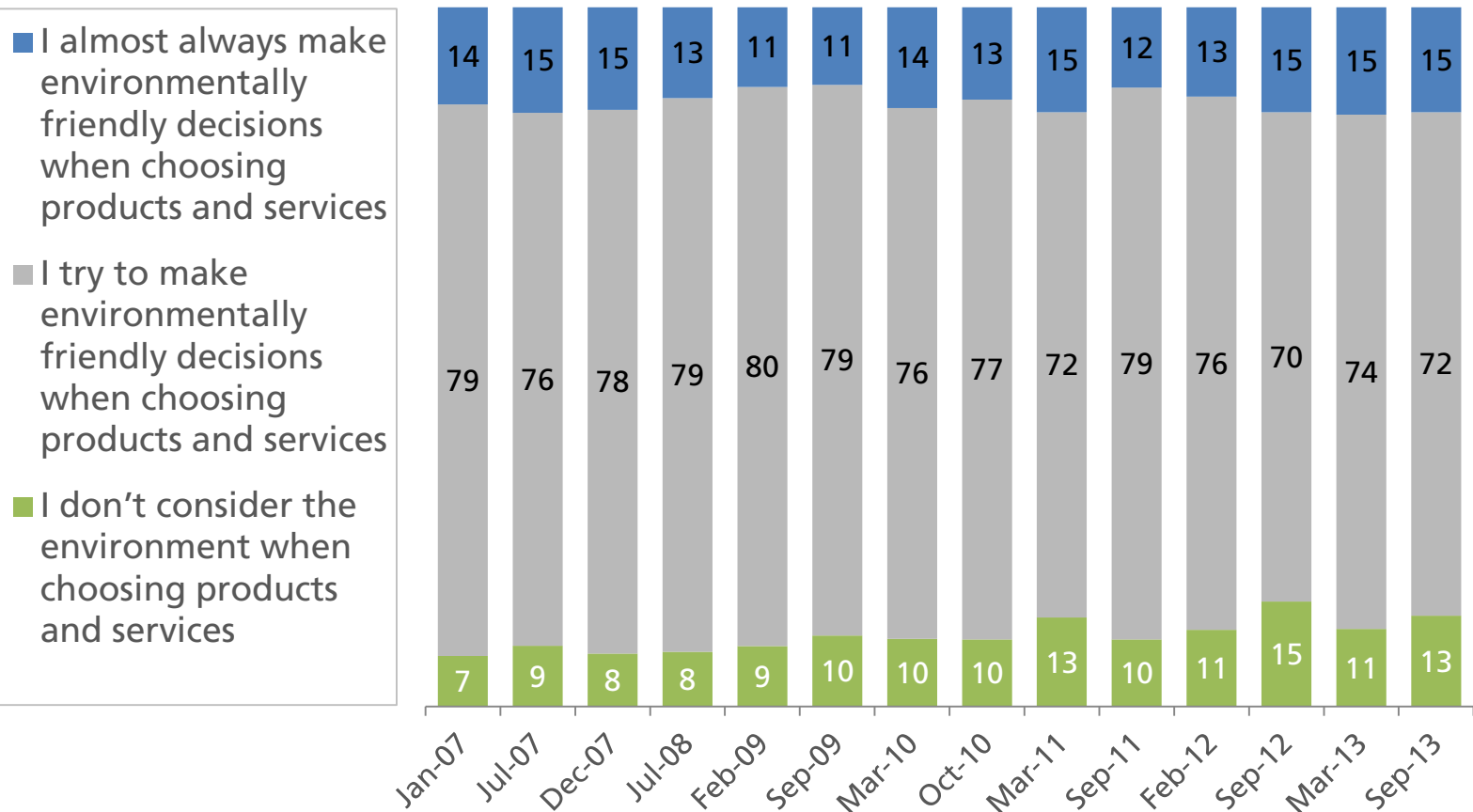


Base: Total sample, Australians aged 14-64 (Sep-13 n=1,000). Note: 'Most concerning' excludes those who selected 'None of these' at the first question; Source: Pollinate, 2013

Note: Ecological issues are shaded green, socio-economic issues are shaded blue, and the purple arrows point to issues with similar phrasing about climate change. Added together, these arrow phrases total 33%, more than double the next most concerning issue (price of petrol). Overall, ecological issues (green) appear to be more concerning than socio-economic issues (blue).

PURCHASING CONSIDERATIONS

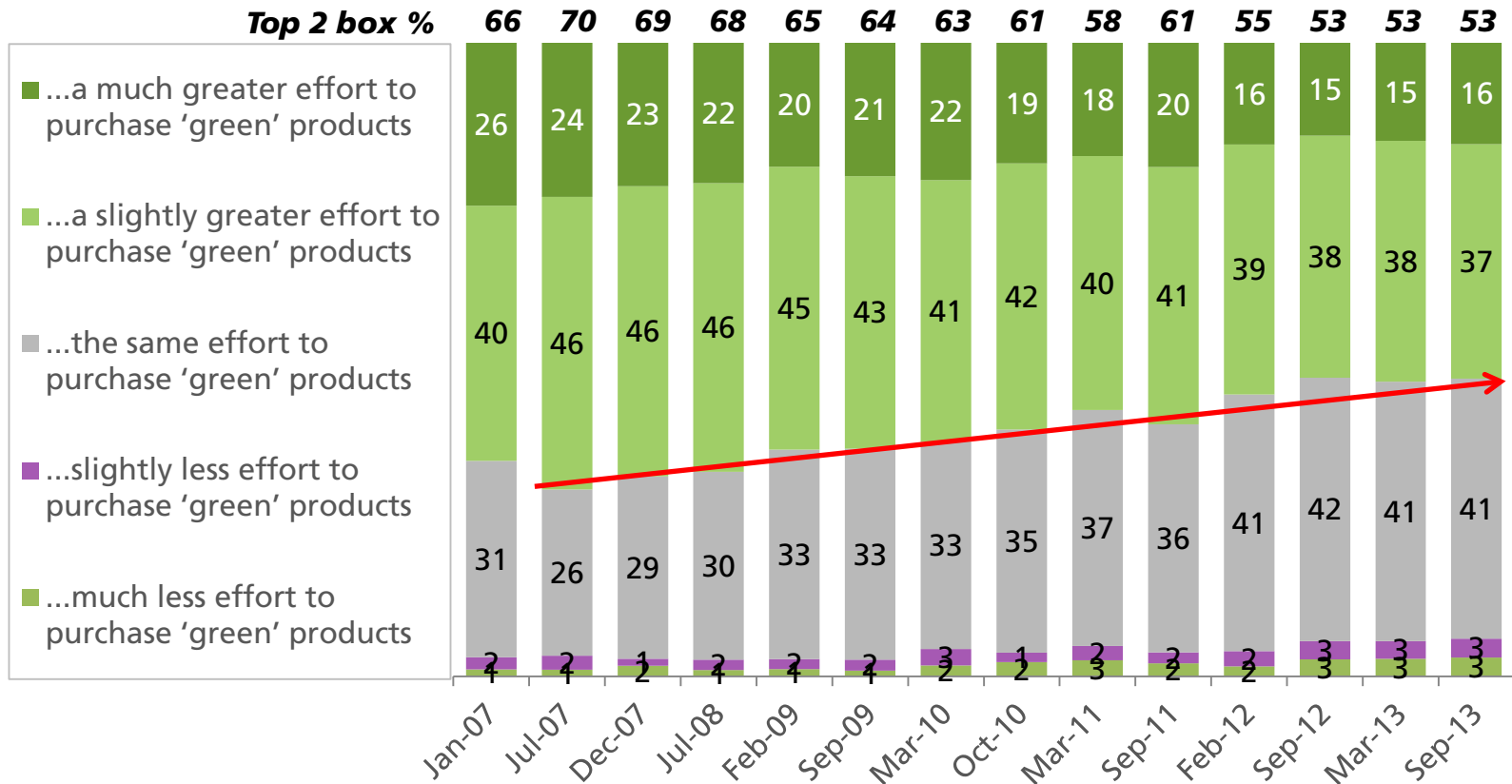
Q: When purchasing products, which of the following statements best describes you?



Base: Total sample, Australians aged 14-64 (approx n=1,000 per wave); Source: Pollinate, 2013

PURCHASING BEHAVIOUR

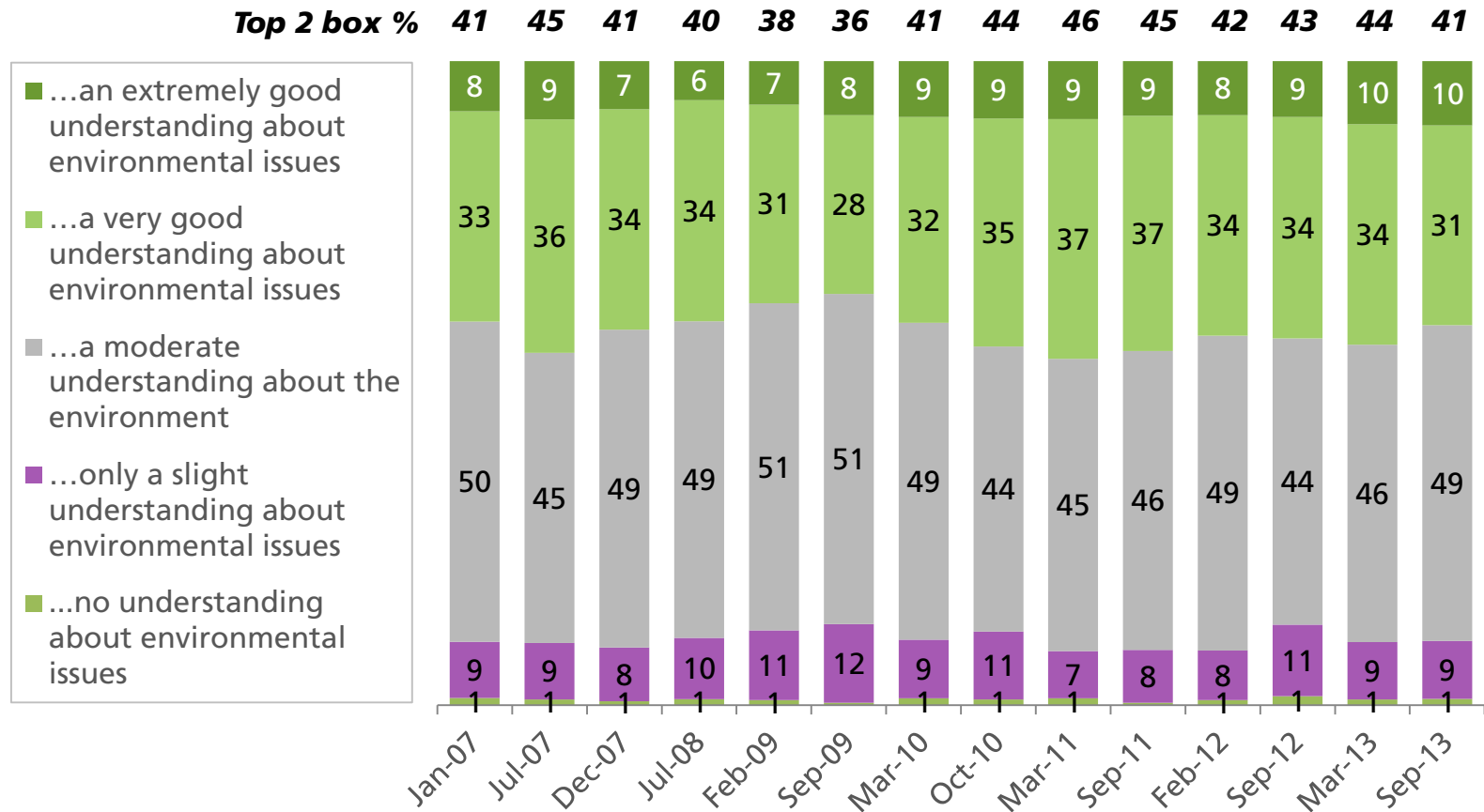
Q: Thinking about all the products and services you have been shopping for recently, which one of the following statements best describes you? I am making...



Base: Total sample, Australians aged 14-64 (approx n=1,000 per wave); Source: Pollinate, 2013

UNDERSTANDING OF ENVIRONMENTAL ISSUES

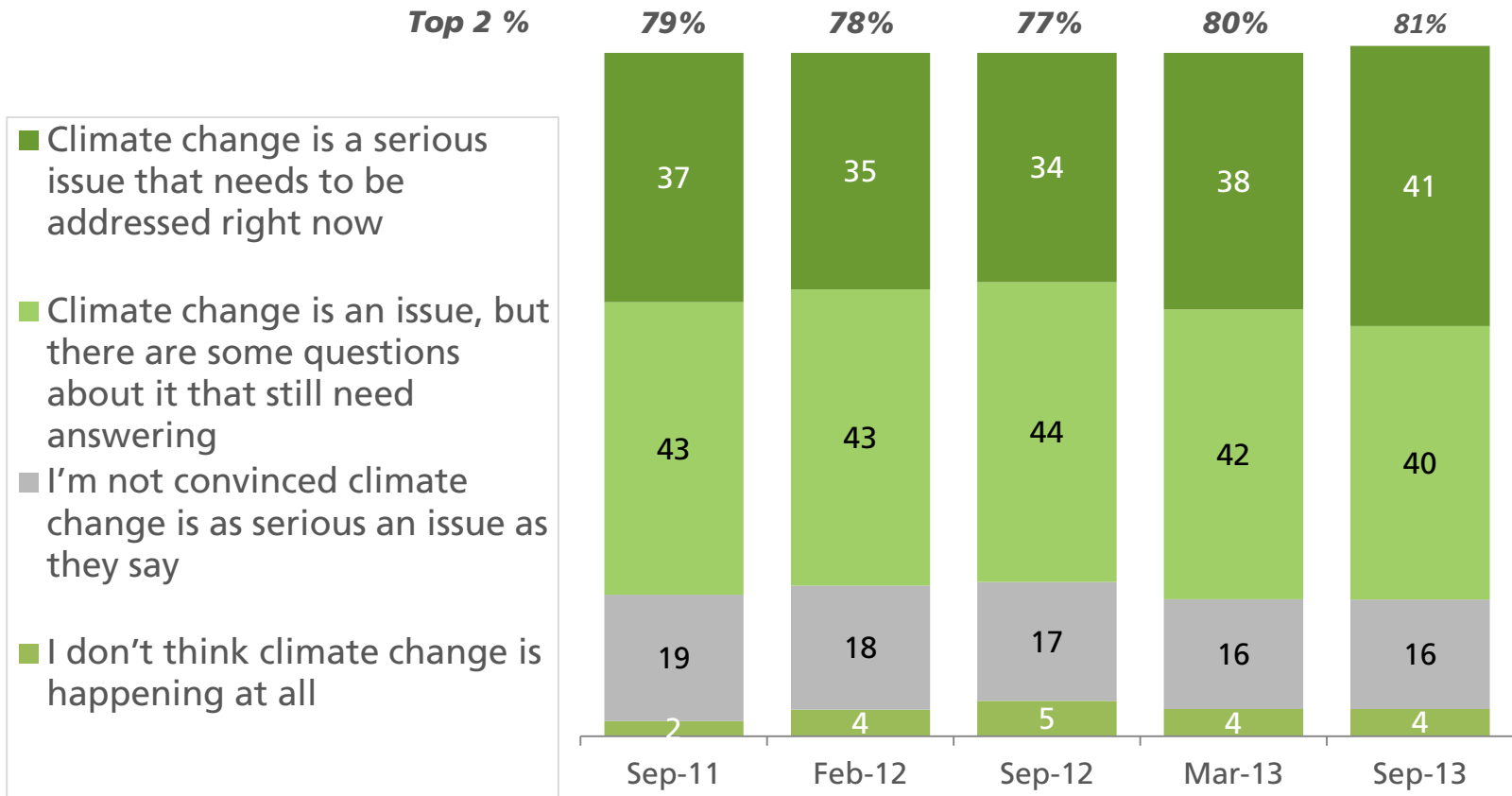
Q: In general, how well do you understand environmental issues? I have...



Base: Total sample, Australians aged 14-64 (approx n=1,000 per wave); Source: Pollinate, 2013

CLIMATE CHANGE BELIEFS

Q: Please indicate which of these statements best describes your beliefs.

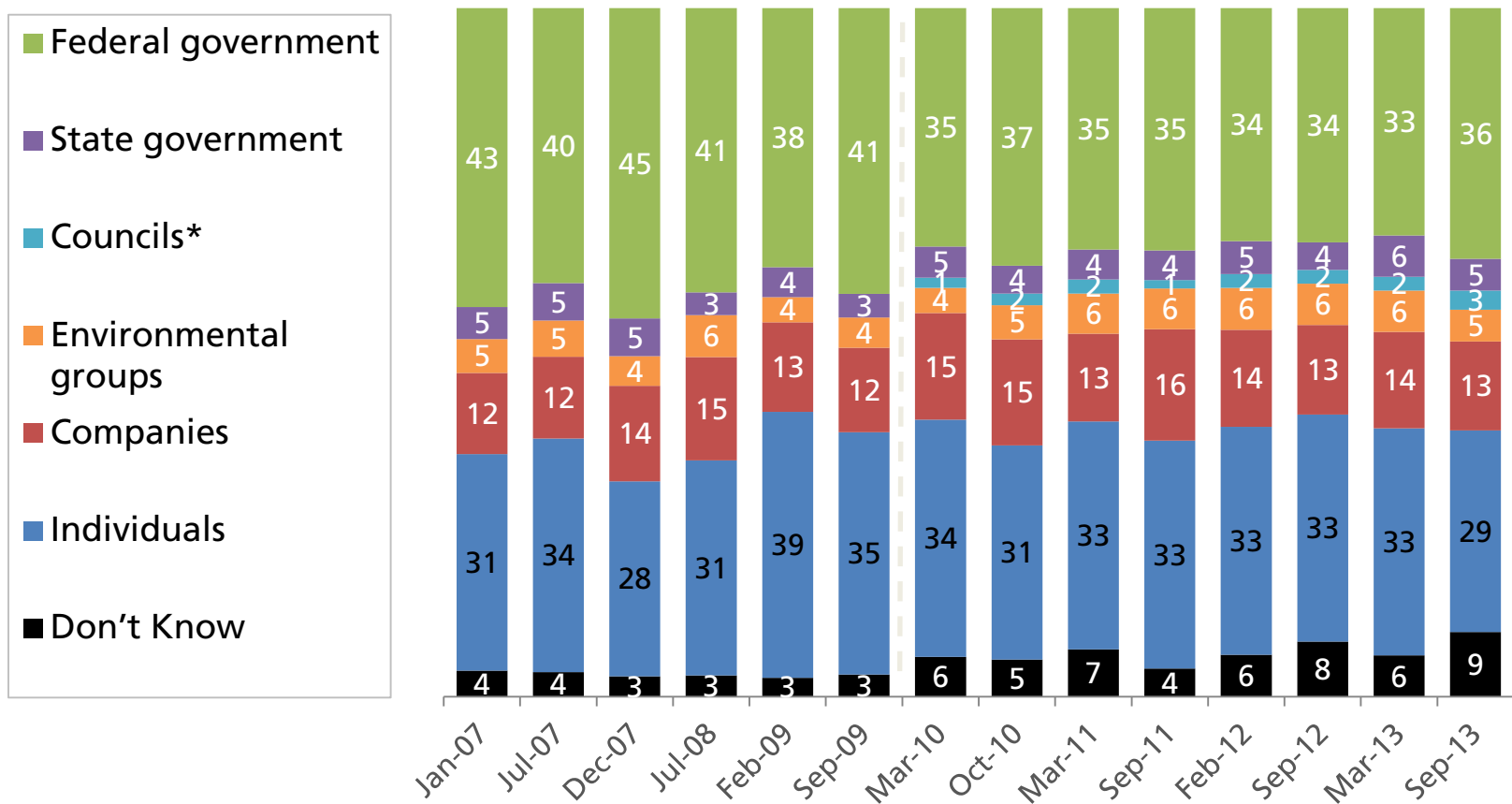


Base: Total sample, Australians aged 14-64 (approx n=1,000 per wave); Source: Pollinate, 2013

Key message: Many people believe climate change is a serious, urgent issue. This segment has increased by approximately 7% in the last year.

WHO CAN MAKE BIGGEST DIFFERENCE TO ENVIRONMENT?

Q: In Australia, which one do you think can make the biggest difference to the environment?

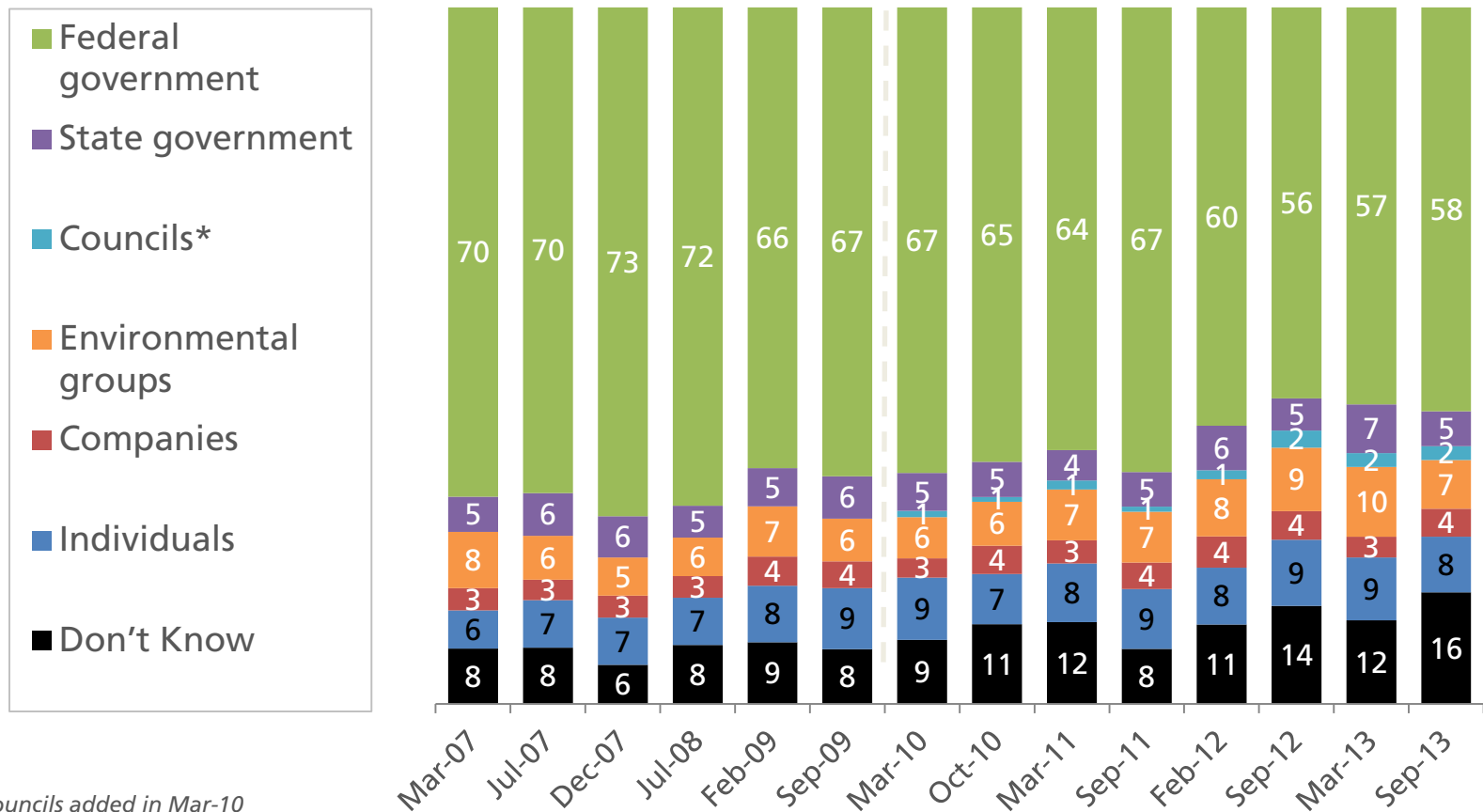


*Councils added in Mar-10

Base: Total sample, Australians aged 14-64 (approx n=1,000 per wave); Source: Pollinate, 2013

RESPONSIBLE FOR ADDRESSING CLIMATE CHANGE

Q: In Australia, who do you consider is most responsible for each of the following? Addressing climate change...



*Councils added in Mar-10

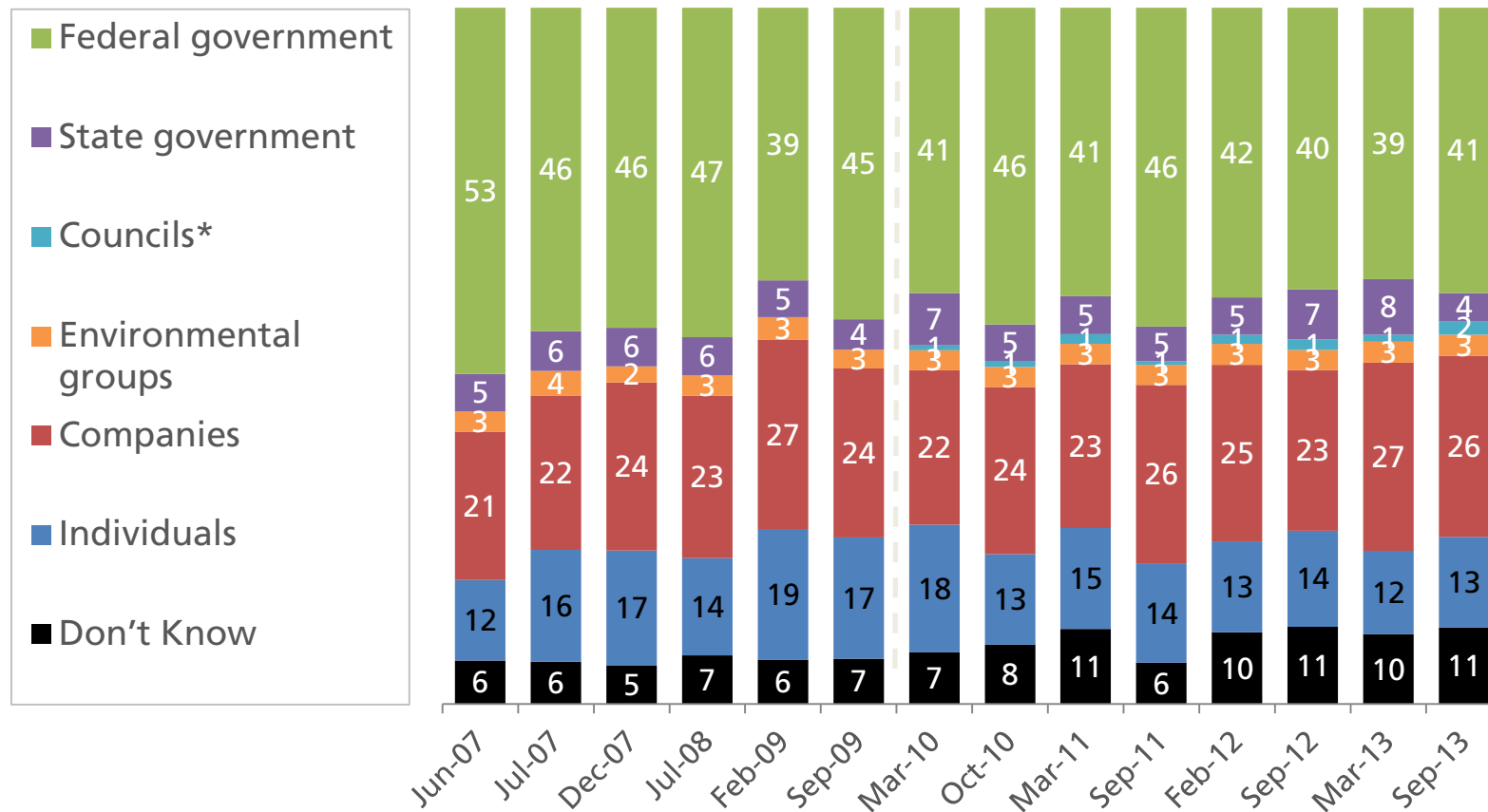
** Not asked in Jan-07, introduced in Mar-07

Base: Total sample, Australians aged 14-64 (approx n=1000 per wave); Source: Pollinate, 2013

Key message: Addressing climate change is largely seen as the responsibility of the federal government.

RESPONSIBLE FOR REDUCING CARBON EMISSIONS

Q: In Australia, who do you consider is most responsible for each of the following? Reducing carbon emissions...

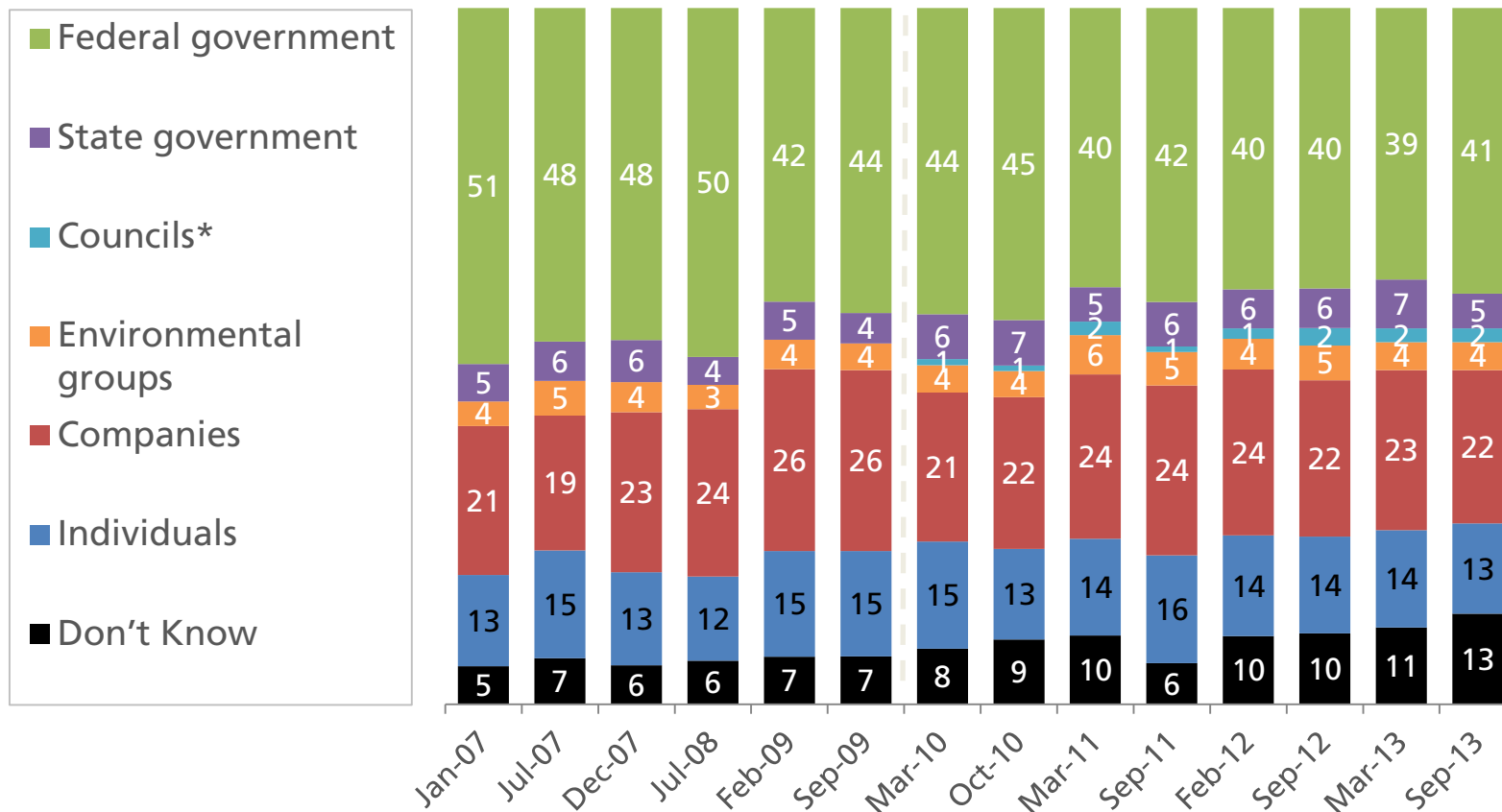


*Councils added in Mar-10

Base: Total sample, Australians aged 14-64 (approx n=1,000 per wave); Source: Pollinate, 2013

RESPONSIBLE FOR REDUCING GREENHOUSE POLLUTION

Q: In Australia, who do you consider is most responsible for each of the following? Reducing greenhouse pollution...

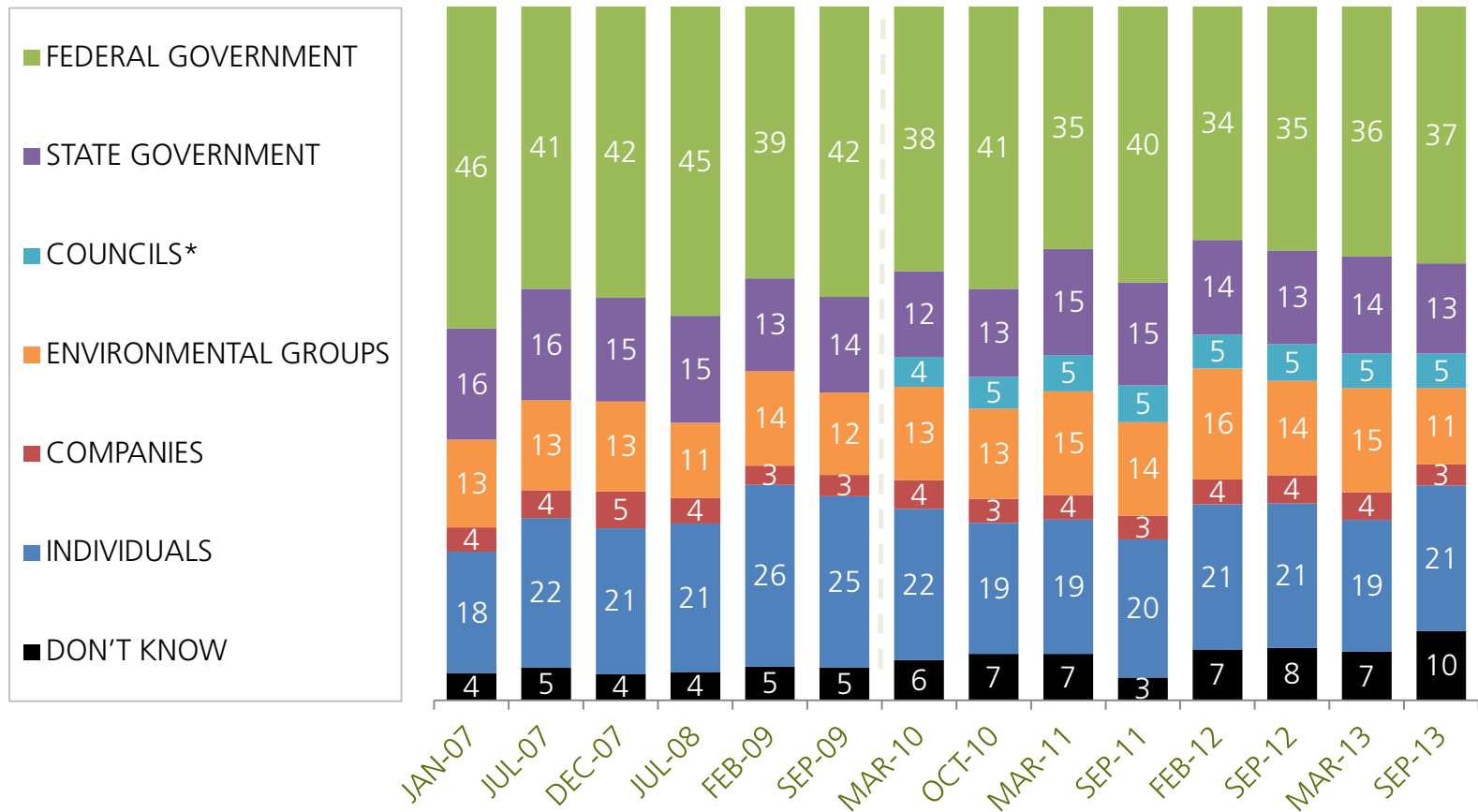


*Councils added in Mar-10

Base: Total sample, Australians aged 14-64 (approx n=1000 per wave); Source: Pollinate, 2013

RESPONSIBLE FOR PROTECTING THE NATURAL ENVIRONMENT

Q: In Australia, who do you consider is most responsible for each of the following? Protecting the natural environment...



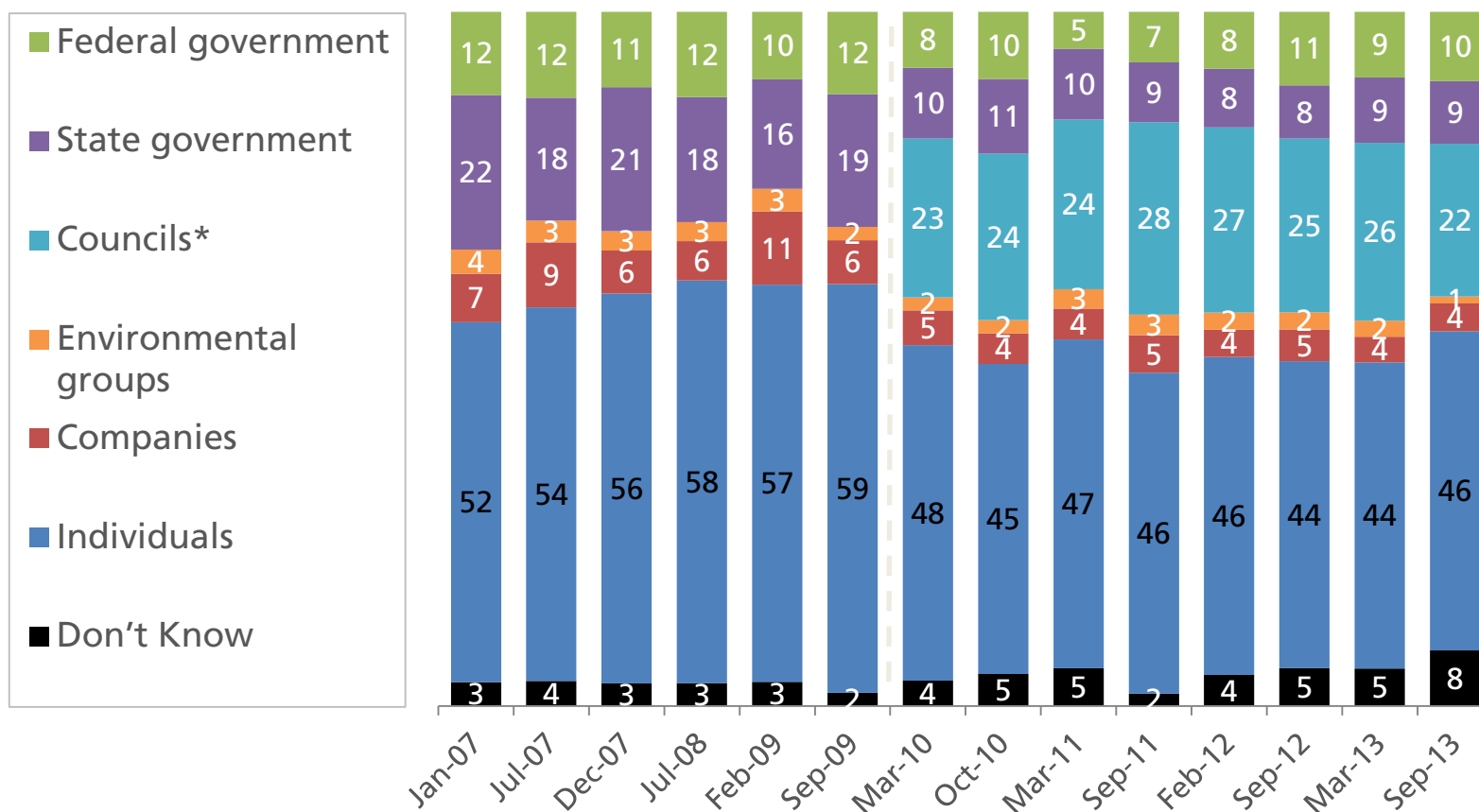
*Councils added in Mar-10

Base: Total sample, Australians aged 14-64 (approx n=1000 per wave); Source: Pollinate, 2013

Key message: Protecting the natural environment is largely seen as the responsibility of the government.

RESPONSIBLE FOR RECYCLING

Q: In Australia, who do you consider is most responsible for each of the following? Recycling...



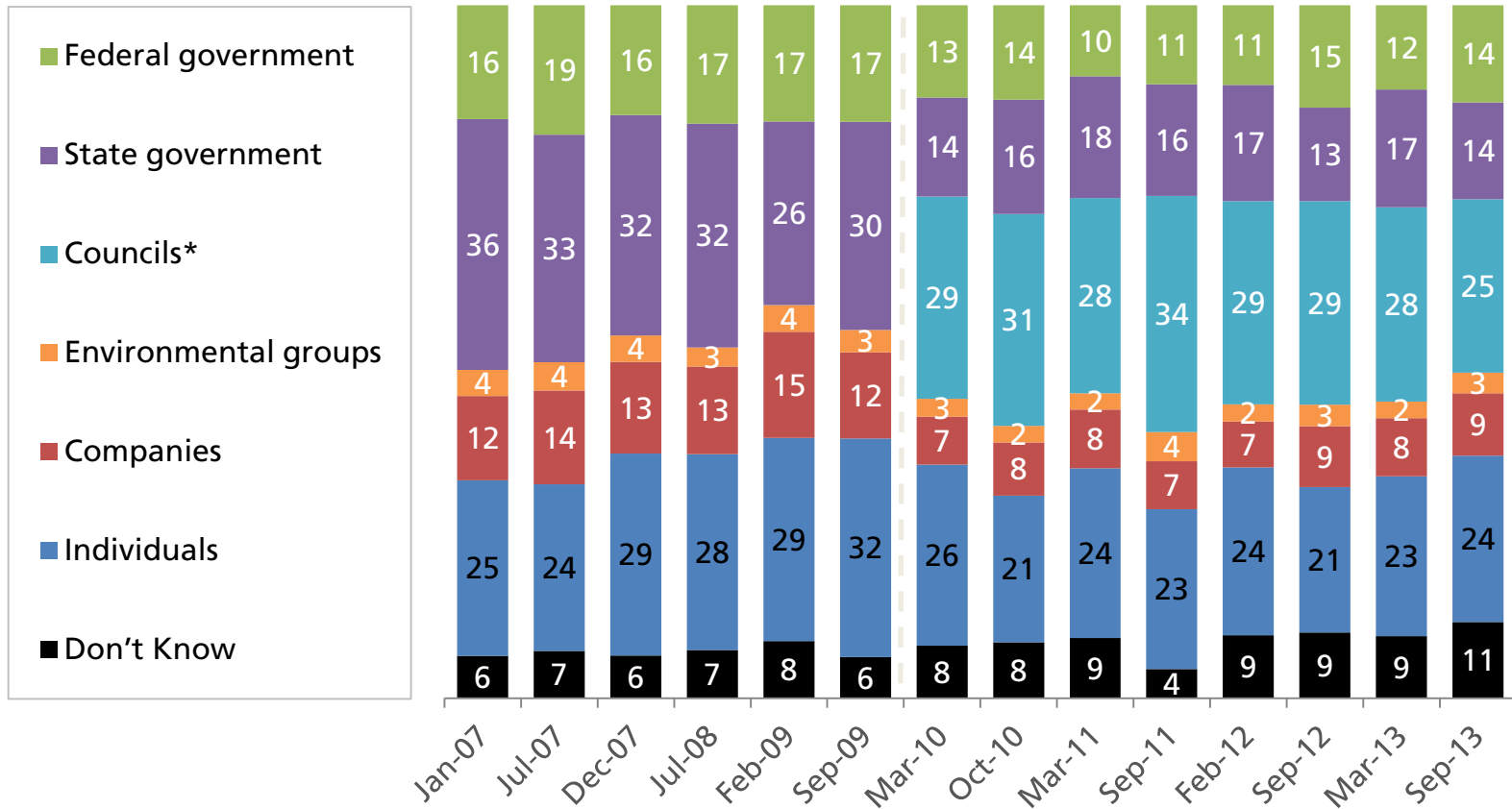
*Councils added in Mar-10

Base: Total sample, Australians aged 14-64 (approx n=1000 per wave); Source: Pollinate, 2013

Key message: Recycling is seen as an individual responsibility.

RESPONSIBLE FOR REDUCING LANDFILL

Q: In Australia, who do you consider is most responsible for each of the following? Reducing landfill...

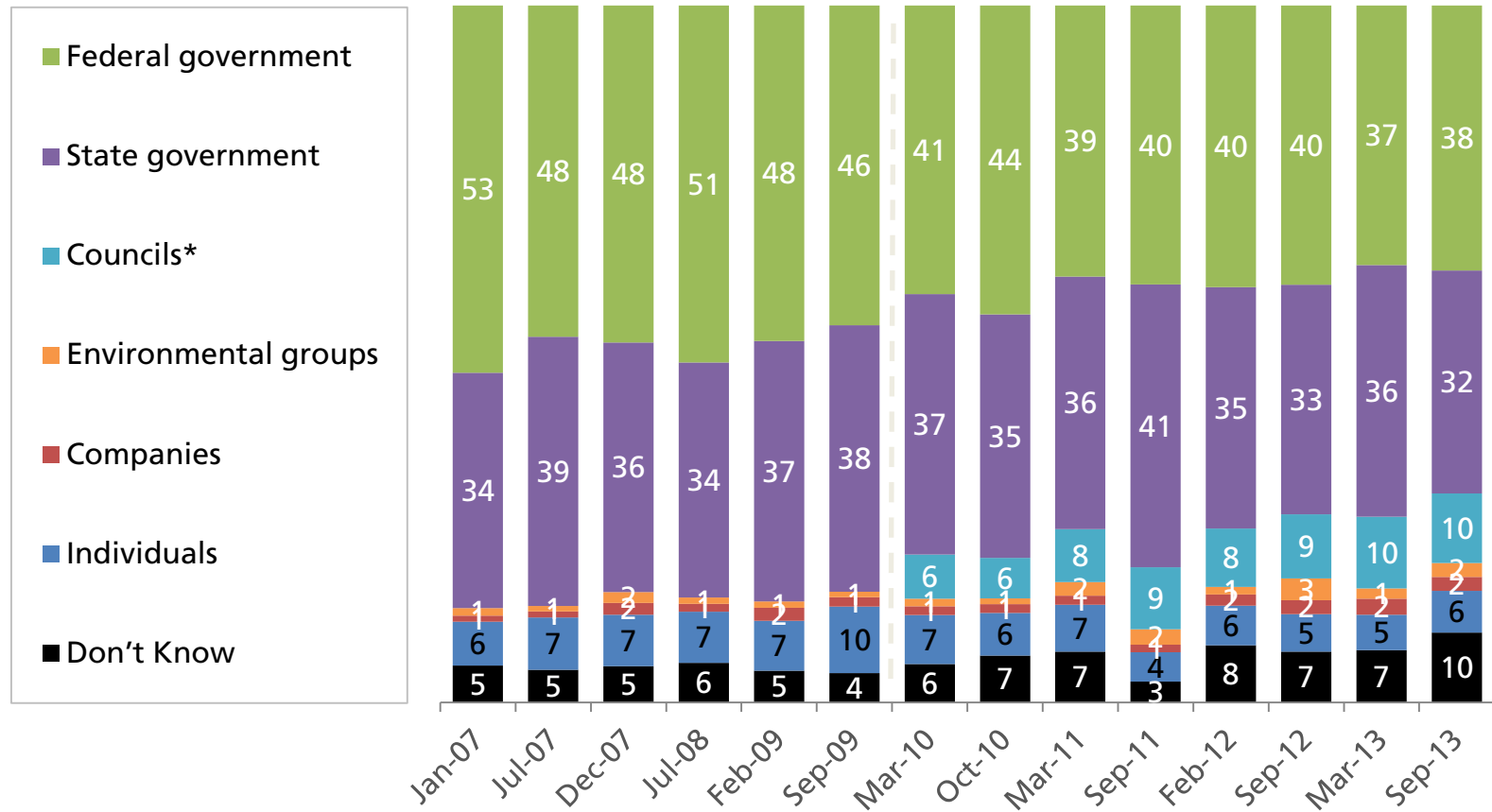


*Councils added in Mar-10

Base: Total sample, Australians aged 14-64 (approx n=1,000 per wave); Source: Pollinate, 2013

RESPONSIBLE FOR ENSURING ADEQUATE WATER SUPPLY

Q: In Australia, who do you consider is most responsible for each of the following? Ensuring adequate water supply...

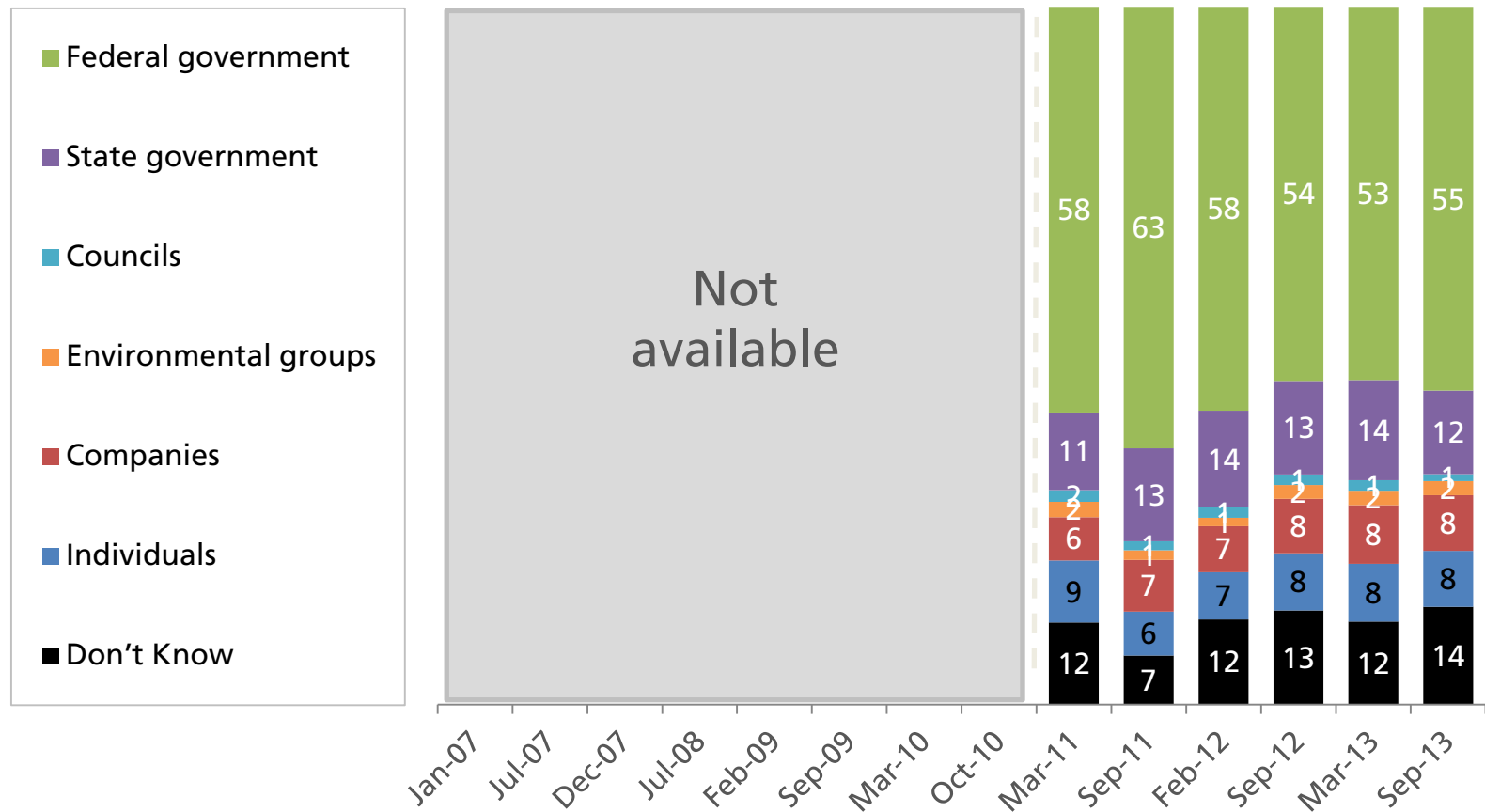


*Councils added in Mar-10

Base: Total sample, Australians aged 14-64 (approx n=1,000 per wave); Source: Pollinate, 2013

RESPONSIBLE FOR ENSURING ADEQUATE FOOD SUPPLY

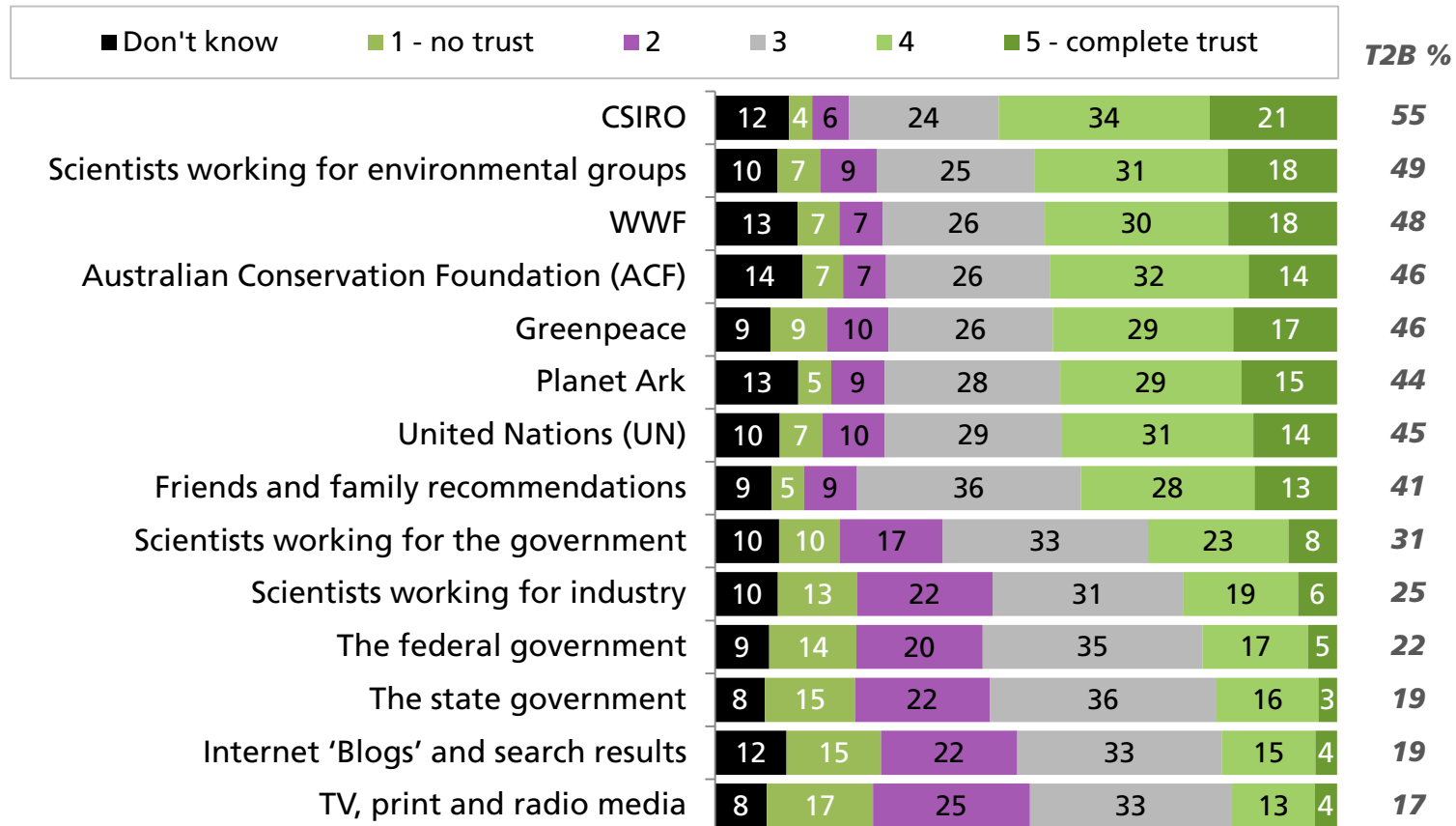
Q: In Australia, who do you consider is most responsible for each of the following? Ensuring adequate food supply...



Base: Total sample, Australians aged 14-64 (approx n=1000 per wave); Source: Pollinate, 2013

TRUST IN REPORTING ENVIRONMENTAL ISSUES

Q: On a scale of 1 to 5, where 1 means you have no trust, and 5 means you have complete trust, how much trust would you have in each of the following when reporting environmental issues?



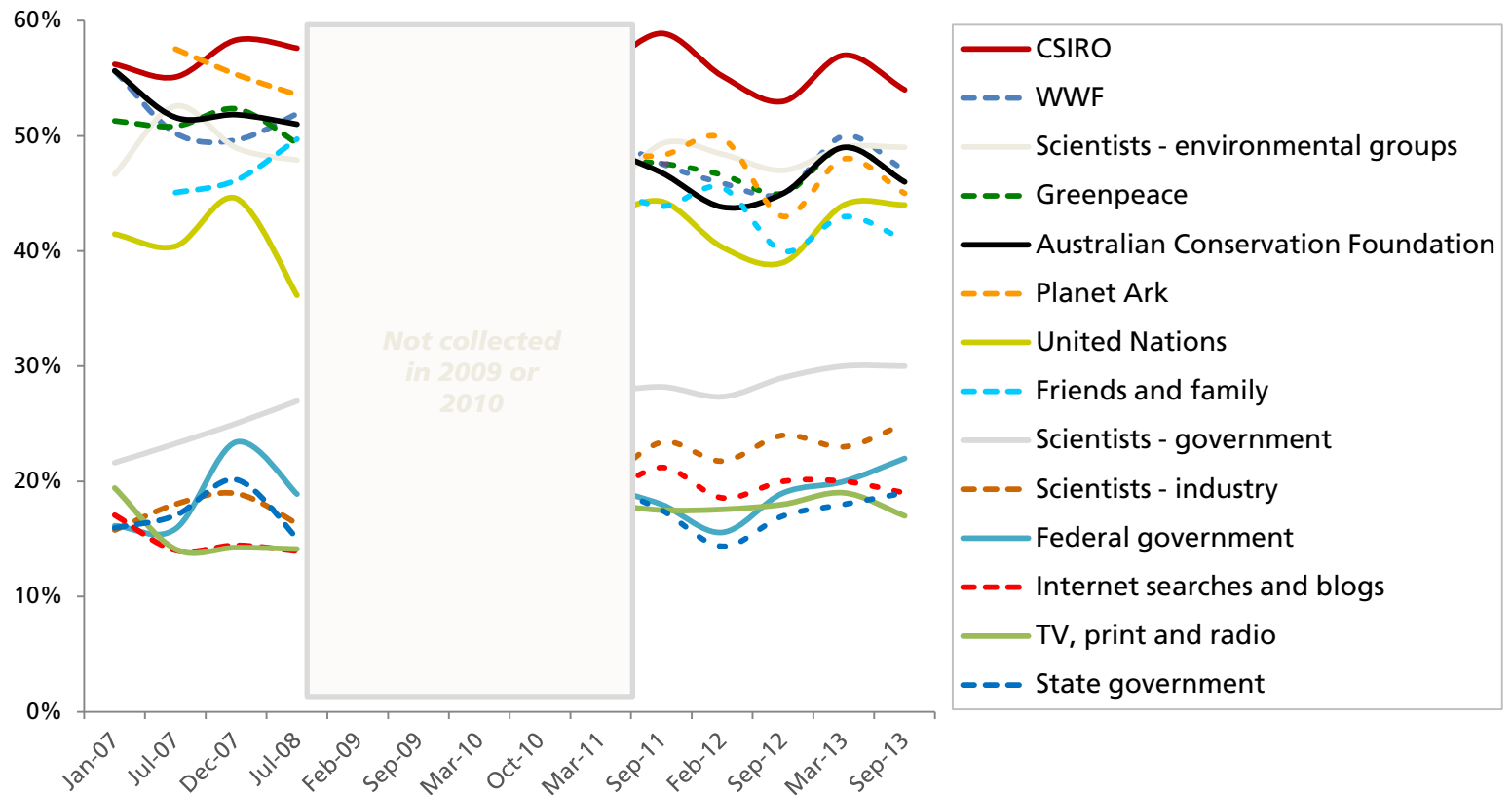
Base: Total sample, Australians aged 14-64 (Sep-13 n=1,000); Source: Pollinate, 2013

Key message: CSIRO is the most trusted Australian source of environmental information.

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TRUST IN REPORTING ENVIRONMENTAL ISSUES

Q: On a scale of 1 to 5, where 1 means you have no trust, and 5 means you have complete trust, how much trust would you have in each of the following when reporting environmental issues (Top 2 Box %)



Base: Total sample, Australians aged 14-64 (approx n=1000 per wave); Source: Pollinate, 2013



National Environmental
Research Program

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