



Australian Fisheries Management Authority 2019 Stakeholder Perceptions Survey

Prepared by: Corey Fisher and Joyce van Dijk
Issue date: 17th October 2019





Setting the scene.



Understanding of the research context

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

Colmar Brunton was approached by AFMA to conduct this stakeholder research in 2017, and again in 2019.

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





Methodology.



Methodology

- The stakeholder survey was conducted using both an online and a paper version of the 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 2017 survey to include questions about stakeholder engagement and communications, and to ensure appropriate statements were measured.
- Email invitations were sent by Colmar Brunton to 1,933 contacts from a stakeholder list supplied by AFMA. We received 228 responses, representing a response rate of 12%. About 65 mail invitations were posted to more remote locations; 1 response was received.
- Fieldwork was conducted between 24th August and 20th September 2019. The online survey was approximately 10 minutes in length.

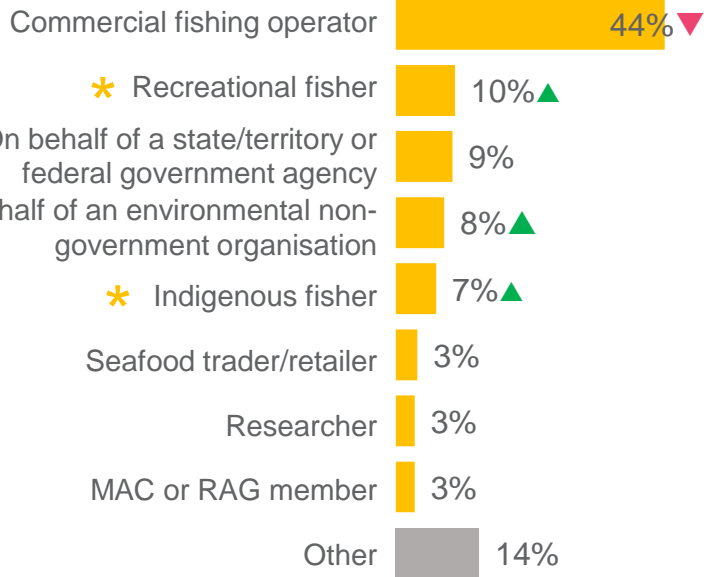




Participant profile.

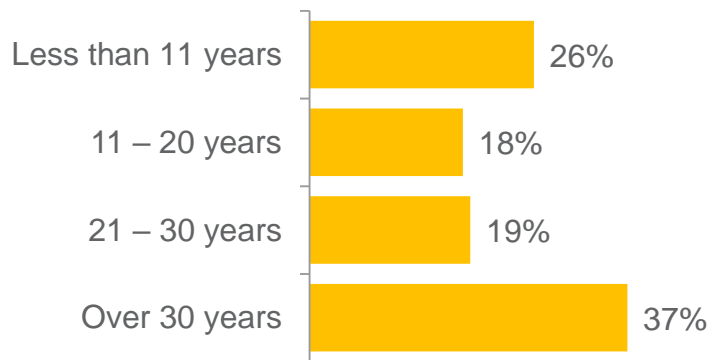


Stakeholder type

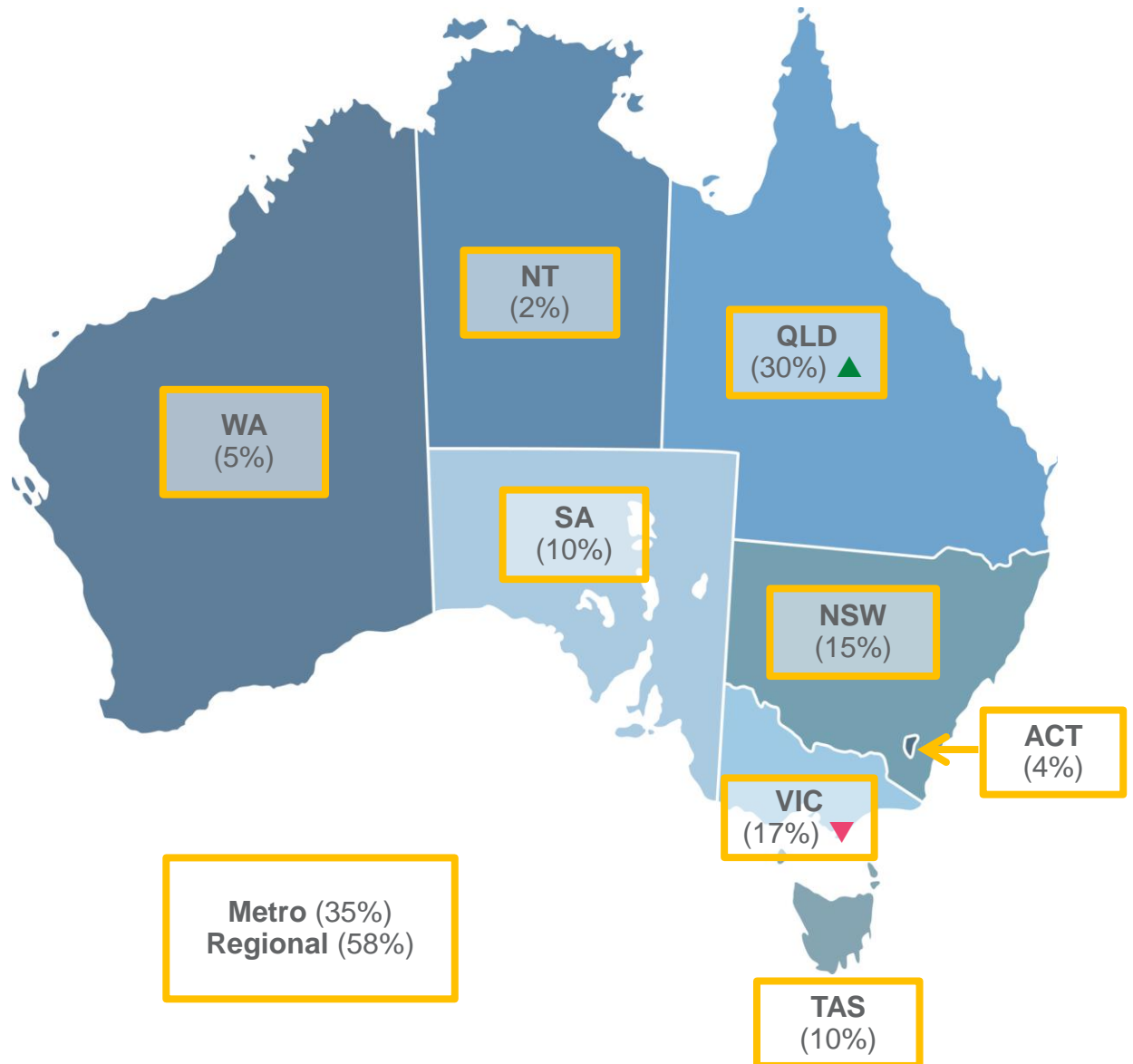


* Not included in 2017

Time in industry



Location



Base: All participants (n=229)

▲ ▼ indicates a significant difference to the previous wave at 95% confidence



Key research
findings.



Key Learnings

2019 stakeholder satisfaction with AFMA's performance is largely consistent with 2017 results: half were satisfied overall and about a third was dissatisfied. Commercial fishing operator satisfaction was significantly lower than other stakeholders.

Stakeholders were most satisfied with AFMA 'communication and consultation'; this score increased compared to 2017. Satisfaction with AFMA 'decision making' was lowest, but in line with 2017 results.

- **Decision Making:** A third was satisfied with AFMA's decisions making. Dissatisfaction was mainly driven by relatively low agreement with consistency, clear explanation of rationale for decision making and openness and transparency about decisions.
- **Compliance Program:** 2/5 were satisfied with AFMA's compliance and enforcement activities, in line with 2017 results. However, confidence in AFMA's ability to detect instances of non-compliance with quotas, gear or Statutory Fishing Rights has dropped in 2019.
- **Service Delivery:** Just over half was satisfied with AFMA service delivery. Less stakeholders had direct contact with AFMA in the past twelve months than in 2017. Ratings for interactions with AFMA staff remained relatively high, although there was a decline in satisfaction with helpfulness of staff, timely processing of issues and issue resolution compared to 2017.
- **Communication and Consultation:** About 2/3 were satisfied with AFMA's communication and consultation activities.
 - The majority agreed that they would benefit from participating in industry-related conferences and workshops and from port visits and community meetings. Half agreed that they would benefit from community event participation.
 - Main AFMA media coverage source was by far the AFMA news emails, followed by the website and social media. The AFMA website content is considered accurate, relevant and easy to use.



Detailed findings.

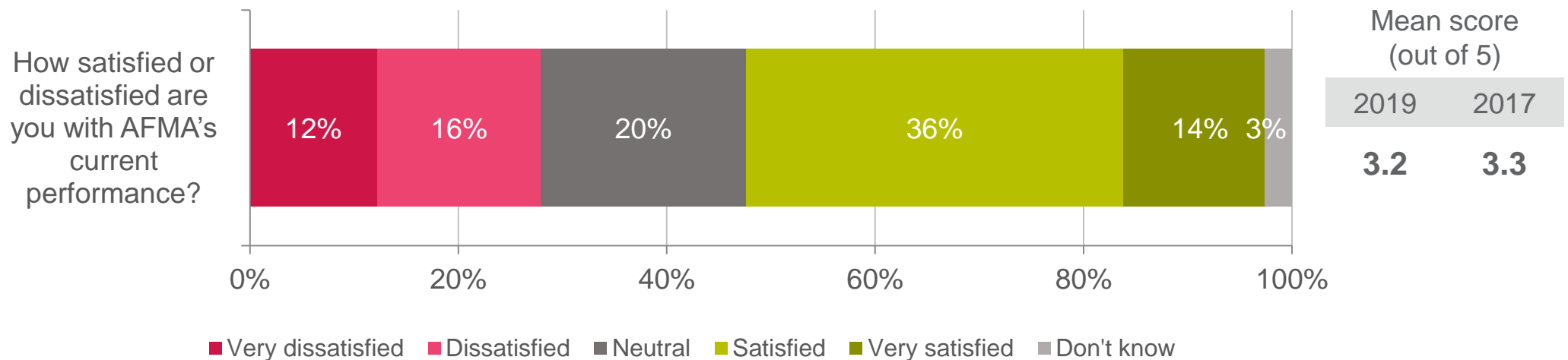


Overall
stakeholder
satisfaction.



Overall stakeholder satisfaction with AFMA's performance consistent with 2017

- Stakeholders' level of satisfaction with AFMA's performance has remained consistent with 2017, with a mean of 3.2 (out of 5) and 50% of stakeholders being satisfied (or very satisfied).
- 28% of stakeholders were dissatisfied (or very dissatisfied).
- Commercial fishing operator satisfaction was significantly lower (2.8) than other stakeholders (3.6).



QA1. How satisfied or dissatisfied are you with AFMA's current performance? (SR)

Base: All participants (n=229)

▲ ▼ indicates a significant difference to the previous wave at 95% confidence



Drivers of satisfaction with AFMA's performance

Reasons for high satisfaction

- AFMA does quality work and has expert knowledge.
- AFMA implements appropriate fish management strategies.
- AFMA communicates well: accessible and skilled staff, great customer service.

"Competent organisation, excellent staff, fisheries well managed"

"The staff I have dealings with are professional and knowledgeable about the issues in their portfolios."

"I have always considered that, by world standards, AFMA does an above average fisheries monitoring and management job. They continue to do so, despite increasing funding constraints."

Reasons for neutral satisfaction

- Minimal interactions with AFMA and unawareness of their performance.
- AFMA perceived to be constrained in ensuring consistent compliance by stakeholders.
- AFMA perceived to have red tape and influence from politics of the day.

"Have not had many dealings with them"

"Unfortunately, I rarely have time to open and read the emails. I think a paper newsletter might be better for me."

"I am not dissatisfied but think AFMA is too easily influenced by politics, the conservation movement and not by science and optimal use of our resources"

Reasons for low satisfaction

- AFMA doesn't consult stakeholders sufficiently.
- AFMA doesn't provide timely and consistent information.
- Rules (especially for trawl fishery) and quota are too strict.
- Fees are too high.

"Too many regulations are strangling the industry. People with no ground based experience managing industries they have no idea about"

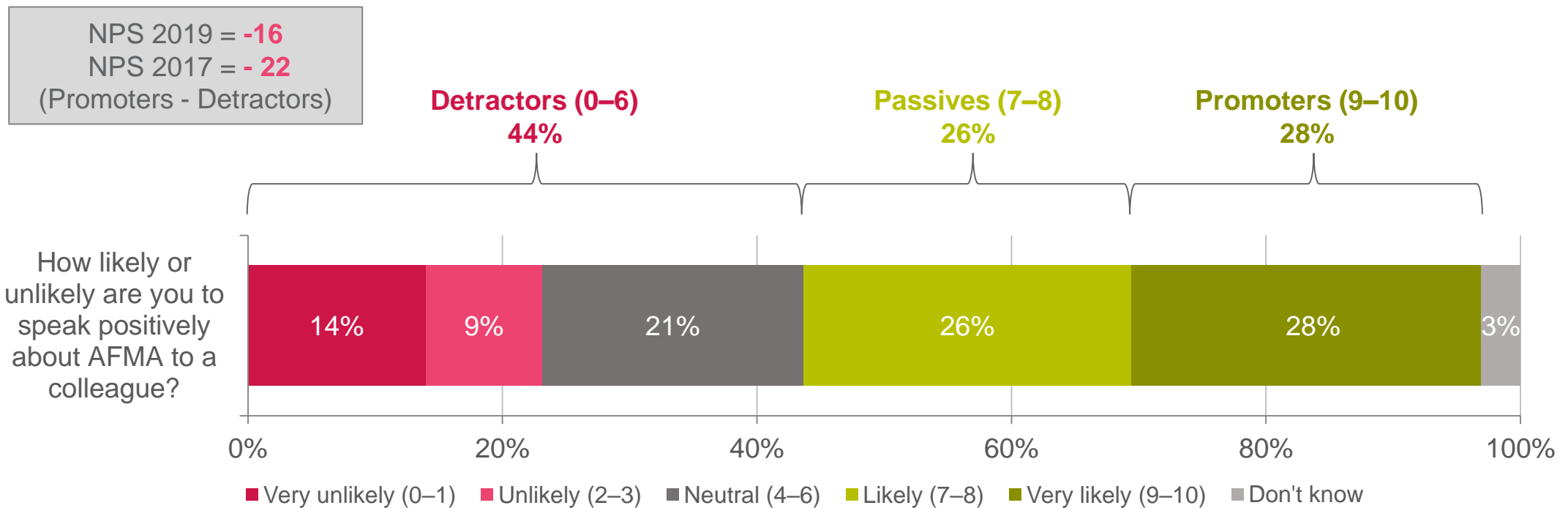
"Because every time we contact AFMA, they say yeah we understand your point but can't do nothing to help you"

"Changing the rules putting endless stress on stakeholders. Fees keep going up (...)."



Net Promoter Score (NPS) remains similar to 2017

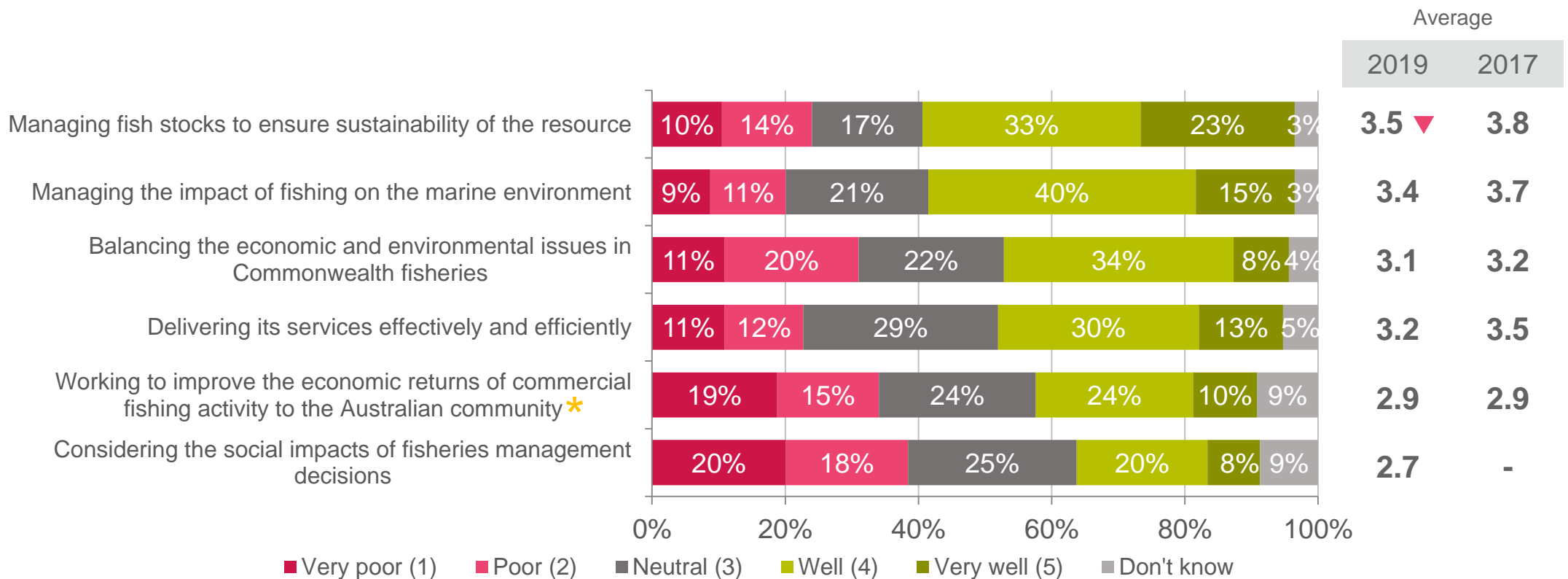
- The NPS is an established measure in private sector and is increasingly used by Government. The measure illustrates the degree to which stakeholders are promoting AFMA, passive, or are detractors. Overall, there has been a small improvement in the NPS from 2017 to 2019.
- Commercial fishing operators have a lower NPS than other stakeholders.





Views of AFMA's performance in its key roles

- Overall similar results to 2017, however the rating for managing fish stocks to ensure sustainability of the resource has decreased by 0.3 points to 3.5 in 2019.
- Commercial fishing operators provided significantly lower ratings than other stakeholders on all items.



QA4. How well or how poorly do you think AFMA is currently performing the following core roles? (SR)

Base: All participants (n=229)

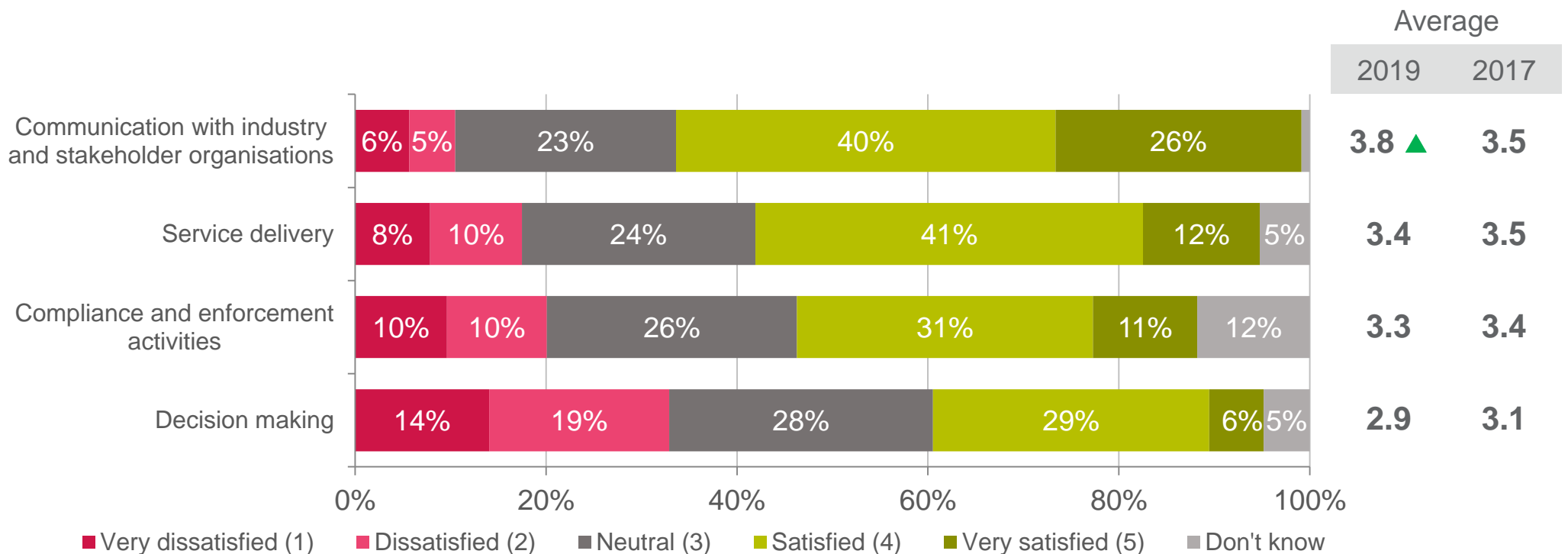
* Note: This was asked as "working to improve the economic returns of fishing activity to the Australian community" in 2017.

▲ ▼ indicates a significant difference to the previous wave at 95% confidence.



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

- Highest overall results for communication with industry and stakeholder organisations, with an increase of 0.3 compared to 2017 (3.5 vs. 3.8 in 2019).
- Commercial fishing operators are significantly less satisfied with AFMA’s decision making than other stakeholders.
- Relatively higher proportion of ‘Don’t know’ for compliance and enforcement activities (12%).



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=229)

▲ ▼ indicates a significant difference to the previous wave at 95% confidence



Decision
making.

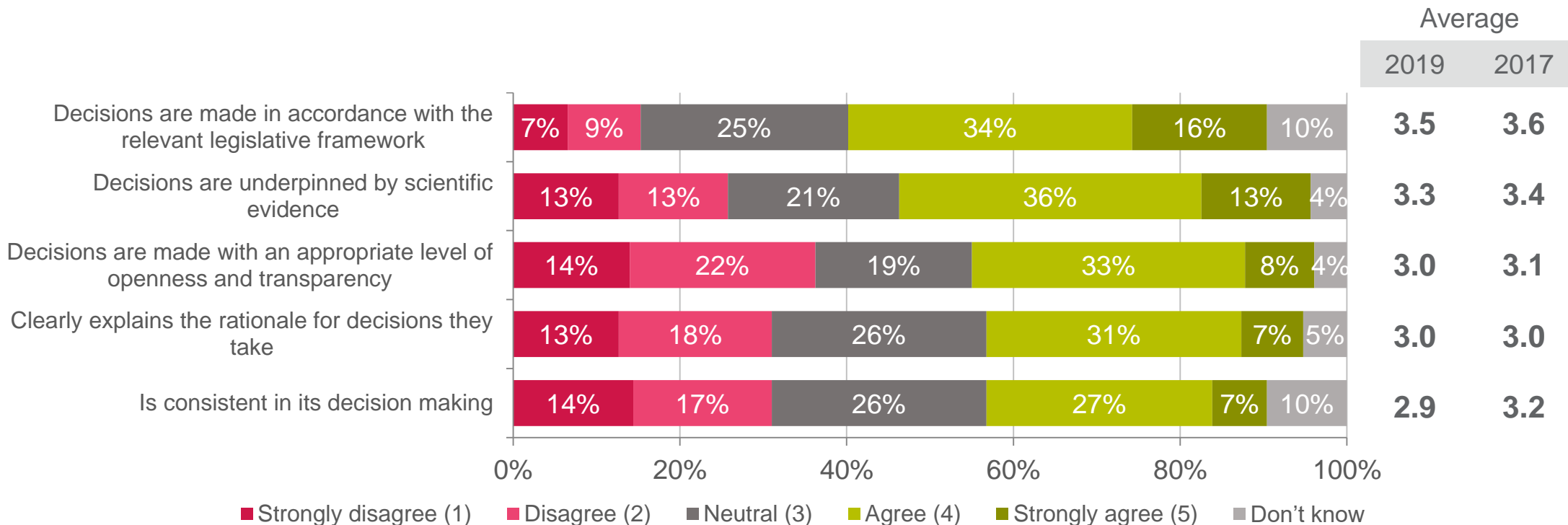
35%

were satisfied
with AFMA's
decision making



AFMA's decision making rated similar to 2017

- Overall, satisfaction with AFMA's decision making was rated the lowest compared to other elements measured.
- Lower satisfaction was mainly driven by relatively low agreement with consistency, clear explanation of rationale for decision making and openness and transparency about decisions.
- Commercial fishing operators had significantly lower agreement with all of these items.



QB2. Please indicate your level of agreement or disagreement with the following statements. (SR)

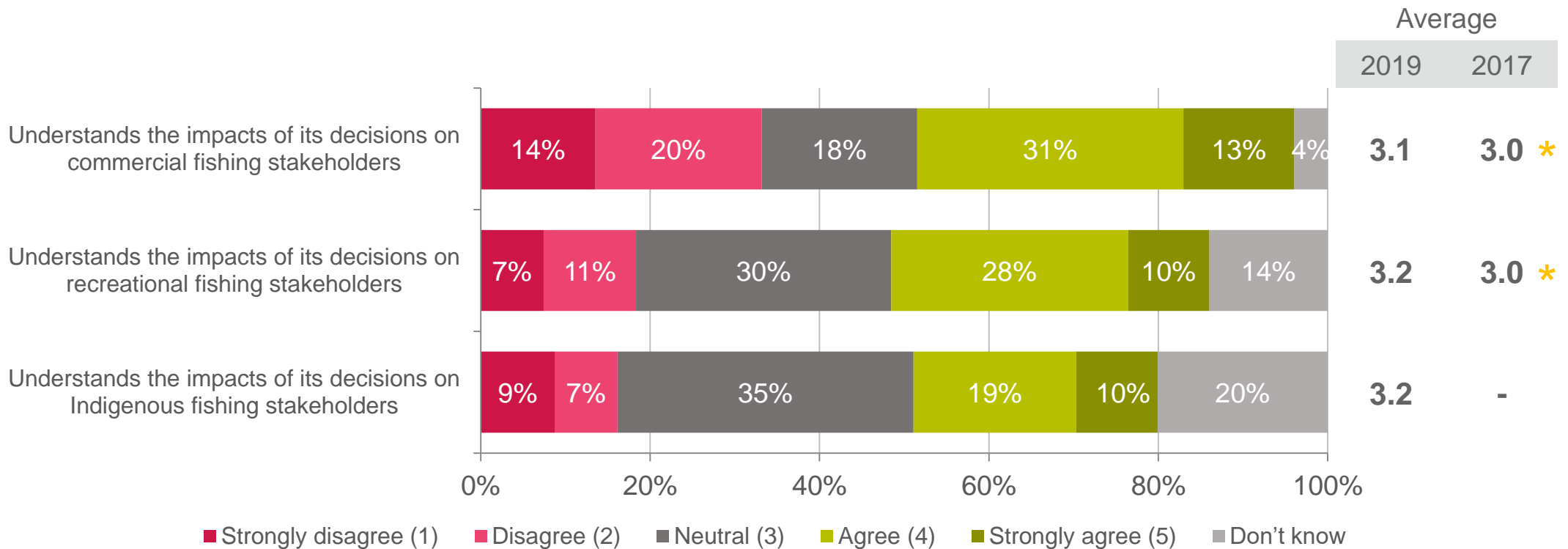
Base: All participants (n=229)

▲ ▼ indicates a significant difference to the previous wave at 95% confidence



Aspects of AFMA's decision making (cont.)

- Agreement with items was consistent with 2017, noting that there was a substantial change to the question that was asked. (In 2017, these questions were combined as “understands the impacts of its decisions on its stakeholders”)
- Commercial fishing operators had lower agreement that AFMA understands the impacts of its decisions on commercial fishing operators.



QB2. Please indicate your level of agreement or disagreement with the following statements. (SR)

Base: All participants (n=229) | ▲ ▼ indicates a significant difference to the previous wave at 95% confidence

* Note: These questions were combined in 2017 as “understands the impacts of its decisions on its stakeholders”, mean score = 3.0.



Service
delivery.

53%

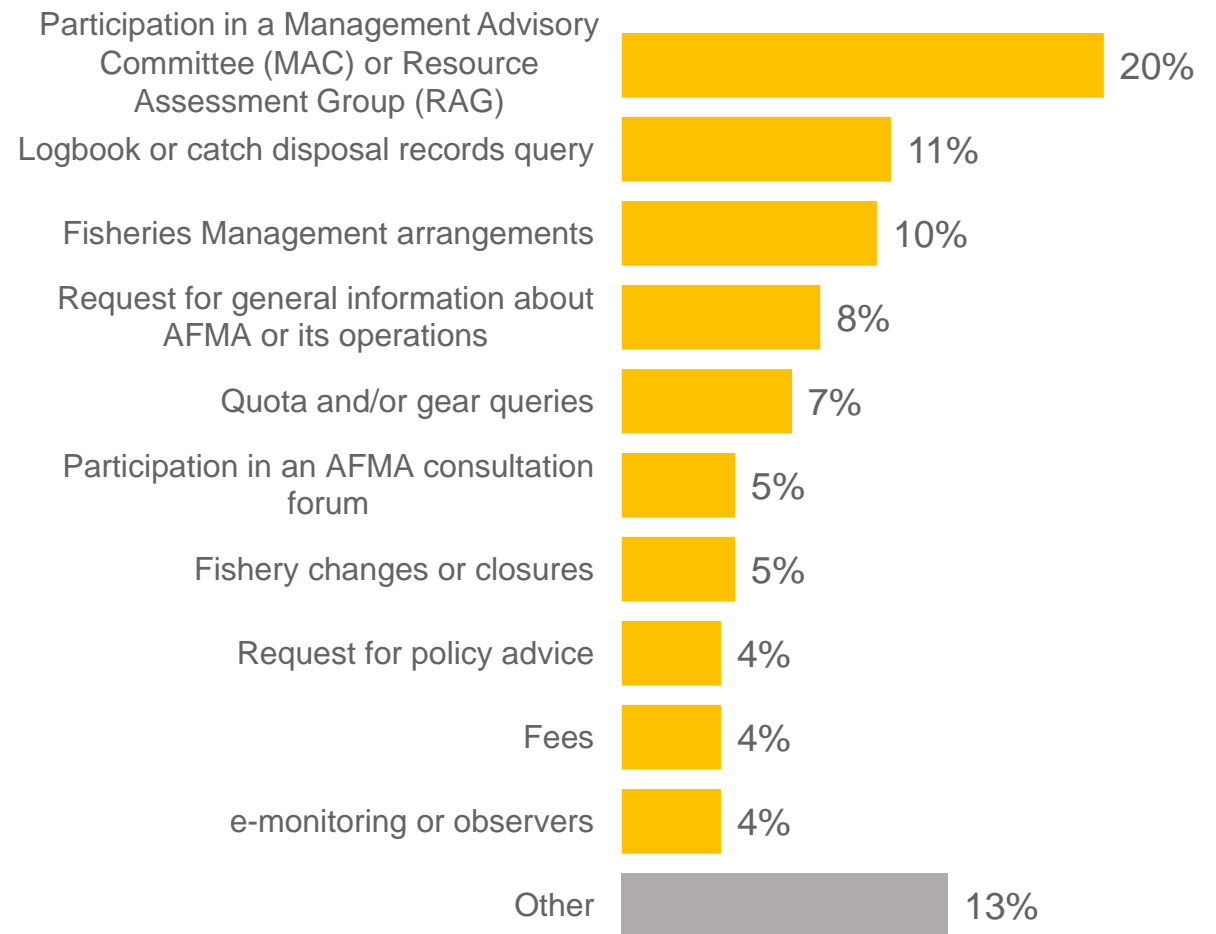
were satisfied
with AFMA's
service delivery



Reasons for direct contact with AFMA staff

- In 2019, three-quarters (76%) of participants had direct contact with AFMA staff in the past twelve months, a significant decline from 2017 (92%).
- Overall, the most common topic of contact overall was participation in an Management Advisory Committees or Resource Assessment Groups (20%).
- Other stakeholders (28%) more likely to have participated in MAC/RAG than commercial fishing operators (10%).
- Commercial fishing operators most likely to contact AFMA about log books/catch disposal records (19%) and quotas/gear (12%).

Topic of most recent direct contact with AFMA staff



QC2. How many times have you had direct contact with AFMA staff over the past 12 months? (ON) Base: All participants (n=229)
 QC3. What was your most recent direct contact with AFMA staff in relation to? (SR) Base: Those who had contact with AFMA staff in the past 12 months (n=173)

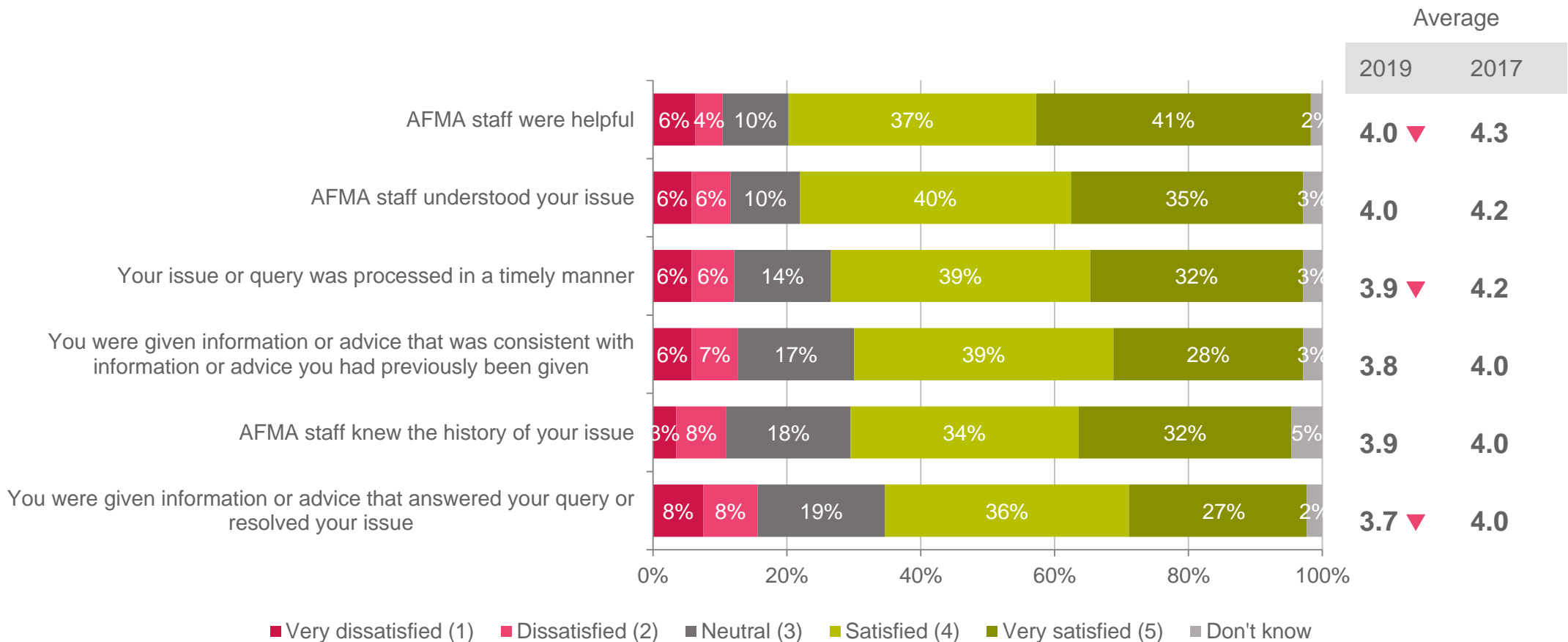
▲ ▼ indicates a significant difference to the previous wave at 95% confidence

Note: themes endorsed by <4% of participants not charted.



Experiences of interacting with AFMA staff

- Ratings for interactions with AFMA staff remained relatively high in 2019, although there was a decline in satisfaction with helpfulness of staff, timely processing of issues and issue resolution compared to 2017.
- Commercial operators and other stakeholders held similar positive views of their interactions with AFMA staff.



QC4. During your most recent interaction with AFMA staff, how satisfied or dissatisfied were you that... (SR)

Base: Those who had contact with AFMA staff in the past 12 months (n=173)

▲ ▼ indicates a significant difference to the previous wave at 95% confidence

Note: themes endorsed by <4% of participants not charted.



Compliance program.

42%

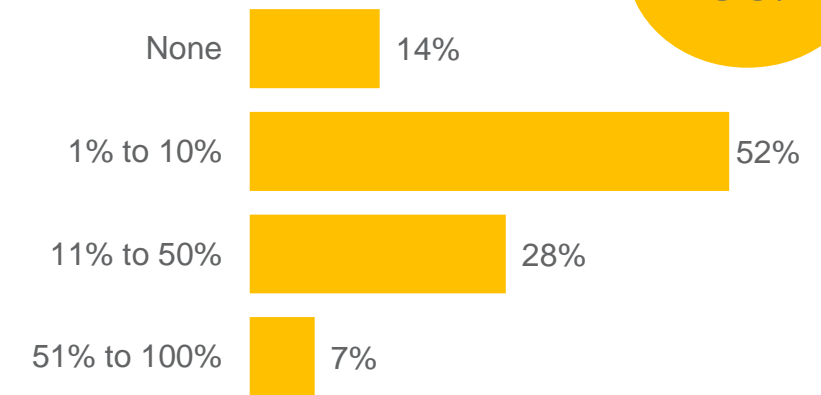
were satisfied with AFMA's compliance and enforcement activities



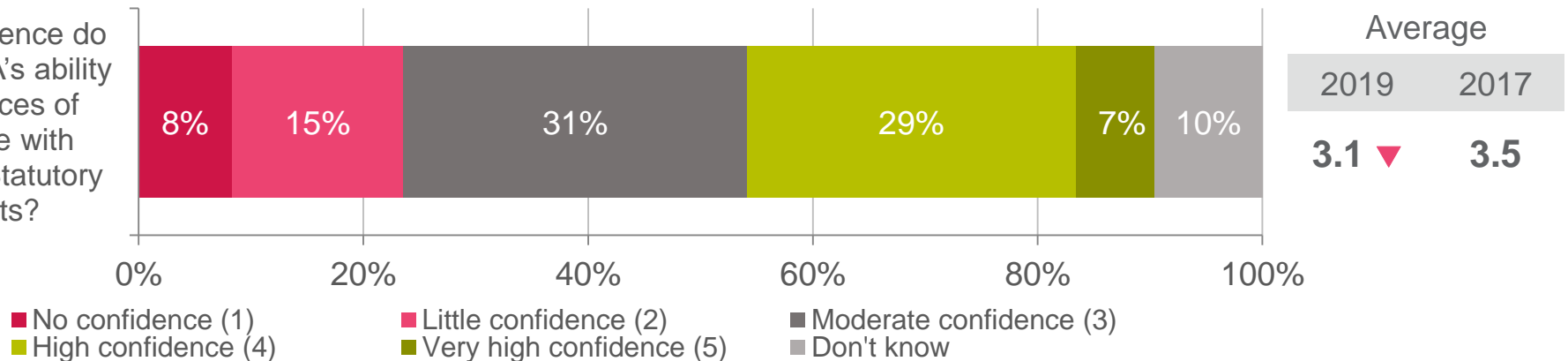
Confidence in AFMA's compliance and enforcement activities

- Confidence in AFMA's ability to detect instances of non-compliance has dropped from 3.5 in 2017 to 3.1 in 2019.
- There was no significant difference between commercial fishing operators and other stakeholders on this measure.
- On average, stakeholders estimated that 15.9% of fish caught in Commonwealth waters by licensed operators were taken illegally. Commercial fishing operators estimated 12.4% versus 18.5% by other stakeholders.

Proportion of fish believed to be caught illegally by licenced operators



How much confidence do you have in AFMA's ability to detect instances of non-compliance with quotas, gear or Statutory Fishing Rights?



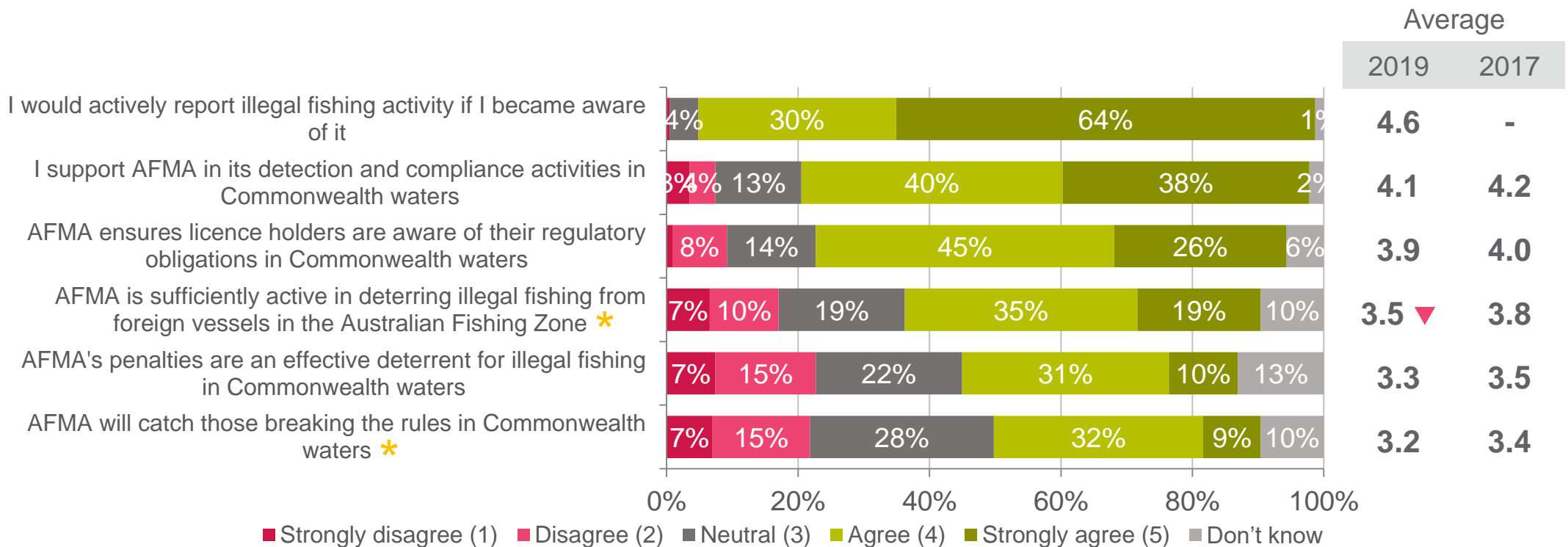
QD2. How much confidence do you have in AFMA's ability to detect instances of non-compliance with quotas, gear or Statutory Fishing Rights? (SR)
 QD3. What percentage of all fish caught in Commonwealth waters by licensed operators do you believe is taken illegally? (ON)

Base: All participants (n=229)
 ▲ ▼ indicates a significant difference to the previous wave at 95% confidence



Perceptions of AFMA's compliance and enforcement activities

- Similar to 2017, the results show that stakeholders value and support AFMA's compliance and enforcement activities.
- There were similar levels of agreement between commercial fishing operators and other stakeholders on most items. The exception being that commercial fishing operators had lower support for AFMA in its detection and compliance activities in Commonwealth waters (mean 3.9 v 4.2).



QD4. Please indicate your level of agreement or disagreement with the following statements. (SR)

Base: All participants (n=229) | ▲ ▼ indicates a significant difference to the previous wave at 95% confidence

* Note: the wording of these questions has changed slightly from 2017.



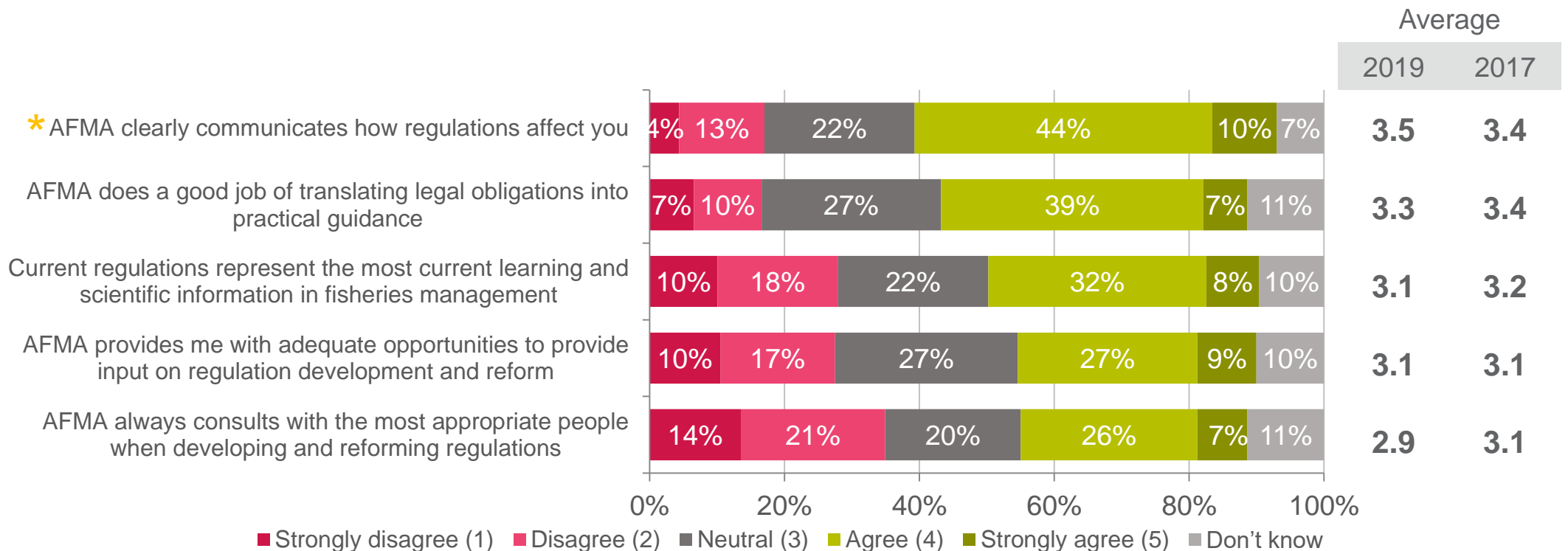
Communication and consultation.

66%
were satisfied
with AFMA's
communication
and consultation



Perceptions of AFMA's communication abilities

- Overall 2019 results were consistent with 2017.
- Approximately half of stakeholders agreed that AFMA clearly communicates how regulations affect them and that AFMA does a good job of translating legal obligations into practice guidance.
- There was lower agreement around consultation and engagement.
- Commercial fishing operators has lower agreement on all items compared to other stakeholders.



QE2. Please indicate your level of agreement or disagreement with the following statements. (SR)

Base: All participants (n=229)

▲ ▼ indicates a significant difference to the previous wave at 95% confidence

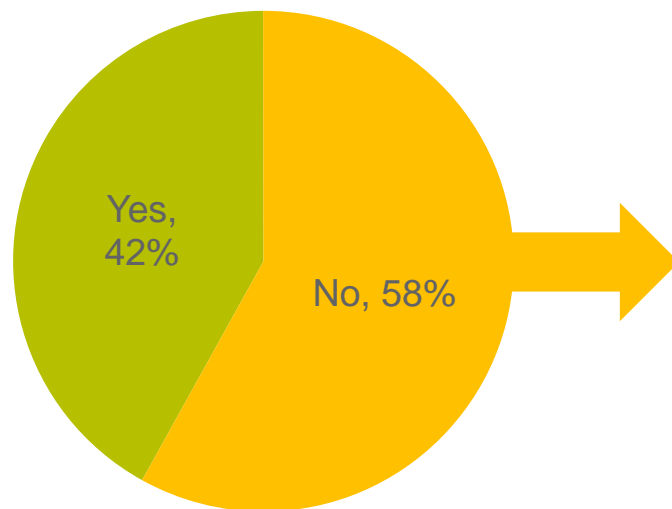
* Note: This was asked as "AFMA clearly communicates how regulations affect the industry" in 2017.



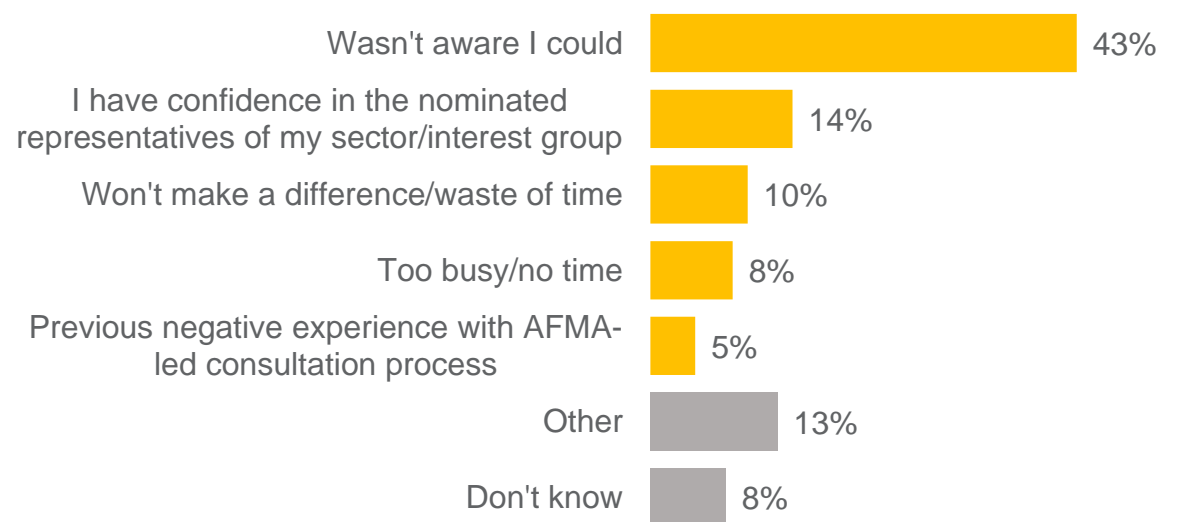
Participation in AFMA-led consultation

- 42% participated in AFMA-led consultation over the past three years.
- Commercial fishing operators (46%) were more likely to have participated than other stakeholders (39%).
- The main reason stakeholders hadn't participated in a consultation was that they weren't aware they could.

Participated in AFMA-led consultation (past three years)



Main reason for not participating in AFMA-led consultation



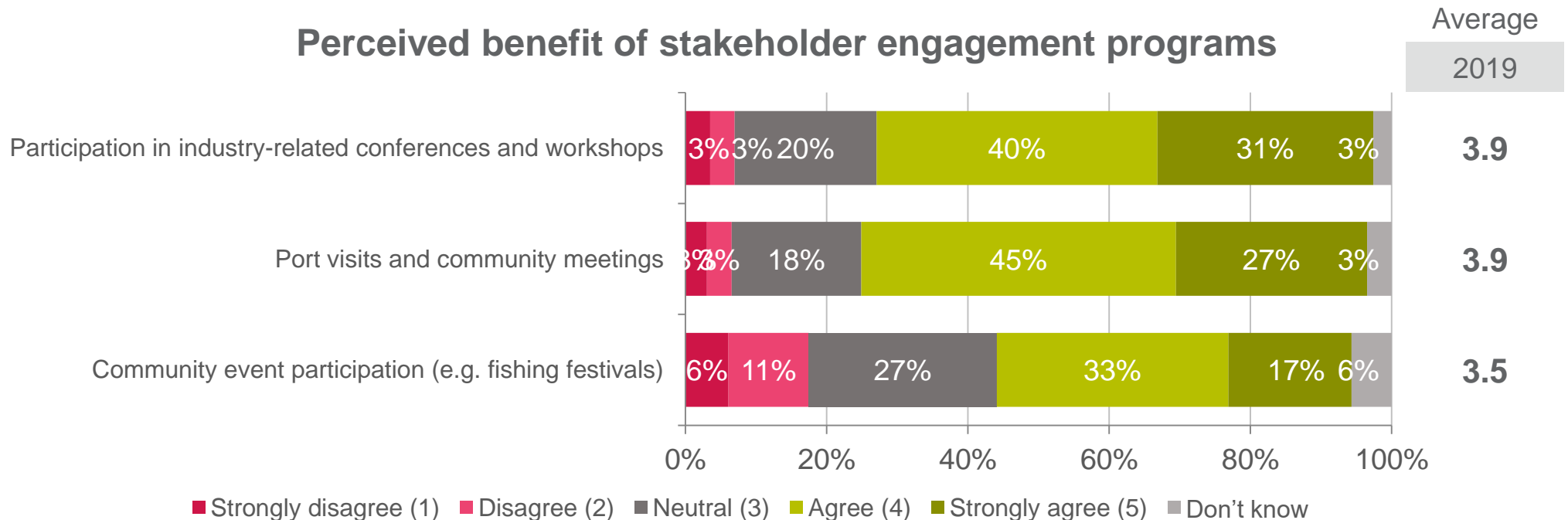
QE3. Have you participated in any AFMA-led consultation on regulation development or reform – including a face-to-face consultation session, or submitting written feedback – over the past three years? (SR) Base: All participants (n=229)
QE4. What is the main reason you have not participated in AFMA-led consultation over the past three years? (SR) Base: Those who have not participated in AFMA-led consultation (n=133)



Perceived benefit from stakeholder engagement programs

- 71% agreed that they would benefit from participating in industry-related conferences and workshops; 72% agreed that they would benefit from port visits and community meetings, and 50% agreed that they would benefit from community event participation.
- Commercial fishing operators had slightly lower agreement about the benefits of community event participation than other stakeholders (average 3.3 v 3.6), but were still supportive overall.

Perceived benefit of stakeholder engagement programs



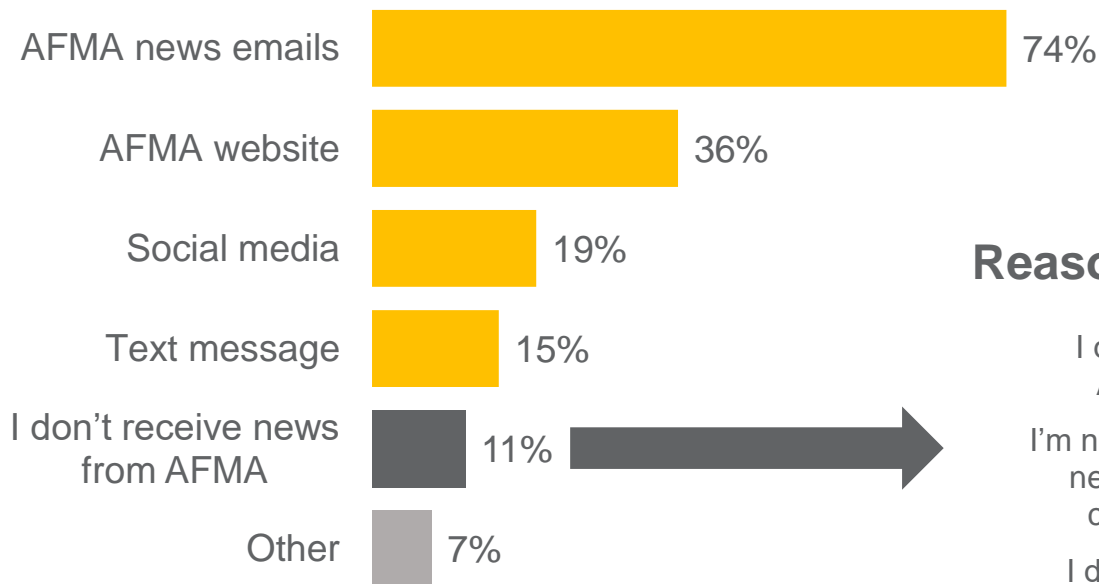


Sources of - and barriers to – AFMA news/media

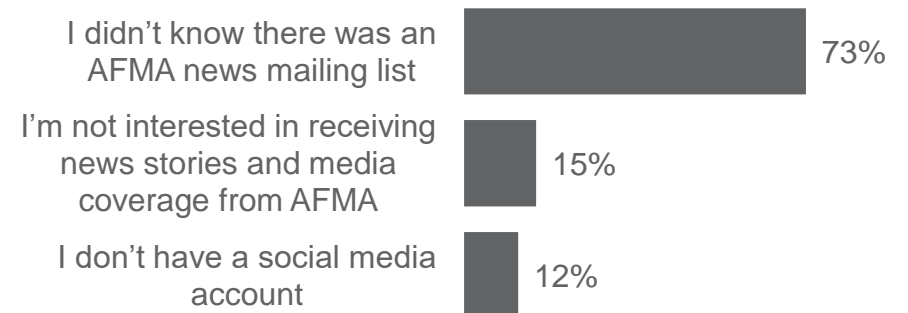
- Main source of news/media from AFMA was by far the AFMA news emails, followed by the website and social media.
- There were very few differences between commercial fishing operators and other stakeholders on these items.



Main source of media from AFMA



Reason for not receiving news from AFMA



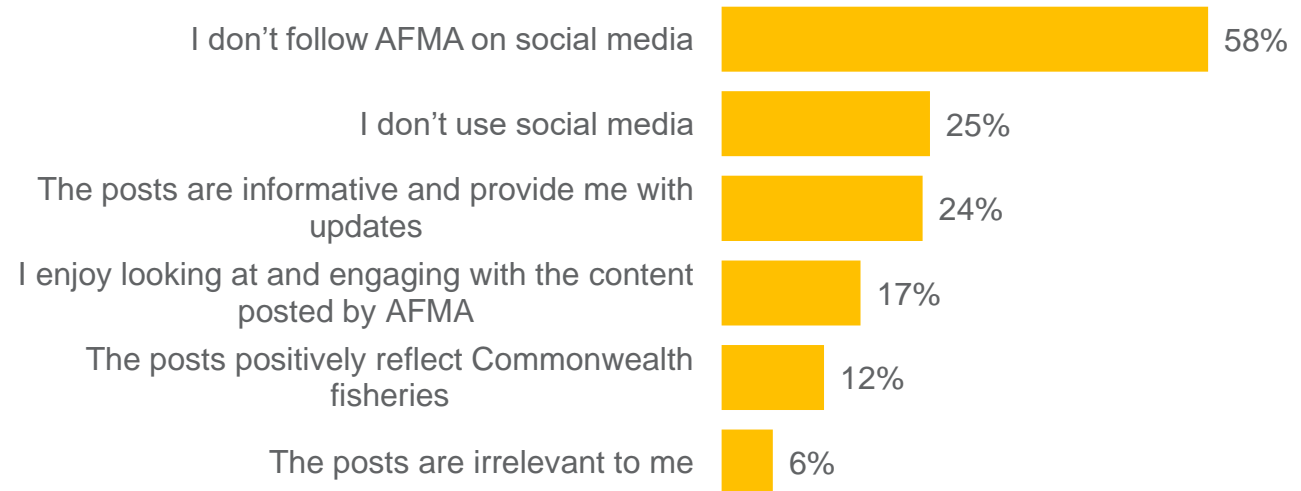


Effectiveness of website and social media content

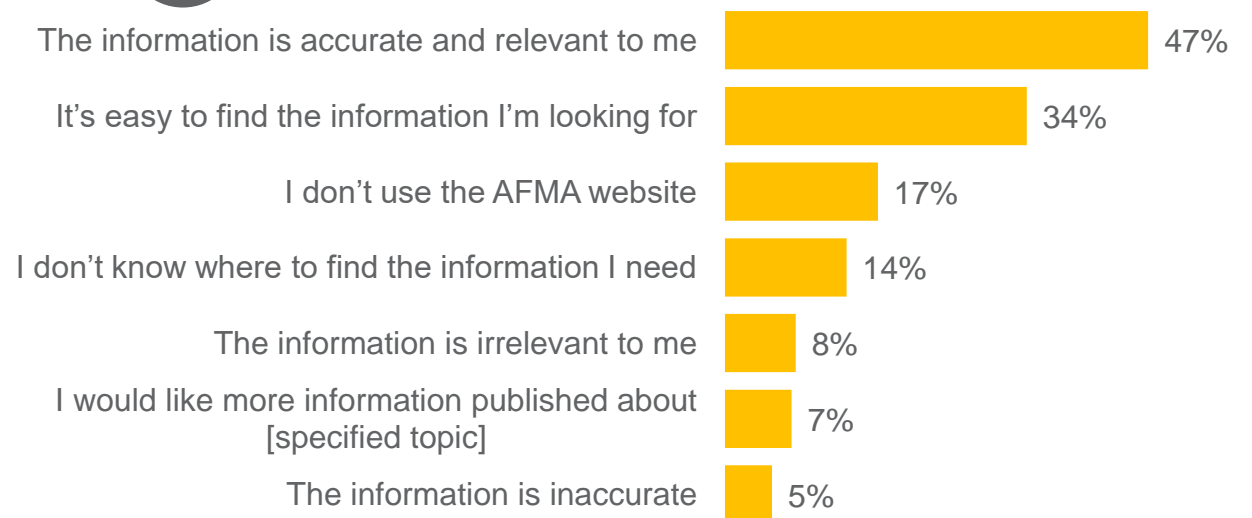
- Social media uptake is relatively low compared to the website, which is used more frequently.
- 25% of stakeholders don't use social media and further 58% don't follow AFMA on social media.
- 47% of stakeholders reported that website content was accurate and relevant. 34% said it's easy to find information.
- There were few differences between commercial fishing operators and other stakeholders on these items. However, commercial fishing operators were more likely to report that website (14%) and social media (11%) content was not relevant to them.



Perceptions of AFMA's social media content



Perceptions of AFMA's website content





Key Learnings (repeated)

2019 stakeholder satisfaction with AFMA's performance is largely consistent with 2017 results: half were satisfied overall and about a third was dissatisfied. Commercial fishing operator satisfaction was significantly lower than other stakeholders.

Stakeholders were most satisfied with AFMA 'communication and consultation'; this score increased compared to 2017. Satisfaction with AFMA 'decision making' was lowest, but in line with 2017 results.

- **Decision Making:** A third was satisfied with AFMA's decisions making. Dissatisfaction was mainly driven by relatively low agreement with consistency, clear explanation of rationale for decision making and openness and transparency about decisions.
- **Compliance Program:** 2/5 were satisfied with AFMA's compliance and enforcement activities, in line with 2017 results. However, confidence in AFMA's ability to detect instances of non-compliance with quotas, gear or Statutory Fishing Rights has dropped in 2019.
- **Service Delivery:** Just over half was satisfied with AFMA service delivery. Less stakeholders had direct contact with AFMA in the past twelve months than in 2017. Ratings for interactions with AFMA staff remained relatively high, although there was a decline in satisfaction with helpfulness of staff, timely processing of issues and issue resolution compared to 2017.
- **Communication and Consultation:** About 2/3 were satisfied with AFMA's communication and consultation activities.
 - The majority agreed that they would benefit from participating in industry-related conferences and workshops and from port visits and community meetings. Half agreed that they would benefit from community event participation.
 - Main AFMA media coverage source was by far the AFMA news emails, followed by the website and social media. The AFMA website content is considered accurate, relevant and easy to use.

Recommendations

Key areas for AFMA to focus on are communication about decision making and leveraging overall communication and stakeholder engagement. Particular attention should be paid to engaging with commercial fishers.

- **Decision Making:** Ensure communications about AFMA's decisions making are clear and straight forward and that any (perceived) inconsistencies or changes are clearly explained. Ensure openness and transparency about decisions by providing rationale and considerations.
- **Compliance Program:** Ensure clear communication about AFMA's performance and achievements to boost stakeholders' confidence in AFMA's ability to detect instances of non-compliance.
- **Service Delivery:** Ensure experiences and interactions with staff, often the only touch point for stakeholders, are positive. Help staff to increase timely processing of issues, potentially by providing better access to information.
- **Communication and Consultation:** Communication with and to stakeholders impacts overall satisfaction and is important to maintain and strengthen. There is appetite for stakeholder participation and consultation activities: ensure this is acted upon. These activities could also offer a valuable platform to build and strengthen stakeholder relations.



Thanks.

