

KANTAR PUBLIC

Australian Fisheries Management Authority

2021 AFMA Stakeholder Perceptions Survey

Final Report

Kantar Public contacts: Erin Maher, Amber-Marie Bedwell and
Katelyn Kemp

Project reference: 263407167

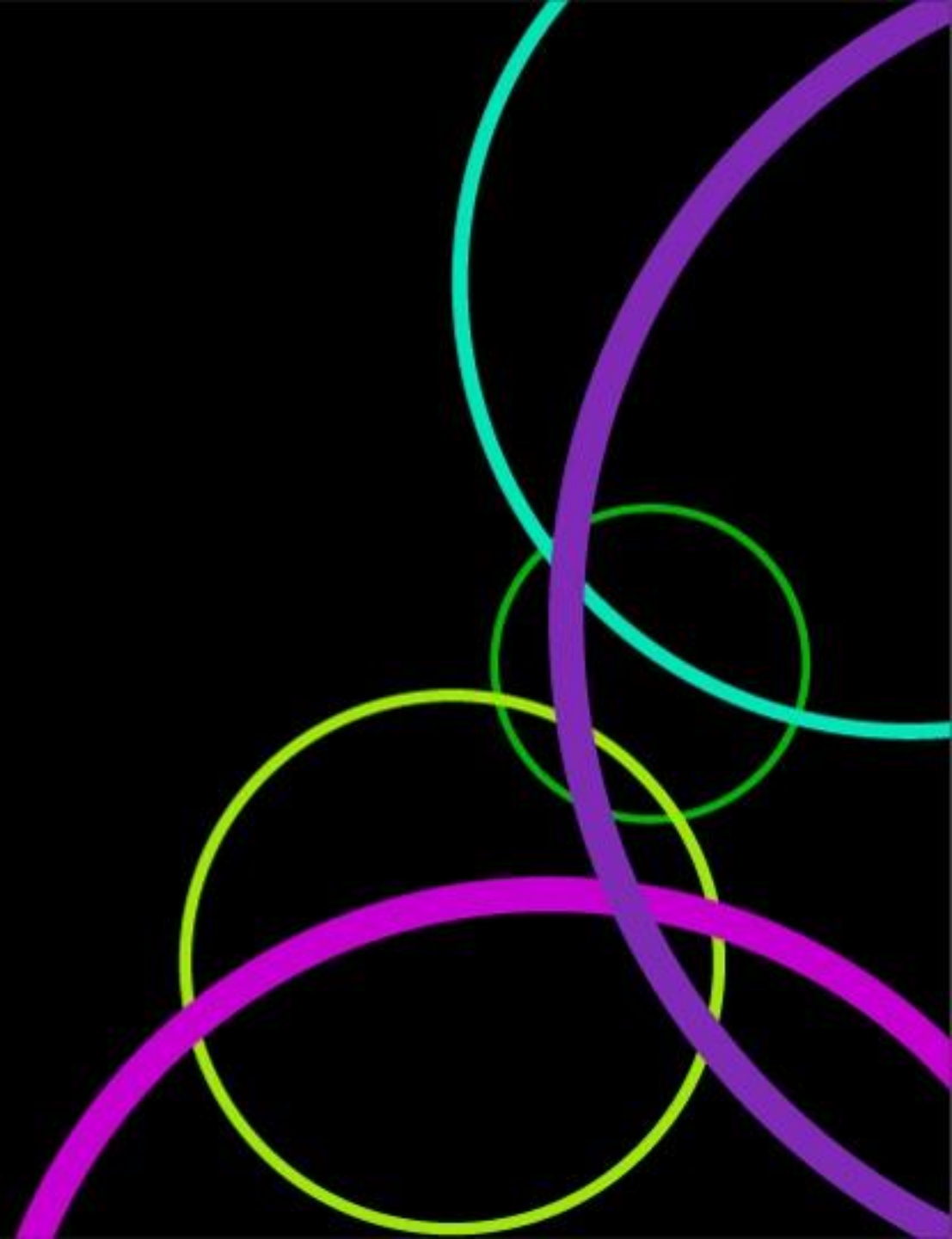
Issue date: 11 February 2022



Contents

1	Executive Summary and Recommendations	3
2	Background and Methodology	6
3	Participant Profile	9
4	Overall Stakeholder Satisfaction	11
5	Decision Making	18
6	Service Delivery	21
7	Compliance Program	26
8	Communication and Consultation	30
9	Appendix	38

1. Executive summary and recommendations



Executive Summary

2021 stakeholder satisfaction with AFMA's performance has improved from 2019, with an uplift in the overall satisfaction mean score from 3.2 in 2019 to 3.5 in 2021 (out of 5). Over three in five stakeholders (62%) are satisfied while one in five stakeholders (22%) are dissatisfied.

Stakeholders are most satisfied with AFMA's 'communication with industry and stakeholder organisations'; with over seven in ten (72%) 'satisfied'. AFMA's 'decision making' remains the area with least satisfaction, but pleasingly has improved upon 2019 results (3.3 mean score in 2021 vs 2.9 mean score in 2019)

Decision Making

Encouragingly, there has been significant improvement in satisfaction with this area since 2019. Almost half (49%) were satisfied with AFMA's decision making in 2021.

Areas within decision making with lower levels of satisfaction include openness, transparency and consistency around making decisions.

However, two in three (65%) are satisfied that decisions are made in accordance with relevant legislative framework.

Service Delivery

Over four in five (84%) stakeholders have had direct contact with AFMA staff in the last 12 months.

Ratings for these interactions remained high in 2021 and marginally increased on some 2019 scores – particularly for AFMA staffs background knowledge and timeliness in responding.

Moving forward, stakeholders would prefer to use email (81%) or phone (72%) to raise issues/queries.

Compliance Program

Confidence in AFMA's ability to detect instances of non-compliance significantly increased and returned to 2017 levels at 3.5 mean score (out of 5) after a dip in 2019 (3.1).

Stakeholders estimate that 13% of fish are taken illegally on average, with the majority (91%) agreeing that they would personally report illegal activity.

They are also supportive of AFMA, with four in five (82%) agreeing they support AFMA with detection and compliance activities.

Communication and Consultation

Almost 3 in 4 (72%) of stakeholders are satisfied with AFMA's performance in this area.

Three in four agree they would benefit from port visits & community meetings (76%) and from industry-related conferences (72%)

Half of stakeholders find the AFMA website content accurate and relevant (52%). Moving forward, the majority (84%) would prefer to receive news and info from AFMA via email, followed by a newsletter (33%) and the website (28%).

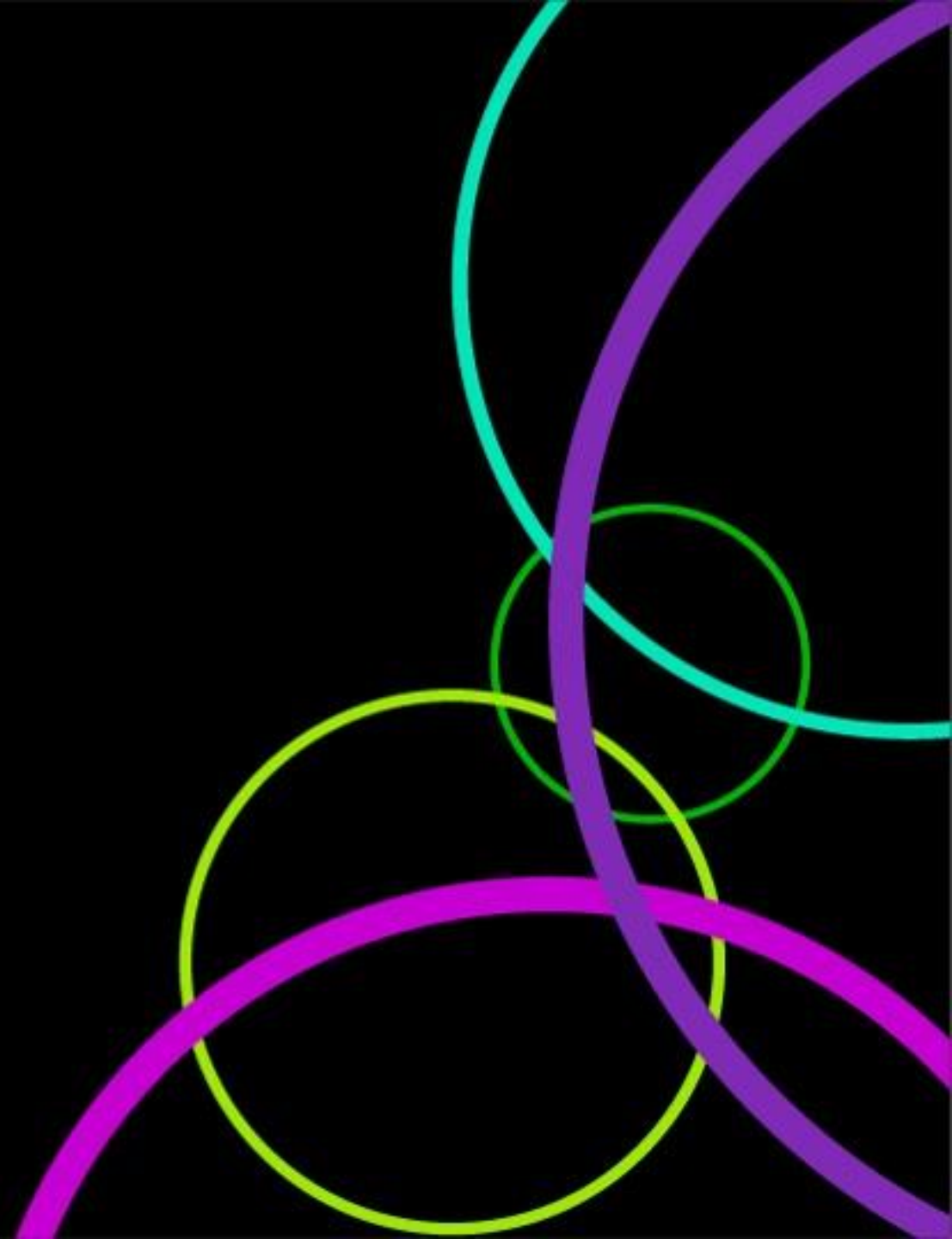
Recommendations

Acknowledging that AFMA has seen continued incremental performance in overall satisfaction and across the four focus areas since the survey was first conducted in 2017, areas have been identified which AFMA could focus on continue to improve service experiences and perceptions. This includes:

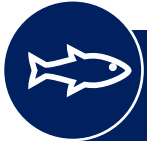
- **Key areas to focus on** include increased communications around decisions made to improve perceptions of transparency, as well as leveraging stakeholder engagement by raising awareness of the ability to participate in consultations and providing conferences, visits and community meetings. Ongoing attention should be given to increasing engagement and satisfaction among the commercial stakeholder grouping, as we continue to see lower scores among this group compared to Government agency stakeholders.
- **Decision Making:** To continue positive improvements in this area, focus further communicating to stakeholders the rationale behind decisions that have been made, which may in turn increase perceptions that AFMA is open and transparent when it comes to decision making. Three in ten stakeholders disagree that AFMA clearly explains the rationale (31%) and that decisions are made with an appropriate level of openness and transparency (30%)
- **Service Delivery:** Encouragingly, eight in ten (82%) were satisfied with the process for raising a query or issue and improvements from the 2019 wave are evident with an uplift in those who believe they were given information or advice that answered their query/issue. Moving forward, ensure that the process for raising issues or queries by email and phone is easy and clear, as the majority of stakeholders prefer these communication methods.
- **Compliance Program:** Stakeholders value and support AFMA's compliance and enforcement activities, so continue to promote any work that is being done in this area. Particularly outcomes of cases where offenders have been caught – as less than half (42%) agreed that AFMA will catch those breaking the rules.
- **Communication and Consultation:** Further increase awareness of stakeholders ability to participate in AFMA led consultations – of the 56% who have not participated in the past 3 years, 30% were not aware that they could. There's also an opportunity to further engage stakeholders in more industry-related conferences and workshops, as well as port visits and community meetings, with three in four agreeing that they would benefit from these. Regular news and updates via email will be a good way to continue to communicate with stakeholders.

In addition, continue to provide **feedback on the survey findings** to maintain and strengthen relationships with stakeholders by acknowledging the input that has been provided, the steps AFMA is taking and the changes that have or will be implemented. This is a valuable tool to encourage participation in future surveys.

2. Background and Methodology



Background and methodology



Background

The Australian Fisheries Management Authority (AFMA) has committed to undertaking a stakeholder survey every two years under its framework for self-assessment.

Colmar Brunton (now Kantar Public) was approached by AFMA to conduct this stakeholder research in 2017, 2019, and again in 2021.

The objectives of the research were to measure overall stakeholder satisfaction with AFMA's performance and performance in the following domains:

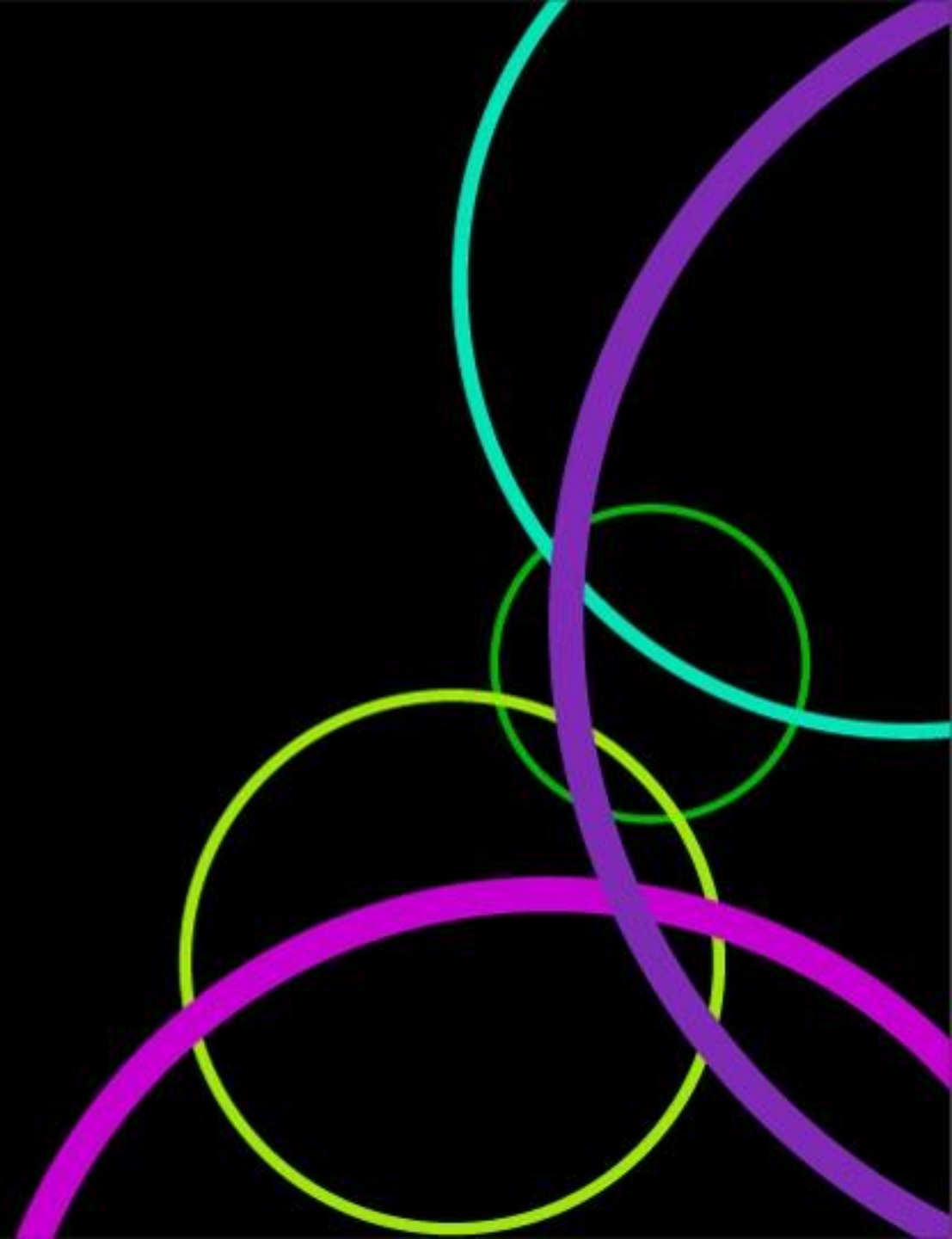
- Overall stakeholder satisfaction
- AFMA's decision making
- Service delivery
- AFMA's domestic compliance program
- AFMA's communication and consultation with its stakeholders



Quantitative methodology

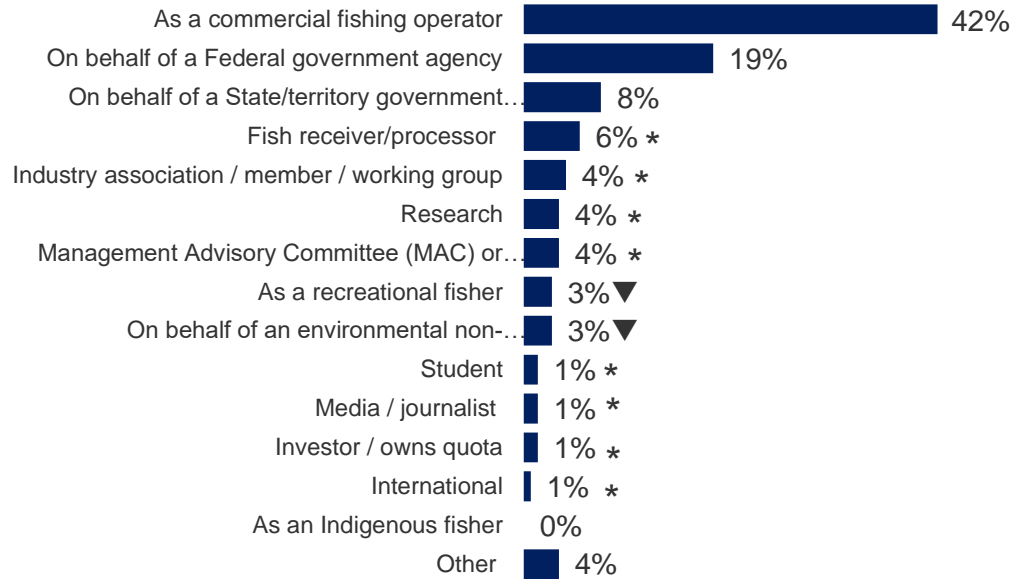
- The stakeholder survey was conducted using an online questionnaire. A primary approach email was sent on behalf of the CEO of AFMA to all stakeholders notifying them of the impending survey and encouraging them to participate.
- Some changes were made to the 2019 survey to include the addition of two questions around preferred communication platforms for providing feedback and receiving updates from AFMA moving forward.
- Email invitations were sent by Kantar Public to 1,376 contacts from a stakeholder list supplied by AFMA. We received 141 responses, representing a response rate of 10%.
- Fieldwork was conducted between 23rd November and 14th December 2021. The median online survey length was approximately 13 minutes.
- Further details of the research approach can be found in Appendix A.

3. Participant Profile

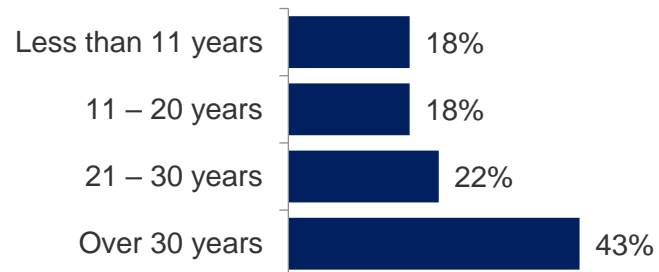


Participant Profile

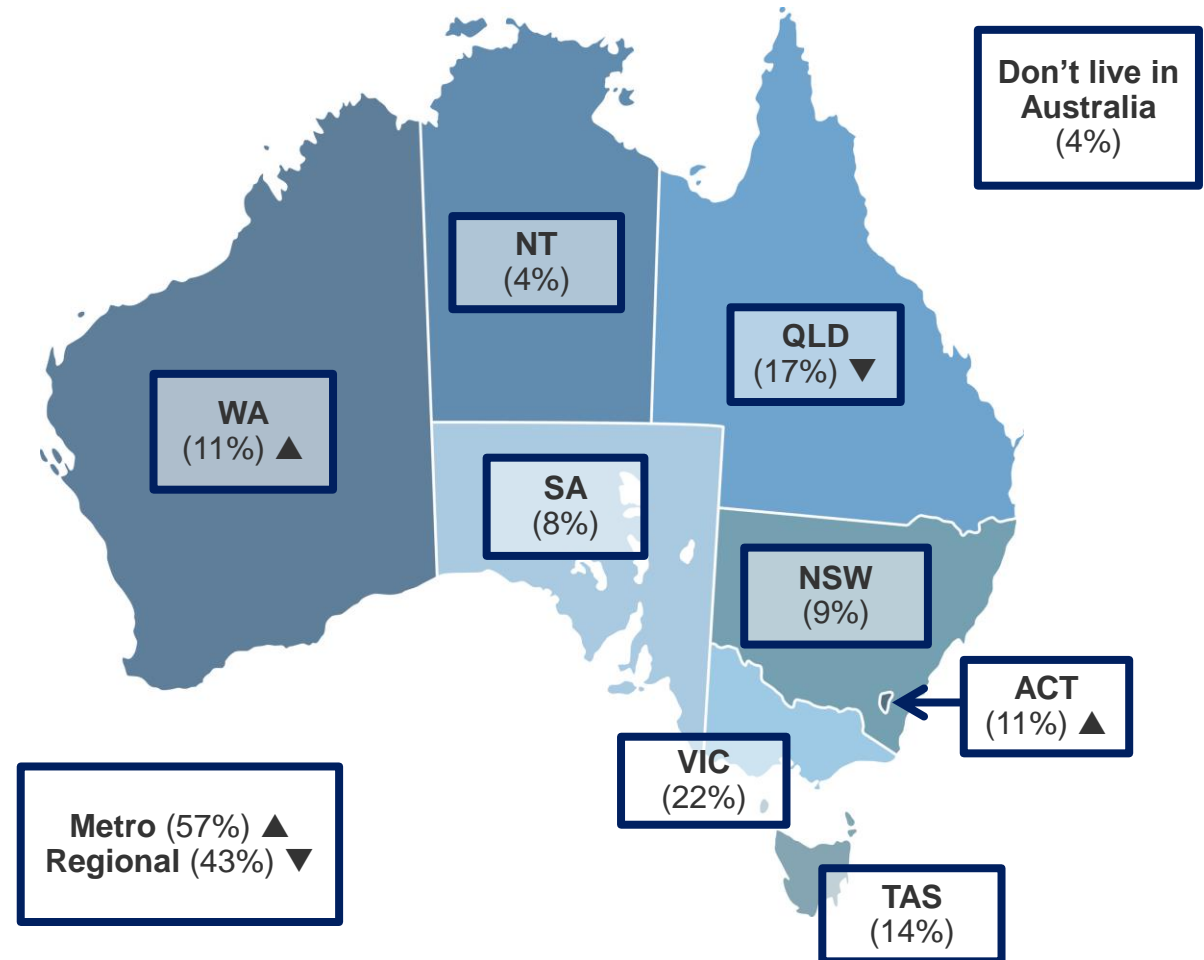
Stakeholder type



Time in industry



Location



QF1. Which of the following best describes how you interact with AFMA? (SR) QF2. How long have you been acting, operating or otherwise involved in the fisheries sector? (SR) QF3. Where are you based? (SR)

Base: All participants (n=141)

▲▼ indicates a significant difference to the 2019 results at 95% confidence

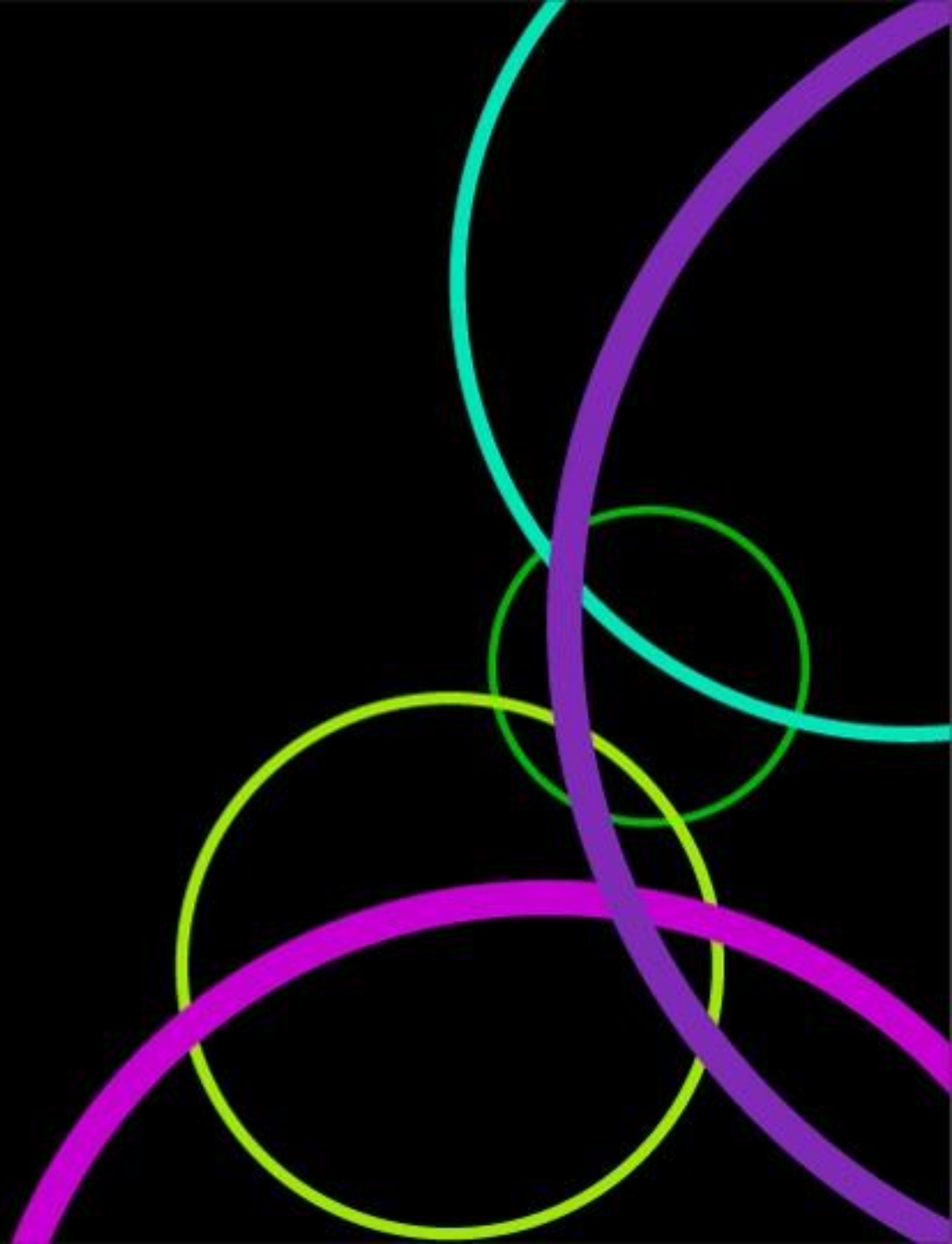
* = Answer code created after back-coding of 'other' responses

Stakeholder Type Sub-groups

- For each delivery area, overall satisfaction results have been presented by stakeholder groupings (as shown below).
- For 2021, significance testing has been conducted between Commercial and Government agency (where base sizes are above n=30) with any significant differences noted in the slide commentary.

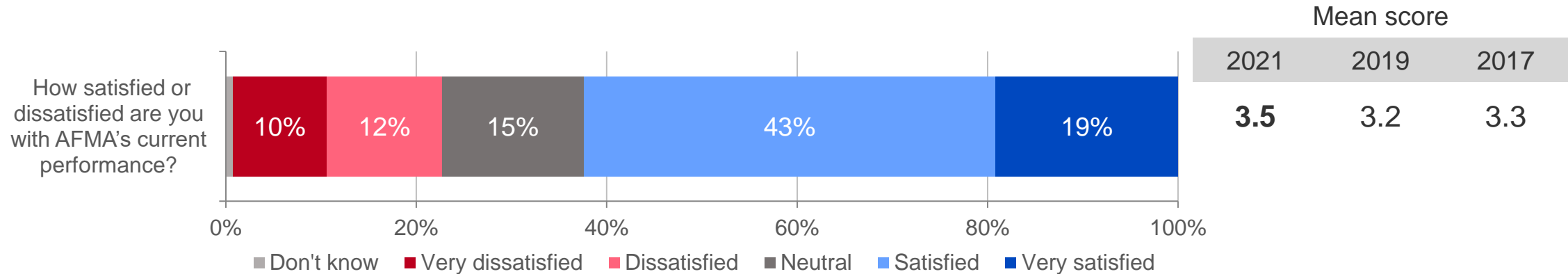
	%	n
As a commercial fishing operator	42%	59
Investor / owns quota	1%	2
International	1%	1
Total Group 1 (Commercial)	44%	62
On behalf of a Federal government agency	19%	27
On behalf of a State/territory government agency	8%	11
Total Group 2 (Government agency)	27%	38
On behalf of an environmental non-government organisation	3%	4
Research	4%	5
Management Advisory Committee (MAC) or Resource Assessment Group (RAG) member	4%	5
Industry association / member / working group	4%	5
Total Group 3 (Non-Government/Industry)	14%	20*
As a recreational fisher	3%	4
As an Indigenous fisher	0%	0
Student	1%	2
Fish receiver/processor	6%	8
Media / journalist	1%	2
Total Group 4 (Fishers)	11%	16*
<i>Other</i>	4%	6*

4. Overall Stakeholder Satisfaction



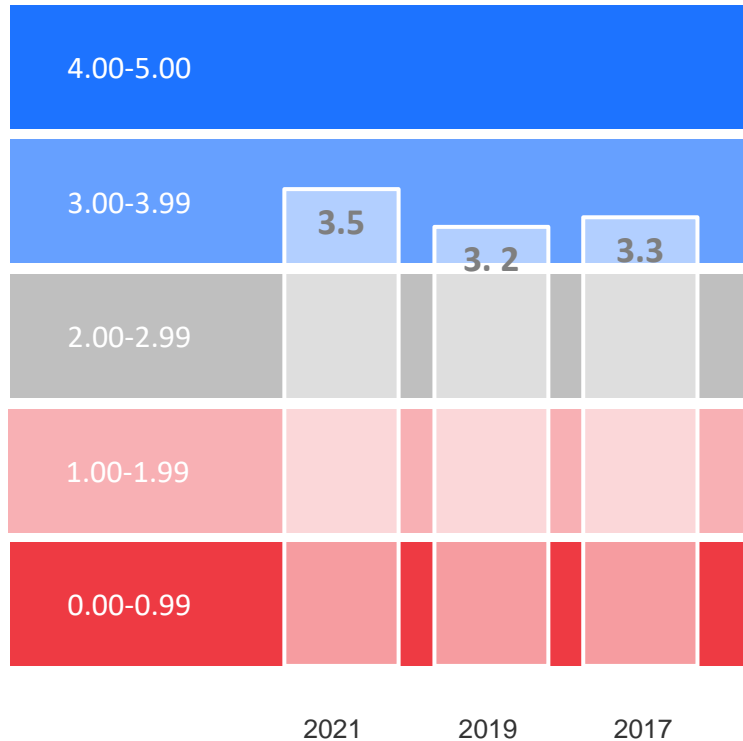
Overall stakeholder satisfaction with AFMA's performance

- Encouragingly, stakeholders satisfaction with AFMA's current performance has grown directionally slightly since 2019, with a mean score of 3.5 recorded, and over three in five stakeholders (62%) either satisfied or very satisfied with AFMA.
- Over this time dissatisfaction has decreased, with under one in four reporting they were dissatisfied or very dissatisfied in 2021.

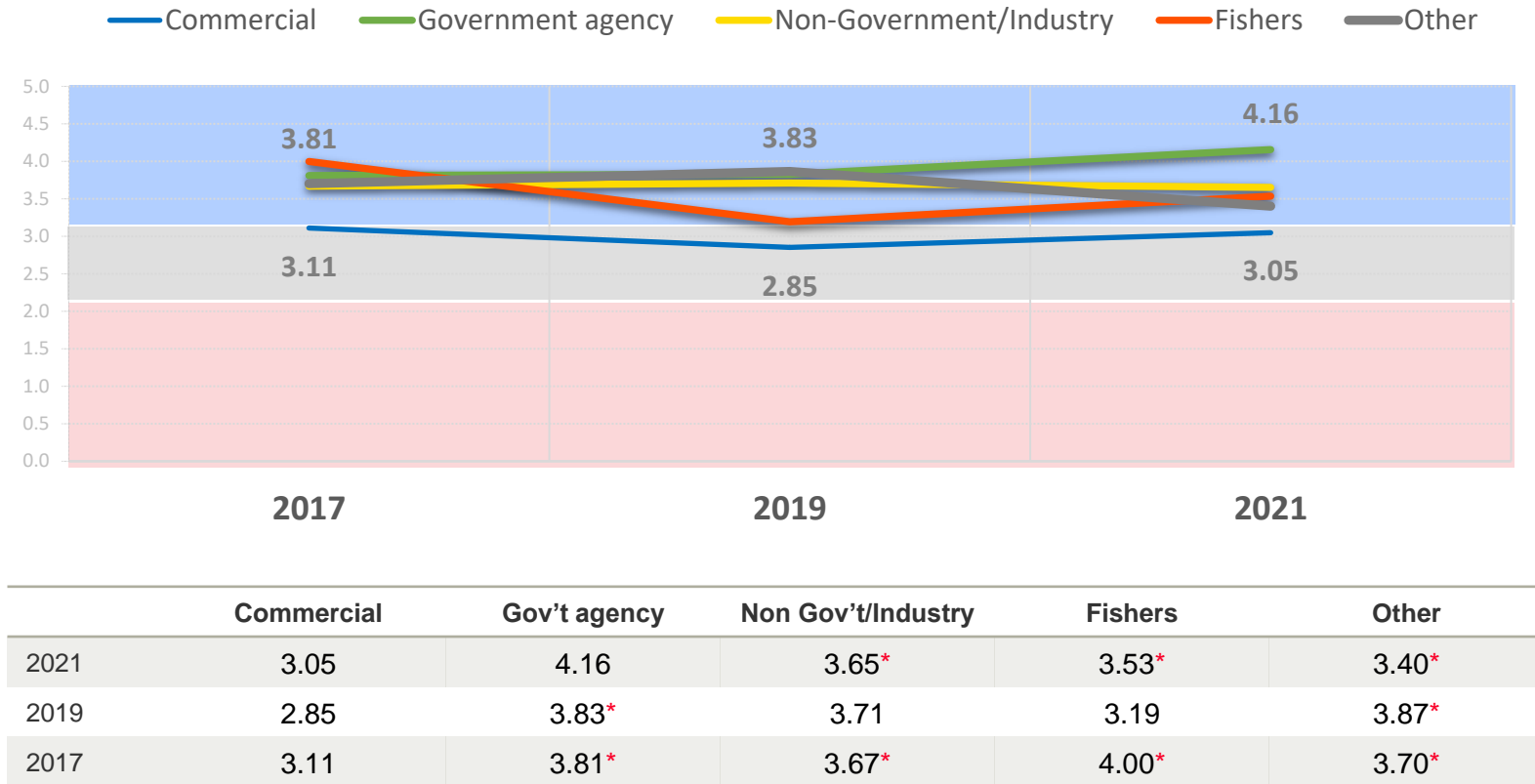


Overall stakeholder satisfaction with AFMA's performance – by stakeholder groupings

Overall Satisfaction (mean score)



By stakeholder groupings (mean score)



Drivers of satisfaction with AFMA's performance

Stakeholders who were satisfied with AFMA think that AFMA communicates well – it is accessible, has skilled staff and offers great customer service. AFMA is also seen to be competent and successful in achieving objectives. Satisfied stakeholders also feel that AFMA implements appropriate and effective fish management strategies.

62%

are satisfied with AFMA in 2021

Reasons for satisfaction with AFMA

*“Always find AFMA to be **open, accessible and collaborative.**”*

*“**Engaged** in conversations, **well connected** to industry and research.”*

*“Australia has some of the best managed fisheries in the world (notwithstanding Twiggy Forrest's recent comments). This has not been by accident nor luck. A lot of **hard work** has been the cause. AFMA has been at the **forefront.**”*

*“**Good management** of fisheries with excellent outcomes re **sustainability; knowledgeable managers** who are strongly supportive of **science-based decision making.**”*

*“**Professional, collegiate and dedicated team.**”*

*“We deal with staff regularly on licensing transfer matters and they are **extremely efficient.**”*

*“Stock assessments are **based on rigorous science**, vms is expanding and is **accurate and well managed**, communication and public engagement is ongoing; decision making is **accountable.**”*

*“Contested NRM is a difficult job and I think AFMA do a **good job** at juggling their responsibilities and different stakeholder expectations.”*

*“Think they do a **good job** performing against their **objectives.**”*

*“Staff are **approachable, helpful and friendly.** They follow through on requests and understand the difficulties of the fishing industry and aren't too heavy handed.”*

*“1) They deliver good fisheries management **outcomes** across a diverse range of fisheries in a complex environment 2) with **no over fishing** occurring in any AFMA managed fisheries - that is not the norm in Australian fisheries - they are delivering demonstrable **good fisheries management** 3) All external reports on Australia's fisheries performance ranks AFMA as a **world leading** agency 4) They are a **good partner** across a range of activities.”*

Drivers of neutral satisfaction with AFMA's performance

Stakeholders who felt neutral towards AFMA's performance in 2021 noted issues such as a lack of communication in some cases, staff turnover, and dissatisfaction regarding fees and quotas.

15%
have neutral
satisfaction with
AFMA in 2021

Reasons for neutral satisfaction with AFMA

"Core of competence and base of systems and processes. Variable performance across fisheries. Turnover of staff and reduction of effective interaction is leading to rigidity in thinking and processes."

"Do not really hear much from AFMA"

"I believe AFMA does what it needs to do in regard to legislative responsibility and available budget. This approach is acceptable, however, lacks ingenuity."

"Doing ok in difficult circumstances. Very economics focused yet don't fight hard enough to counter measures by non commercial groups that impact fishing. limited interactions with first nations people."

"AFMA staff who do compliance and enforcement are responsive and professional. Joint Authority matters are delayed and communication is poor to explain delays and/or process."

"AFMA continue to have little focus on recreational fishing. It is noted attempts have been made to recognise recreational fishing however these attempts are largely ineffective as AFMA do not have a good understanding of recreational fishing values and drivers and continue to base their fisheries management processors around traditional fisheries management ideas that are largely based on commercial fishing practices."

"Fees are high for a fishery that cannot attract participants."

"There is a divide between the outputs expected/needed to inform fishery management when coinciding with the fishery operating in a area of large environmental change and the data available to do analyses sophisticated enough to take into account these changes."

"Reducing TAC on some species is not a very comforting thing for us , as we do not own quota, and have to rely on sufficient quota available to lease for the year. Reducing Swordfish quota is an example, the fleet did not target this species during covid for lack of available airspace and domestic markets slow, because of lockdowns . THIS is why the TAC for swordfish is low, not because of low numbers."

Drivers of dissatisfaction with AFMA's performance

Stakeholders who have been dissatisfied with AFMA in 2021 felt this way due to being unhappy about specific AFMA decisions (e.g. around quota rules). Dissatisfied stakeholders also complained about high staff turnover and under-resourcing, leading to interactions with less experienced staff.

Reasons for dissatisfaction with AFMA

*"Become very **bureaucratic, non-responsive** and with a high turnover of staff there is very **little experience** or corporate history in the organisation"*

*"**Poor handling** of the school shark CSIRO report and the subsequent poor handling of the Cordue Report."*

*"**Lack of staff** and **experienced** staff means that day to day business is falling behind. Many **new staff do not come from a fisheries background** and It takes some time to train these staff to be able to do the jobs they were employed to do. **Unilateral decisions** by Fisheries Executive without consultation."*

*"**Not listening** and **failing to act** on key issues."*

*"**Inconsistent** approach to managing Commonwealth fisheries that adjoin the different jurisdictions. For example, what applies to South Australia is inconsistent with what applies to Victoria."*

*"There are many passionate and dedicated people at AFMA however the number of simple **errors being made** which potentially have significant implications continues to grow."*

*"The recent decision to **cut the swordfish quota** in the ETBF is a disgrace."*

*"They are starting to **Mirco manage** fish stocks and not looking at the big picture of our fishery."*

*"Concerned at **staff turnover** and that we seem to have **moved away from the objectives** of the EPBC and FM Acts and indeed from AFMA's 5 principles for the management of by-catch in favour of triggers and escalating consequences from breaches triggers that aren't in line with either Act and largely out of the control of fishers."*

*"Because of the ongoing **discrimination** towards the **Gill net sector** and there ignorance and disrespect to actual fishers on the water."*

*"We are in the shark industry we **do not get any feedback** about quota cuts an outage on go-fish we will get an email to tell us about the problem gummy quota cut which effects our whole life **we don't hear about until it has happened.**"*

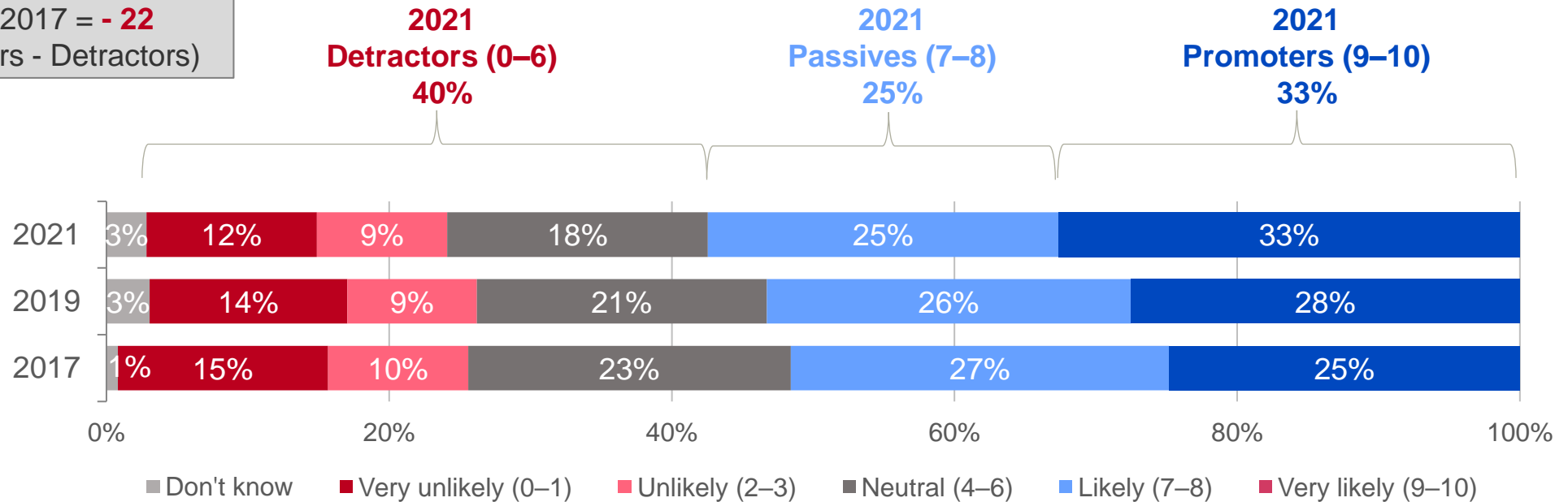
22%

are dissatisfied with AFMA in 2021

Net Promoter Score (NPS) improved since 2017 and 2019 scores

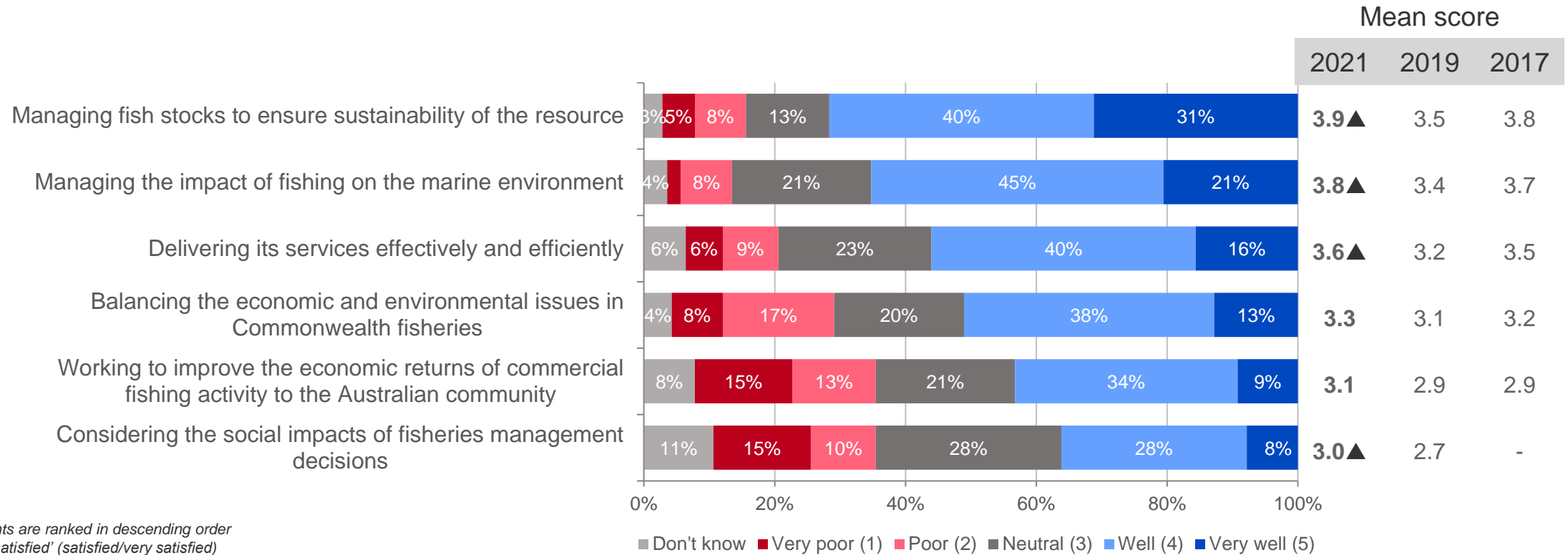
- The NPS is an established measure in private sector and is increasingly used by Government. The measure illustrates the degree to which stakeholders are promoting AFMA, passive, or are detractors. Overall, there has been a positive improvement in 2021 with the NPS score now at -7 (from -16 in 2019 and -22 in 2017).
- One in three stakeholders (33%) are promoters.
- The Commercial group has a much lower NPS (-40) compared with the Government Agency group (+44.7).

NPS 2021 = **-7**
 NPS 2019 = **-16**
 NPS 2017 = **-22**
 (Promoters - Detractors)



Views of AFMA's performance in its key roles

- Overall, AFMA's performance against each of its core roles has directionally improved when compared to 2019 – with significant improvements in performance recorded for managing fish stocks to ensure sustainability of the resource (3.9 in 2021 vs 3.5 in 2019), managing the impact of fishing on the marine environment (3.8 in 2021 vs. 3.4 in 2019), delivering its services effectively and efficiently (3.6 in 2021 vs 3.2 in 2019) and considering the social impacts of fisheries management decisions (3.0 in 2021 vs 2.7 in 2019).
- The Commercial group provided consistently lower ratings than the Government Agency group, all significant except *managing the impact of fishing on the marine environment*.

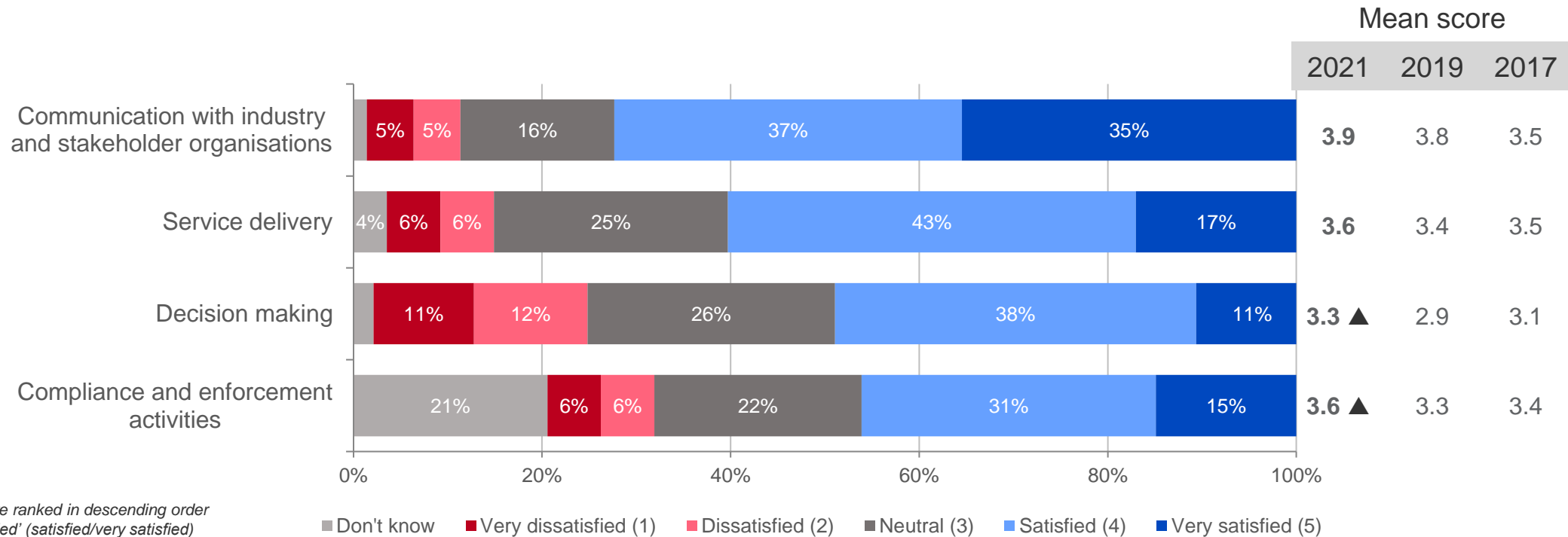


Statements are ranked in descending order by total 'satisfied' (satisfied/very satisfied)

QA4. How well or how poorly do you think AFMA is currently performing the following core roles? (SR)
 Base: All participants (n=141)
 *Note – percentages on single response questions may not always add up to 100% exactly due to rounding
 ▲▼ indicates a significant difference to the 2019 results at 95% confidence.

Overall satisfaction ratings: communication, service delivery, compliance and decision making

- Across all four focus areas that feedback is sought on, there were directional improvements observed, with significant increases in satisfaction recorded for decision making (3.3 in 2021 vs 2.9 in 2019) and compliance and enforcement activities (3.6 in 2021 vs 3.3 in 2019).
- The Commercial group are significantly less satisfied with AFMA's *decision making*, *service delivery*, and *compliance activities* than the Government Agency group. Communication is also perceived as less satisfactory, though this is not statistically significant.
- Despite the significant improvement in the mean score, there is a relatively higher proportion of stakeholders who are less certain on their feelings towards compliance and enforcement activities and selected 'don't know' (21%), which is higher than the proportion of stakeholders who selected this response across the three other focus areas.



Statements are ranked in descending order by total 'satisfied' (satisfied/very satisfied)

■ Don't know ■ Very dissatisfied (1) ■ Dissatisfied (2) ■ Neutral (3) ■ Satisfied (4) ■ Very satisfied (5)

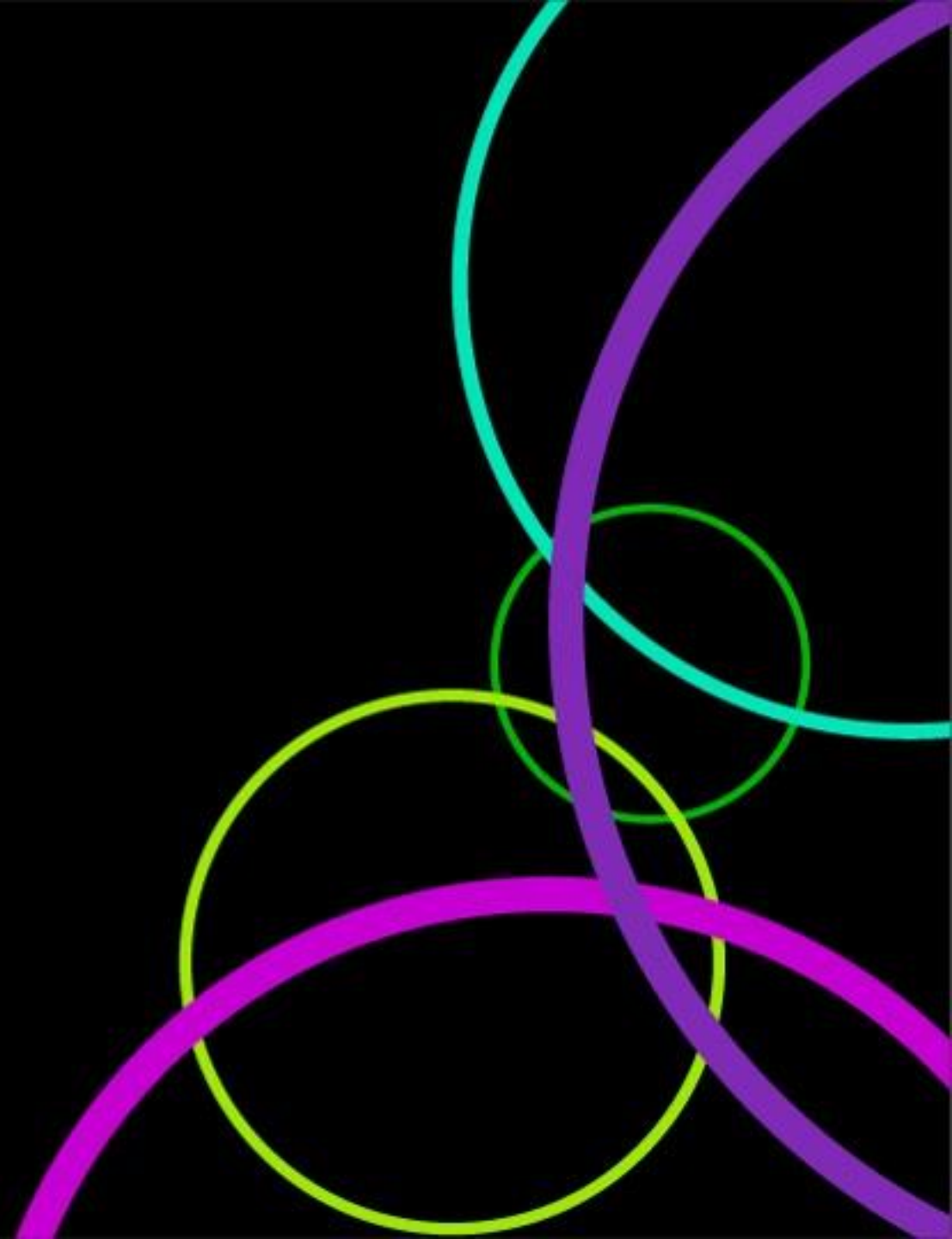
How satisfied or dissatisfied are you with AFMA's [QB1. decision making/QC1. service delivery/QD1. domestic compliance and enforcement activities/QE1. communication with you]? (SR)

Base: All participants (n=141)

*Note – percentages on single response questions may not always add up to 100% exactly due to rounding

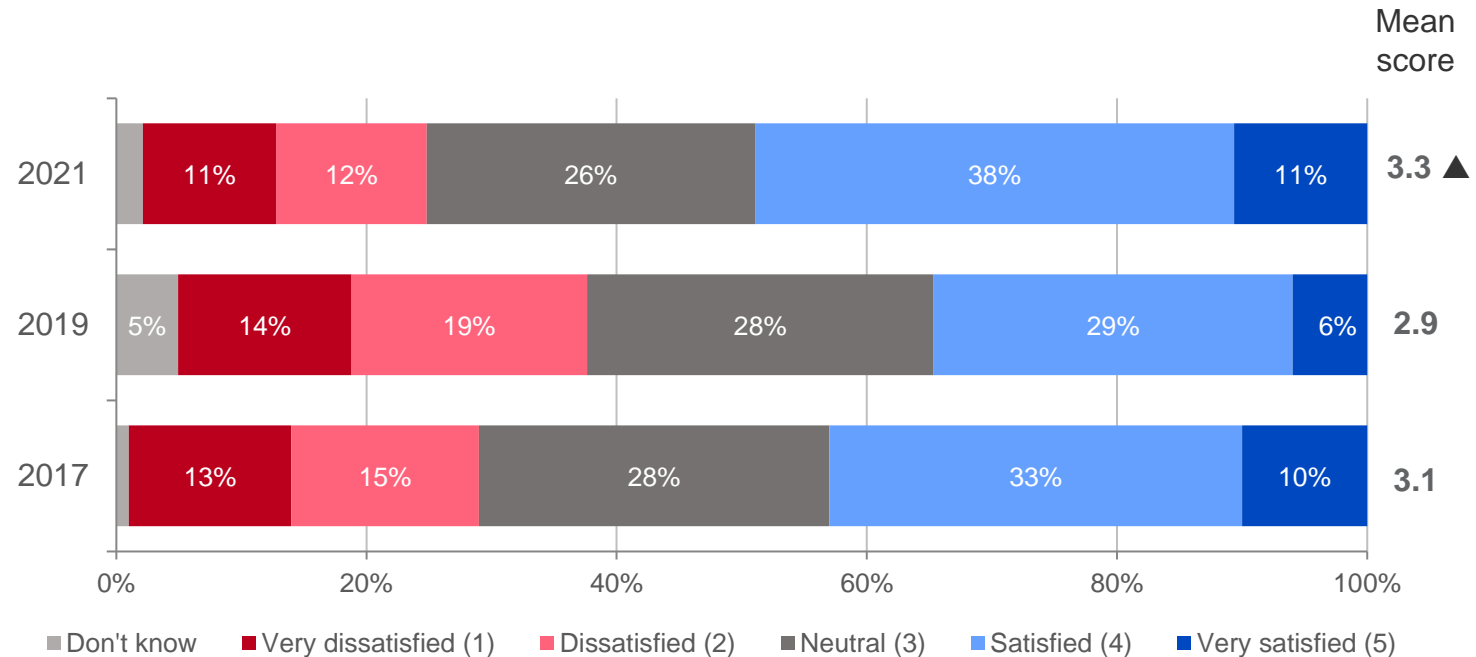
▲▼ indicates a significant difference to the 2019 results at 95% confidence

5. Decision Making



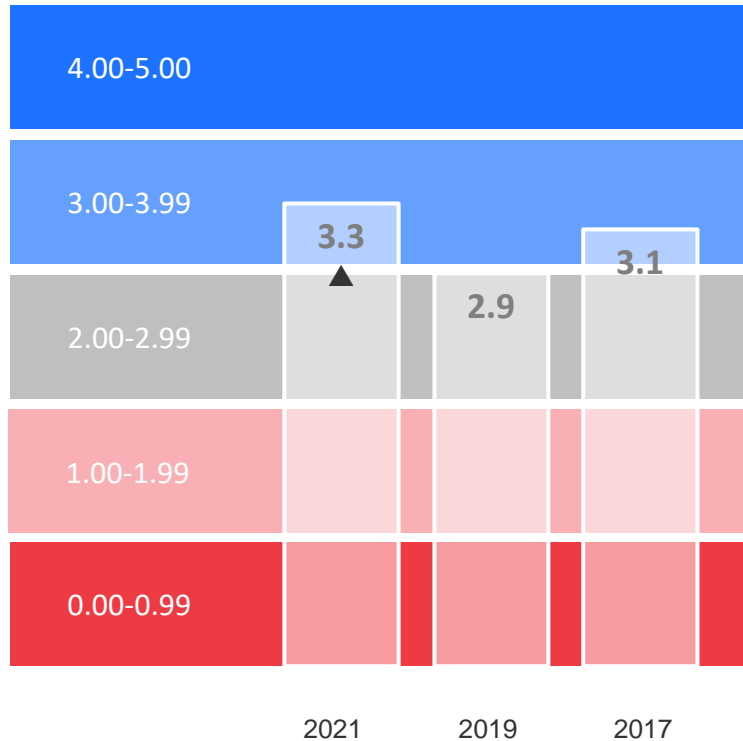
Overall satisfaction with AFMA's decision making

- Overall satisfaction with AFMA's decision making has grown directionally since 2019, with just under half of all stakeholders (49%) claiming to be satisfied in 2021, while dissatisfaction has decreased to 23%. There was also a significant increase in the mean score of 3.3 recorded this year.
- Despite these improvements, satisfaction with decision making remains the lowest of the four focus areas stakeholder feedback is provided on. In 2021, satisfaction is also significantly lower among the Commercial group compared to the Government Agency group.

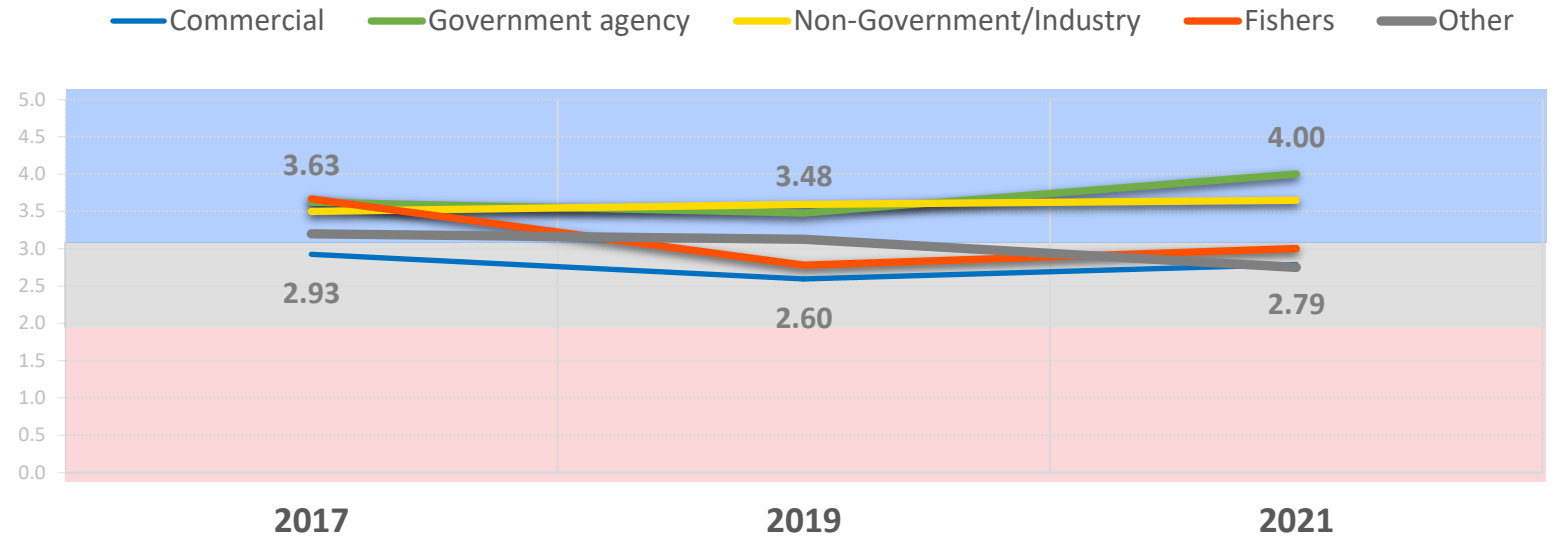


Overall stakeholder satisfaction with AFMA's decision making – by stakeholder groupings

Overall Satisfaction (mean score)



By stakeholder groupings (mean score)



	Commercial	Gov't agency	Non Gov't/Industry	Fishers	Other
2021	2.79	4.00	3.65*	3.00	2.75*
2019	2.60	3.48*	3.59	2.78	3.13*
2017	2.93	3.63*	3.50*	3.67*	3.20*

QB1. How satisfied or dissatisfied are you with AFMA's decision making? (SR)

Base: **2021** (Commercial n=62, Government agency n=38, Non-Government/Industry, n=20, Fishers n=16, Other n=6), **2019** (Commercial n=102, Government agency n=23, Non-Government/Industry n=38, Fishers n=50, Other n=16), **2017** (Commercial n=83, Government agency n=16, Non-Government/Industry n=12, Fishers n=3, Fishers n=10)

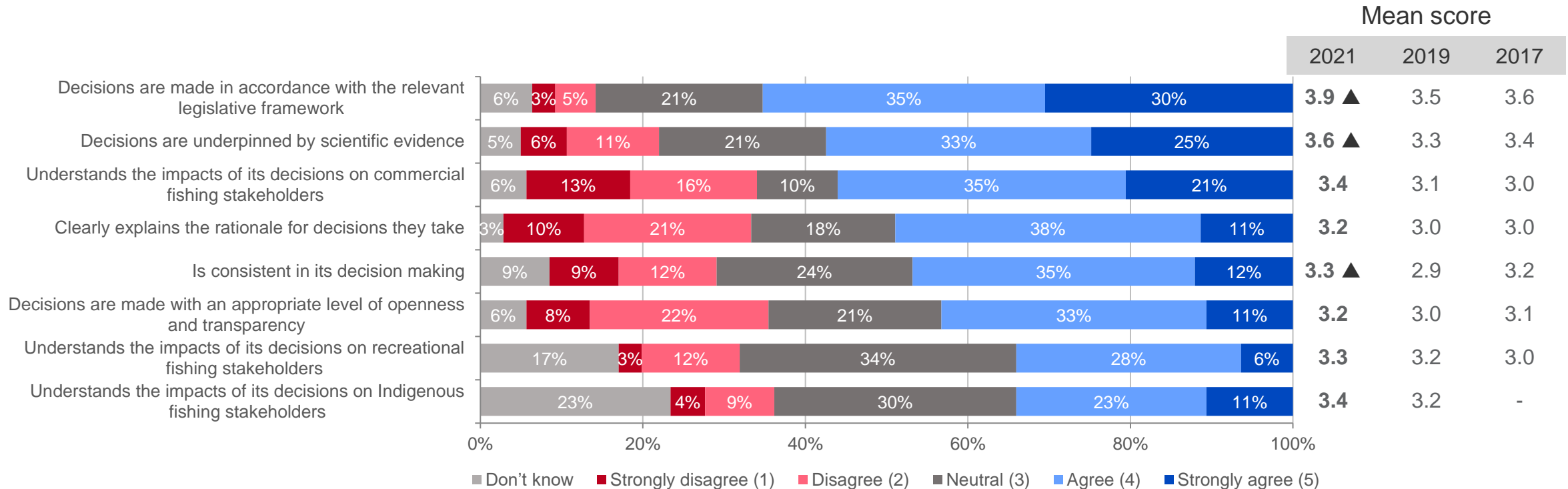
***Caution: Low base size of below n=30 = results are indicative only**

***Note: Data points for Non-Government/Industry, Fishers and Other are not shown on the line chart due to space – these results are shown in the table beneath.**

▲▼ indicates a significant difference vs. 2019 results [where base sizes are above n=30]

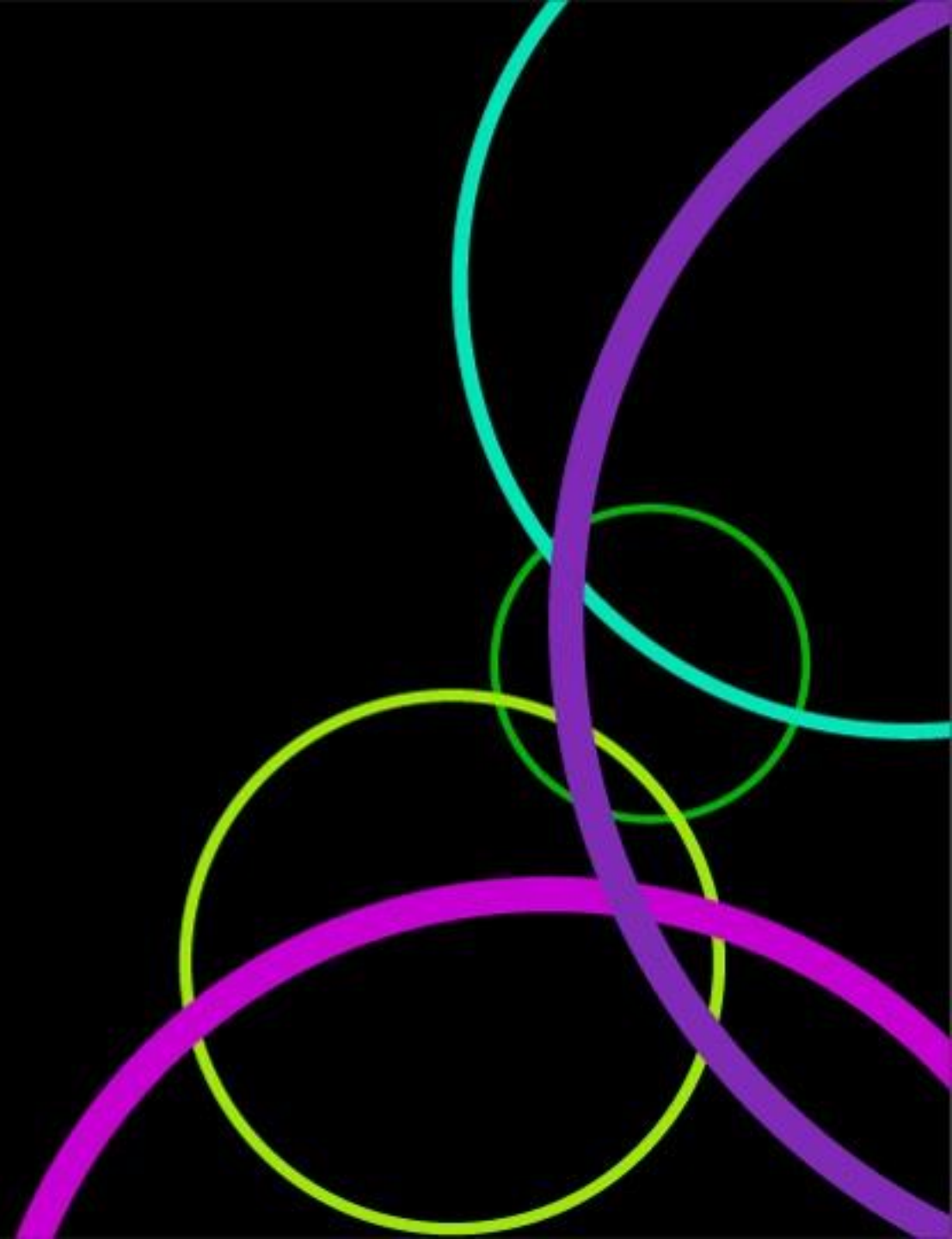
Agreement with specific attributes of AFMA's decision making

- Agreement with all attributes of AFMA's decision making have grown this year, with stakeholders significantly more satisfied with decisions being made in accordance with the relevant legislative framework (3.9 in 2021 vs 3.5 in 2019), decisions being underpinned by scientific evidence (3.6 in 2021 vs 3.3 in 2019) and consistency in decision making (3.3 in 2021 vs 2.9 in 2019).
- The Commercial group had significantly lower agreement than the Government Agency group, with all attributes except 'understanding the impacts of its decisions on Indigenous fishing / recreational fishing stakeholders'.



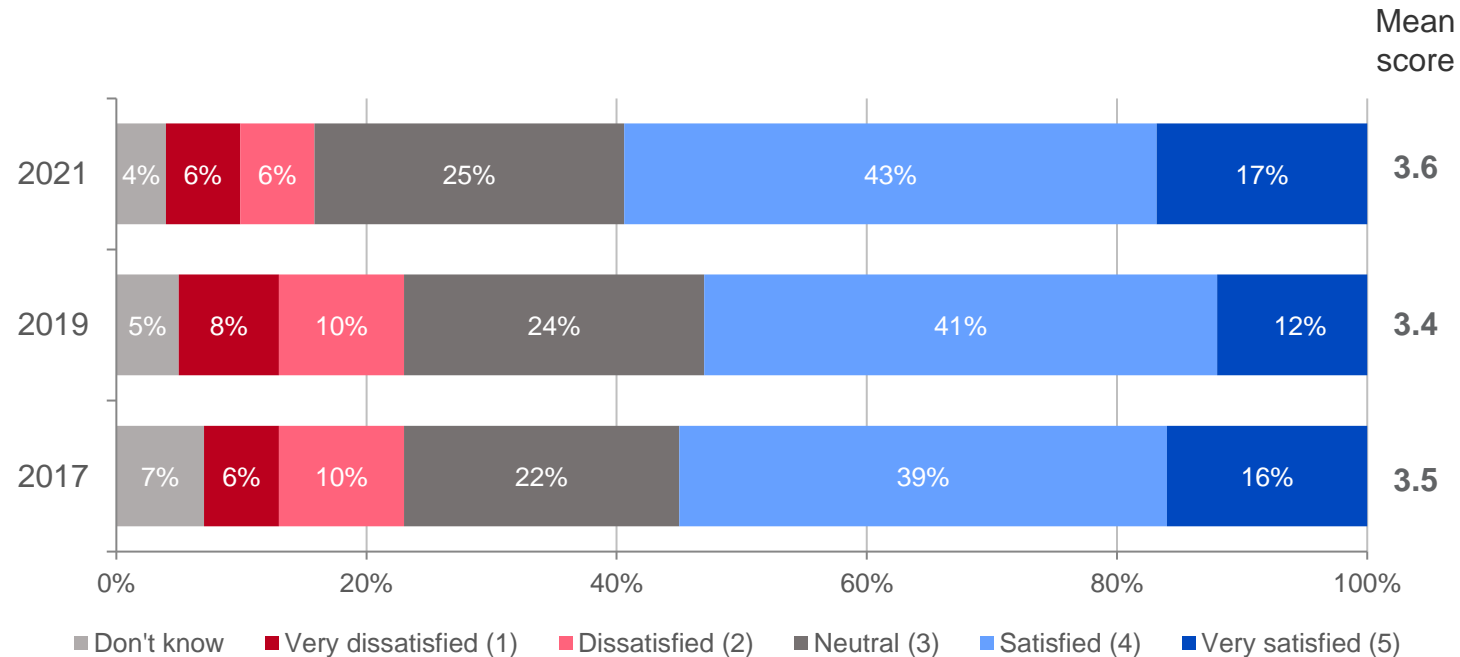
Statements are ranked in descending order by total 'satisfied' (satisfied/very satisfied)

6. Service Delivery



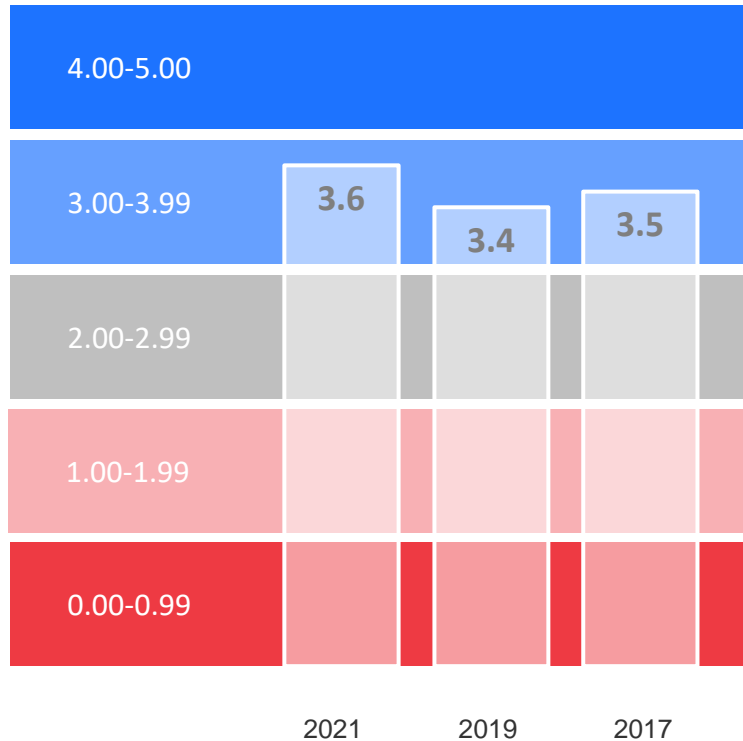
Overall satisfaction with AFMA's service delivery

- Overall satisfaction with AFMA's service delivery has marginally improved upon 2019 scores, with 3 in 5 (60%) now feeling 'satisfied' with this area compared to 53% in 2019.
- Pleasingly, dissatisfaction has also decreased to 12% in 2021 from 18% in 2019.
- The Commercial group are significantly less satisfied with AFMA's service delivery compared to the Government Agency group.

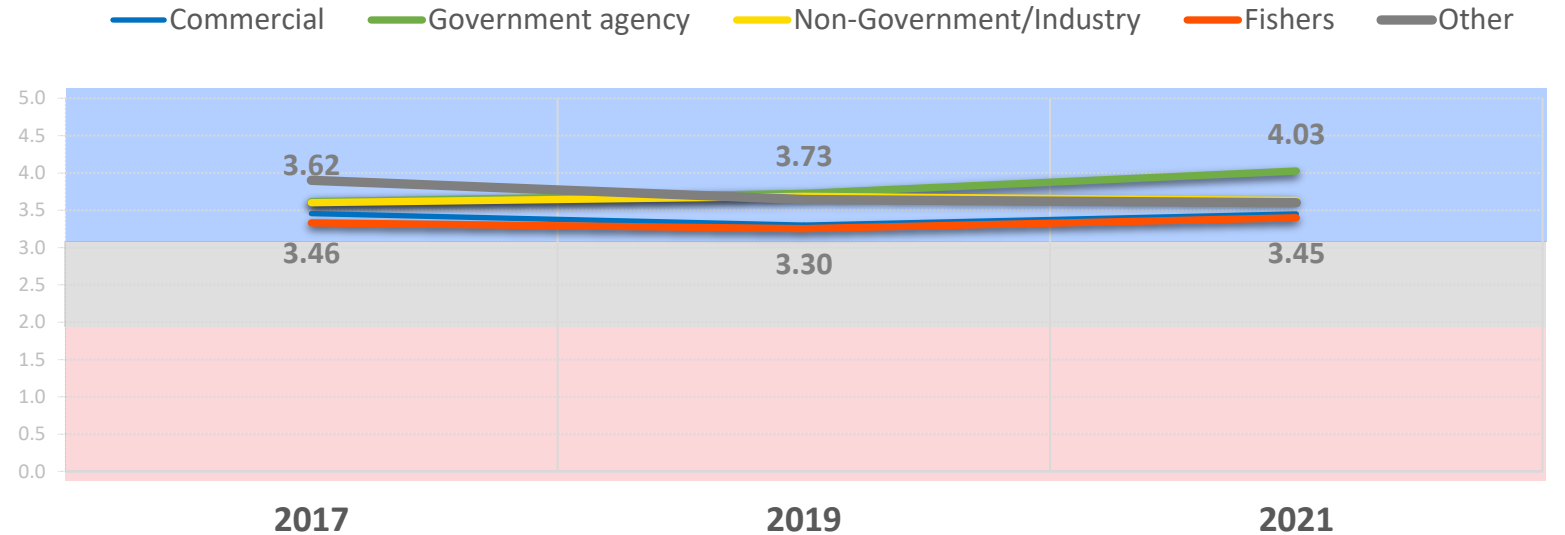


Overall stakeholder satisfaction with AFMA's service delivery – by stakeholder groupings

Overall Satisfaction (mean score)



By stakeholder groupings (mean score)

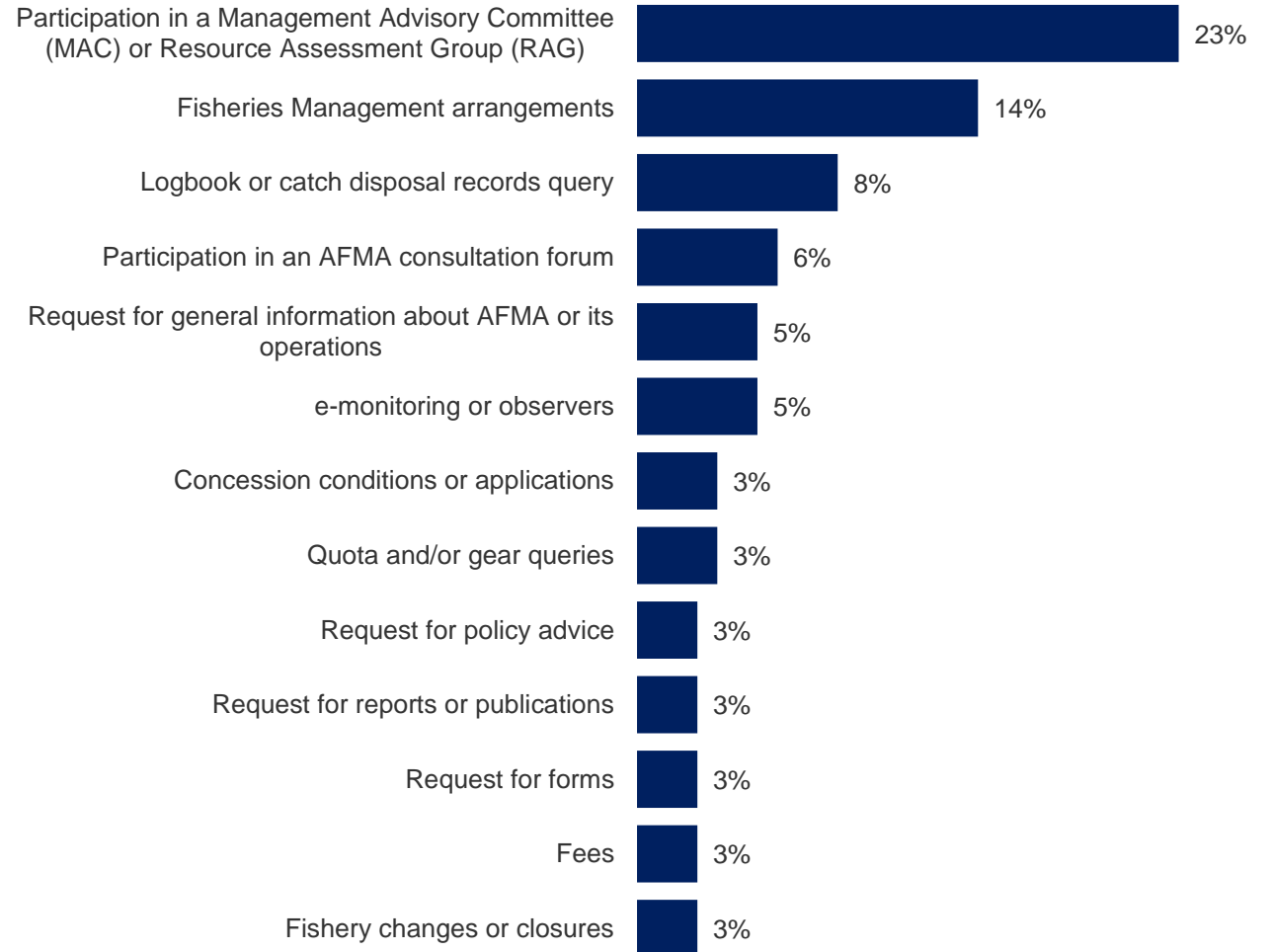


	Commercial	Gov't agency	Non Gov't/Industry	Fishers	Other
2021	3.45	4.03	3.63*	3.40	3.60*
2019	3.30	3.73*	3.69	3.26	3.64*
2017	3.46	3.62*	3.60*	3.33*	3.90*

Reasons for direct contact with AFMA staff

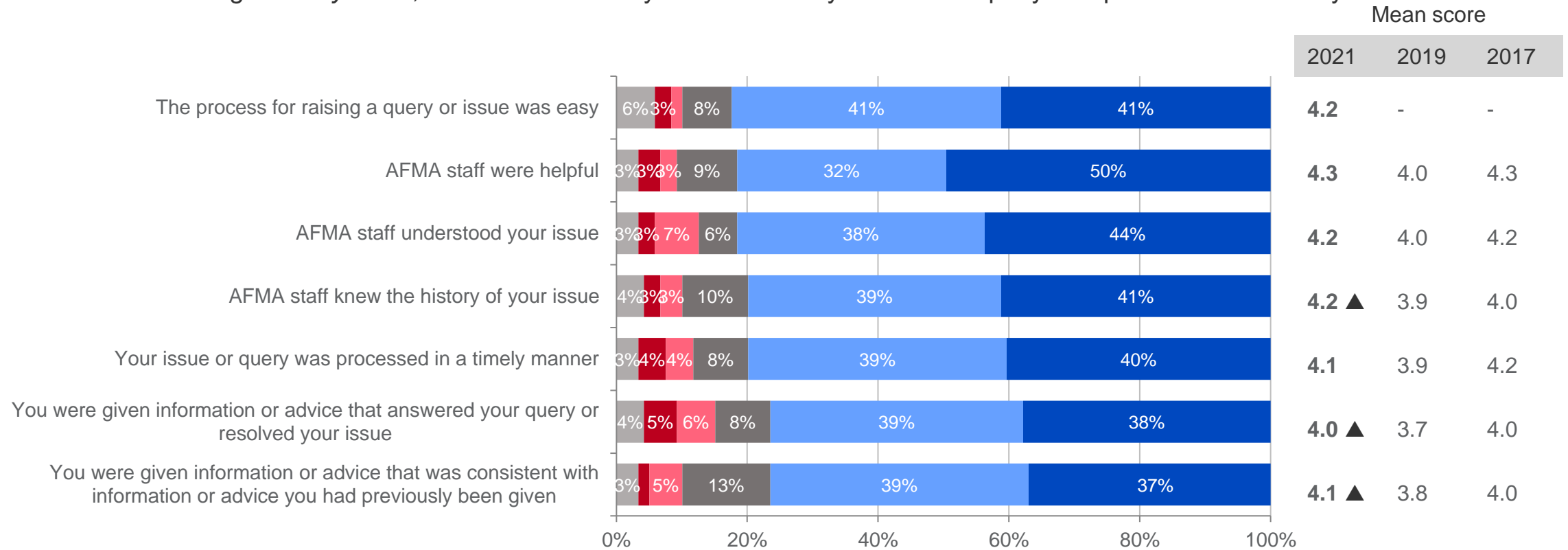
- In 2021, over eight in ten (84%) participants had direct contact with AFMA staff in the past twelve months, a slight increase from 2019 (76%).
- Overall, the most common topic of contact overall was participation in an Management Advisory Committees or Resource Assessment Groups (23%)
- Those in metro areas were more likely to contact AFMA in relation to Fisheries Management arrangements than regional areas (21% vs 6%).
- The Commercial group had direct contact with AFMA staff significantly fewer times than the Government Agency group. The Commercial group had direct contact more regarding 'logbook or catch disposal records query', while the Government Agency had more contact regarding 'Fisheries Management arrangements' or 'request for policy advice'.

Topic of most recent direct contact with AFMA staff



Satisfaction with AFMA staff

- Ratings for interactions with AFMA staff directionally improved for all attributes – and significantly increased for attributes including AFMA staff’s knowledge of the history of issues (4.2 in 2021 vs 3.9 in 2019), the provision of information or advice that answered your query or resolved your issue (4.0 in 2021 vs 3.7 in 2019), and the provision of information or advice that was consistent (4.1 in 2021 vs 3.8 in 2019).
- This year, the Commercial group was consistently less satisfied than the Government Agency group for all statements, though two statements were not *significantly* lower; ‘AFMA understood your issue’ and ‘your issue or query was processed in a timely manner’.



Statements are ranked in descending order by total 'satisfied' (satisfied/very satisfied)

■ Don't know ■ Very dissatisfied (1) ■ Dissatisfied (2) ■ Neutral (3) ■ Satisfied (4) ■ Very satisfied (5)

QC4. During your most recent interaction with AFMA staff, how satisfied or dissatisfied were you that... (SR) *The process for raising a query or issue was easy' – was added in 2021

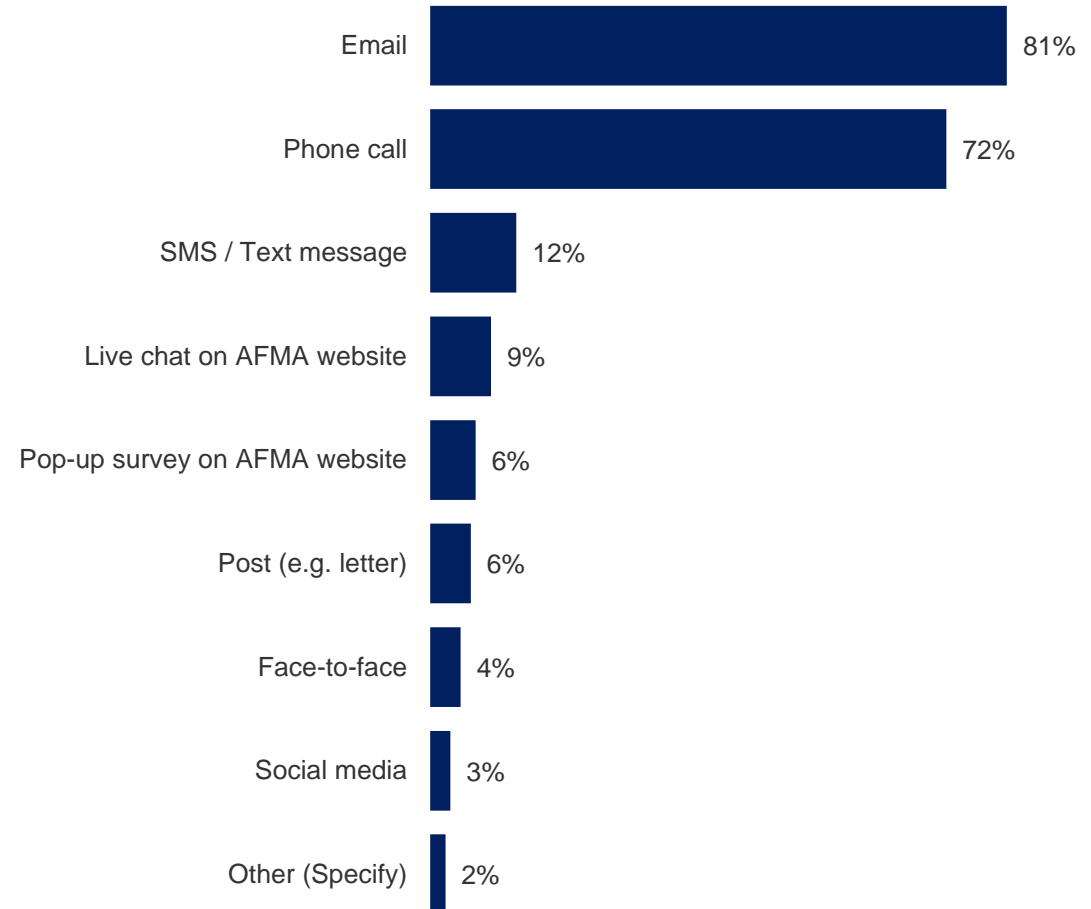
Base: Those who had contact with AFMA staff in the past 12 months (n=119)

*Note – percentages on single response questions may not always add up to 100% exactly due to rounding

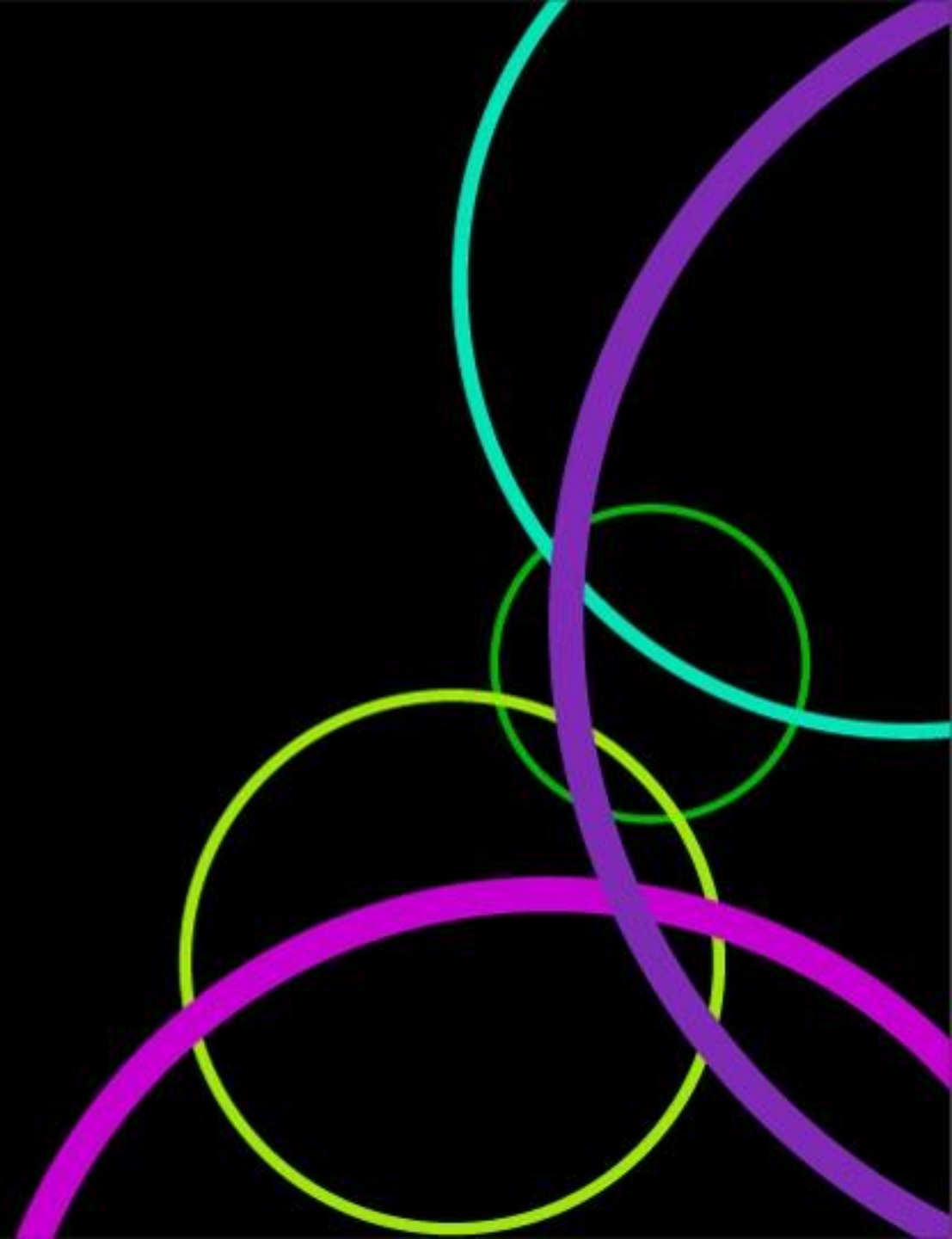
▲▼ indicates a significant difference to the 2019 results at 95% confidence

Preferred platform for raising issues or queries

- In 2021, over eight in ten (81%) participants prefer raising issues or queries with AFMA by email. A slightly lower proportion (72%) prefer a phone call.
- Fewer of the Commercial group preferred email (71%) or a pop-up survey on AFMA's website (2%) compared to the Government Agency group (92% and 11%, respectively).
- Those in metro areas were more likely (10%) than those in regional areas (2%) to prefer pop-up surveys on the AFMA website.

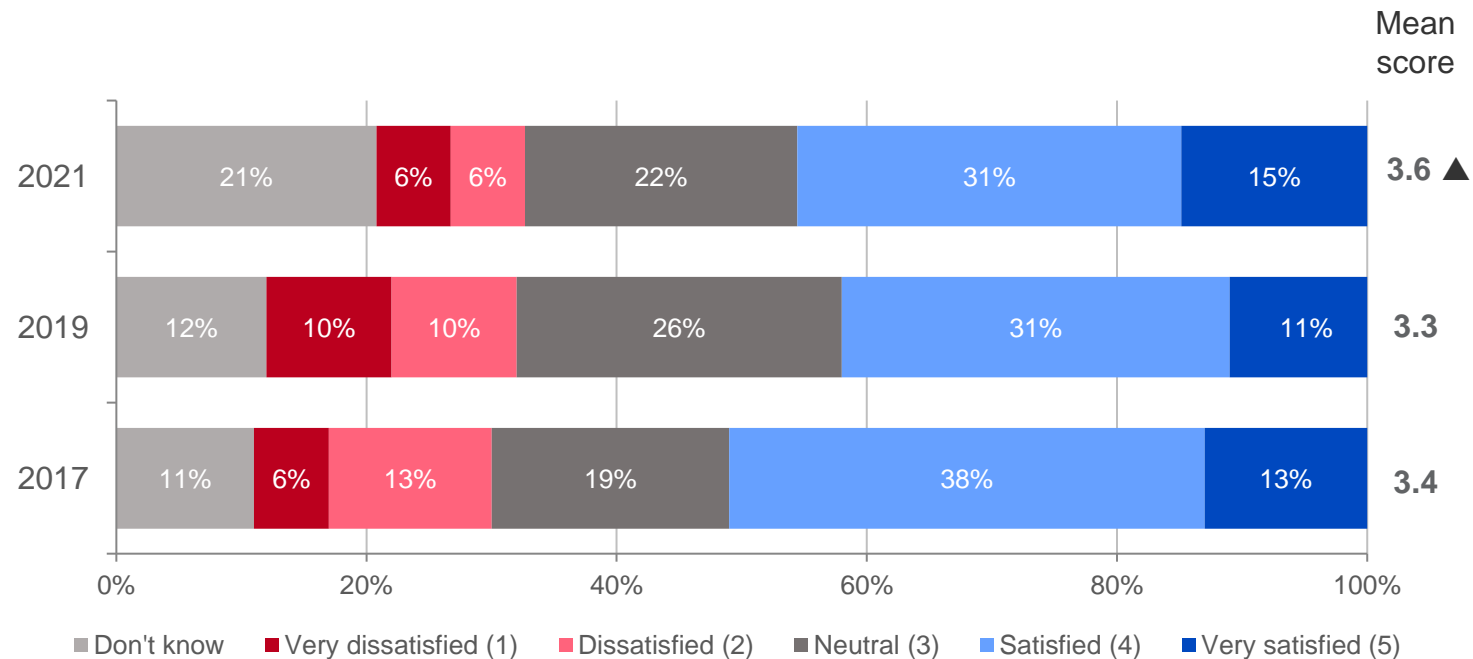


7. Compliance Program



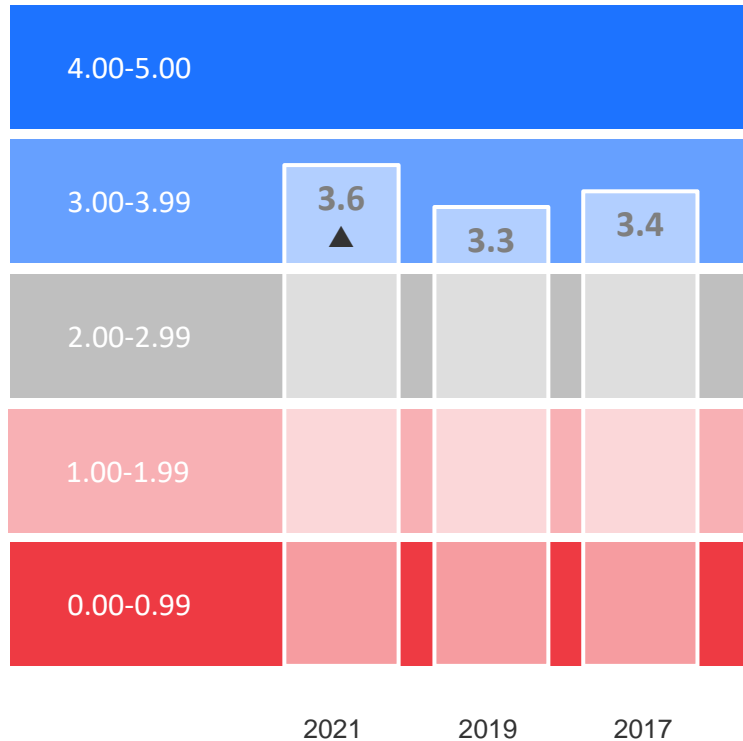
Overall satisfaction with AFMA's domestic compliance and enforcement activities

- Overall satisfaction with AFMA's domestic compliance and enforcement activities has significantly increased this year vs. 2019 (3.6 mean score out of 5, vs. 3.3 in 2019).
- Almost half (46%) of stakeholders are satisfied with this area, and only around 1 in 10 (12%) are dissatisfied.
- There has been a slight increase in those who are unsure (21% vs. 12% in 2019 and 11% in 2017).
- The Commercial group is significantly less satisfied with AFMA's domestic compliance and enforcement activities compared to the Government Agency group.

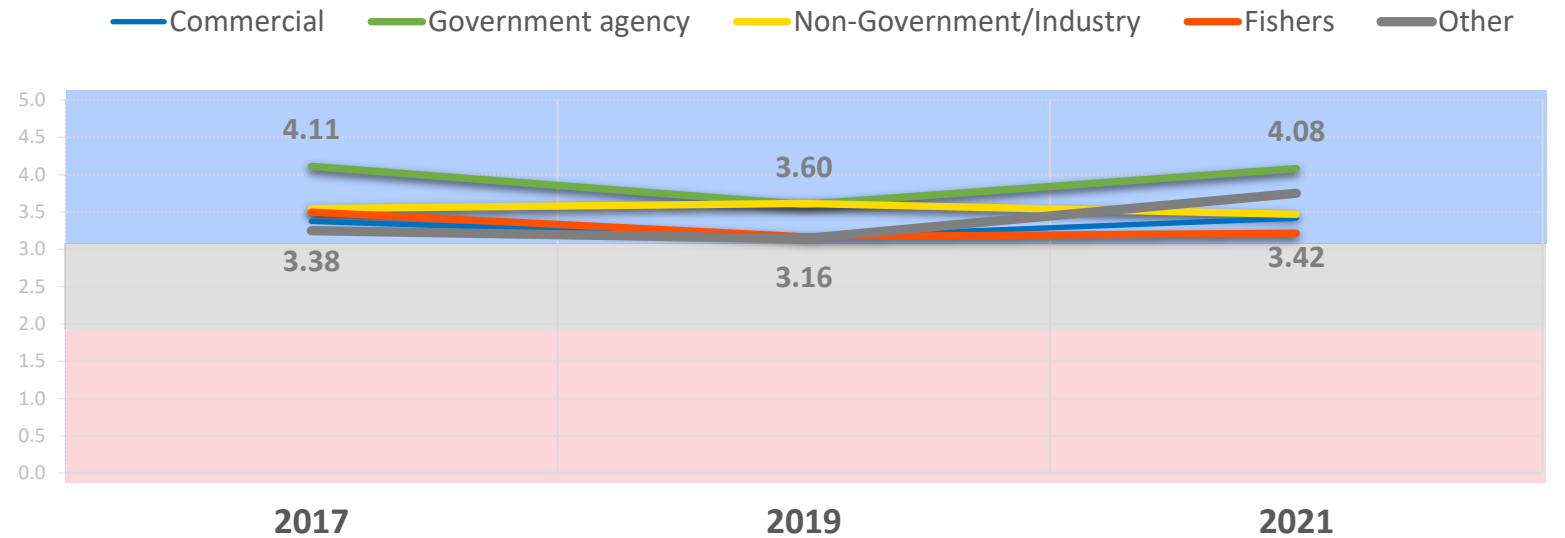


Overall stakeholder satisfaction with AFMA's domestic compliance and enforcement activities – by stakeholder groupings

Overall Satisfaction (mean score)



By stakeholder groupings (mean score)



	Commercial	Gov't agency	Non Gov't/Industry	Fishers	Other
2021	3.42	4.08	3.47*	3.21	3.75*
2019	3.16	3.60*	3.62	3.17	3.14*
2017	3.38	4.11*	3.55*	3.50*	3.25*

QD1. How satisfied or dissatisfied are you with AFMA's domestic compliance and enforcement activities? (SR)

Base: **2021** (Commercial n=62, Government agency n=38, Non-Government/Industry, n=20, Fishers n=16, Other n=6), **2019** (Commercial n=102, Government agency n=23, Non-Government/Industry n=38, Fishers n=50, Other n=16), **2017** (Commercial n=83, Government agency n=16, Non-Government/Industry n=12, Fishers n=3, Fishers n=10)

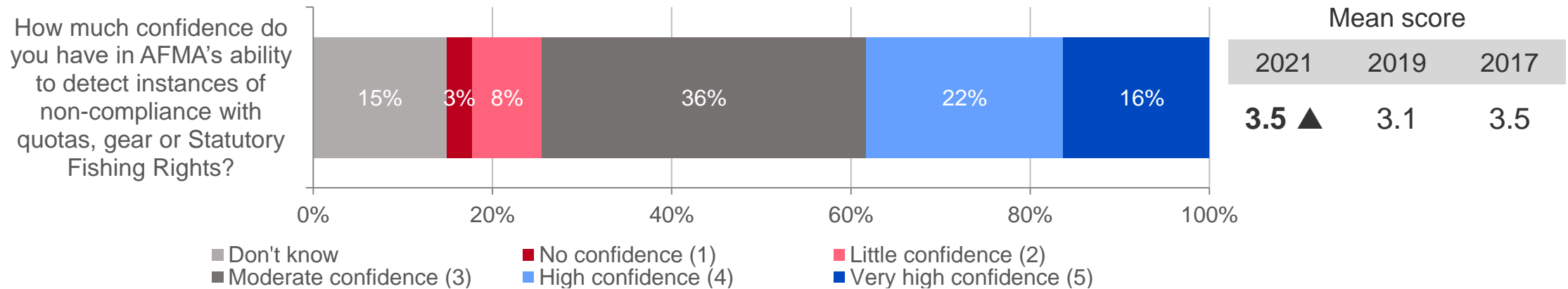
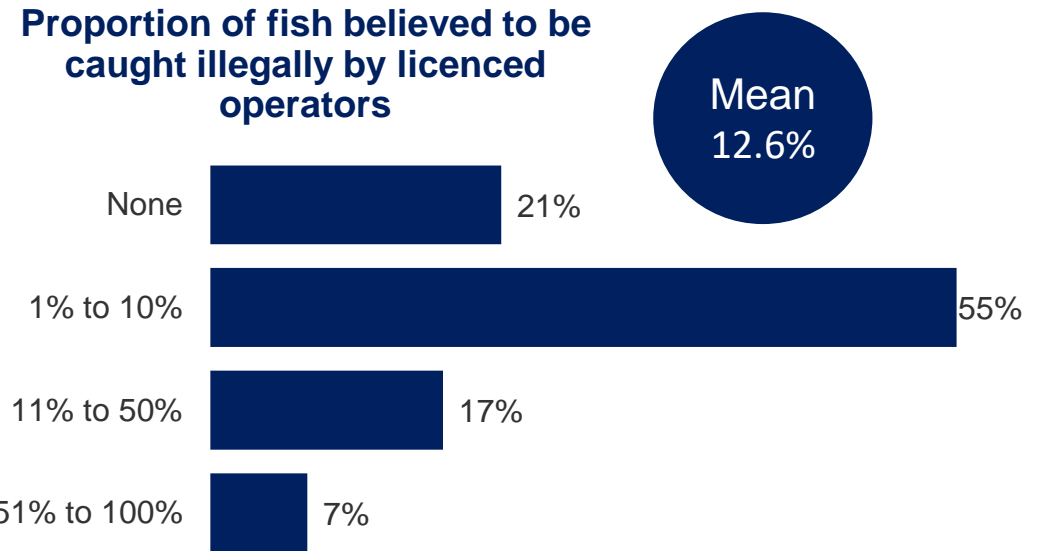
***Caution: Low base size of below n=30 = results are indicative only**

*Note: Data points for Non-Government/Industry, Fishers and Other are not shown on the line chart due to space – these results are shown in the table beneath.

▲▼ indicates a significant difference vs. 2019 results [where base sizes are above n=30]

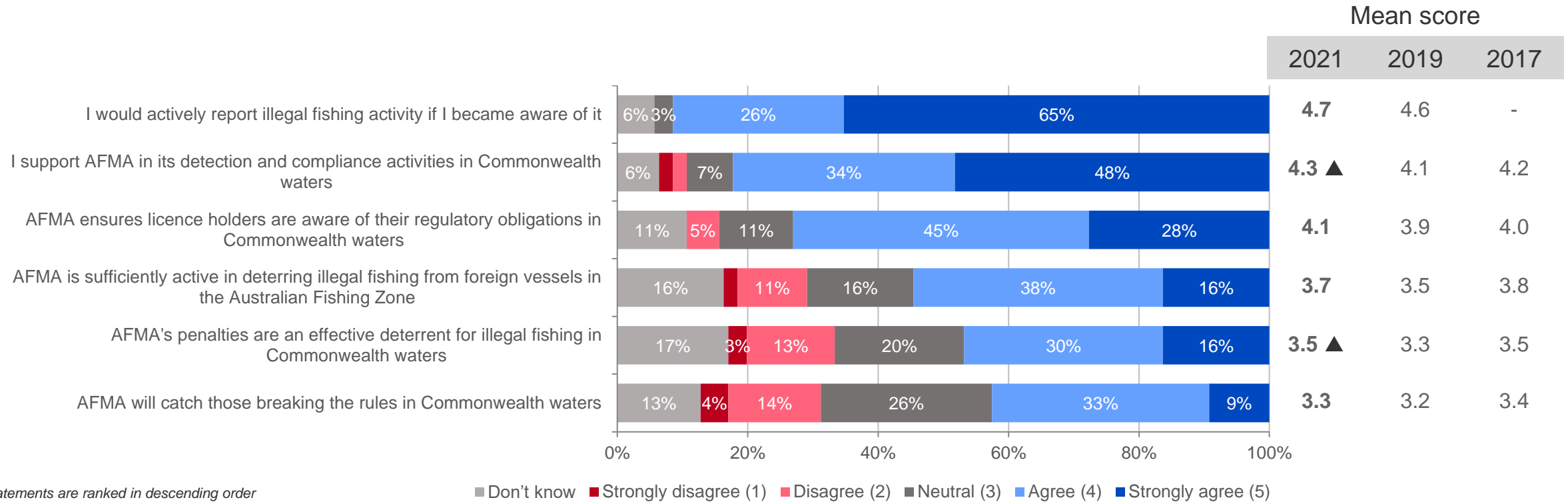
Confidence in AFMA's compliance and enforcement activities

- In 2021, confidence in AFMA's ability to detect instances of non-compliance has significantly increased and returned to 2017 levels with a mean score of 3.5 recorded this year.
- There was no significant difference between Commercial and Government agency on this measure.
- On average, stakeholders estimated that 12.6% of fish caught in Commonwealth waters by licensed operators were taken illegally. The Commercial group estimated 10.2% versus 7.1% by the Government Agency group.



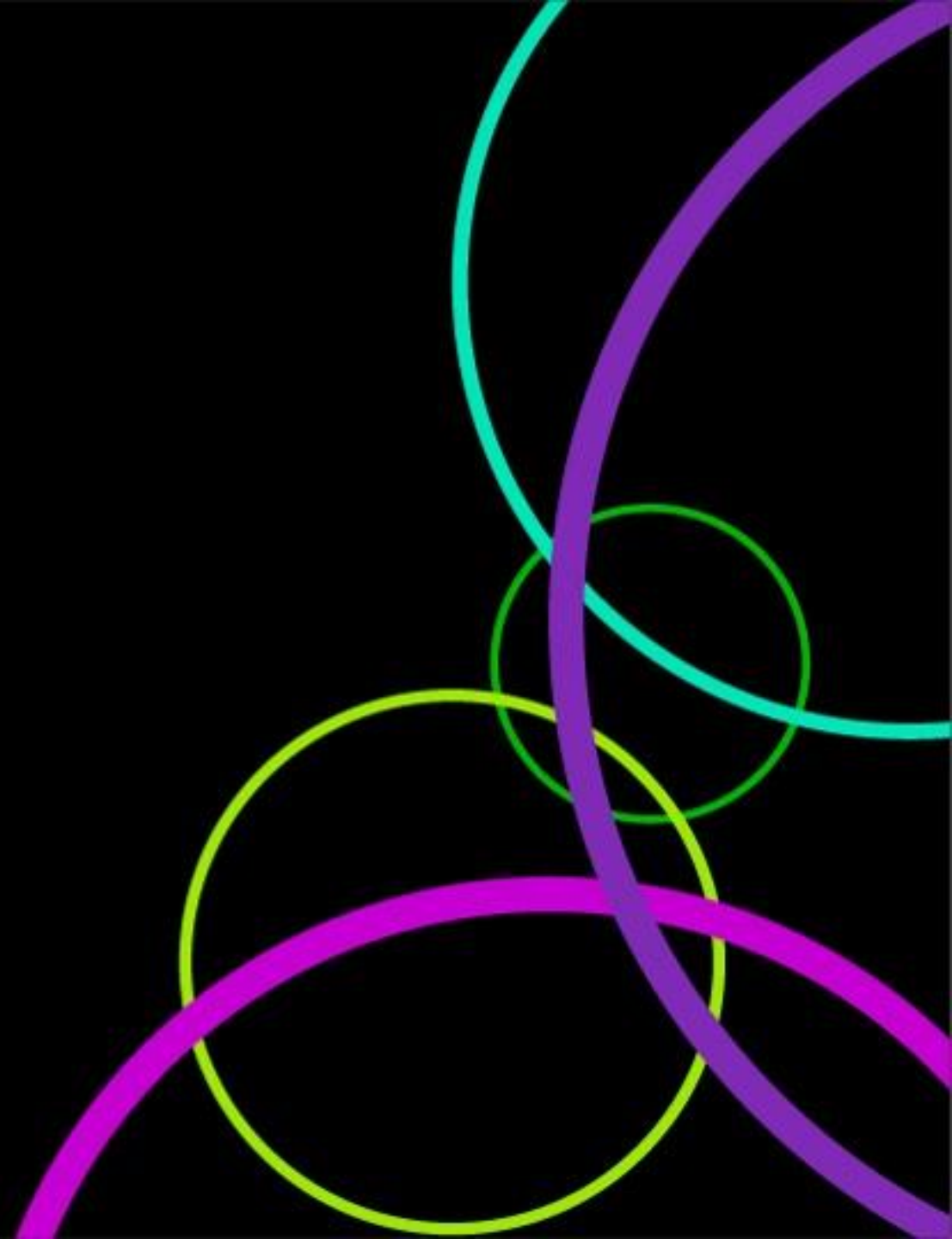
Agreement with specific aspects of AFMA's compliance and enforcement activities

- In 2021 AFMA has seen directional growth across all components of compliance and enforcement activities, in particular with support of AFMA in its detection and compliance activities in Commonwealth waters and AFMA's penalties are an effective deterrent for illegal fishing in Commonwealth waters, which have both grown significantly since 2019.
- There were similar levels of agreement between the Commercial group and Government Agency group on most items. However, average agreement that AFMA ensures licence holders' awareness of the regulatory obligations in Commonwealth waters is significantly lower for Commercial than Government Agency. One in five (21%) from the Government Agency group indicated 'don't know' for this statement.



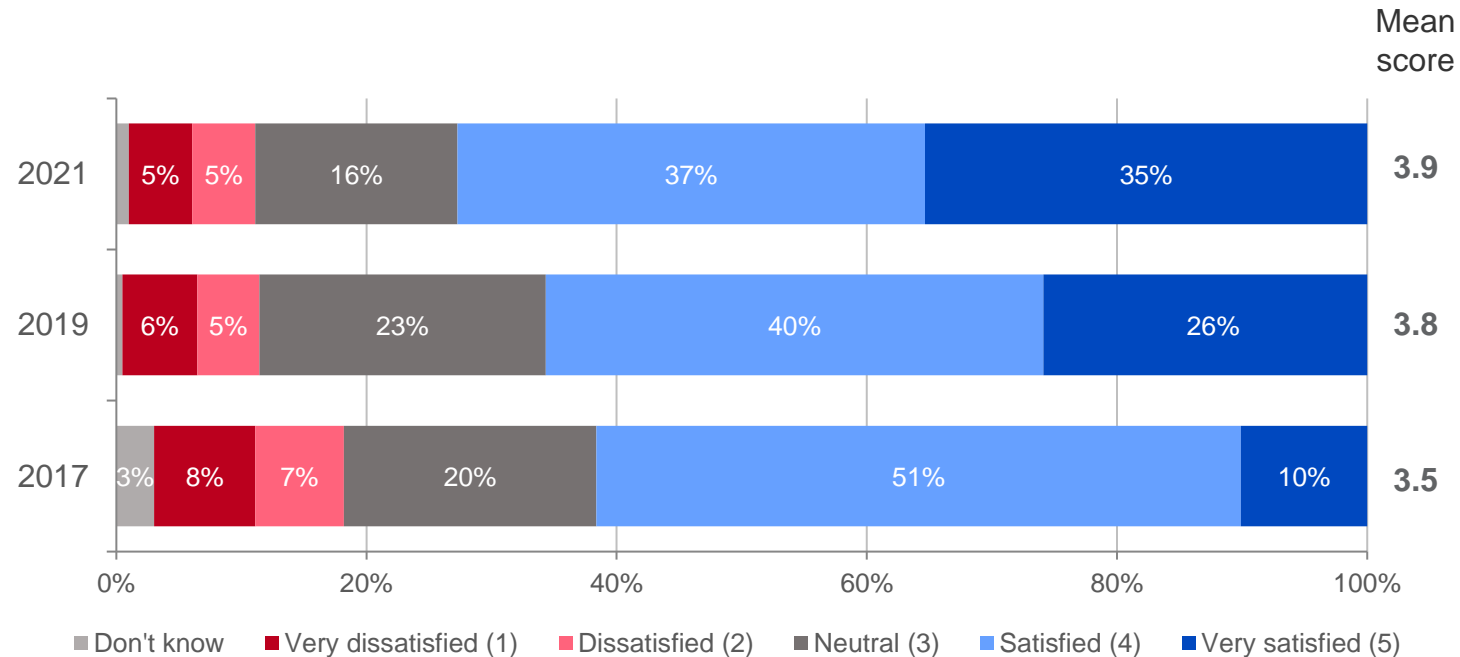
Statements are ranked in descending order by total 'satisfied' (satisfied/very satisfied)

8. Communication and Consultation



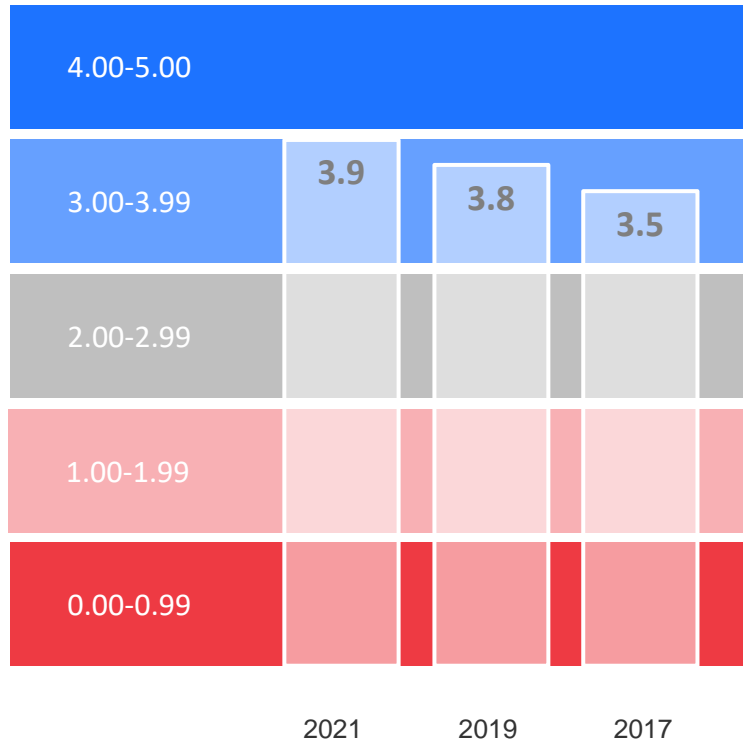
Overall satisfaction with AFMA's communication

- Overall satisfaction with AFMA's communication continues to grow and has directionally increased, with almost 3 in 4 (72%) satisfied with performance in this area, achieving a mean score of 3.9 (out of 5).
- Only 1 in 10 are 'dissatisfied'.

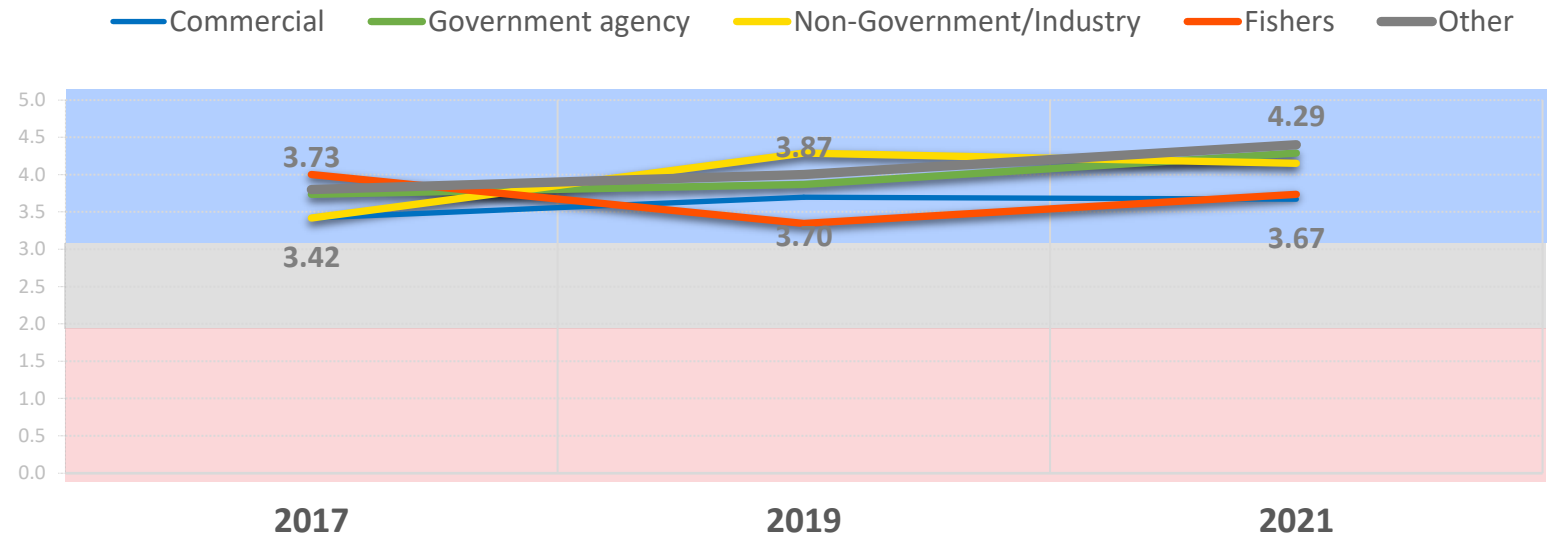


Overall stakeholder satisfaction with AFMA's communication – by stakeholder groupings

Overall Satisfaction (mean score)



By stakeholder groupings (mean score)



	Commercial	Gov't agency	Non Gov't/Industry	Fishers	Other
2021	3.67	4.29	4.15*	3.73	4.40*
2019	3.70	3.87*	4.29	3.35	4.00*
2017	3.42	3.73*	3.42*	4.00*	3.80*

QE1. How satisfied or dissatisfied are you with AFMA's communication with you? (SR)

Base: **2021** (Commercial n=62, Government agency n=38, Non-Government/Industry, n=20, Fishers n=16, Other n=6), **2019** (Commercial n=102, Government agency n=23, Non-Government/Industry n=38, Fishers n=50, Other n=16), **2017** (Commercial n=83, Government agency n=16, Non-Government/Industry n=12, Fishers n=3, Fishers n=10)

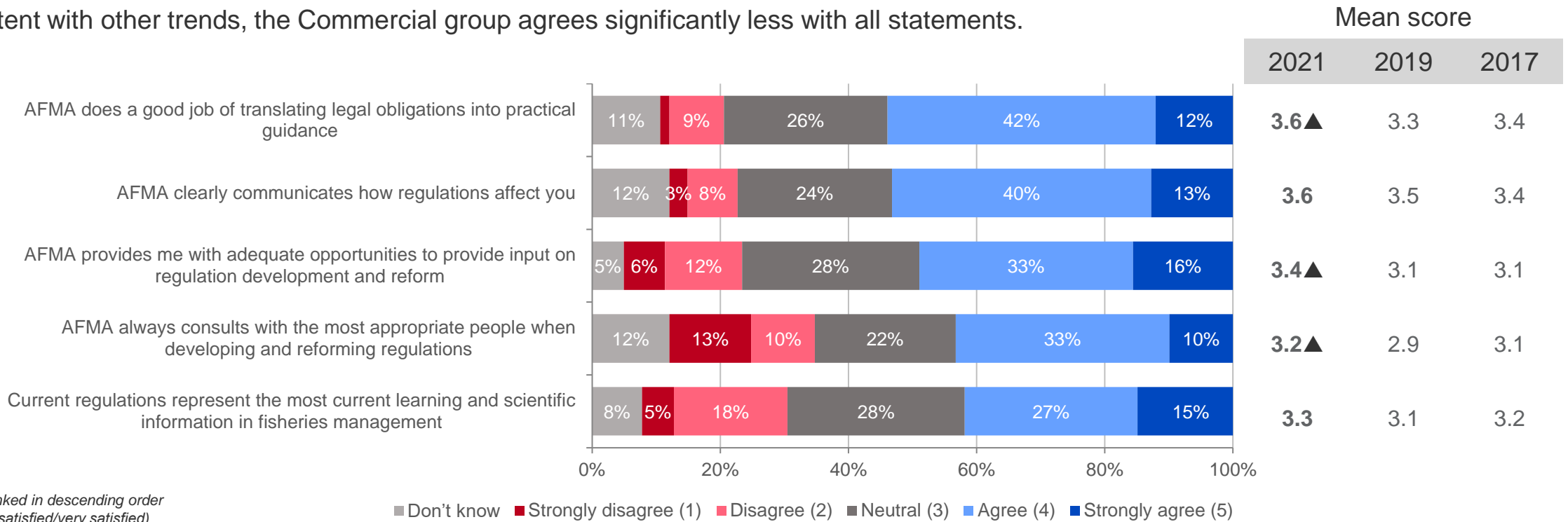
***Caution: Low base size of below n=30 = results are indicative only**

*Note: Data points for Non-Government/Industry, Fishers and Other are not shown on the line chart due to space – these results are shown in the table beneath.

▲▼ indicates a significant difference vs. 2019 results [where base sizes are above n=30]

Agreement with specific aspects of AFMA's communication and consultation activities

- This year, there are also directional improvements across all five aspects of communication and consultation, and encouragingly significant improvements in agreement for AFMA doing a good job of translating legal obligations in to practical guidance (3.6 in 2021 vs 3.3 in 2019), providing adequate opportunities to provide input (3.4 in 2021 vs 3.1 in 2019) and always consulting the most appropriate people (3.2 in 2021 vs 2.9 in 2019).
- Despite these improvements, there are approximately one in four stakeholders who disagree (either strongly disagree or disagree) that AFMA provides adequate opportunities to provide input (18%), that AFMA consults with the most appropriate people (23%) and that current regulations are up to date (23%), suggesting these areas provide an opportunity for improvement.
- Consistent with other trends, the Commercial group agrees significantly less with all statements.



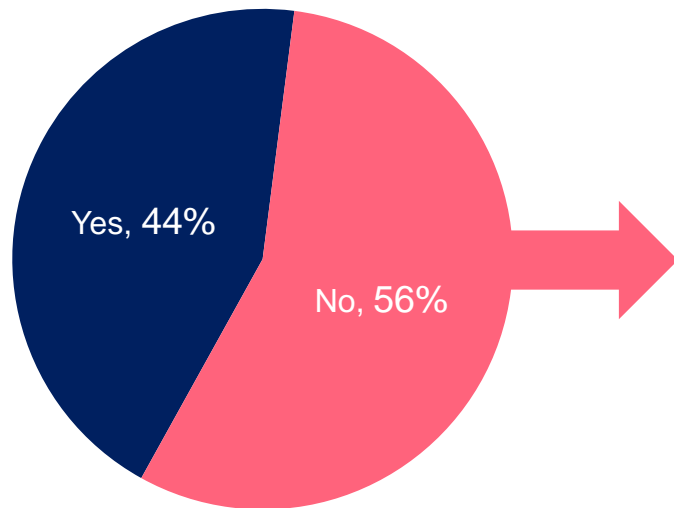
Statements are ranked in descending order by total 'satisfied' (satisfied/very satisfied)

QE2. Please indicate your level of agreement or disagreement with the following statements. (SR)
 Base: All participants (n=141)
 *Note – percentages on single response questions may not always add up to 100% exactly due to rounding
 ▲▼ indicates a significant difference to the 2019 results at 95% confidence
 Note: This was asked as "AFMA clearly communicates how regulations affect the industry" in 2017

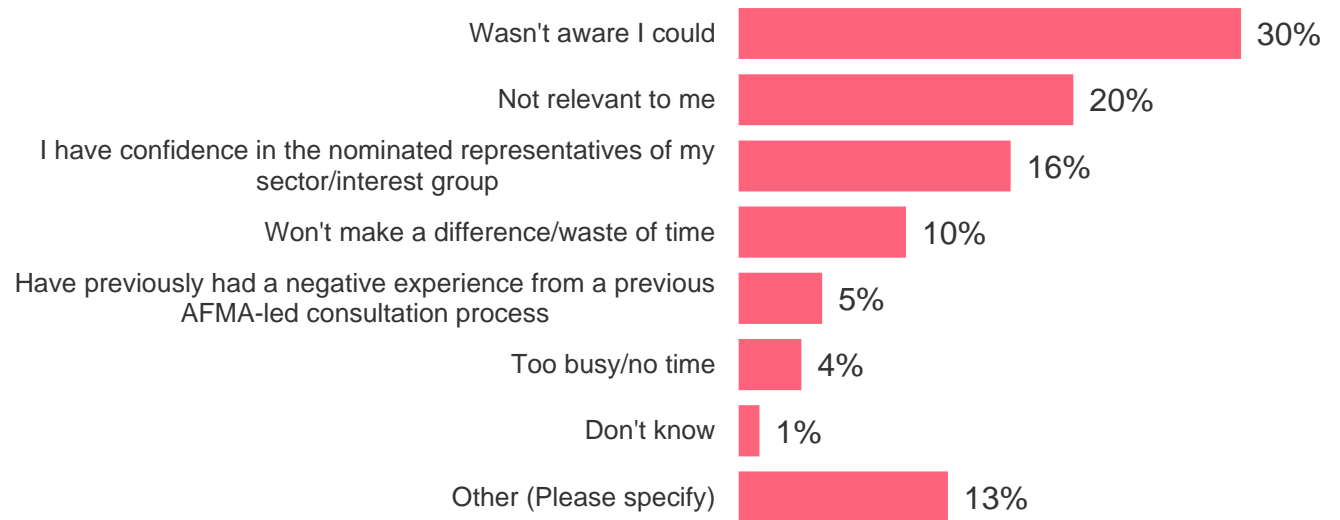
Participation in AFMA-led consultation

- 44% of stakeholders participated in AFMA-led consultation over the past three years.
- There was no significant difference between the proportion of the Commercial group and the Government Agency group who participated in AFMA-led consultation (44% v 39%). However, the results support the finding that the Commercial group are more sceptical of AFMA, with 23% indicating more 'it won't make a difference / waste of time' responses compared to the Government Agency group indicating more 'it's not relevant to me' (48%)-type responses.
- The main reason stakeholders had not participated in a consultation was that they weren't aware they could (30%), followed by feeling that the consultation was not relevant to them (20%).

Participated in AFMA-led consultation (past three years)

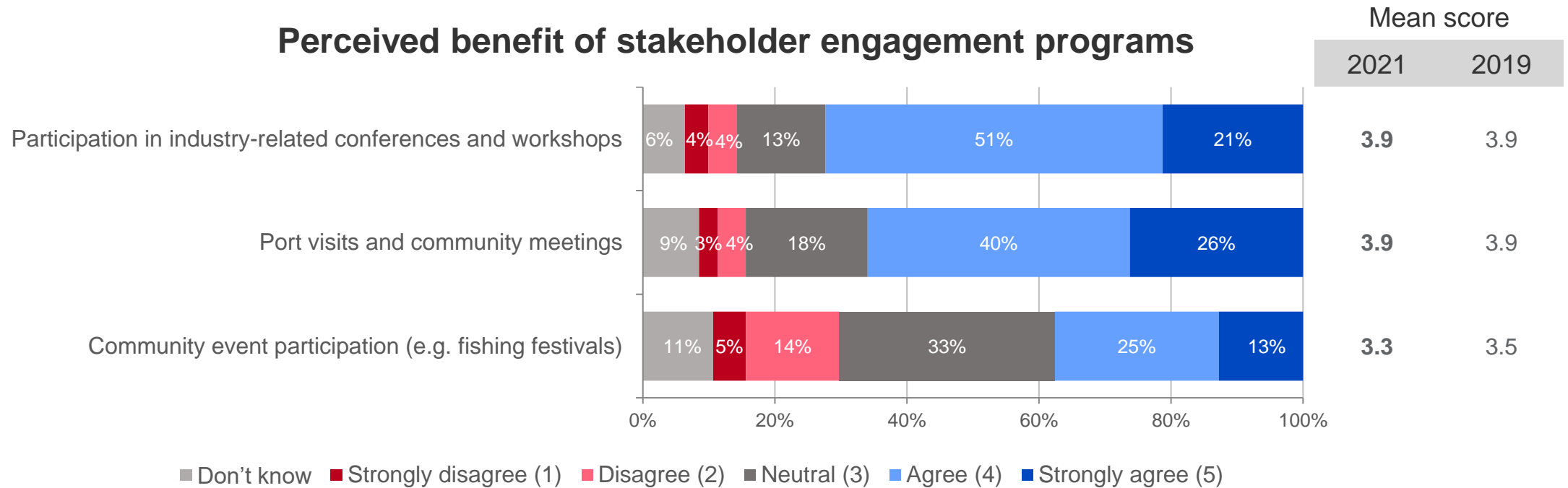


Main reason for not participating in AFMA-led consultation



Perceived benefit from stakeholder engagement programs

- Results were very similar to 2019, with the same levels of perceived benefit recorded for participation in industry-related conference and workshops (3.9 in 2021 vs 3.9 in 2019), as well as port visit and community meetings (3.9 in 2021 vs 3.9 in 2019). There was however a slight directional decline in the level of perceived benefit recorded this year for community event participation (3.3 in 2021 vs 3.5 in 2019).
- The Commercial group had lower agreement about the perceived benefits of participating in industry-related conferences and workshops compared to the Government Agency group, but were still supportive overall.



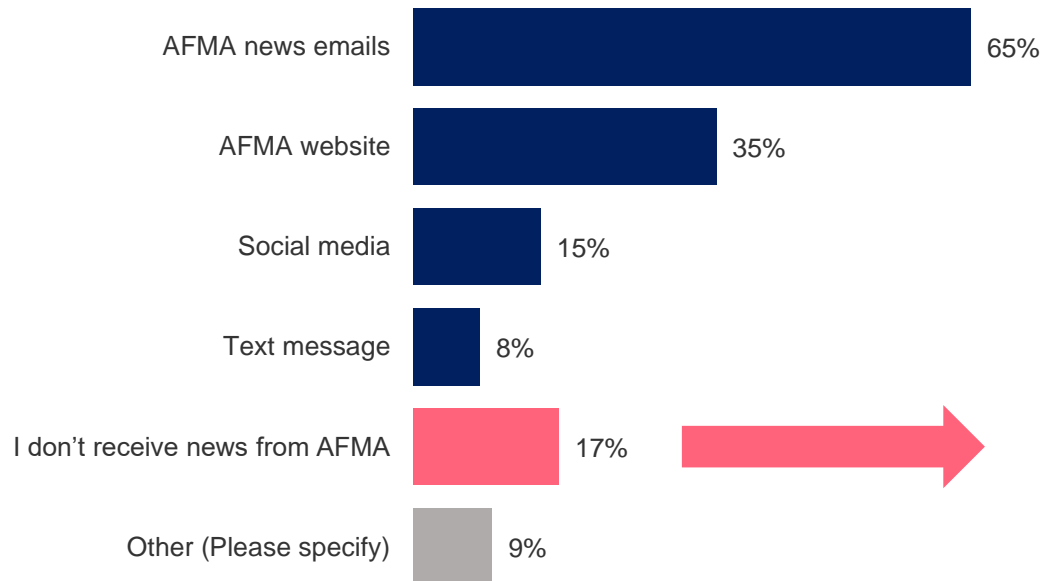
Statements are ranked in descending order by total 'satisfied' (satisfied/very satisfied)

Sources of - and barriers to – AFMA news/media

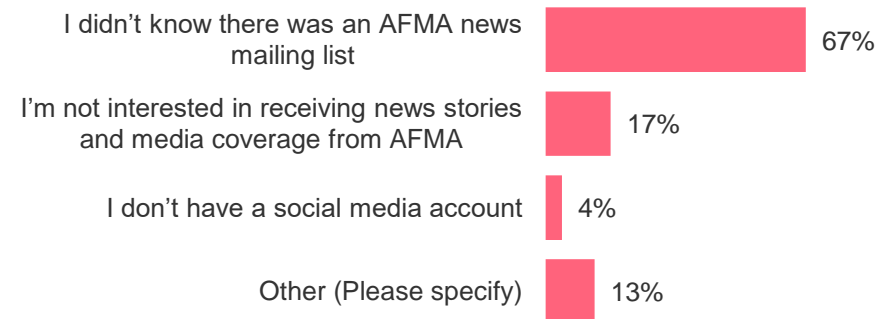
- In line with previous waves, the main source of news stories and media coverage from AFMA was by far the AFMA news emails (65%), followed by the website (35%) and social media (15%).
- More of the Commercial group received AFMA news/media coverage via AFMA news emails (74%) or text message (13%) compared to the Government Agency group, who received it more via AFMA’s website (45%) or AFMA news emails (45%). A notable proportion (34%) of the Government Agency group did not receive news from AFMA.



Main source of media from AFMA

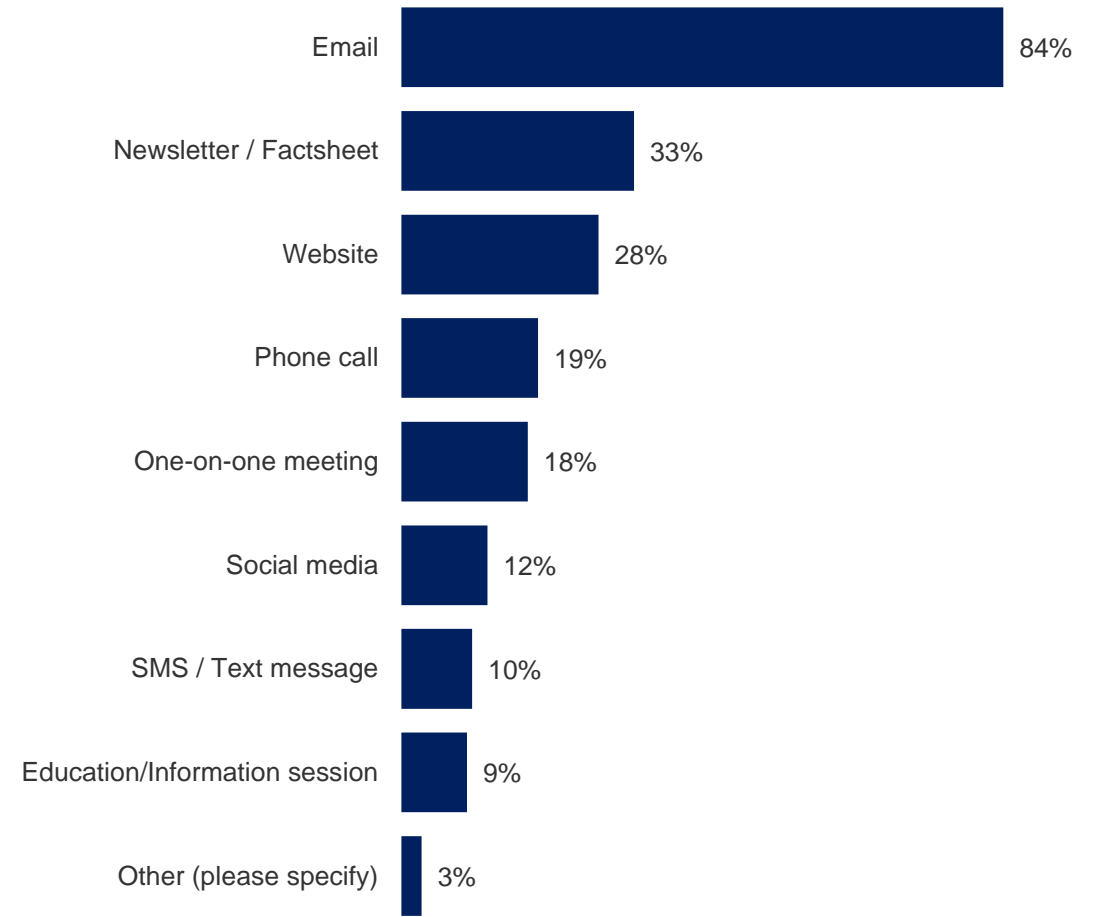


Reason for not receiving news from AFMA



Preferred channel to receive news and information from AFMA

- Digital channels were the preferred channels to receive news and information from AFMA with 84% preferring email, 33% preferring a newsletter and 28% preferring the AFMA website.
- Compared with the Government Agency group, the Commercial group preferred to receive news and information via SMS / text messages (16%). The Government Agency group, in contrast, prefer to receive news and information via website (42%) or social media (29%).

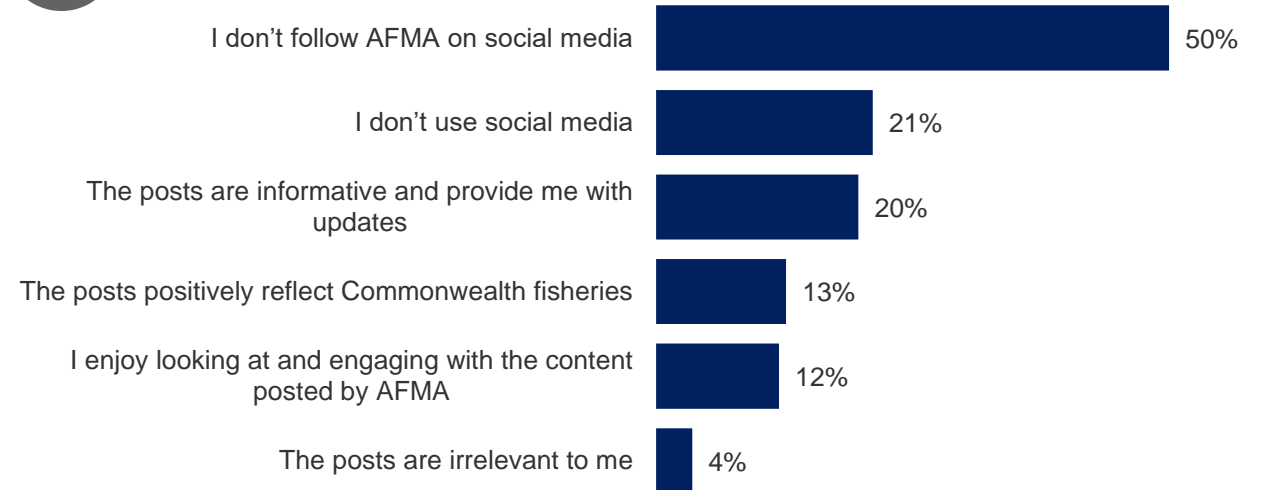


Effectiveness of website and social media content

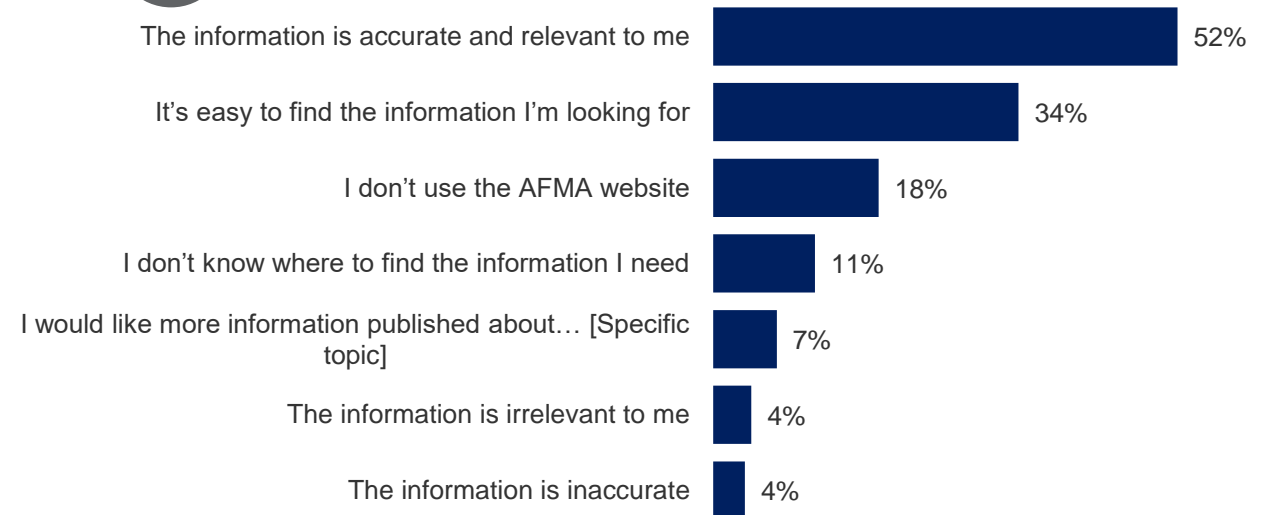
- In line with 2019, social media uptake is relatively low compared to the website, which is used more frequently.
- 21% of stakeholders don't use social media and a further 50% don't follow AFMA on social media.
- 52% of stakeholders reported that website content was accurate and relevant. 34% said it's easy to find information.
- Fewer of the Commercial group find information on the AFMA website helpful (40%) compared to the Government Agency group, where the majority (68%) did. No differences exist between Commercial stakeholders and Government Agency stakeholders regarding AFMA's content on social media.



Perceptions of AFMA's social media content

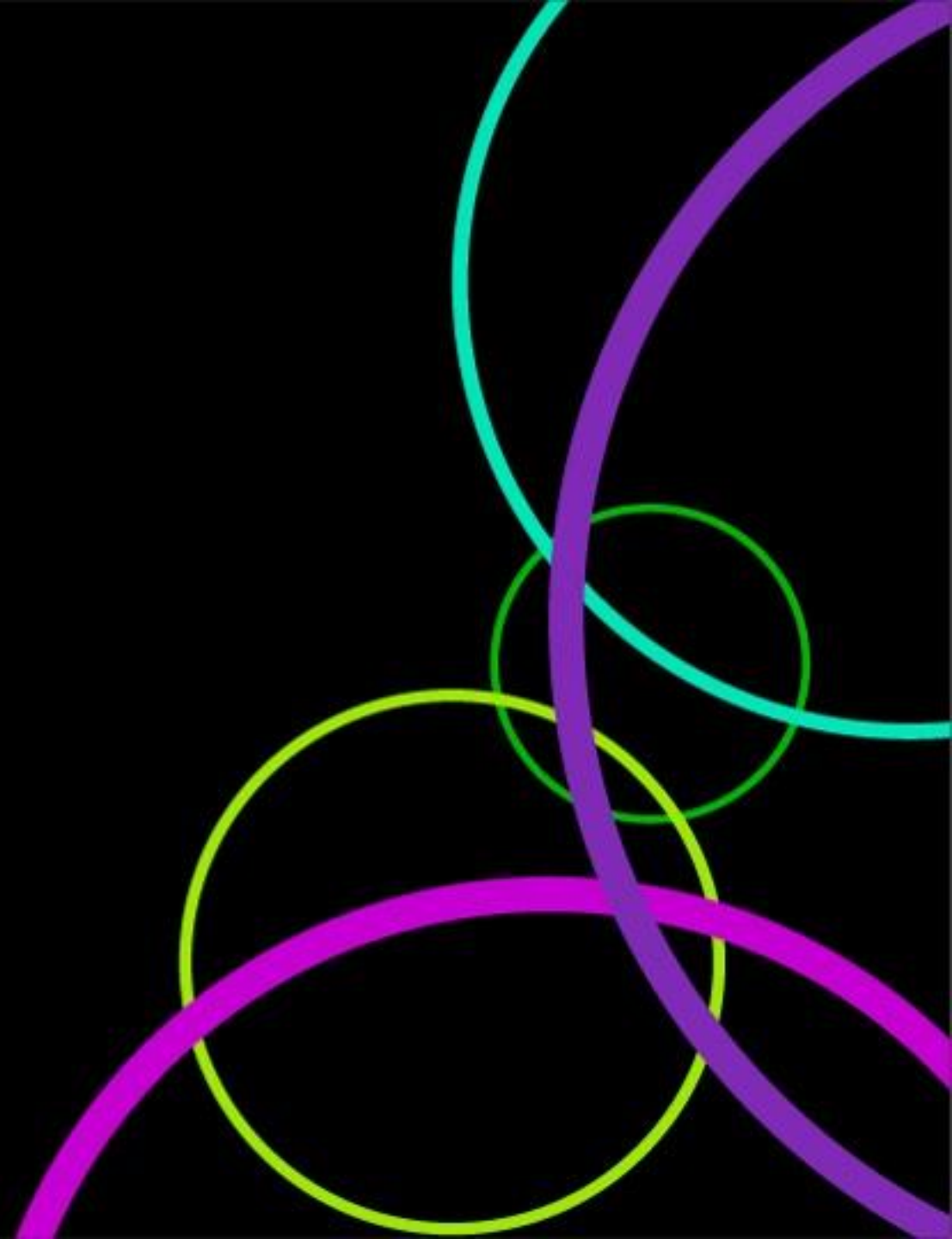


Perceptions of AFMA's website content



Appendix A.

Technical notes



Research methodology and fieldwork

An online approach was used to administer the survey with AFMA stakeholders. The online approach was used as it is a flexible way for stakeholders to complete the survey at a time most convenient to them. Prior to the commencement of fieldwork, AFMA sent an introductory email to its stakeholders, which clearly outlined the purpose of the research and encouraged participation.

Email invitations were then sent to stakeholders via our fieldwork partner, Action Market Research.

Minor revisions were made to the 2021 survey, which included the addition of two questions focussed on preferred methods of communication. Details of these revisions can be found in Appendix B: Questionnaire changes.

AFMA provided Kantar Public with a list of its stakeholders and an initial email was sent to all on the list. The email again outlined the purpose of the research and contained a link to complete the survey. During the fieldwork period two reminder emails were sent.

In 2021 a total of n=141 stakeholders completed the survey, which was a slight decrease increase from the n=228 stakeholders who completed the survey in 2019.



Analysis and reporting

Findings from the online survey have been presented at an overall level showing results from the 2021, 2019 and 2017 surveys. Sub-group analysis and has been undertaken with the 2021 results which examined the difference in the data by the Commercial stakeholder group vs. Government Agency stakeholder group . Occasionally differences in results by metro vs non-metro have also been commented on. The final 2021 sample sizes achieved for each of these sub-groups can be seen in the table to the right.

Tests for statistical significance have been conducted on these particular subgroups of interest in this report. Tests have been undertaken at a 95% confidence level (please note significance testing could not be undertaken on sample sizes smaller than n=30). If there is a statistically significant difference between the result for a particular group and the result for the wider population, we can be confident that this difference has not occurred by chance, rather that it reflects a genuine difference among that group compared to the wider population.

		2021 n=
<i>QF1. Stakeholder type</i>	As a commercial fishing operator	59
	Investor / owns quota	2
	International	1
	Total Group 1 (Commercial)	62
	On behalf of a Federal government agency	27
	On behalf of a State/territory government agency	11
	Total Group 2 (Government agency)	38
<i>QF3. Metro/Regional</i>	Metro	80
	Regional	81

Appendix B: Questionnaire changes

Questionnaire changes 2019 to 2021

#	Changes to the 2019 questionnaire (from the 2017 version)
QA4	<ul style="list-style-type: none">• New answer code added: “Considering the social impacts of fisheries management decisions”• Answer code reworded: “Working to improve the economic returns of fishing activity to the Australian community” changed to “Working to improve the economic returns of commercial fishing activity to the Australian community”
QB2	<ul style="list-style-type: none">• New answer code added: “Understands the impacts of its decisions on Indigenous fishing stakeholders”• Answer codes split: “Understands the impacts of its decisions on stakeholders” separated to be two separate answer codes of “Understands the impacts of decisions on commercial fishing stakeholders” and “Understands the impacts of its decisions on recreational fishing stakeholders”
QD4	<ul style="list-style-type: none">• New answer code added: ‘I would actively report illegal fishing activity if I became aware of it’• Answer code reworded: “AFMA is sufficiently active in deterring illegal fishing from foreign vessels in the Australian Fishing Zone” and “AFMA will catch those breaking the rules in Commonwealth waters” wording were changed slightly in 2019
QE2	<ul style="list-style-type: none">• Answer code reworded: “AFMA clearly communicates how regulations affect the industry” changed to “AFMA clearly communicates how regulations affect you”
QE5	<ul style="list-style-type: none">• New question added: “Would it benefit you to have AFMA expand its stakeholder engagement through the following?”

#	Changes to the 2021 questionnaire (from the 2019 version)
QC4	<ul style="list-style-type: none">• New answer code added: ‘The process for raising a query or issue was easy’
QC5	<ul style="list-style-type: none">• New question added: “Moving forward, which platform(s) would you most prefer to use for raising an issue or query with AFMA”
QE7a	<ul style="list-style-type: none">• New question added: “Moving forward, how would you most prefer to receive news and information from AFMA?”
QF6	<ul style="list-style-type: none">• New demographic question added: “Which device did you use to complete this survey?”

KANTAR PUBLIC

