



COMMUNITY PERCEPTIONS OF WESTERN ROCK LOBSTER INDUSTRY

Prepared by Research Solutions

November 2020

Executive summary

In September 2020 three focus groups and a community perceptions survey of 801 members of the Western Australian community was undertaken for Western Rock Lobster (WRL). The number of completed interviews was:

- **Perth metropolitan area – 500 respondents**
- **Coastal western rock lobster (WRL) communities – 106 respondents**
- **Elsewhere in country WA – 195 respondents**

The results are a very encouraging start to the development of the industry’s “social license to operate”. The industry is recognized as:

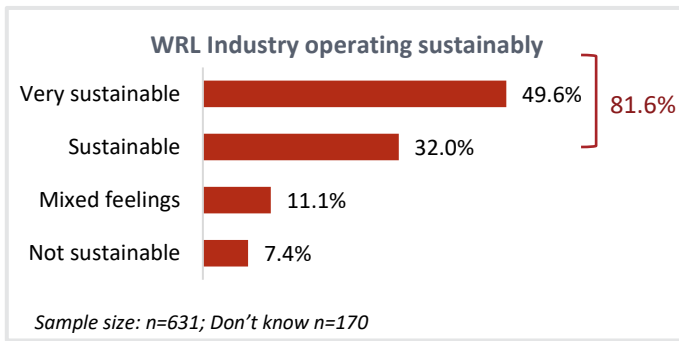
- An important export industry
- Making an important contribution to WA’s economy, and as an important source of employment
- Operating sustainably
- Having strong support (particularly in Perth).

Further 40% of the community say that they consume WRL at least occasionally and the many who consume it at least once a year consider WRL as an affordable luxury.

However, there are some areas where WRL needs to build its reputation in order to further secure its social license to operate:

1. **In WRL coastal fishing communities**, WRL is not seen to make more than a moderate contribution to the local community in terms of jobs and economic activity; and few (18.9%) feel that the industry “puts back” into the local community showing a perceived lack of reciprocity in these communities.
2. **Holding the position of custodianship of the industry is important** to driving support for WRL and social license. Hence positioning the industry as the custodian would be beneficial; however, this role is currently perceived by many to be held by DPIRD / Department of Fisheries not the WRL industry.
3. **The availability and accessibility of WRL** is considered good in Perth (77.6%), but less so in coastal communities (66.9% good) or in other country areas (55.3% good).
4. Ensuring that WRL is **available at a reasonable price in WA** is perceived to be delivered fairly well in Perth (70.7%) but few coastal communities feel that WRL does this well (37.8%) or communities elsewhere in country WA (34.8%). Recreational fishers are also less convinced about WRL being delivered at a reasonable price (50.4% feel the industry does well).
5. **Recreational fishers show a lower support of the WRL Industry generally** than the West Australian community.

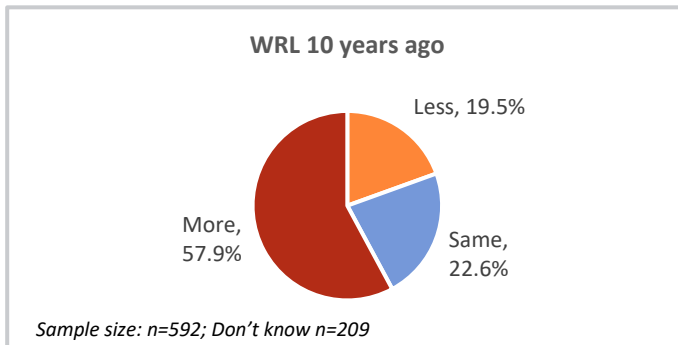
Community perceptions of sustainability



Analysis by region

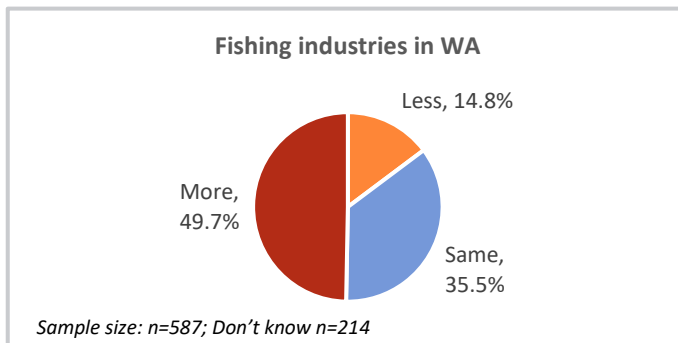
| | Perth Metro | Coastal Towns | Remaining Country |
|---------------------------|-------------|---------------|-------------------|
| Operating sustainably | 84.3% | 71.8% | 73.3% |
| Mixed feelings | 11.3% | 10.2% | 10.3% |
| Not operating sustainable | 4.4% | 18.0% | 16.4% |
| | 100% | 100% | 100% |

Operating sustainably compared to:



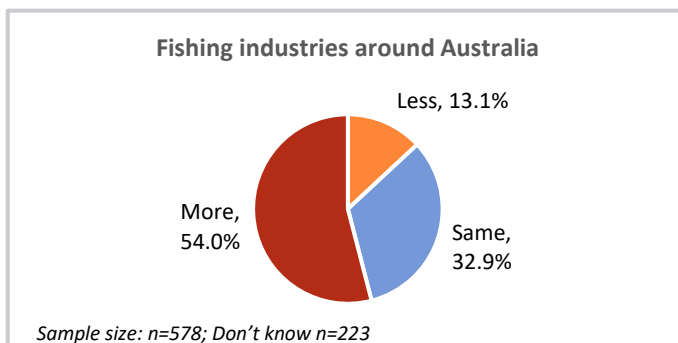
Analysis by region

| | Perth Metro | Coastal Towns | Remaining Country |
|-------------------------|-------------|---------------|-------------------|
| WRL 10 years ago | | | |
| More sustainable | 37.8% | 51.2% | 52.8% |
| The same | 18.0% | 9.7% | 10.8% |
| Less sustainable | 13.6% | 15.3% | 14.9% |
| Don't know | 30.6% | 23.8% | 21.5% |
| | 100% | 100% | 100% |



Analysis by region

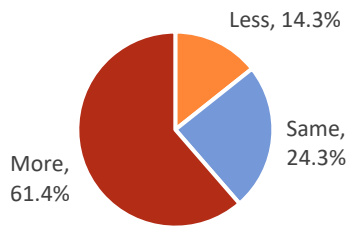
| | Perth Metro | Coastal Towns | Remaining Country |
|---|-------------|---------------|-------------------|
| Fishing industries in metro area | | | |
| More sustainable | 37.6% | 28.2% | 32.3% |
| The same | 23.0% | 35.1% | 34.4% |
| Less sustainable | 11.4% | 6.5% | 9.2% |
| Don't know | 28.0% | 30.2% | 24.1% |
| | 100% | 100% | 100% |



Analysis by region

| | Perth Metro | Coastal Towns | Remaining Country |
|--|-------------|---------------|-------------------|
| Fishing industries around Australia | | | |
| More sustainable | 41.6% | 33.5% | 30.8% |
| The same | 20.8% | 32.6% | 33.3% |
| Less sustainable | 10.4% | 6.1% | 6.7% |
| Don't know | 27.2% | 27.7% | 29.2% |
| | 100% | 100% | 100% |

Fishing industries around the World



Sample size: n=566; Don't know n=235

Analysis by region

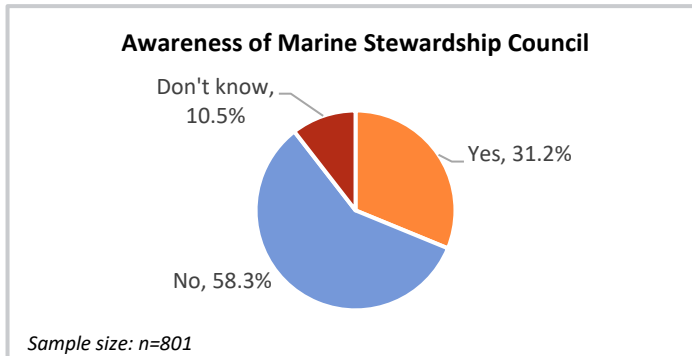
| | Perth Metro | Coastal Towns | Remaining Country |
|--|-------------|---------------|-------------------|
| Fishing industries around the World | | | |
| More sustainable | 42.2% | 42.8% | 52.3% |
| The same | 19.4% | 18.0% | 9.7% |
| Less sustainable | 11.2% | 10.5% | 6.7% |
| Don't know | 27.2% | 28.7% | 31.3% |
| | 100% | 100% | 100% |

What we asked:

- Q. How would you describe the Western Rock Lobster industry operating sustainably?
- Q. How sustainable is the industry compared to.....

The Marine Stewardship Council (MSC)

Awareness:

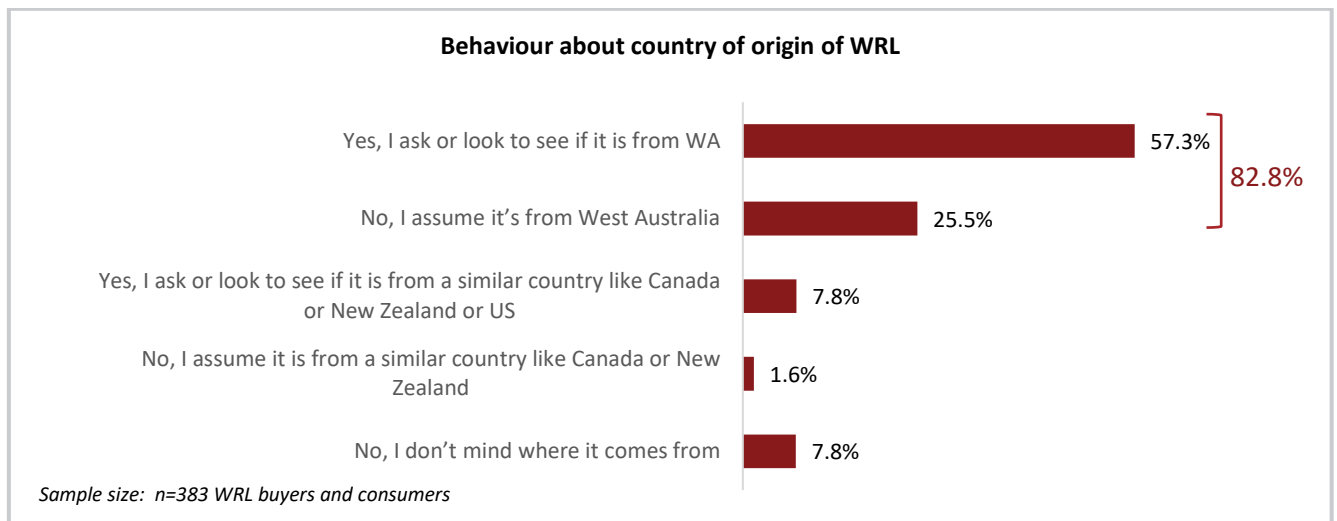
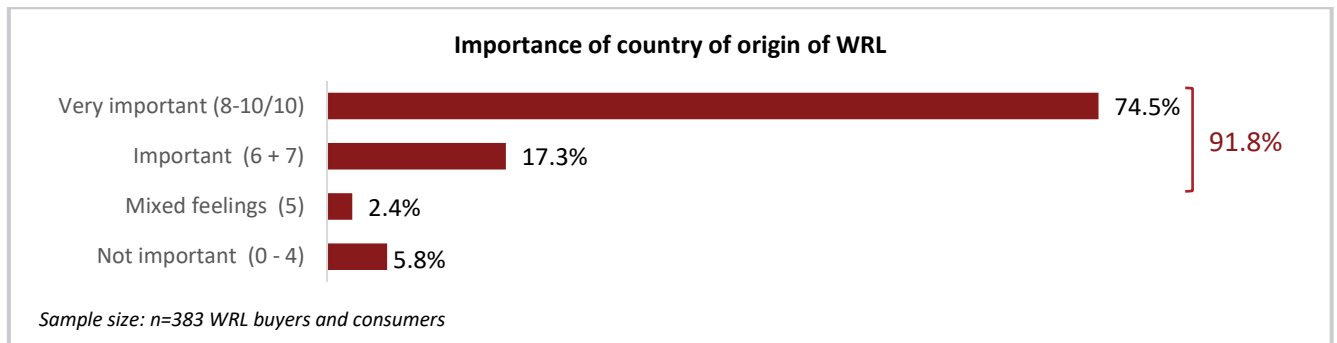


Analysis by region

| | Perth Metro | Coastal Towns | Remaining Country |
|--|-------------|---------------|-------------------|
| Awareness of Marine Stewardship Council | | | |
| Yes | 28.4% | 36.1% | 36.9% |
| No | 59.2% | 52.0% | 56.9% |
| Don't know | 12.4% | 11.9% | 6.2% |
| | 100% | 100% | 100% |

The impact of Country of origin compared to MSC:

The research showed that in Western Australia considered country of origin to be far more important to buyers and consumers of WRL than Marine Stewardship Council branding.



What we asked:

Q. Have you seen the logo for Marine Stewardship Council certification before, it is a blue logo with certified sustainable seafood on and the outline of a fish in white?

Q. Please rate how important the country of origin of the lobster you eat is out of 10?

Q. When you buy or eat lobster do you usually know or ask where it comes from?

Social licence

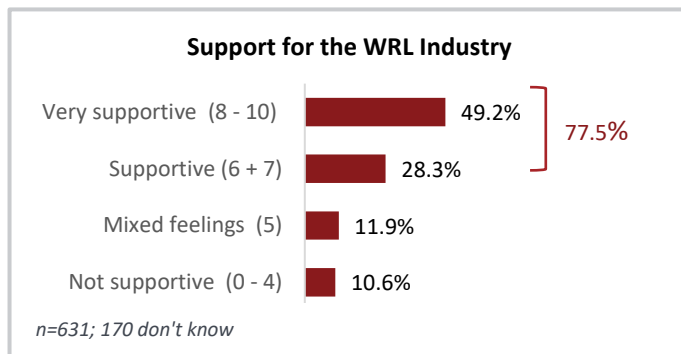
The stages of Social License:

The **social license to operate**¹ (SLO), or simply **social license**, refers to the ongoing acceptance of a company or industry's standard business practices and operating procedures by its employees, stakeholders, and the general public.

There are considered to be 3 stages of social license.

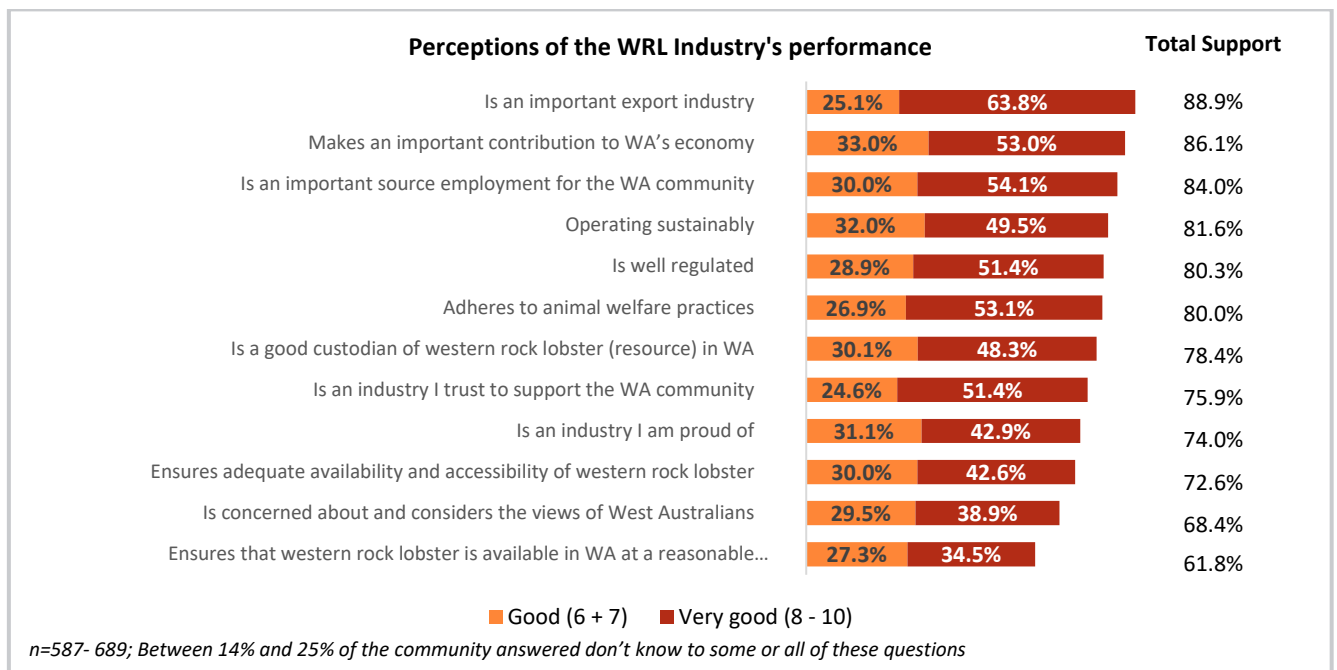


Support for the industry is high and attitudes are positive which is an excellent start but discussions with the West Australian community indicate that they have little understanding of the WRL industry.



Analysis by region

| | Perth Metro | Coastal Towns | Remaining Country |
|----------------------------------|-------------|---------------|-------------------|
| Views of the WRL Industry | | | |
| Very supportive | 52.5% | 47.0% | 37.9% |
| Supportive | 30.6% | 16.7% | 23.6% |
| Mixed feelings | 10.5% | 16.6% | 15.5% |
| Not supportive | 6.4% | 19.7% | 23.0% |
| | 100% | 100% | 100% |



What we asked:

Q. How would you describe your view of the Western Rock Lobster industry?

Q. How would you describe the Western Rock Lobster industry?

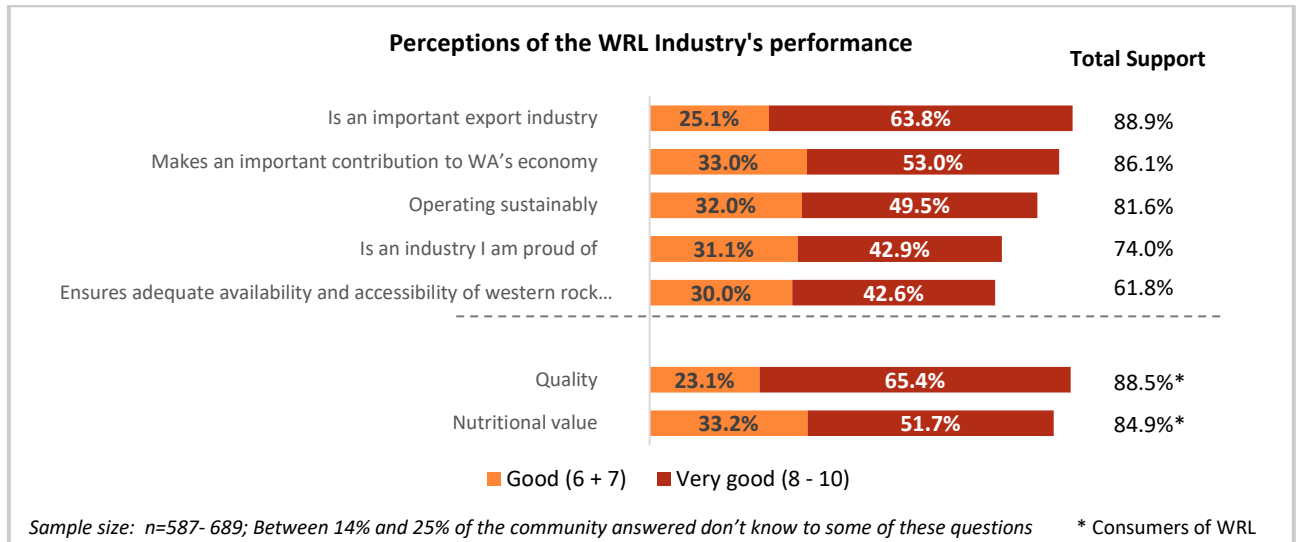
¹ Social License to Operate W. Kenton, Investopedia, Microeconomics, 23.08.2019

Key drivers of support and social license are:

- WRL as a good custodian
- Pride in the WRL industry
- Sustainability
- Pride in the industry as a key exporter.

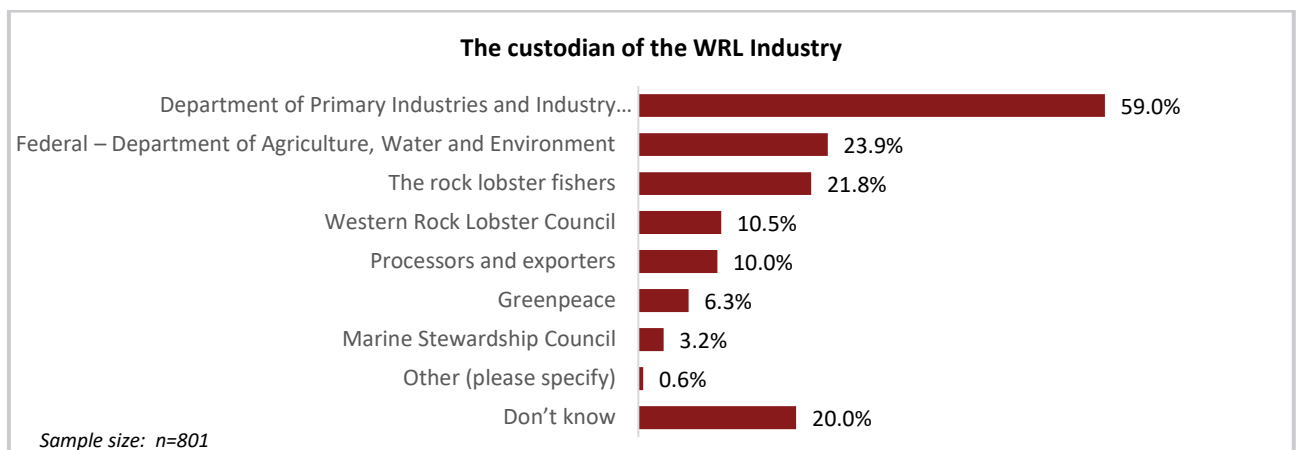
Also influenced by:

- Availability and accessibility
- Perceived quality and high nutritional value.



Custodianship of the WRL Industry

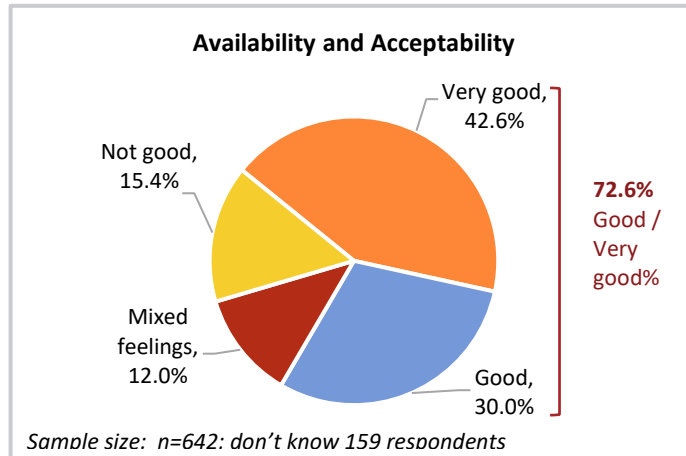
Custodianship of the WRL Industry is attributed to the Department of Primary Industries and Regional Development / Department of Fisheries as shown below.



What we asked:

- Q. How would you describe the Western Rock Lobster industry? For each statement I would like you to rate the industry's performance out of 10 where 0 = is not at all good and 10 = extremely good.
- Q. Who do you feel is the caretaker for the western rock lobster industry? (Note: does not add to 100% as multiple responses accepted).

Community perceptions of availability and accessibility



| Analysis by region | | | |
|-------------------------------|-------------|---------------|-------------------|
| | Perth Metro | Coastal Towns | Remaining Country |
| Perceptions by regions | | | |
| Very good | 45.4% | 38.7% | 32.9% |
| Good | 32.1% | 28.2% | 22.4% |
| Mixed feelings | 13.0% | 4.7% | 9.9% |
| Not good | 9.4% | 28.4% | 34.8% |
| | 100% | 100% | 100% |

Community perceptions of availability of western rock lobster at a reasonable price



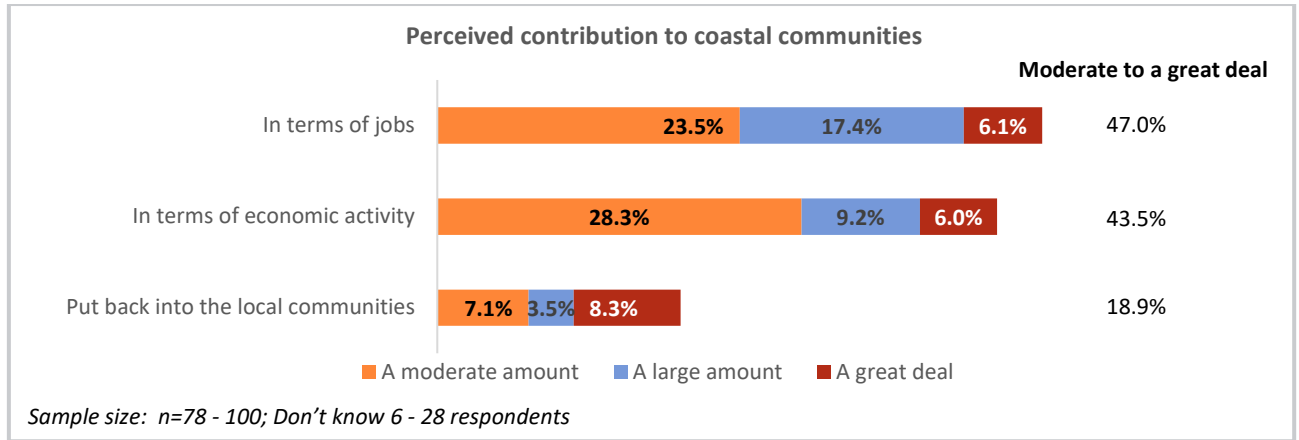
| Analysis by region | | | |
|-------------------------------|-------------|---------------|-------------------|
| | Perth Metro | Coastal Towns | Remaining Country |
| Perceptions by regions | | | |
| Very good price | 41.4% | 11.7% | 14.6% |
| Good price | 29.3% | 26.1% | 20.1% |
| Mixed feelings | 12.8% | 8.4% | 12.2% |
| Not good | 16.5% | 53.8% | 53.0% |
| | 100% | 100% | 100% |

What we asked:

Q. How would you describe the Western Rock Lobster industry? For each statement I would like you to rate the industry's performance out of 10 where 0 = is not at all good and 10 = extremely good.

- Ensures adequate availability and accessibility of western rock lobster
- Ensures that western rock lobster is available in Western Australia at a reasonable price

Reciprocity by the WRL industry considered fairly low in coastal communities



Coastal communities perceived the WRL industry's reciprocity was fairly low in their community as shown above. However, on all other issues except providing WRL at a reasonable price (which also received a low score), the views of coastal communities took the middle ground between the positive views of the Perth community and the little less positive views of country people outside the coastal communities.

What we asked:

Q. How big a contribution do you feel that the western rock lobster industry makes to your community...

About respondents

Where do you live?

| | | |
|---|-------|--------|
| In the Greater Metropolitan area | 75.7% | |
| Coastal communities – Kalbarri, Horrocks, Dongara /Port Denison, Leeman/Green Head, Jurien Bay, Cervantes, Lancelin, Ledge Point. | 0.4% | } 5.2% |
| - In Geraldton | 1.5% | |
| - In Mandurah | 3.3% | |
| Elsewhere in Country WA | 19.1% | |

Sample size: n=801

Gender

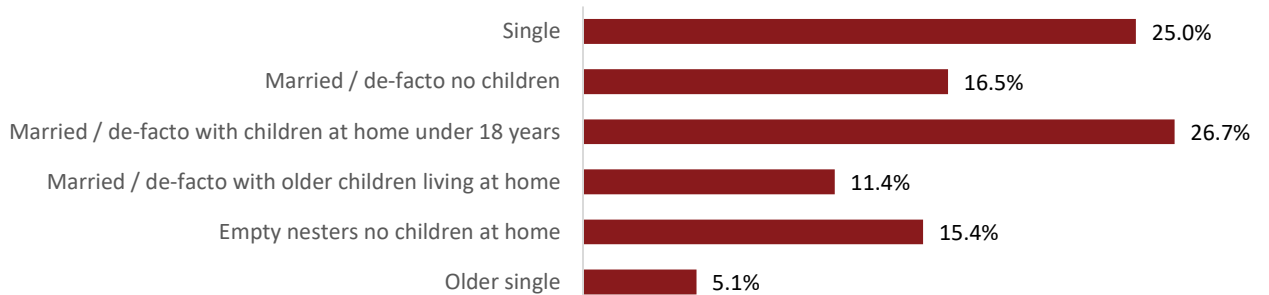


Sample size: n=801

Respondent's Age

| | | |
|---------------|-------|-------|
| 18 – 24 years | 11.9% | 33.6% |
| 25 – 34 years | 21.6% | |
| 35 – 44 years | 17.6% | 36.4% |
| 45 – 54 years | 18.8% | |
| 55 – 64 years | 15.7% | 30.0% |
| 65 plus years | 14.4% | |

Stage in family life cycle



Sample size: n=801

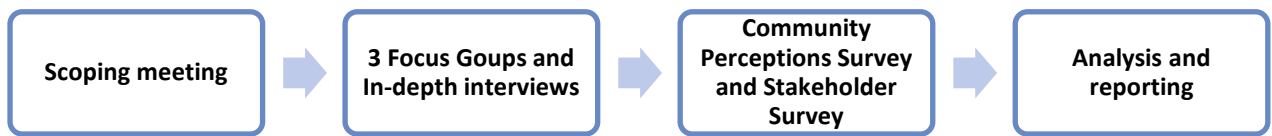
What we asked:

Q. Where do you live?

Q. Are you?

Q. In which of the following age groups to you belong?

Method



Focus groups

- **1 group of regular consumers** of western rock lobster at home; in restaurants, some had recreational fisher licenses.
- **1 group of independent consumers** of western rock lobster for special occasions.
- **1 group of people living in coastal** western rock lobster fishing communities not directly involved in the industry

Community Perceptions Survey

Three segments:

- **500 respondents in the Perth** metropolitan area –Survey via online panel
- **106 people living in coastal western rock lobster fishing communities** outside Perth – telephone survey
- **195 country residents** outside the fishing communities – telephone survey

Total 800 – weighted back to be representative of the Western Australian community.

Stakeholder survey

Explanatory survey online:

- **Processors and exporters**, 5 out of 6 responded (sample 12)
- **Hospitality venues**, many with western rock lobster on their menus (sample 51)