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FISHERIES RESEARCH &  
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FINAL

# Recreational Fishers in Tasmania

Understanding experiences, behaviours, drivers, communication  
needs and change factors

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# Executive Summary

## Understanding the Diverse Motivations and Preferences of Recreational Fishers in Tasmania

### Lead Paragraph

In a groundbreaking study, Action Market Research, Hudson Howells, Power Stats, and Jane Gallichan, CEO of TARFish, conducted a comprehensive psychographic segmentation analysis of the Tasmanian recreational fishing sector. The research, funded by the Fisheries Research and Development Corporation (FRDC), aimed to gain deeper insights into the diverse drivers, behaviours, and emerging trends among Tasmania's vibrant community of 100,000 recreational fishers. The study was undertaken in 2023 to inform the implementation of the Tasmanian Recreational Sea Fishing Strategy 2021-2030 and to enable tailored approaches for sustainable fisheries management and sector growth. By understanding the unique motivations and preferences of different angler segments, stakeholders can develop targeted strategies to enhance the fishing experience, promote responsible practices, and ensure the long-term sustainability of Tasmania's valuable recreational fishing resources.

### Background

Recreational fishing is an integral part of Tasmania's lifestyle and economy, with over 100,000 fishers contributing \$160 million annually through various expenditures such as accommodation, fuel, bait, and tackle. However, the sector faces challenges, including declining license numbers and concerns over fish stock depletions, particularly for popular species like flathead. In response, the Tasmanian Recreational Sea Fishing Strategy 2021-2030 was developed to address these issues and outline key focus areas for the future of recreational fishing in the state. The strategy emphasises the importance of promoting responsible fishing practices, engaging younger generations, improving accessibility for diverse groups, and encouraging stewardship among all types of recreational fishers. To effectively implement the strategy and drive sustainable sector growth, it was crucial to gain a deeper understanding of the diverse motivations and preferences of recreational fishers across Tasmania.

### Aims/Objectives

The primary objectives of the psychographic segmentation study were fourfold:

1. Identify distinct psychographic segments within the Tasmanian recreational fishing community based on their attitudes, behaviours, and preferences.

2. Develop a comprehensive understanding of the diverse motivations, values, and attitudes that drive each segment's engagement with recreational fishing.
3. Inform the development of targeted interventions and strategies for sustainable fisheries management and sector growth, tailored to the unique needs and preferences of each segment.
4. Enable the creation of personalised marketing and engagement strategies to effectively reach and resonate with specific segments of the recreational fishing community.

## **Methodology**

To achieve these objectives, a rigorous Multinomial Logit Modelling (MLM) approach was employed to analyse survey responses from a representative sample of Tasmanian recreational fishers. The survey included a range of attitudinal statements designed to capture the diverse perspectives and motivations of anglers across the state. Through an iterative process, the final segmentation model was refined to consist of 20 key attitudinal statements, yielding an impressive 80.9% in-sample classification rate. This robust methodology allowed for the identification of four distinct psychographic segments within the Tasmanian recreational fishing community: Green Individualists, Homebody Anglers, Outgoing Adventurers, and Daring Enthusiasts.

## **Results/Key Findings**

The psychographic segmentation analysis revealed four distinct segments, each with unique characteristics, motivations, and preferences:

1. **Green Individualists (32%):** This segment comprises environmentally conscious and confident individuals who prioritise the overall fishing experience rather than the size of their catch. They strongly support conservation efforts and sustainable fishing practices.
2. **Homebody Anglers (17%):** These family-oriented anglers are less adventurous and primarily enjoy fishing as a means of relaxation and bonding with loved ones. They value the social aspects of fishing and aim to catch enough for a satisfying meal.
3. **Outgoing Adventurers (24%):** As serious fishers, the Outgoing Adventurers are tech-savvy and big spenders who appreciate the challenge and enjoyment of fishing. They are more likely to be members of fishing clubs and associations and actively support local tackle stores.
4. **Daring Enthusiasts (27%):** Passionate, competitive, and brand-conscious, the Daring Enthusiasts thrive on the thrill of catching larger fish. They embrace the latest fishing gear and technologies and view fishing as a significant part of their identity.

## Implications

The insights gained from the psychographic segmentation study have far-reaching implications for various stakeholders in the Tasmanian recreational fishing sector:

- **Industry:** Fishing-related businesses, such as tackle shops, boat manufacturers, and tourism operators, can develop tailored products, services, and experiences that cater to the unique preferences and needs of each segment. By aligning their offerings with the motivations and values of specific segments, businesses can enhance customer satisfaction and loyalty.
- **Communities:** Understanding the diverse attitudes and behaviours of recreational fishers can help foster a sense of belonging and encourage responsible fishing practices within local communities. By engaging specific segments through targeted initiatives and events, communities can promote stewardship, sustainability, and social cohesion among anglers.
- **Managers/Policy-makers:** The study's findings provide valuable guidance for fisheries managers and policy-makers in developing targeted regulations, conservation initiatives, and accessibility improvements. By considering the attitudes and behaviours of different segments, decision-makers can implement policies that effectively address the needs and concerns of the recreational fishing community while promoting sustainable resource management.

## Recommendations

Based on the psychographic segmentation analysis, the following recommendations are proposed to optimise marketing efforts, increase participation, and secure private enterprise funding for the Tasmanian recreational fishing sector:

1. Prioritise the Outgoing Adventurers as the primary market segment and the Daring Enthusiasts as the secondary segment for targeted marketing and engagement efforts. These segments demonstrate strong leadership, high spending propensity, and a keen interest in fishing, making them ideal targets for promotional campaigns and partnerships.
2. Develop targeted marketing campaigns and strategic partnerships to attract individuals from all segments and increase overall participation in recreational fishing. By tailoring messages and initiatives to the specific motivations and preferences of each segment, the sector can effectively engage a broader range of anglers and encourage sustainable growth.
3. Explore tailored sponsorship opportunities with the Outgoing Adventurers and Daring Enthusiasts to optimise private enterprise funding for the sector. These segments' enthusiasm, spending habits, and influence within the fishing community make them attractive partners for businesses looking to support and invest in the recreational fishing industry.
4. Adapt the psychographic segmentation approach for other Australian states and territories, considering regional differences in fishing culture, environmental factors, and regulatory

frameworks. By sharing knowledge and experiences from the Tasmanian study, other jurisdictions can undertake similar research to better understand and serve their recreational fishing communities.

## **Keywords**

Recreational fishing, psychographic segmentation, motivations, preferences, attitudes, Tasmania, sustainable fisheries management, Tasmanian Recreational Sea Fishing Strategy 2021-2030, flathead, brown trout, market segments, consumer behaviour, fishing industry, angler engagement

# Introduction

Action Market Research, Hudson Howells, Power Stats and Jane Gallichan, CEO of TARFish, the peak body for recreational fishers in Tasmania, were commissioned by Fisheries Research and Development Corporation (FRDC) to undertake research to better understand the current drivers and emerging trends in the behaviours of recreational fishers in Tasmania.

## Background and Research Objectives

Recreational fishing is an important way of life for many Tasmanians, with over 100,000 fishers going recreational fishing each year, generating some \$160m in economic contribution to Tasmania's economy through accommodation, fuel, bait, tackle, and other expenditure. Revenue generated from the recreational license fees supports the Fishwise fund, which includes recreational fisheries management, licensing and administration, communications and partnerships and resource management. Trends across 2019-2020 show the number of licence fee holders remains relatively low – around 10% less than the average across the last 10 years. The recent release of Tasmanian Recreational Sea Fishing Strategy 2021-2030 ("The Strategy") has resulted in expenditure exceeding revenue in 2019/20. However, The Strategy is an important, meaningful step in developing forward-thinking approach to Tasmanian's recreational sea fishing culture. The action implementation plan of The Strategy focuses on fishers looking after fish stocks and being involved in the future of recreational fishing, particularly in terms of developing responsible fishing practices; instilling a positive fishing ethic in younger generations; making it easier for all types of people to go fishing by improving accessibility, especially for women, younger generations and people of all abilities); addressing fish stock depletions (e.g., flathead); and encouraging greater fishing stewardship across all types of recreational fishers.

In line with the goals of The Strategy, this project was initially aimed at better understanding the current drivers and emerging trends in the behaviours of recreational fishers, including fishing behaviours as well as exploring visitation, consumption, expenditure, and communication behaviours with the aim of developing a segmentation of the Tasmanian recreational fishing population. Understanding recreational fisher segments and developing profiles along fishing and frequency type will enable Tasmanian Fisheries Management to devise effective interventions for sustainable fisheries management, as well as to develop effective ways to work with different types of recreational fishing communities to address collective challenges and improve outcomes for recreational fishers, and to enable the sector to actively market to, and develop, specific parts of the fishery to ensure a long-term approach to sustaining and potentially growing the sector.

After discussions with Jane Gallichan (CEO, TARFish) the research outcomes TARFish was most wanting to achieve from this research were distilled to be:

- > A rich understanding, from a marketing perspective, of the segments that make up the recreational fishing sector in Tasmania.
  
- > The attitudes and behaviours (particularly recreational fishing behaviours) of these segments and the

associated demographics and geographics that will enable TARFish to target those segments that have the propensity to become TARFish members together with the associated services that would appeal to prospective members.

- > The extent and nature of segment usage of substitutes. In this sense, substitutes are considered to be other recreational activities that existing and prospective TARFish members undertake such as other outdoor activities, team sports, volunteering, etc.
- > The propensity of existing and prospective TARFish members for purchasing fishing equipment, and their associated preferences, which will enable TARFish to build a convincing business case to attract sponsorships.
- > The segment usage of social media platforms to enable targeted marketing techniques to be used.

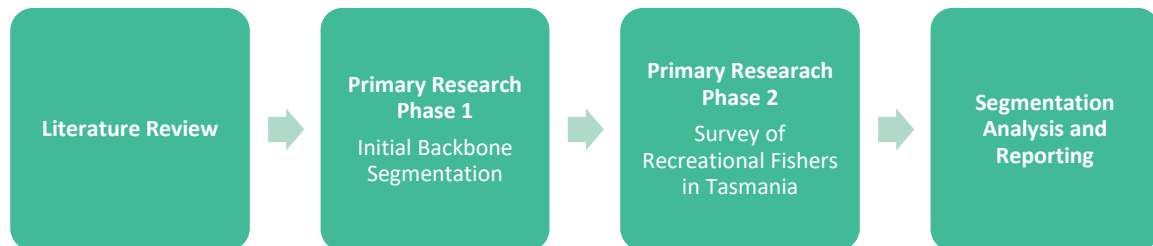
This report presents:

- > The full results of the study including the technical aspects of the methodology and sampling we deployed to achieve the project's research objectives.
- > The results of the segmentation analysis.
- > The key research findings as distilled through the segment profiles that have been developed.
- > A reflection on the lessons learned and applicability of this project to other jurisdictions.

# Method

In this section we detail the research design used for the study, which comprised four key research phases.

The aim of this research was to understand the current drivers and emerging trends in behaviours of recreational fishers, inclusive of fishing behaviours as well as visitation, consumption, expenditure, and communication behaviours. To achieve this, an iterative approach was designed to ensure each step in the research process was well informed and reviewed thoroughly prior to taking place:



*Figure 1 - Methodology.*

At the conclusion of each phase, a meeting was held to present the outcomes of each phase, and discuss the next steps involved.

## Literature Review

Recent publications, articles and reports were sourced and reviewed by the project team for relevance and to help inform the design of the questions to be used. Materials for this activity were sourced from:

- > Discussions with Mr Rodd Pearn, Fisheries Management Officer, Department of Natural Resources and Environment Tasmania.
- > Discussions with Ms Jane Gallichan, CEO, TARFish.
- > Internet searches.

A total of 16 documents were deemed suitable for inclusion in the literature review, with the project team scoring each on a 0 to 10 scale, with a "0" score indicating the document has no relevance to the research, and a "10" score indicating the document has high relevance to the research. The output from this activity included an Excel file detailing the relevance scores for each document, along with the comments captured to assist the design of the research questions. The outcomes from the Literature Review can be found in Appendix 1 – 2021-116 Rec Fishers in Tasmania – Literature Review Assessment Final.

The literature review assisted the research team in determining the parameters for the respondents to be included in the research and assisted in the design of the screening questions and the associated fishing demographics. This included determining how a respondent would qualify for the research - in this case, for a respondent to qualify, they must have resided in Tasmania via a postcode check at the time of the survey, and either have fished in Tasmania in the last 12 months or intend to fish in Tasmania in the next 12 months and be 18+ years of age.

In addition, this phase was used to identify access to any additional databases of Tasmanian recreational fishers that could assist with this research activity. It was determined that the following sources were available to the research team:

Sample Source	Estimated size and detail	Method of engagement
<b>TARFish database of members</b> (Sourced by Jane Gallichan)	<ul style="list-style-type: none"> <li>Estimated size of database is 1,200 members</li> <li>All likely to be actively fishing and have higher avidity.</li> </ul>	Online survey, distributed by TARFish
<b>TARFish social media channels</b> (Sourced by Jane Gallichan)	<ul style="list-style-type: none"> <li>Approximately 2,000 followers, and the ability to share among other community and fishing groups/pages.</li> <li>All likely to be actively fishing and have higher avidity.</li> </ul>	Online survey, distributed by TARFish
<b>BCF database of customers</b> (Sourced by Jane Gallichan)	<ul style="list-style-type: none"> <li>Database size is estimated to be quite large, but unable to obtain an exact size.</li> <li>All likely to have a higher outdoor activity avidity, which will include fishing.</li> </ul>	Online survey, distributed by BCF
<b>Tasmanian Government database of recreational fishers</b> (Sourced by Jane Gallichan)	<ul style="list-style-type: none"> <li>Estimated size approximately 20,000.</li> <li>All likely to be actively fishing and have a range of avidity levels.</li> </ul>	Online survey, distributed by Tasmanian Government
<b>Research only panel(s) of Tasmanians</b> (Sourced by Action Market Research)	<ul style="list-style-type: none"> <li>Estimated number of research-only panellists in Tasmania is 1,300.</li> <li>General public sample only, with incidence of fishing activity to be determined through screening.</li> </ul>	Online survey, distributed by AMR
<b>Random household selection via telephone interviewing</b> (Sourced by Action Market Research)	<ul style="list-style-type: none"> <li>Landline and mobile phone sample available for Tasmania, approximately 75,000 numbers.</li> <li>Random selection of 2,500 numbers made from this to undertake interviewing.</li> <li>General public sample only, with incidence of fishing activity to be determined through screening.</li> </ul>	Computer Assisted Telephone Interviewing (CATI), undertaken by AMR

Table 1 - Sample Sources

It was determined that the overall target sample size of 600 completed interviews for Primary Research Phase 2 would be achievable from these sample sources, and provide a statistically robust sample size for determination of the recreational fisher segments.



## Primary Research Phase 1 – Initial Backbone Segmentation

Primary Research Phase 1 was designed to test the questionnaire and segmentation to ensure the questions are suitable for the purposes of the research, and to ensure that clearly defined segments can be determined. For this first research phase, it was determined that the TARFish database would be the only sample used, and the other sample sources would be saved for Phase 2. This phase of the research involved:

- > Design and workshop review of the questionnaire.
- > Programming and testing of the questionnaire tool.
- > Distribution of the survey to the TARFish database.
- > Data review and preparation.
- > Initial backbone segmentation.
- > Data analysis and report of findings.
- > Workshop review of findings, questionnaire review and Phase 2 survey timing.

### Questionnaire Design and Workshop Review

A questionnaire was designed in Word format and went through a series of iterations and reviews prior to it proceeding to fieldwork. As part of the questionnaire design and review, a workshop was undertaken on Wednesday 9<sup>th</sup> November 2022 and attended by the research team, Jeremy Lyle (TARFish board member), and Cassie Price (OZFish Director of Habitat Programs, Fishing Conservation) to review the questionnaire in detail. The feedback from this meeting was instrumental in the final questionnaire design. The final questionnaire for this phase included the following elements:

Questionnaire element	Description
<b>Introduction</b>	A descriptive introduction was prepared ensuring the respondent is fully informed about the purpose of the research, who the research is undertaken by and for, the estimated length of the interview, a definition of recreational fishing in saltwater, a statement about privacy, and how to make contact with the research team if required.
<b>Screening</b>	Screening was undertaken on the respondent's fishing experience recency and intention to fish in the next 12 months. Those who have not fished in the last 12 months and are not intending to fish in the next 12 months were disqualified from the research. In addition, for this phase of the research, it was determined that the survey should be limited to saltwater fishers, and anyone that indicated they only fish in freshwater was disqualified from the research.
<b>Fishing demographics</b>	Including fishing frequency, region fished, species of fish mainly fish for, fishing site, fishing location, boat ownership, where purchase fishing equipment.
<b>Attitudinal statements for segmentation</b>	A series of 30 statements for each respondent to rate their level of agreement on. These statements are used to determine the segments.
<b>Fishing behavioural statements</b>	A series of 18 statements for each respondent to rate their level of agreement on. These statements are used to assist in describing the segments.
<b>Activities outside of fishing</b>	Including a series of activity groups, to assist in determining activities that align for marketing purposes.

<b>Social media usage</b>	Determining which social media channels are used at least weekly, to assist with marketing purposes
<b>Other demographics</b>	Including gender, age, marital status, household status, children that fish, Aboriginal or Torres Strait Islander status, disability status, occupation, level of education, household income, language other than English, and country of birth.

Table 2 - Questionnaire elements

A copy of the questionnaire used for Primary Research Phase 1 can be found in Appendix 2: 2021-116 Rec Fishers in Tasmania – Phase 1 – Segmentation Study Survey Questionnaire Final.

### **Programming and Testing of the Questionnaire Tool**

Once the questionnaire was approved, it was programmed into AMR's online programming tool, limesurvey. The survey link was reviewed and checked by the AMR operations team and distributed to the research team for a review prior to the survey being launched. Survey checks were undertaken to ensure the programmed version matched the final version of the questionnaire for this research phase, along with checks on:

- Survey logic, and ensuring any skip patterns, or terminates were working correctly.
- Questionnaire flow.
- Presentation of the questions and scales on screen.
- Checking presentation on mobile devices and across different web browsers.
- Questionnaire length, and ensuring it was kept to no more than 15-minutes.

The questionnaire was approved to proceed to fieldwork by the research team.

### **Distribution of Survey to TARFish Database**

The survey was distributed to the TARFish database by Jane Gallichan via email on December 7<sup>th</sup>, 2022. Several reminder emails were made during the fieldwork period, with the fieldwork closed on January 23<sup>rd</sup>, 2023. A total of 124 usable completed interviews was achieved during this period, or approximately a 10.3% completion rate was achieved from an estimated total sample of 1,200.

## Data Review and Preparation

Prior to the data being sent to Power Stats for the initial backbone segmentation, the data was thoroughly reviewed to check for the following:

Data checks performed	Result
<b>Any duplicate responses?</b>	A total of 126 completed interviews were captured. Two respondents were clearly duplicate responses via both their IP address and contact details provided matching. The first response by each respondent was included in the final outcome. The second completed response by each respondent was discarded.
<b>Any obvious poor responders?</b>	All completed interviews were deemed good quality. Checks undertaken included the speed of interview completion, verbatim quality, and the differentiation of response for the segmentation questions. All respondents passed each of these tests.
<b>Completeness and accuracy</b>	Each question was tested to ensure the responses given matched the answers allowed by the questionnaire. All skip patterns were also tested to ensure the respondents required to provide an answer did so, and those that were required to skip did so. All data passed this test.

Table 3 - Data checks performed.

The data was prepared in both SPSS format, and Excel format and sent to Power Stats for the initial backbone segmentation.

## Initial Backbone Segmentation

The primary objective of the Research Phase 1 survey was to undertake a pilot segmentation of current TARFish members. Segmentation analysis is a data exploration (mining) tool for dividing a multivariate dataset into 'natural' clusters (segments).

The pilot segmentation analysis for this study was undertaken by Power Stats, a Sydney based company specialising in advanced statistical analysis for corporate and government clients. Power Stats has been providing these services to its client organisations since 2002.

The survey questionnaire included questions targeting behaviours, attitudes, and demographics of TARFish members. Segmentation was used to explore whether segments based on attitudes towards fishing and life in general existed in the survey dataset.

Using the survey data from 124 respondents, the results of a range of clustering algorithms were compared. The algorithms used suggested that, for this pilot dataset, a five-segment solution was the optimum fit. The final allocation of respondents to segments was undertaken using the Ward's method (Ward's minimum variance method). This method provided the cleanest interpretation of the data and was the more robust analysis within

cluster similarities and between cluster difference measures.

The overall aim of the preliminary segmentation was to ensure that the segments were of a reasonable size (in the sample and in the population), distinct from each other and, most importantly, that they could be reached (engaged with).

The segments were 'profiled' in terms of the variables used for the segmentation, including behaviours, attitudes and demographics as detailed in the spreadsheet provided as Appendix 3 - 2021-116 Rec Fishers in Tasmania - Phase 1 - Segment Profile Analysis Final.

It is important to note this pilot segmentation was preliminary, with the expectation that the segmentation solution would change as the size of the data set built to its optimum size of 600+ respondents.

### **Data Analysis and Report of Findings**

The segment outcome (a five-segment solution) was appended to the final data in SPSS. Results were then tabulated using the OfficeReports tabulation package, with tables and charts prepared for each question by total and each of the five segments. This tables and charts file can be found in Appendix 4 - 2021-116 Rec Fishers in Tasmania - Phase 1 - Segment Tables and Charts Final.

A report was generated in PowerPoint detailing the key findings from Primary Research Phase 1, including a description of the five identified segments from the data collected. This report can be found in Appendix 5: Rec Fishers in Tasmania – Phase 1 – Summary of Key Findings Presentation Final.

### **Workshop Review of Findings, Questionnaire Review and Phase 2 Survey Timing**

A second workshop was held on February 16<sup>th</sup>, 2023, attended by the research team and Jeremy Lyle (TARFish board member) to review the findings from Primary Research Phase 1, to review any questionnaire gaps, to discuss any changes to the methodology and to discuss the timing of Primary Research Phase 2.

It was highlighted in this meeting and agreed that:

- > The questions defining the segments worked well to define a five-segment solution. A larger sample size (i.e. Phase 2) would expand on the segments identified, and clearly define and develop a rich understanding of the segments which represent the recreational fishing sector in Tasmania. No changes were recommended to the attitudinal or behavioural statements.
- > The number of completed interviews was sufficient to test the questionnaire, however the research team was concerned about the survey uptake and agreed that a prize draw should be offered to any database sourced complete. Jane Gallichan was tasked to source suitable prizes for this purpose.
- > The average questionnaire length (18 minutes) was appropriate, and it was deemed that no changes to the survey length were required.

- > It was identified that the screening questions needed to be expanded to allow freshwater fishers, in addition to saltwater fishers. This would likely also improve the incidence of those who qualified for the research. Additional fishing demographics for the freshwater fishers would be needed in Phase 2.
- > It was also recommended that a question asking about other fishing associations or fishing memberships may assist in reviewing the representativeness of the Phase 2 results, and it was agreed this should be added.
- > Finally, it was recommended that a question be added asking respondents whether they hold a saltwater and/or freshwater fishing licence, and it was agreed this should be added.

Overall, Primary Research Phase 1 validated the research approach, and provided valuable insights into the TARFish members included. Approval was given to proceed to Phase 2 once the questionnaire adjustments had been finalised.

The survey timing was reviewed, and it was highlighted by TARFish that there might be a potential clash with the University of Tasmania's IMAS survey distribution. It was requested that the fieldwork timing be paused in February 2023 to allow for the IMAS survey to be given 'clear air'. This was agreed, with the fieldwork scheduled to occur between March 1<sup>st</sup> and April 15<sup>th</sup>, 2023.

## Primary Research Phase 2 – Survey of Recreational Fishers in Tasmania

Primary Research Phase 2 was the main survey component, with the aim of completing as many interviews as possible within the research period. This phase of the research involved:

- > Undertaking questionnaire updates from the recommendations made in Phase 1.
- > Programming and checking of the updated questionnaire tool.
- > Distribution of the survey to the different sample sources.
- > Data review and preparation.
- > Segmentation analysis.
- > Data analysis and report of findings.
- > Presentation of findings.

### Questionnaire Updates from Primary Research Phase 1

Several questionnaire updates were made to the introduction, screening, and fishing demographics sections of the questionnaire, including:

- > Adding in appropriate introduction pathways for the different sample sources.
- > Adding in questions and instructions regarding the prize draw.
- > Adding questions to determine if a respondent is a TARFish member, or a member of other fishing clubs or associations.
- > Adding in a question to capture whether the respondent holds a Tasmania recreational sea fishing licence and/or a freshwater fishing licence.
- > Adding in questions to capture freshwater fishers, and corresponding fishing demographics.

A copy of the questionnaire used for Primary Research Phase 2 can be found in Appendix 6: 2021-116 Rec Fishers in Tasmania – Phase 2 – Segmentation Study Survey Questionnaire Final.

### Programming and Testing of the Questionnaire Tool

The Phase 1 programmed questionnaire was updated with the new questionnaire changes, and the survey link was reviewed and checked by the AMR operations team and distributed to the research team for review prior to the survey being launched. Survey checks were undertaken to ensure the programmed version matched the final version of the questionnaire for this research phase, along with checks on:

- > Survey logic, and ensuring any skip patterns, or terminates were working correctly.
- > Questionnaire flow.
- > Presentation of the questions and scales on screen.
- > Checking presentation on mobile devices and across different web browsers.
- > Questionnaire length, and ensuring it was kept to no more than 15-minutes.

The questionnaire was approved to proceed to fieldwork by the research team.

## Distribution of the Survey

The table below details the different sample sources, their fieldwork dates, and total completed interviews achieved from each source:

Sample Source	Fieldwork Dates	Completed Interviews (passed quality checks)
<b>TARFish database (Phase 2)</b>	28 <sup>th</sup> April – 31 <sup>st</sup> May 2023	133
<b>TARFish social media</b>	29 <sup>th</sup> April – 31 <sup>st</sup> May 2023	100
<b>Tasmanian Government</b>	18 <sup>th</sup> May – 31 <sup>st</sup> May 2023	100
<b>Research only panels</b>	1 <sup>st</sup> March – 27 <sup>th</sup> April 2023	507
<b>Telephone interviews</b>	1 <sup>st</sup> May – 18 <sup>th</sup> May 2023	100
<b>BCF database</b>	Did not proceed	0
<b>Total</b>	1 <sup>st</sup> March – 31 <sup>st</sup> May 2023	<b>940 completed interviews</b>

Table 4 - Sample Source

As the core components of the survey remained the same between Phase 1 and Phase 2, it was deemed appropriate to combine the datasets together, providing an overall sample size of 1,064 completed interviews to use for the final reporting. This provides an overall margin of error of +/- 3.0% at a 95% confidence level when reporting on the total result.

## Data Review and Preparation

Prior to the data being sent to Power Stats for the final segmentation analysis, the data was thoroughly reviewed to check for the following:

Data checks performed	Result
<b>Any duplicate responses?</b>	Across all survey versions, a total of 1,120 completed interviews were captured. A total of 24 respondents were clearly duplicate responses via both their IP address and contact details provided matching. The first response by each respondent was included in the final outcome. The second completed response by each respondent was discarded. Note that duplicates were checked within each survey version and across survey versions.
<b>Any obvious poor responders?</b>	A total of 32 respondents were excluded from the final outcome due to responding to the survey too quickly (27 respondents completed the survey in less than half of the median survey length), or obvious strings of responses to arrays/straight-lining answers (five respondents were excluded for this assessment). All verbatim responses were reviewed and deemed acceptable.
<b>Completeness and accuracy</b>	Each question was tested to ensure the responses given matched the answers allowed by the questionnaire. All skip patterns were also tested to ensure the respondents required to provide an answer did so, and those that were required to skip did so. All data passed this test.

Table 5 - Data checks performed.

The data was prepared in both SPSS format, and Excel format and sent to Power Stats for the final segmentation analysis. Please see the 'Sample' section of this report to review a more detailed breakdown of the sample performance for each sample source used.

## **Segmentation**

The segmentation analysis was undertaken by Power Stats, a Sydney based company specialising in advanced statistical analysis for corporate and government clients. Power Stats has been providing these services to its client organisations since 2002.

Segmentation analysis is a data exploration (mining) tool for dividing a multivariate dataset into 'natural' clusters (segments). This tool was used to explore whether segments based on attitudes towards fishing and life in general existed in the survey dataset.

To arrive at the optimum number of clusters, the results of different clustering algorithms were compared. Cluster analysis is used when the sample units come from an unknown number of distinct populations or sub-populations, as was the case with this research project.

The objective of the analysis was to group the survey respondents into clusters that share similar attitudes, as measured by two batteries of questions in the survey.

Cluster analysis can be broadly classified as an exploratory technique, and different algorithms may suggest different number of clusters and allocation of respondents to each cluster.

For this research, we explored the potential clusters using four techniques on the same dataset:

1. **Average Linkage:** In average linkage, the distance between two clusters is defined as the average distance between data points in the first cluster and data points in the second cluster.
2. **Centroid Method:** In the centroid method, the distance between two clusters is the distance between the two mean vectors of the clusters. At each stage of the process, clusters that have the smallest centroid distance are combined.
3. **Ward's Method:** This method does not directly define a measure of distance between two points or clusters. It is an ANOVA (Analysis of Variance) based approach. One-way univariate ANOVAs are done for each variable with groups defined by the clusters at that stage of the process. At each stage, two clusters merge that provide the smallest increase in the combined error sum of squares.
4. **Latent Class Cluster analysis:** For each survey respondent, the analysis obtains the probability of belonging to each cluster. Respondents are assigned to the cluster to which they have the highest probability of belonging.



To arrive at the optimum number of clusters, we compared the results of the different clustering algorithms. In this study, all the algorithms tested suggested four segments.

The final allocation of respondents to segments was done using Ward's method. This method provided a cleaner interpretation of the data, and more robust within cluster similarities, and between cluster difference measures.

The final segment solution and their size was as follows:

Segment Solutions and Size	Count (n)	Percentage (%)
<b>Base</b>	1,064	100%
<b>Segment 1 "Green Individualists"</b>	336	32%
<b>Segment 2 "Homebody Anglers"</b>	182	17%
<b>Segment 3 "Outgoing Adventurers"</b>	255	24%
<b>Segment 4 "Daring Enthusiasts"</b>	291	27%

Table 6 - Segment solutions and size

The names for each of the segments were determined from further analysis, and are descriptive of their attitudes and behaviours.

## **Data Analysis, Reporting and Presentation**

The four-segment solution outcome was appended to the final data in SPSS. Results were then tabulated using the OfficeReports tabulation package, with tables and charts prepared for each question by total and each of the four segments. This tables and charts file can be found in Appendix 7: 2021-116 Rec Fishers in Tasmania – Phase 2 – Segment Tables and Charts File.

Additional analysis of the attitudinal and behavioural questions was undertaken to highlight the key differences between the four segments. This was undertaken by comparing the 'Top 2 Box' outcome within each segment (the percentage sum of Strongly Agree and Agree, providing the 'Total Agree' percentage) to the rest of the sample combined outcome. This analysis highlighted the similarities and unique characteristics of each segment group, providing the evidence required to build the descriptive segment profiles, stories, and personas. The segment outcomes can be found in the 'Key Findings' section of this report.

In addition, a PowerPoint report was generated detailing the key findings from Primary Research Phase 2, including a dashboard style description of each of the four segments. This report can be found in Appendix 8: 2021-116 Rec Fishers in Tasmania – Phase 2 – Segmentation Overview Presentation Final, noting that the segmentation analysis evolved with feedback received from meeting attendees at that time.

# Sampling

In this section we detail the sampling expectations, inclusions, and outcomes for the project.

## Sample sources, sample sizes and selection methods

Given the diverse range of sample sources used for this study, different sample selection methods were used for each, overlaid with screening questions to ensure qualified respondents participated in the research. The different sample selection types for each of the sample sources is detailed below:

Sample Source	Sample Type	Sample Selection Method	Participation Method	Estimated Sample Size
<b>TARFish database (Phase 1)</b>	Membership Database	Non-probability, using convenience sampling (i.e. anyone on the database could participate)	Self-complete, via online survey	~1,200
<b>TARFish database (Phase 2)</b>	Membership Database	Non-probability, using convenience sampling (i.e. anyone on the database could participate)	Self-complete, via online survey	1,060 who received email
<b>TARFish social media</b>	Social media promotion	Non-probability, using convenience sampling	Self-complete, via online survey	2,000 followers
<b>Tasmanian Government</b>	Database	Non-probability, using convenience sampling (i.e. anyone on the database could participate)	Self-complete, via online survey	~20,000
<b>Research only panels</b>	Web-panel	Non-probability, using access panel sampling	Self-complete, via online survey	1,328
<b>Telephone interviews</b>	Landline & Mobile phone number database	Probability sampling, using a simple random selection method.	Telephone interview, conducted by interviewer	Sample selection of 3,000 telephone records (50% landline, 50% mobile)

Table 7 - Sample Source, size, and selection methods

## Screening Questions

Screening questions were used in the questionnaire to exclude certain respondent types from the research. Some of the screening questions did not apply to some of the sample sources. A summary of the screening criteria, and which sample sources they applied, to are provided below:

Screening exclusions	TARFish Database (Phase 1)	TARFish Database (Phase 2)	TARFish social media	Tasmanian Government	Research only panel	Telephone Interviews
<b>Under 18 years</b>	Yes	Yes	Yes	Yes	Yes	Yes
<b>Residing outside of Tasmania</b>	No	No	Yes	Yes	Yes	Yes
<b>Has not fished last 12 months, and not intending to fish in the next 12 months</b>	Yes	Yes	Yes	Yes	Yes	Yes

Table 8 - Screening exclusions

A respondent qualified for the research if they were aged over 18 years, resided in Tasmania, and had either fished in the last 12 months, or were intending to fish in the next 12 months at the time of the survey. A summary of the counts of those who disqualified for the research at each of these questions is provided below:

Counts of Disqualified Respondents	TARFish Database (Phase 1)	TARFish Database (Phase 2)	TARFish social media	Tasmanian Government	Research only panel	Telephone Interviews
<b>Under 18 years</b>	0	2	1	1	6	0
<b>Residing outside of Tasmania</b>	n/a	0	3	3	33	4
<b>Has not fished last 12 months, and not intending to fish in the next 12 months</b>	1	1	0	0	473	99
<b>Total Disqualified</b>	<b>1</b>	<b>3</b>	<b>4</b>	<b>4</b>	<b>512</b>	<b>103</b>
<b>Total Qualified (before cleaning)</b>	<b>126</b>	<b>150</b>	<b>104</b>	<b>101</b>	<b>539</b>	<b>100</b>
<b>Qualification Percentage</b>	<b>99.2%</b>	<b>98.0%</b>	<b>96.3%</b>	<b>96.2%</b>	<b>51.3%</b>	<b>49.3%</b>

Table 9 - Counts of disqualified respondents

## Data Cleaning Steps

The completed interviews were reviewed to ensure they passed several quality checks including:

- > Had the respondent completed the interview too quickly? All those who completed the questionnaire in less than 40% of the overall median length were reviewed and removed if required.
- > Had the respondent provided a quality verbatim response? All verbatim answers were reviewed and any that were obviously 'junk' responses were tagged for removal.
- > Had the respondent provided a string of similar answers (known as 'straight lining' array style questions)? All respondents who provided the same response to strings of answers or patterned answers to the array questions were reviewed and tagged for removal if required.
- > Checking for duplicates, including checks on the IP address used by the respondent, and checking the contact details provided by the respondents (if applicable). Any duplicate IP addresses or contacts were tagged for removal (keeping the respondent's first response). This check was undertaken within each survey version and across all survey versions.
- > For the telephone interviews, 10% of all interviews were reviewed by listening to the interview itself to ensure the script was followed correctly, and the answers matched the responses captured throughout.

The counts of respondents removed for each of these data cleaning checks is provided below:

Counts of Respondents Failing Data Cleaning Steps	TARFish Database (Phase 1)	TARFish Database (Phase 2)	TARFish social media	Tasmanian Government	Research only panel	Telephone Interviews
<b>Total Qualified (before cleaning)</b>	126	150	104	101	539	100
<b>Respondent Completed Interview Too Quickly</b>	0	0	0	0	27	0
<b>Poor Verbatim Response</b>	0	0	0	0	0	0
<b>Strings of Similar Responses (Straight lining)</b>	0	0	0	0	5	0
<b>Duplicate Respondent</b>	2	17	4	1	0	0
<b>Total Respondents Removed</b>	<b>2</b>	<b>17</b>	<b>4</b>	<b>1</b>	<b>32</b>	<b>0</b>
<b>Total Completed Interviews for Reporting</b>	<b>124</b>	<b>133</b>	<b>100</b>	<b>100</b>	<b>507</b>	<b>100</b>

Table 10 - Counts of respondents failing data cleaning steps.

## Sample Performance

The sample performance figures are provided below. The definition used for each of the calculations is as follows:

- > Participation Rate = Total Number Screened / Total Number of Unique Survey Attempts.
- > Quality Response Rate = Total Qualified & Quality Completed Interviews / Total Number of Unique Survey Attempts.

Note that the definition of a 'unique survey attempt' is a survey attempt from a unique IP address.

Sample Performance	TARFish Database (Phase 1)	TARFish Database (Phase 2)	TARFish social media	Tasmanian Government	Research only panel	Telephone Interviews
<b>Total Sample Size</b>	~1,200	1,060	2,000	~20,000	1,328	3,000
<b>Total Non-Response</b>	~981	629	1,528	~19,773	184	2,797
<b>Total Number of Unique Survey Attempts</b>	219	431	472	227	1,144	203
<b>Total Number Screened</b>	127	153	108	104	1,051	203
<b>Participation rate</b>	58.0%	28.8%	22.9%	45.8%	91.9%	100%
<b>Total Qualified &amp; Quality Completed Interviews</b>	124	133	100	100	507	100
<b>Quality Response Rate</b>	56.6%	30.9%	21.2%	44.1%	44.3%	49.3%

Table 11 - Sample performance

For the self-complete versions of the survey, many respondents clicked on the survey link provided, hit the first page of the survey, and did not proceed any further. This page informs the respondent about the research, including the estimated length of time the survey will take. The participation rate is therefore the rate of success in converting a unique respondent into a survey attempt.

The research-only panel had the highest survey participation rate among the self-complete survey versions, which is likely directly linked to the small incentive offered by research panels to respondents for their full participation.

For the telephone survey, the Total Non-Response includes those who refused participation, were non-

contactable and a non-usable sample.

## Prize Draw

To boost participation for Phase 2 of the research, a prize draw was offered to all participants except for the research-only panel participants.

The prize for the prize draw was sourced by Jane Gallichan, and included a chance to win one of two prizes, including:

- Prize 1 (valued at approximately \$550) included a fishing prize pack from Fisherman's Shed, including 1 x Spotters sunglasses, 1 x Voyager tuna skirt, 4 x Liquid Gold lures, and 1 x \$100 gift voucher to Fisherman's Shed.
- Prize 2 (valued at \$500) was a BCF Voucher.
- Prize 3 (valued at approximately \$400) was a Penn Slammer IV Reel.

Respondents who were offered the prize draw were informed about the prizes as part of the survey introduction and given an opportunity to opt into the prize draw at the end of the survey, and to provide their preferred contact details at that time. The prize draw was undertaken at Action Market Research, Level 3, 68 Grenfell Street, South Australia on 7 June 2023 and the winner(s) were announced by TARFish on 7 June 2023.

The inclusion of the prize draw assisted the survey in a few ways:

- By boosting survey participation – this greatly assisted in obtaining a very robust sample size than could have otherwise been achieved.
- By assisting in highlighting duplicate responses – the contact details captured as part of the prize draw were used to verify a unique response.

The research-only panel participants were paid an incentive for their survey completion (a small amount, usually around \$3-\$5), and so were excluded from participating in the prize draw.

## Margin of Error and Potential Sources of Bias

The margin of error at 95% confidence level is +/- 3.0% when reporting on the total outcome (n=1,064). Note that this is the margin of error that would apply if the sample was truly random.

For this survey there is clear potential for selection bias. This includes the sources of samples used in this survey which almost certainly selects different types of people:

- > Those coming from any of the databases, such as TARFish members, are more likely to be current and avid fishers.
- > The use of self-complete survey options could lead to some qualifying for the research to receive their incentive payment (in the case of the research only panels), or enter the prize draw (in the case for the other options).

In summary, combining the sample sources together assists in reducing the bias from any single sample source.

The responses captured are what people believe (or at least say), not necessarily what is true. The data cleaning steps undertaken should have removed those who consistently provided poor answers throughout; however, it is impossible to prove whether a participant chose to do so for any individual question.



# Results

## Fishing Demographic Outcomes

In this section we present the demographic outcomes of the fieldwork based on the sample sources used to test for any biases between the different sample sources and sample types.

The sample sourced can be grouped into two key categories:

- **Database/Supplied sample** – this includes the sample provided from the TARFish database, the Tasmanian Government, and TARFish social media. This sample group is likely to be more avid fishers. There are a total of 457 respondents that fit into this category.
- **General Fishing Public** – this includes the research-only panel and the telephone interviews. This sample will provide a snapshot of the general fishing public. There are a total of 607 respondents that fit into this category.

The fishing demographic questions included in the research include the following:

- > Fishing Licence status.
- > Fishing recency, and intention.
- > Saltwater and Freshwater fishing status.
- > Fishing frequency (captured separately for Saltwater and Freshwater).
- > Region of Tasmania in which fished (captured separately for Saltwater and Freshwater).
- > Species of fish (captured separately for Saltwater and Freshwater).
- > Fishing platforms used (captured separately for Saltwater and Freshwater).
- > Fishing location (captured separately for Saltwater and Freshwater).
- > Boat ownership.
- > How acquired fishing equipment in the last 12 months.

The results for each of these questions are presented on the next few pages. The results have been shown by All Respondents (all who responded to the question), and by the two categories listed above (Database/Supplied sample and General Fishing Public). This comparison helps to highlight where there may be sampling-driven bias in the outcomes. Any significant differences between the Database/Supplied sample and General Fishing Public groups are highlighted in bold and blue on each of the tables. Testing for significance is undertaken using column proportions (Z-test) at 95% confidence, with a significant outcome determined by the p-value being less than 0.05.

It is important to note that to qualify for the research, a respondent must have either fished recreationally in the last 12 months or intend to do so in the next 12 months. This means that the 'General Fishing Public' are those who have some interest in fishing and are not reflective of the general public overall.

## Fishing Licence Status

The question asked in the survey was:

**S6. Do you hold a current Tasmania recreational sea fishing licence (such as rock lobster, abalone, scallop, graball, or setline) and/or freshwater fishing licence?**

Yes – Saltwater Licence	1	CONTINUE
Yes – Freshwater Licence	2	CONTINUE
No [Exclusive]	3	CONTINUE
Unsure [Exclusive]	4	CONTINUE

*Note: this question was not asked in Phase 1 of the research.*

The survey results were:

Fishing Licence Status	All Respondents	Database/ Supplied Sample	General Fishing Public
<b>Base</b>	940	333	607
<b>Yes – Saltwater Licence</b>	33%	<b>62%</b>	17%
<b>Yes – Freshwater Licence</b>	27%	<b>39%</b>	21%
<b>No</b>	50%	21%	<b>66%</b>
<b>Unsure</b>	1%	0%	<b>1%</b>
<b>TOTAL YES (hold a Saltwater or a Freshwater fishing licence)</b>	49%	79%	33%

*Table 12 - Fishing license status*

Overall, 49% of respondents hold a current Tasmanian recreational fishing licence with 33% holding a saltwater fishing licence, and 27% holding a freshwater fishing licence.

Among the Database/Supplied sample, 79% of respondents hold a Tasmanian recreational fishing licence, with 62% holding a saltwater fishing licence, and 39% holding a freshwater fishing licence.

Among the General Public sample, 33% of respondents hold a Tasmanian recreational fishing licence, with 17% holding a salt water fishing licence and 21% holding a freshwater fishing licence.

As to be expected, there is a significantly higher proportion of respondents from the Database/Supplied sample that currently hold a Tasmanian fishing licence.

## Fishing Recency

The question asked in the survey was:

### Q1a. Have you recreationally fished in Tasmania in the last 12 months?

[SINGLE RESPONSE]

Yes	1
No	2

The survey results were:

Fishing Recency	All Respondents	Database/ Supplied Sample	General Fishing Public
<b>Base</b>	1,064	457	607
<b>Yes</b>	86%	<b>98%</b>	76%
<b>No</b>	14%	2%	<b>24%</b>

Table 13 - Fishing recency

Overall, 86% of respondents have recreationally fished in Tasmania in the last 12 months. This is significantly higher for the Database/Supplied sample (98%) and lower for the General Fishing Public sample (76%).

## Saltwater versus Freshwater Fishing Status

The question asked in the survey was:

### Q1b. Please select which of the following options best describes you:

[SINGLE RESPONSE]

I fish <u>only</u> in saltwater	1
I fish mainly in saltwater	2
I fish equally in saltwater and freshwater	3
I fish mainly in freshwater	4
I fish <u>only</u> in freshwater	5

Note: this was only asked of those who indicated they have fished recreationally in the last 12 months

The survey results were:

Saltwater vs Freshwater Recency	All Respondents	Database/ Supplied Sample	General Fishing Public
<b>Base</b>	912	449	463
<b>I fish only in saltwater</b>	43%	44%	43%
<b>I fish mainly in saltwater</b>	29%	<b>32%</b>	25%
<b>I fish equally in saltwater and freshwater</b>	18%	20%	15%
<b>I fish mainly in freshwater</b>	9%	4%	<b>14%</b>
<b>I fish only in freshwater</b>	2%	1%	3%

Table 14 - Saltwater vs Freshwater Recency

Overall, saltwater fishing is more prevalent in Tasmania, with 43% indicating they only fish in saltwater, with a further 29% indicating they mainly do this (72% combined). Just 2% indicated they only fish in freshwater, with a further 9% indicating they mainly fish in freshwater (11% combined).

For the Database/Supplied sample group, they have a slightly higher saltwater fishing prevalence with 44% indicating they only fish in saltwater, and 32% indicating they mainly fish in saltwater (76% combined, significantly higher than the General Fishing Public). Just 1% indicated they only fish in freshwater, and a further 4% indicated they mainly fish in freshwater (5% combined).

For the General Fishing Public sample group, they have a lower saltwater fishing prevalence with 43% indicating they only fish in saltwater, and 25% indicating they mainly fish in saltwater (68% combined). There is a higher prevalence of freshwater fishing among this group, with 3% indicating they only fish in freshwater, and 14% indicating they fish mainly in freshwater (17% combined, significantly higher than the Database/Supplied Sample).

## Fishing Intention

The question asked in the survey was:

### Q1c. Are you intending to recreationally fish in Tasmania in the next 12 months?

[SINGLE RESPONSE]

Yes, I will recreationally fish <u>only</u> in saltwater	1
Yes, I will recreationally fish mainly in saltwater	2
Yes, I will recreationally fish equally in saltwater and freshwater	3
Yes, I will recreationally fish mainly in freshwater	4
Yes, I will recreationally fish <u>only</u> in freshwater	5
No, I don't intend to recreationally fish in Tasmania in the next 12 months	6

Note: This question was only asked in Phase 2.

The survey results were:

Saltwater vs Freshwater Intention	All Respondents	Database/ Supplied Sample	General Fishing Public
<b>Base</b>	940	333	607
<b>Yes, I will recreationally fish only in saltwater</b>	39%	42%	37%
<b>Yes, I will recreationally fish mainly in saltwater</b>	27%	<b>31%</b>	25%
<b>Yes, I will recreationally fish equally in saltwater and freshwater</b>	20%	21%	20%
<b>Yes, I will recreationally fish mainly in freshwater</b>	9%	5%	<b>11%</b>
<b>Yes, I will recreationally fish only in freshwater</b>	3%	1%	<b>4%</b>
<b>No, I don't intend to recreationally fish in Tasmania in the next 12 months</b>	2%	0%	<b>3%</b>

Table 15 - Saltwater vs Freshwater intention

Fishing intention for the year ahead is also predominantly saltwater rather than freshwater. Overall, the majority will either only fish in saltwater, or mainly fish in saltwater (66% combined). The Database/Sample Supplied sample group is more likely to be saltwater fishing (73% combined, a significantly higher outcome), with the General Fishing Public being significantly lower (62% combined).

There is a much lower likelihood of freshwater fishing in the next 12 months compared with saltwater fishing.

## Fishing Frequency

This was asked of both saltwater and freshwater fishing, and the questions asked in the survey were:

**Q2A. Thinking about your fishing in saltwater specifically, how many days did you recreationally fish in saltwater in Tasmania in the last 12 months? Please note that 'days' refers to any day on which you have gone fishing regardless of the duration or number of times you have gone fishing in a single day.**

**Q2B. Thinking about your fishing in freshwater specifically, how many days did you recreationally fish in freshwater in Tasmania in the last 12 months? Please note that 'days' refers to any day on which you have gone fishing regardless of the duration or number of times you have gone fishing in a single day.**

[SINGLE RESPONSE]

0 days	1
1 to 10 days	2
11 to 20 days	3
21 to 30 days	4
31 days or more	5
Not sure	6

Note: these questions were asked of those who have fished in saltwater or freshwater in the last 12 months.

For saltwater fishing, the survey results were:

Saltwater Fishing Frequency	All Respondents	Database/ Supplied Sample	General Fishing Public
<b>Base</b>	895	446	449
<b>0 days</b> [0]	2%	0%	<b>3%</b>
<b>1 to 10 days</b> [5]	41%	20%	<b>63%</b>
<b>11 to 20 days</b> [15]	23%	<b>26%</b>	20%
<b>21 to 30 days</b> [25]	16%	<b>23%</b>	9%
<b>31 days or more</b> [40]	17%	<b>30%</b>	5%
<b>Not sure</b> [0]	1%	1%	1%
<b>Average number of days (using mid-points for mean factors)</b>	<b>16.4 days</b>	<b>22.6 days</b>	<b>10.2 days</b>

Table 16 - Saltwater fishing frequency

Overall, the total number of days saltwater fishing in the last 12 months was between 1 to 20 days, with an average of 16.4 days fishing. Among the Database/Supplied sample group, the average number of days fishing

in the year is higher (22.6 days) and is lower for the General Fishing Public (10.2 days).

For freshwater fishing, the survey results were:

Freshwater Fishing Frequency	All Respondents	Database/ Supplied Sample	General Fishing Public
<b>Base</b>	454	188	266
<b>0 days</b> [0]	16%	13%	18%
<b>1 to 10 days</b> [5]	46%	44%	48%
<b>11 to 20 days</b> [15]	20%	23%	18%
<b>21 to 30 days</b> [25]	7%	6%	9%
<b>31 days or more</b> [40]	9%	<b>13%</b>	6%
<b>Not sure</b> [0]	2%	1%	2%
<b>Average number of days (using mid-points for mean factors)</b>	<b>10.7 days</b>	<b>12.4 days</b>	<b>9.5 days</b>

Table 17 - Freshwater fishing frequency

Overall, the total number of days freshwater fishing in the last 12 months was between 1 to 20 days, with an average of 10.7 days fishing. Among the Database/Supplied sample group, the average number of days fishing in the year is higher (12.4 days) and is lower for the General Fishing Public (9.5 days).

There was a higher frequency of saltwater fishing than freshwater fishing in the last 12 months. Fishing frequency is significantly higher for those respondents from the Database/Supplied sample for both saltwater and freshwater fishing.

## Where Fished in Tasmania

This was asked of both saltwater and freshwater fishing, and the questions asked in the survey were:

**Q3A. Where in Tasmania do you mainly recreationally fish in saltwater? Please select as many as apply.**

**Q3B. Where in Tasmania do you mainly recreationally fish in freshwater? Please select as many as apply.**

[MULTIPLE RESPONSE]

North West, and West Coast (including Devonport and Burnie)	1
North East (including Launceston)	2
East and Central (including the Tasman Peninsula)	3

South East (including Hobart, Clarence, and Huon Valley council areas)	4
Other (please specify)	5

Note: these questions were asked of those who have fished in saltwater or freshwater in the last 12 months.

For saltwater fishing, the survey results were:

Region Fished in Saltwater	All Respondents	Database/ Supplied Sample	General Fishing Public
<b>Base</b>	<b>895</b>	<b>446</b>	<b>449</b>
<b>North West and West Coast (including Devonport and Burnie)</b>	22%	20%	25%
<b>North East (including Launceston)</b>	21%	23%	19%
<b>East and Central (including the Tasman Peninsula)</b>	44%	<b>53%</b>	34%
<b>South East (including Hobart, Clarence and Huon Valley)</b>	38%	37%	40%
<b>Other</b>	0%	0%	0%

Table 18 - Region fished in saltwater.

Overall, the majority of saltwater fishing was undertaken in the East and Central region (including the Tasman Peninsula), with the South East (including Hobart, Clarence and Huon Valley) the second most common region.

Respondents in the Database/Supplied Sample group are significantly more likely to have saltwater fished in the East and Central region, whereas the General Fishing Public respondents are more likely to have fished the South East (not significantly), with the East and Central location coming in a close second.

For freshwater fishing, the survey results were:

Region Fished in Freshwater	All Respondents	Database/ Supplied Sample	General Fishing Public
<b>Base</b>	<b>454</b>	<b>188</b>	<b>266</b>
<b>North West and West Coast (including Devonport and Burnie)</b>	26%	23%	27%
<b>North East (including Launceston)</b>	17%	13%	19%
<b>East and Central (including the Tasman Peninsula)</b>	54%	<b>65%</b>	46%



Region Fished in Freshwater	All Respondents	Database/ Supplied Sample	General Fishing Public
<b>Base</b>	<b>454</b>	<b>188</b>	<b>266</b>
<b>South East (including Hobart, Clarence and Huon Valley)</b>	19%	15%	22%
<b>Other</b>	3%	3%	3%

Table 19 - Region fished in freshwater.

Overall, freshwater fishing was mainly undertaken in the East and Central region, with the North West and West the second most common region.

Among the Database/Supplied Sample group the East and Central is the most common region (significantly more common than the General Fishing Public), with North West and West the second most common region. Similarly, among the General Fishing Public group, East and Central is the most common region, followed by North West and West.

These results indicate that the East and Central location is the location where the most fishing activity (saltwater and freshwater) occurs.

## Species of Fish

This was asked of both saltwater and freshwater fishing, and the answer options were specific to each. The saltwater question was:

**Q4A. Which of the following species do you mainly recreationally fish in saltwater in Tasmania for? *You can select as many as apply.***

[MULTIPLE RESPONSE]

Flathead	1
Trumpeter	2
Australian Salmon	3
Snapper	4
Black Bream	5
Tuna	6
King George Whiting	7
Kingfish	8
Calamari/Squid	9

Rock Lobster	10
Abalone	11
Other (please specify)	12

Note: these questions were asked of those who have fished in saltwater or freshwater in the last 12 months.

For saltwater fishing, the survey results were:

Species Fished in Saltwater	All Respondents	Database/ Supplied Sample	General Fishing Public
<b>Base</b>	895	446	449
<b>Flathead</b>	90%	91%	88%
<b>Calamari / Squid</b>	55%	<b>71%</b>	39%
<b>Australian Salmon</b>	48%	<b>56%</b>	39%
<b>Rock Lobster</b>	33%	<b>51%</b>	14%
<b>Tuna</b>	29%	<b>43%</b>	16%
<b>King George Whiting</b>	22%	<b>30%</b>	15%
<b>Kingfish</b>	21%	<b>33%</b>	9%
<b>Trumpeter</b>	21%	<b>34%</b>	8%
<b>Abalone</b>	20%	<b>29%</b>	10%
<b>Snapper</b>	20%	<b>25%</b>	14%
<b>Black Bream</b>	16%	19%	14%
<b>Other</b>	10%	<b>16%</b>	4%

Table 20 - Species fished in saltwater.

Overall, Flathead is the top species fished for in saltwater (90%). Secondary species include Calamari / Squid (55%), Australian Salmon (48%), Rock Lobster (33%) and Tuna (29%).

The top three species are consistent across the two sample groups (Flathead, Calamari / Squid and Australian Salmon). Among the Database/Supplied Sample group, there are significantly more species targeted in saltwater, with the majority (over 50%) fishing for Flathead, Calamari/Squid, Australian Salmon, and Rock Lobster. Among the General Fishing Public group, Flathead is the key species, with over a third also targeting Calamari/Squid, and Australian Salmon.

The freshwater question was:

**Q4B. Which of the following species do you mainly recreationally fish in freshwater in Tasmania for? You can select as many as apply.**

[MULTIPLE RESPONSE]

Brown Trout	1
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Brook Trout	2
Rainbow Trout	3
Australian Salmon	4
Other (please specify)	5

For freshwater fishing, the survey results were:

Species Fished in Freshwater	All Respondents	Database/ Supplied Sample	General Fishing Public
<b>Base</b>	454	188	266
<b>Brown Trout</b>	80%	<b>89%</b>	73%
<b>Rainbow Trout</b>	66%	69%	64%
<b>Australian Salmon</b>	21%	18%	23%
<b>Brook Trout</b>	13%	14%	12%
<b>Other</b>	4%	5%	3%

Table 21 - Species fished in freshwater.

Overall, Brown Trout and Rainbow Trout are clearly the two freshwater species targeted by freshwater fishers. This is consistent across both sample groups, and significantly higher outcome for the Database/Supplied Sample.

## Fishing Platforms Used

This was asked of both saltwater and freshwater fishing, and the questions asked in the survey were:

**Q5A. When you recreationally fish in saltwater in Tasmania, what platforms do you mainly fish from? Please select as many as apply.**

**Q5B. When you recreationally fish in freshwater in Tasmania, what platforms do you mainly fish from? Please select as many as apply.**

[MULTIPLE RESPONSE]

Beach	1
Jetty or Wharf	2
Rocks	3
Boat	4
Other (specify)	5

Note: these questions were asked of those who have fished in saltwater or freshwater in the last 12 months.

For saltwater fishing, the survey results were:

Platforms Used in Saltwater	All Respondents	Database/ Supplied Sample	General Fishing Public
<b>Base</b>	895	446	449
<b>Beach</b>	32%	27%	<b>37%</b>
<b>Jetty or Wharf</b>	35%	25%	<b>46%</b>
<b>Rocks</b>	28%	25%	<b>31%</b>
<b>Boat</b>	76%	<b>91%</b>	62%
<b>Other</b>	2%	3%	2%

Table 22 - Platforms used in saltwater.

Overall, the most common platform used for saltwater fishing is by boat (76%), followed by a jetty/wharf (35%).

Among the Database/Supplied Sample group, saltwater fishing from a boat is the most common method (91%). Fishing from a beach, jetty/wharf or rocks are secondary alternatives for this group.

Similarly, among the General Fishing Public group, saltwater fishing is predominantly undertaken by boat (62%). Fishing from a jetty/wharf is a secondary option for this group.

For freshwater fishing, the survey results were:

Platforms Used in Freshwater	All Respondents	Database/ Supplied Sample	General Fishing Public
<b>Base</b>	454	188	266
<b>Beach</b>	21%	15%	<b>25%</b>
<b>Jetty or Wharf</b>	19%	10%	<b>26%</b>
<b>Rocks</b>	39%	36%	41%
<b>Boat</b>	52%	<b>69%</b>	40%
<b>Other</b>	19%	19%	20%

Table 23 - Platforms used in freshwater.

Overall, freshwater fishing is mainly undertaken using a boat (52%), with fishing from rocks the secondary choice (39%).

Among the Database/Supplied Sample group, freshwater fishing from a boat is clearly the main platform used (69%, significantly higher), followed by rocks (36%).

Among the General Fishing Public group, freshwater fishing from rocks (41%) is slightly higher (not significantly) than fishing from a boat (40%). Fishing from a beach or jetty/wharf is significantly higher among the General Fishing Public.

## Fishing Location

This was asked of both saltwater and freshwater fishing, and the questions asked in the survey were:

**Q6A. When you recreationally fish in saltwater in Tasmania, which location do you typically fish from? *Please select as many as apply.***

**Q6B. When you recreationally fish in freshwater in Tasmania, which location do you typically fish from? *Please select as many as apply.***

[MULTIPLE RESPONSE]

A location close to your home	1
A location close to a holiday home or shack you own	2
A location close to a holiday home or shack you rent, borrow or visit	3
A location close to a caravan/cabin or RV park	4
A location close to a designated campsite	5
A location close to a campsite that is not designated e.g. bush campsite	6
Other (please specify)	7

For saltwater fishing, the survey results were:

Saltwater Fishing Location	All Respondents	Database/ Supplied Sample	General Fishing Public
<i>Base</i>	895	446	449
<b>A location close to your home</b>	64%	65%	62%
<b>A location close to a holiday home or shack you own</b>	26%	<b>31%</b>	21%
<b>A location close to a holiday home or shack you rent, borrow or visit</b>	15%	13%	17%
<b>A location close to a caravan/cabin or RV park</b>	8%	10%	6%
<b>A location close to a designated campsite</b>	13%	13%	12%
<b>A location close to a campsite that is not designated e.g. bush campsite</b>	9%	9%	8%
<b>Other</b>	9%	<b>11%</b>	6%
<b>TOTAL Holiday Home/Shack</b>	<b>39%</b>	<b>42%</b>	<b>37%</b>

<b>TOTAL Campsite (Designated and Not Designated)</b>	<b>17%</b>	<b>18%</b>	<b>17%</b>
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Table 24 - Saltwater fishing location

Overall, the majority of saltwater fishing is done at a location close to where the respondent resides (64%). Almost two-fifths of respondents (39%) undertake their saltwater fishing from a holiday home/shack, and just under a fifth undertake their fishing from a campsite (17%).

Among the Database/Supplied Sample group, the majority of saltwater fishing is undertaken close to home (65%), followed by from a holiday home/shack (42%). Holiday home/shack ownership is significantly higher among the Database/Supplied Sample group.

Among the General Fishing Public, the majority of saltwater fishing is undertaken close to home (62%), followed by from a holiday home/shack (37%).

For freshwater fishing, the survey results were:

Freshwater Fishing Location	All Respondents	Database/ Supplied Sample	General Fishing Public
<i>Base</i>	454	188	266
<b>A location close to your home</b>	50%	45%	53%
<b>A location close to a holiday home or shack you own</b>	13%	13%	12%
<b>A location close to a holiday home or shack you rent, borrow or visit</b>	20%	20%	19%
<b>A location close to a caravan/cabin or RV park</b>	9%	7%	10%
<b>A location close to a designated campsite</b>	21%	<b>26%</b>	18%
<b>A location close to a campsite that is not designated e.g. bush campsite</b>	21%	24%	19%
<b>Other</b>	9%	11%	8%
<b>TOTAL Holiday Home/Shack</b>	<b>30%</b>	<b>30%</b>	<b>29%</b>
<b>TOTAL Campsite (Designated and Not Designated)</b>	<b>35%</b>	<b>40%</b>	<b>32%</b>

Table 25 - Freshwater fishing location

Overall, freshwater fishing is mainly undertaken at a location close to home (50%), followed by from a campsite (35%) or a holiday home/shack (30%).

There are very similar results among the two groups when compared to the total. Database/Supplied Sample respondents are significantly more likely to have undertaken freshwater fishing from a location close to a designated campsite.

## Boat Ownership

The question asked in the survey was:

### Q9. Do you or anyone in your immediate household own a boat used for recreational fishing?

[SINGLE RESPONSE]

Yes	1
No	2

The survey results were:

Boat Ownership	All Respondents	Database/ Supplied Sample	General Fishing Public
<b>Base</b>	1,064	457	607
<b>Yes</b>	60%	<b>87%</b>	40%
<b>No</b>	40%	13%	<b>60%</b>

Table 26 - Boat ownership

Overall, 60% of households indicate they own a boat for recreational fishing.

Among the Database/Supplied Sample group, boat ownership is significantly higher with 87% indicating they own a boat for recreational fishing.

Among the General Fishing Public group, boat ownership is significantly lower with 40% indicating they own a boat for recreational fishing.

## Where Acquired Fishing Equipment Last 12 Months

The question asked in the survey was:

### Q11. How have you acquired fishing equipment in the last 12 months? *You can select as many as apply.*

[MULTIPLE RESPONSE]

From an online store such as Amazon or eBay	1
From a major outlet such as BCF, Anaconda or Tackleworld	2
From a department store such as Big W or Kmart	3
From the local bait and tackle store where you live	4
From the local bait and tackle store where you fish	5



By swapping things you own in exchange for fishing equipment	6
By buying second hand fishing equipment	7
Another way (please specify)	8
I haven't bought or swapped any fishing gear in the last 12 months [EXCLUSIVE]	9

The survey results were:

Where Acquired Fishing Equipment Last 12 Months	All Respondents	Database/ Supplied Sample	General Fishing Public
<b>Base</b>	1,064	457	607
<b>A major outlet such as BCF, Anaconda or Tackleworld</b>	60%	<b>79%</b>	45%
<b>From the local bait and tackle store where you live</b>	44%	<b>64%</b>	29%
<b>From an online store such as Amazon or eBay</b>	23%	<b>32%</b>	16%
<b>From a department store such as Big W or Kmart</b>	21%	20%	22%
<b>From the local bait and tackle store where you fish</b>	19%	<b>27%</b>	15%
<b>By buying second hand fishing equipment</b>	14%	<b>18%</b>	11%
<b>By swapping things you own in exchange for fishing equipment</b>	2%	2%	1%
<b>Another way</b>	2%	3%	2%
<b>I haven't bought or swapped any fishing gear in the last 12 months</b>	21%	7%	<b>32%</b>

Table 27 - Where acquired fishing equipment L12M

Overall, the majority of respondents have acquired some fishing equipment over the last 12 months (79%). Of these, the majority (60%) have acquired fishing equipment from a major outlet (such as BCF, Anaconda or Tackleworld) in the last 12 months. Just under half have acquired fishing equipment from the local bait and tackle store where they reside (44%).

Among the Database/Supplied Sample, there is a higher proportion who have acquired fishing equipment in the last 12 months (93%, significantly higher). The majority have either purchased from a major outlet (79%, significantly higher) or from their local bait and tackle store where they reside (64%, significantly higher).

Among the General Fishing Public, a smaller proportion but still the majority (68%) have purchased fishing equipment in the last 12 months. Major outlets (45%) and their local bait and tackle stores where they reside (29%) are the two key sources of fishing equipment.

## Fishing Demographic Summary Table

Fishing Demographic Summary Table	Results	Summary / Key Difference Notes
<b>Fishing Licence Status</b> % Hold a Current Fishing Licence	All Respondents Combined: <b>49%</b> Database/Supplied Sample: <b>79%</b> General Fishing Public: <b>33%</b>	There is a higher proportion of respondents among the Database/Supplied Sample that hold a current fishing licence.
<b>Fishing Recency</b> % Recreationally Fished in Tasmania Last 12 Months	All Respondents: <b>86%</b> Database/Supplied Sample: <b>98%</b> General Fishing Public: <b>76%</b>	The majority in both samples have fished in the last 12 months.
<b>Saltwater vs Freshwater Recency</b> % only + mainly saltwater	All Respondents: <b>72%</b> Database/Supplied Sample: <b>76%</b> General Fishing Public: <b>68%</b>	The majority in both sample groups either only fish or mainly fish in saltwater.
<b>Fishing Intention</b> % only + mainly saltwater	All Respondents: <b>66%</b> Database/Supplied Sample: <b>73%</b> General Fishing Public: <b>62%</b>	The majority in both sample groups intend to only fish or mainly fish in saltwater in the next 12 months.
<b>Fishing Frequency (Saltwater)</b> Average Number of Days	All Respondents: <b>16.4 days</b> Database/Supplied Sample: <b>22.6 days</b> General Fishing Public: <b>10.2 days</b>	There is a greater number of days fished in saltwater among the Database/Supplied Sample group.
<b>Fishing Frequency (Freshwater)</b> Average Number of Days	All Respondents: <b>10.7 days</b> Database/Supplied Sample: <b>12.4 days</b> General Fishing Public: <b>9.5 days</b>	There is a slightly greater number of days fished in freshwater among the Database/Supplied Sample group.
<b>Region in Tasmania Fished (Saltwater)</b> Top 2 Regions Fished	All Respondents: <b>1<sup>st</sup> East and Central, 2<sup>nd</sup> South East</b> Database/Supplied Sample: <b>1<sup>st</sup> East and Central, 2<sup>nd</sup> South East</b> General Fishing Public: <b>1<sup>st</sup> South East, 2<sup>nd</sup> East and Central</b>	The top 2 regions fished in saltwater are consistent across the sample groups.
<b>Region in Tasmania Fished (Freshwater)</b> Top 2 Regions Fished	All Respondents: <b>1<sup>st</sup> East and Central, 2<sup>nd</sup> North West and West</b> Database/Supplied Sample: <b>1<sup>st</sup> East and Central, 2<sup>nd</sup> North West and West</b> General Fishing Public: <b>1<sup>st</sup> East and Central, 2<sup>nd</sup> North West and West</b>	The top 2 regions fished in freshwater are consistent across the sample groups.

Fishing Demographic	Results	Summary / Key Difference Notes
<b>Species of Fish (Saltwater)</b> Top 3 Species	All Respondents Combined: <b>1<sup>st</sup> Flathead, 2<sup>nd</sup> Calamari / Squid, 3<sup>rd</sup> Australian Salmon</b> Database/Supplied Sample: <b>1<sup>st</sup> Flathead, 2<sup>nd</sup> Calamari / Squid, 3<sup>rd</sup> Australian Salmon</b> General Fishing Public: <b>1<sup>st</sup> Flathead, 2<sup>nd</sup> Calamari / Squid, 3<sup>rd</sup> Australian Salmon</b>	The top 3 species for saltwater fishing are common among both sample groups.
<b>Species of Fish (Freshwater)</b> Top 2 Species	All Respondents Combined: <b>1<sup>st</sup> Brown Trout, 2<sup>nd</sup> Rainbow Trout</b> Database/Supplied Sample: <b>1<sup>st</sup> Brown Trout, 2<sup>nd</sup> Rainbow Trout</b> General Fishing Public: <b>1<sup>st</sup> Brown Trout, 2<sup>nd</sup> Rainbow Trout</b>	The top 2 species for freshwater fishing are common among both sample groups.
<b>Platforms Used (Saltwater)</b> Top 2 Platforms	All Respondents: <b>1<sup>st</sup> Boat, 2<sup>nd</sup> Jetty/Wharf</b> Database/Supplied Sample: <b>1<sup>st</sup> Boat, 2<sup>nd</sup> Beach</b> General Fishing Public: <b>1<sup>st</sup> Boat, 2<sup>nd</sup> Jetty/Wharf</b>	For saltwater fishing, a boat is the preferred platform for both sample groups
<b>Platforms Used (Freshwater)</b> Top 2 Platforms	All Respondents: <b>1<sup>st</sup> Boat, 2<sup>nd</sup> Rocks</b> Database/Supplied Sample: <b>1<sup>st</sup> Boat, 2<sup>nd</sup> Rocks</b> General Fishing Public: <b>1<sup>st</sup> Rocks, 2<sup>nd</sup> Boat</b>	For freshwater fishing, a boat is preferred for the majority, and is a very close second for the General Fishing Public.
<b>Fishing Location (Saltwater)</b> Top 2 Locations	All Respondents: <b>1<sup>st</sup> Close to home, 2<sup>nd</sup> Holiday home/shack</b> Database/Supplied Sample: <b>1<sup>st</sup> Close to home, 2<sup>nd</sup> Holiday home/shack</b> General Fishing Public: <b>1<sup>st</sup> Close to home, 2<sup>nd</sup> Holiday home/shack</b>	For saltwater fishing, the top 2 fishing locations are consistent among the two sample groups.
<b>Fishing Location (Freshwater)</b> Top 2 Locations	All Respondents: <b>1<sup>st</sup> Close to home, 2<sup>nd</sup> Campsite</b> Database/Supplied Sample: <b>1<sup>st</sup> Close to home, 2<sup>nd</sup> Campsite</b> General Fishing Public: <b>1<sup>st</sup> Close to home, 2<sup>nd</sup> Campsite</b>	For freshwater fishing, the top 2 fishing locations are consistent among the two sample groups.

Fishing Demographic	Results	Summary / Key Difference Notes
<b>Boat Ownership</b> Yes %	All Respondents Combined: <b>60%</b> Database/Supplied Sample: <b>87%</b> General Fishing Public: <b>40%</b>	There is a higher proportion of boat ownership among the Database/Supplied Sample group.
<b>Acquired Fishing Equipment Last 12 Months</b> % Acquired	All Respondents Combined: <b>79%</b> Database/Supplied Sample: <b>93%</b> General Fishing Public: <b>68%</b>	There is a higher proportion of respondents among the Database/Supplied Sample group that has acquired fishing equipment in the last 12 months. However, the majority of both groups have done so.
<b>Where Acquired Fishing Equipment</b> Top 2 Sources	All Respondents Combined: <b>1<sup>st</sup> Major Outlet, 2<sup>nd</sup> Local Bait and Tackle Store close to home</b> Database/Supplied Sample: <b>1<sup>st</sup> Major Outlet, 2<sup>nd</sup> Local Bait and Tackle Store close to home</b> General Fishing Public: <b>1<sup>st</sup> Major Outlet, 2<sup>nd</sup> Local Bait and Tackle Store close to home</b>	The top 2 sources for acquiring fishing equipment are consistent across both sample groups.

Table 28 - Fishing demographic summary table

## Sample Sources Key Fishing Demographic Similarities and Differences

Overall, there is a great deal of consistency in the results between the two sample groups. In particular, the results between the two sample groups are consistent for:

- The majority have fished and intend to fish in saltwater.
- The regions in which they fish in saltwater and freshwater.
- The top 3 species targeted in saltwater and the top 2 species targeted in freshwater.
- A boat being the key fishing platform used for both saltwater and freshwater.
- All fish close to home, or from a holiday home/shack they have access to.
- The majority have acquired fishing equipment in the last 12 months, and all tend to use a major outlet, or a local bait and tackle shop close to home.

The key differences between the two groups are:

- A significantly higher proportion of Database/Supplied Sample group respondents hold a current recreational fishing licence.
- Database/Supplied Sample group has a significantly greater number of days fished for both saltwater and freshwater.
- The Database/Supplied Sample group has a significantly higher proportion of boat ownership.

- In general, the Database/Supplied Sample group targets more fish species when fishing, and has purchased more fishing equipment, indicating a greater depth of 'fishing engagement' than the General Fishing Public group.

When combining the two sample groups together, it's important to note that:

- The consistent elements between the two sample groups remain consistent in the overall result. This means that these fishing demographic outcomes can be broadly claimed to apply to the Tasmanian fishing public as a whole.
- The key differences between the two sample groups provide a combined outcome that might not align with the Tasmanian fishing public as a whole. We recommend using caution when reporting on these questions given the potential bias in the sampling. However, these results provide an indication of the outcome of these questions.

In summary, it is important to be aware of the potential bias and limitations of the results based on the sample type and research methodology utilised.

## Segmentation

This section provides the results of the psychographic segmentation undertaken on primary research collected during Phase 2 of the research project.

### Overview

The segmentation analysis for this study was undertaken by Power Stats, a Sydney based company specialising in advanced statistical analysis for corporate and government clients. Power Stats has been providing these services to its client organisations since 2002.

Segmentation analysis is a data exploration (mining) tool for dividing a multivariate dataset into 'natural' clusters (segments). This tool was used to explore whether segments based on attitudes towards fishing and life in general existed in the survey dataset.

To arrive at the optimum number of clusters, the results of different clustering algorithms were compared. In this study, all the algorithms tested indicated a four-segment solution.

The final allocation of respondents to segments was undertaken using the Ward's method (Ward's minimum variance method). This method provided the cleanest interpretation of the data and was the more robust analysis within cluster similarities and between cluster difference measures.

The analysis supplied by Power Stats provided cluster profiles in terms of the input variables and enabled the development of a description or 'story' for each segment. As noted above, a four-segment solution was determined to be the most relevant option this report is based on that option.

The term population used in this report refers to the Tasmanian recreational fisher population. Therefore, the segments described in this report relate to that population.

The primary basis for segmentation employed in this study is psychographic (attitudinal) segmentation with all other data being collected during the survey mapped back to one of the four segments. From a segmentation perspective, the objective is to identify segments that are large enough to warrant the development of segment specific strategies for a range of purposes which may include communication, engagement and program and service development and delivery. At the same time, it is important that the segments have minimal overlap; that is, they are identifiable as discrete segments.

## Segments Described

The following sections describe each of the four segments. These are the segments stories. The first part of each story is a narrative which is based on the responses to the attitudinal and behavioural questions included in the survey questionnaire. The second part of the story builds on this narrative with a sorted on differences analysis using two-box agreement which is a simple and effective way to compare two sets of data and identify their dissimilarities. Please refer to the explanation below. The two-box agreement is done for three sets of statements per segment, the first being general attitudes, the second relating to fishing attitudes and the third set is focused on actual fishing behaviours.

This is followed by an overview of the demographics associated with each respective segment. Please note that the sample sizes vary from topic to topic as not all respondents answered every question. Accordingly, the number of respondents answering these questions is highlighted. The fourth and final part of each story sheds light on specific fishing related behaviours associated with the associated segment via the development of a 'persona' for each segment. Each section concludes with a brief interpretation of the findings. This highlights the most substantial differences, any patterns observed, or potential reasons behind the disparities. The goal is to provide readers with valuable insights into the data comparison of each segment and provide multiple opportunities to make sense of the information in different ways.

As highlighted above, four segments were identified. Each of these segments has been given a descriptive label:

- Segment 1 — Green Individualists 32%
- Segment 2 — Homebody Anglers 17%
- Segment 3 — Outgoing Adventurers 24%
- Segment 4 — Daring Enthusiasts 27%

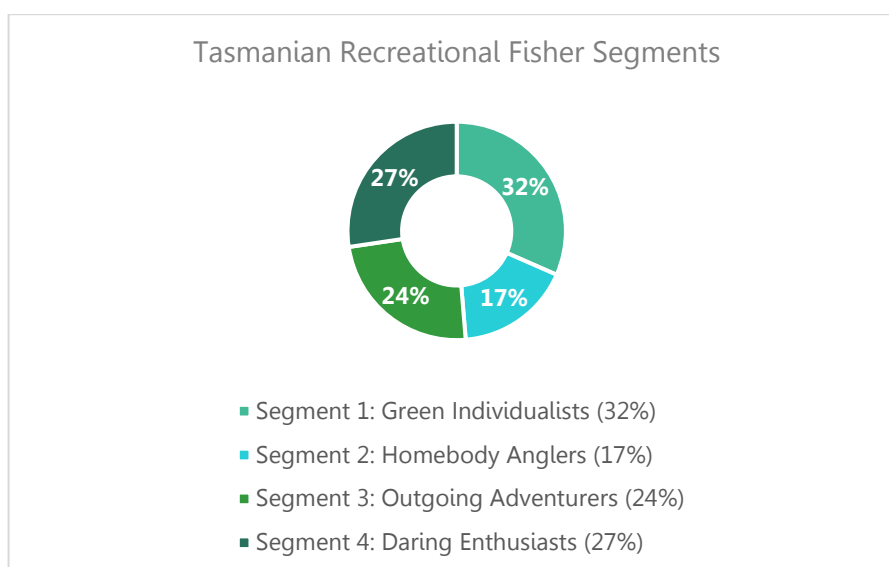


Figure 2 – Segments

## Sorted on Differences Analysis Explained

The primary goal of the sorted on differences report is to highlight the discrepancies or differences between two sets of data in a clear and concise manner. This comparison allows readers to easily see the variations and understand how the data differs across the two groups being analysed. The two-box agreement visually represents the data discrepancies shown in this report. In this report we are comparing the data from each segment with the cumulative data from each of the remaining three segments.

Before creating the two-box agreement, the data from both datasets is sorted in descending order. This sorting helps in identifying patterns and trends that might not be apparent otherwise. Once the data is sorted, the report highlights the differences between the two datasets by placing them side-by-side in a two-box agreement table. This makes it easy to compare data points directly and quickly identify any deviations. To enhance readability, colour coding has been used in the two-box agreement. This visual aid provides a quick overview of where the significant variations lie.

As noted above, a sorted on differences report using two-box agreement is a simple and effective way to compare two sets of data and identify their dissimilarities. This method provides for the presentation of data in a reader-friendly format, making it easy to comprehend the variations between two datasets.

Please note that percentage figures presented in the tables below may not add up to 100% due to rounding.



## **Segment 1 – Green Individualists (32%)**

### **Segment Story**

Coming predominantly from the south east of Tasmania, the Green Individualists' segment comprises individuals who have a deep appreciation for nature and prioritise a sense of space, openness, and the environment. Confident, with a clear understanding of their goals in life, they are not swayed by the opinions of others and prioritise their own thoughts and beliefs.

They are well educated and have a strong desire to travel and experience new things both within Australia and abroad. Whilst still slightly optimistic about the future, taking action against climate change is a cause they feel strongly about, and they believe that more can be done to protect and preserve the environment.

When it comes to fishing, the Green Individualists do not consider themselves serious fishers but instead approach it as a recreational activity that allows them to connect with nature and create lasting memories, often fishing close to a shack they own or visit. They believe that the success of a fishing trip is not solely dependent on the number of fish caught or the size, but rather on the overall experience. They find fishing to be a source of relaxation and unwinding from their daily lives.

In terms of fishing practices, the Green Individualists are less likely to have a fishing licence, fish less often and are the least likely to have fished in the last 12 months but when they do go, they are responsible and conscious of sustainable fishing. They easily understand fishing rules and regulations and appreciate safety considerations when going fishing. They support fisheries management principles and accept fishing rules and regulations even if it means catching fewer fish. They recognise the importance of maintaining a balance between recreational and commercial fishing in Tasmania, but they are also sceptical of the Government's ability to manage Tasmania's fisheries.

The Green Individualists are the most affluent of the segments but are light shoppers when it comes to supporting their fishing experience. Shopping for recognised brands is less important to them, and they would rather head to a major 'big box' retailer than browse the local tackle shop for their fishing needs.

Overall, the Green Individualists' segment represents individuals who value nature, and a commitment to environmental sustainability. They engage in fishing as a means to connect with the natural world, to relax and unwind and bring back fond childhood memories.

## Sorted On Differences Analysis

The following highlights the differences between the two datasets by placing them side-by-side in a two-box agreement table. To enhance readability, colour coding has been used in the 'Difference' column, with green signifying significantly higher and red signifying significantly lower. This visual aid provides a quick overview of where the significant variations lie.

<b>S1 - Segment Statements – Set 1 General Attitudes</b>	<b>n = 336</b>	<b>n = 728</b>	
	<b>Green Individualists</b>	<b>Segments 2+3+4</b>	<b>Difference</b>
I don't think Australians are doing enough to combat climate change	74%	46%	<b>28%</b>
I have travelled a lot around Australia or overseas	81%	63%	<b>18%</b>
I'd describe myself as a bit of a homebody	60%	48%	<b>12%</b>
There's a lot more we could be doing to look after our environment	93%	80%	<b>12%</b>
I'm more concerned with what I think, than what other people think of me	77%	67%	<b>10%</b>
I feel really uncomfortable when I'm out of my normal environment	32%	30%	<b>2%</b>
A sense of space and openness is important to me	93%	93%	<b>0%</b>
My health and wellbeing is very important to me	95%	96%	<b>-1%</b>
I like the freedom of not having to comply with rules and regulations	35%	36%	<b>-1%</b>
I see myself as a trendsetter	12%	15%	<b>-3%</b>
I think most people that know me well would consider me to be a confident person	75%	82%	<b>-6%</b>
A sense of community is an important consideration for me when I'm choosing somewhere to live.	68%	74%	<b>-6%</b>
I consider myself to be a bit of a risk taker	36%	43%	<b>-7%</b>
Keeping in close contact with my family is very important to me	80%	90%	<b>-10%</b>
In a group situation I often take the lead	45%	56%	<b>-11%</b>
I have a clear idea of my goals in life	72%	85%	<b>-13%</b>

Technology is changing so fast I find it hard to keep up	40%	52%	-13%
I'm optimistic about the future	55%	70%	-15%
I think most people that know me well would consider me a competitive person	43%	60%	-17%
I'd describe myself as adventurous and outgoing	55%	75%	-20%

Table 29 - Segment 1 set 1 statements

## Interpretation of Findings

The sorted on differences report using two-box agreement reveals a number of major differences between the Green Individualists' segment and Segments 2+3+4. These differences can be positive, or negative, with differences of 10% or greater being detailed.

### Positive Differences:

**Climate Change Concern:** The Green Individualists' segment shows a significantly higher concern about climate change, with 74% expressing this view compared to 46% in Segments 2+3+4, resulting in a positive difference of 28%. This suggests that the Green Individualists are likely to be more environmentally conscious and active in addressing climate change issues.

**Travel Experience:** The Green Individualists' segment demonstrates a more extensive travel experience, with 81% having travelled extensively around Australia or overseas. In contrast, only 63% of respondents from Segments 2+3+4 share similar experiences. This positive difference of 18% indicates that the Green Individualists' segment tends to be more well-travelled, enjoying the exploration of new travel experiences.

**Homebody Preference:** The Green Individualists' segment shows a higher inclination towards being homebodies, with 60% describing themselves as such, while only 48% of respondents from Segments 2+3+4 identify as homebodies. This results in a difference of 12%.

**Environmental Awareness:** 93% of Green Individualists believe there is a lot more they could do to look after the environment, while 80% of respondents from Segments 2+3+4 share this view, resulting in a positive difference of 13%. This disparity highlights a stronger sense of environmental responsibility and awareness among the "Green Individualists."

**Concerned with Own Opinions:** The Green Individualists' segment demonstrates a lower level of concern with what other people think of them, with 77% stating this, compared to 67% in Segments 2+3+4, resulting in a positive difference of 10%. This indicates that the Green Individualists may value others' opinions and judgments to a lesser extent than the other segments.

### Negative Differences:

**Keeping in Close Contact with Family:** The Green Individualists' segment places slightly less importance on

keeping in close contact with their family, with 80% considering it very important, while 90% of respondents from Segments 2+3+4 share this view. This negative difference of 10% suggests that the Green Individualists may not prioritise frequent communication with family members as much as the other segments.

**Taking the Lead in Group Situations:** The Green Individualists' segment is less likely to take the lead in group situations, with only 45% stating this characteristic, compared to 56% in Segments 2+3+4. This negative difference of 11% indicates that the Green Individualists may be less inclined to assume leadership roles in social settings.

**Clarity of Goals in Life:** The Green Individualists' segment is slightly less clear about their goals in life, with 72% having a clear idea of their goals, while 85% of respondents from Segments 2+3+4 share this clarity. This negative difference of 13% suggests that the Green Individualists may have a somewhat less defined sense of direction and purpose in life.

**Challenges Keeping Up with Technology:** The Green Individualists' segment finds it less challenging to keep up with rapidly changing technology, with 40% expressing this sentiment, compared to 52% in Segments 2+3+4. This negative difference of 12% indicates that the Green Individualists may be more adaptive or interested in staying up to date with technological advancements.

**Optimism about the Future:** The Green Individualists' segment exhibits a lower level of optimism about the future, with 55% expressing optimism, while 70% of respondents in Segments 2+3+4 share this positive outlook. This negative difference of 15% suggests that the Green Individualists may be slightly less hopeful or positive about future prospects.

**Perceived Competitiveness:** The Green Individualists' segment is perceived as less competitive by others who know them well, with only 43% considering them competitive individuals, compared to 60% in Segments 2+3+4. This negative difference of 17% indicates that the Green Individualists may be seen as less driven by competition.

**Adventurous and Outgoing Self-Description:** The Green Individualists' segment is much less likely to describe themselves as adventurous and outgoing, with only 55% claiming these characteristics, while 75% of respondents from Segments 2+3+4 describe themselves similarly. This negative difference of 20% suggests that the Green Individualists perceive themselves as less adventurous and outgoing compared to the other segments.

<b>S1 - Segment Statements – Set 2 Fishing Attitudes</b>		<b>n = 336</b>	<b>n = 728</b>	
	<b>Green Individualists</b>	<b>Segments 2+3+4</b>	<b>Difference</b>	
I don't consider myself to be a serious fisher	80%	47%	<b>33%</b>	
A fishing trip can be successful even if you don't catch fish	88%	81%	<b>7%</b>	

Safety is an important consideration when I go fishing	96%	95%	1%
Sharing a fishing experience helps strengthen relationships with family and friends	84%	89%	-5%
I trust the government to manage our fisheries	28%	37%	-9%
For me, fishing brings back pleasant childhood memories	69%	82%	-13%
The bigger the fish I catch, the better the trip	18%	41%	-23%
The more fish I catch, the happier I am	17%	43%	-26%
Buying a recognised brand of fishing equipment is important to me	15%	43%	-27%
Most people I know would consider me to be a keen fisher	25%	69%	-44%

Table 30 - Segment 1 set 2 statements

**Positive Difference:**

**I don't consider myself to be a serious fisher:** The Green Individualists' segment has a significantly higher percentage (80%) of individuals who don't consider themselves serious fishers, compared to only 47% in Segments 2+3+4. This positive difference of 33% suggests that the Green Individualists are less likely to see themselves as serious participants in the activity of fishing.

**Negative Differences:**

**Fishing and Childhood Memories:** The Green Individualists' segment experiences less connection between fishing and pleasant childhood memories, with 69% stating this, while 82% of respondents in Segments 2+3+4 associate fishing with positive childhood memories. This negative difference of 13% indicates that the Green Individualists may have fewer nostalgic associations with fishing from their childhood.

**Big Fish and Trip Enjoyment:** The Green Individualists' segment places less emphasis on the size of the fish caught enhancing the enjoyment of the trip, with only 18% believing in this connection, while 41% of respondents from Segments 2+3+4 share the same view. This negative difference of 23% suggests that the Green Individualists may not consider catching large fish as crucial for trip satisfaction.

**Fish Catch and Happiness:** The Green Individualists' segment associates catching fewer fish with happiness less frequently, with only 17% stating this sentiment, compared to 43% in Segments 2+3+4. This negative difference of 26% indicates that the Green Individualists may not derive as much happiness from the number of fish they catch.

**Importance of Recognised Brand for Fishing Equipment:** The Green Individualists' segment places less importance on buying recognised brands of fishing equipment, with only 15% considering it important, while 43% of respondents from Segments 2+3+4 prioritise recognised brands. This negative difference of 27% suggests that the Green Individualists may not be as brand conscious when it comes to fishing equipment.

**Perceived Keen Fisher:** The Green Individualists' segment is perceived as less keen on fishing by most people they know, with only 25% being considered keen fishers, while 69% of respondents in Segments 2+3+4 are viewed the same way. This negative difference of 44% indicates that the Green Individualists may not be seen as enthusiastic about fishing by their social circles.

<b>S1 - Segment Statements – Set 3 Fishing Behaviours</b>	<b>n =336</b>	<b>n =728</b>	
	<b>Green Individualists</b>	<b>Segments 2+3+4</b>	<b>Difference</b>
I am a responsible fisher and accept fishing rules and regulations even if it means I catch less fish	97%	93%	4%
I support fisheries management principles	79%	76%	3%
I usually release most of the fish I catch	50%	48%	2%
I find fishing rules and regulations easy to understand	77%	75%	2%
I aim to catch enough fish for a feed rather than take the bag limit	86%	85%	1%
I buy fishing equipment that's affordable / look for the best deals	77%	79%	-2%
Fishing with my friends and family is the best part of going fishing	79%	83%	-4%
I support both recreational and commercial fishing in Tasmania	67%	73%	-5%
I catch fish, lobsters, etc. for food for myself or to share with my friends and family	78%	84%	-6%
I usually fish on my own to get away from people	22%	30%	-8%
I don't go fishing as often as I would like to	76%	85%	-9%
I fish to catch trophy sized fish	4%	13%	-10%

I like to browse in a tackle shop and then check online to see if I can get it cheaper	25%	35%	-11%
I like to compete in fishing competitions	2%	16%	-14%
I fish for the challenge and enjoyment of catching fish	72%	89%	-17%
I like to support my local tackle shop	58%	77%	-19%
Time spent fishing is one of the best ways I know to relax and unwind	65%	87%	-22%
When it comes to fishing, I tend to spend a lot of my money on this activity because I love it so much!	17%	50%	-33%

Table 31 - Segment 1 set 3 statements

### **Negative Differences:**

**Fishing for Trophy-Sized Fish:** The Green Individualists' segment shows a lower inclination to fish for trophy-sized fish, with only 4% fishing for this purpose, while 13% of respondents from Segments 2+3+4 share the same objective. This negative difference of 10% suggests that the Green Individualists are less motivated by the pursuit of catching trophy-sized fish.

**Shopping for Tackle Deals:** The Green Individualists' segment is less likely to browse in a tackle shop and then check online to find cheaper deals, with only 25% adopting this approach, while 35% of respondents in Segments 2+3+4 do the same. This negative difference of 11% indicates that the Green Individualists may not prioritise finding the best deals for fishing gear.

**Competing in Fishing Competitions:** The Green Individualists' segment shows less interest in competing in fishing competitions, with only 2% expressing this preference, compared to 16% in Segments 2+3+4. This negative difference of 14% suggests that the Green Individualists may not actively engage in fishing competitions.

**Fishing for Challenge and Enjoyment:** The Green Individualists' segment places less emphasis on fishing for the challenge and enjoyment of catching fish, with 72% fishing for these reasons, while 89% of respondents from Segments 2+3+4 share this motivation. This negative difference of 17% indicates that the Green Individualists may not derive as much pleasure from the challenge of fishing.

**Supporting Local Tackle Shops:** The Green Individualists' segment is less inclined to support their local tackle shop, with only 58% expressing this intention, while 77% of respondents from Segments 2+3+4 prioritise supporting local businesses. This negative difference of 19% suggests that the Green Individualists may not be as loyal to their local tackle shops.

**Fishing as a Relaxation Method:** The Green Individualists' segment considers spending time fishing as one of

the best ways to relax and unwind less frequently, with 65% stating this, while 87% of respondents in Segments 2+3+4 share the same sentiment. This negative difference of 22% indicates that the Green Individualists may not view fishing as a primary means of relaxation.

**Significant Spending on Fishing:** The Green Individualists' segment tends to spend significantly less money on fishing because of their love for the activity, with only 17% indicating such spending, while 50% of respondents from Segments 2+3+4 allocate more funds to fishing. This negative difference of 33% suggests that the Green Individualists are unlikely to prioritise spending on fishing.

## Segment Demographics

As shown below the Green Individualists' segment comprises individuals who are predominantly male, spread across different age groups, mostly married, with diverse family compositions and varying occupational backgrounds and educational achievements:

- > Gender: The majority of respondents in this segment are male (83%), while females make up a smaller portion (16%) of the segment.
- > Age Group: The segment is relatively evenly distributed across age groups. The largest age group is 50-64 years, accounting for 36% of respondents, followed by 65+ years (26%), 35-49 years (20%), and 18-34 years (18%).
- > Marital Status: The majority of respondents in this segment are married (66%), indicating a significant presence of individuals in committed relationships. A smaller percentage of respondents fall under the categories of never married (23%), divorced (4%), separated (2%), or widowed (1%).
- > Family Composition: The segment is primarily composed of couples or families without children living at home (50%). The next significant category is couples or families with children living at home (29%). A smaller percentage represents other family compositions, such as single parents with or without children (1% and 2% respectively), single individuals living alone (7%), and group households (5%).
- > Children's Fishing: Among respondents with children (Base 105), a majority of them (61%) have children who fish, indicating that fishing is a shared activity within families.
- > Occupation: The occupation distribution within this segment shows that a notable portion of respondents are retired (30%). Other significant categories include blue-collar workers (21%), professionals/executives (18%), and individuals with white-collar occupations (13%). A smaller percentage represents students (5%), those involved in home duties (3%), or unemployed individuals (2%).
- > Education: Respondents in this segment have varying educational backgrounds. The largest category comprises individuals who have completed a trade/apprenticeship/certificate/diploma (40%), followed closely by those with a bachelor's degree or higher (39%). A smaller percentage has completed high school or less (19%).



- > Household Income: The income distribution in this segment indicates a relatively balanced representation across income brackets. The highest percentage falls within the range of \$80,000 to <\$130,000 (28%), followed by \$130,000 or more (29%), \$40,000 to <\$80,000 (22%), and less than \$40,000 (11%).
- > Country of Birth: The vast majority of respondents in this segment were born in Australia (87%), with the remaining 13% representing individuals born in other countries.

## **Specific Fishing Related Behaviours**

This section details the Green Individualists specific fishing related behaviours:

- > Out of 336 respondents in Segment 1, 76% of them have engaged in recreational fishing in Tasmania in the last 12 months.
- > In total, 78% of Segment 1 respondents mainly fish in saltwater, while 19% fish in freshwater or a combination of saltwater and freshwater.
- > In total, 66% of Segment 1 respondents are planning to fish in saltwater, while 32% are planning to fish in freshwater or a combination of saltwater and freshwater.
- > Based on the responses of 248 Segment 1 respondents, the average number of days spent fishing in saltwater in Tasmania in the last 12 months is 12.3 days.
- > Based on the responses of 109 Segment 1, the average number of days spent fishing in freshwater in Tasmania in the last 12 months is 7.2 days.
- > Among 148 Segment 1 respondents, 20% mainly fish in saltwater in the North West and West Coast regions, 20% mainly fish in the North East region, 37% mainly fish in the East and Central regions, and 43% mainly fish in the South East region.
- > Among 148 Segment 1 respondents, 27% mainly fish in freshwater in the North West and West Coast regions, 16% mainly fish in the North East region, 51% mainly fish in the East and Central regions, and 17% mainly fish in the South East region.
- > Among 248 Segment 1 respondents, the top species they mainly fish for in saltwater in Tasmania are Flathead (88%), Calamari/Squid (47%), Australian Salmon (50%), Rock Lobster (21%), Tuna (19%), King George Whiting (20%), Snapper (17%), Trumpeter (13%), Kingfish (16%), Abalone (17%), Black Bream (14%), and other species (8%).

- > Among 109 Segment 1 respondents, the top species they mainly fish for in freshwater in Tasmania are Brown Trout (76%), Rainbow Trout (60%), Australian Salmon (22%), Brook Trout (11%), and other species (6%).
- > Among 248 Segment 1 respondents, the preferred platforms for saltwater fishing are Beach (33%), Jetty or Wharf (38%), Rocks (28%), Boat (72%), and other platforms (3%).
- > Among 109 Segment 1 respondents, the preferred platforms for freshwater fishing are Beach (30%), Jetty or Wharf (19%), Rocks (38%), Boat (39%), and other platforms (28%).
- > Among 248 Segment 1 respondents, the typical fishing locations in saltwater are a location close to their home (63%), a location close to a holiday home or shack they own (27%), a location close to a holiday home or shack they rent, borrow, or visit (16%), a location close to a designated campsite (12%), a location close to a non-designated campsite (7%), a location close to a caravan/cabin or RV park (8%), and other locations (7%).
- > Among 109 Segment 1 respondents, the typical fishing locations in freshwater are a location close to their home (45%), a location close to a holiday home or shack they own (16%), a location close to a holiday home or shack they rent, borrow, or visit (22%), a location close to a designated campsite (20%), a location close to a non-designated campsite (18%), a location close to a caravan/cabin or RV park (11%), and other locations (9%).
- > Out of the 336 respondents in Segment 1, 51% of them own a boat used for recreational fishing in saltwater.
- > Among 20 Segment 1 respondents, 45% acquired fishing equipment from a major outlet such as BCF, Anaconda, or Tackleworld, 30% acquired it from the local bait and tackle store where they live, 12% acquired it from an online store such as Amazon or eBay, 18% acquired it from a department store such as Big W or Kmart, 14% acquired it from the local bait and tackle store where they fish, 12% acquired it by buying second-hand fishing equipment, 2% acquired it by swapping things they own in exchange for fishing equipment, 3% acquired it through another way, and 37% haven't bought or swapped any fishing gear in the last 12 months.

## **Segment Persona**

*Name: John, the Green Individualist*

*Age: 60*

*Occupation: Retired (former Director in a Government Department)*

John spent decades working in a government department following his graduation from university and worked his way up to Director level before retiring. In retirement, he has embraced a new chapter in life, spending plenty

of time at the families shack in "Doo Town" on the Tasman Peninsula and escaping the winter somewhere else in Australia or overseas where it's warm and an interesting place to visit.

John shakes his head about how little is being done to deal with climate change and is increasingly concerned for the future for his young grandkids that live in Melbourne with his daughter and her husband. He tries to do his bit for the environment and contribute to positive change. A dedicated recycler, he also recently purchased an electric vehicle as a second car and he and his wife have converted their garden to natives to support local wildlife. Believing there is more to be done to care for the planet, he actively seeks opportunities to reduce his environmental footprint and inspire others to do the same.

John and his wife recently helped out at a tree-planting day along the bank of the creek that runs behind their suburban property, and they are regular contributors to the 'little library' on their street corner.

John is a bit of a homebody but heads out for a walk every morning or rides his bike with a few mates to a local café. He and his wife are regulars at the State Cinema, usually enjoying a bite to eat in North Hobart before a show.

John values his own convictions and has confidence in his choices. He is not overly concerned with what others think of him. His strong sense of self enables him to remain steadfast in his values and actions.

John heads out fishing when he's at his shack, usually when his friend Craig from the shack up the road is about. He keeps his fishing gear in good order and has been using the same boat rod for at least a decade or longer but thinks it might be time for a new reel soon. Heading out early, dawn is the perfect time to enjoy some down time in the Tasmanian summer weather when it's calm on the water. Heading back to shore by early afternoon to miss the sea breeze, he and Craig enjoy a beer as they split the catch between them and chat to their Doo Town neighbours who are also coming off the water before they all head to Craig's place for an early BBQ.

## **Segment Summary**

In summary, members of the Green Individualists' segment prioritise space, openness, and they strongly support environmental preservation and action against climate change. They are confident, have clear life goals, and are largely unaffected by the opinions of others. Experience and exploration are essential to them. Fishing for them is a recreational activity to connect with nature, valuing the experience and bonding with family and friends rather than the number of fish caught. They are responsible and conscious of sustainable fishing practices, supporting fisheries management principles and accepting regulations. Light spenders when it comes to supporting their fishing experience, they will head to a major 'big box' retailer rather than browse the local tackle shop. Fishing serves as a source of relaxation and unwinding from their daily lives, cherished for the camaraderie and shared experiences with friends and loved ones.

## Segment 2 - Homebody Anglers (17%)

### Segment Story

The Homebody Anglers' segment consists of individuals who highly value their personal space and a sense of openness. They consider themselves homebodies and find comfort in familiar environments. They prioritise maintaining close contact with their family, which is of utmost importance to them.

While they may not be as adventurous or outgoing as some of the other segments, they still possess a moderate level of confidence but are less certain of their life goals. The Homebody Anglers hold their own thoughts and opinions in high regard and are not overly concerned with the opinions of others. They're less likely to seek the spotlight and tend to take a more reserved approach in group situations. They are definitely not trendsetters and tend to find it hard to keep up with technology.

In terms of fishing, the Homebody Anglers do not consider themselves serious fishers but like to catch fish and enjoy the activity as a means of strengthening relationships with family and friends.

They are not overly concerned with catching trophy-sized fish or participating in competitions, but they aim to catch enough fish for a satisfying meal. They often release most of the fish they catch, which they consider to be a responsible approach to fishing. The Homebody Anglers are more likely to fish from a wharf or the rocks and are the least likely to own a boat.

These individuals are less likely than the other segments to trust the government to manage fisheries. They appreciate the freedom of not having to comply with strict rules and regulations but prioritise safety when going fishing and believe in fisheries management principles. They support both recreational and commercial fishing in Tasmania.

When it comes to purchasing fishing equipment, the Homebody Anglers are light spenders. Affordability is very important to them, and they look for the best deals. They appreciate the support of local tackle shops and browse both physical stores and online platforms.

The Homebody Anglers view fishing as a way to reconnect with pleasant childhood memories and find relaxation and peace in spending time by the water. They cherish the moments shared with friends and family during fishing outings and consider it the best part of the experience.

Overall, the Homebody Anglers' segment represents individuals who find solace and contentment in their home environment. They engage in fishing to catch a feed, strengthen relationships, and enjoy the simple pleasures in life.

## Sorted On Differences Analysis

The following highlights the differences between the two datasets by placing them side-by-side in a two-box agreement table. To enhance readability, colour coding has been used in the 'Difference' column, with green signifying significantly higher and red signifying significantly lower. This visual aid provides a quick overview of where the significant variations lie.

<b>S2- Segment Statements – Set 1 General Attitudes</b>	<b>n=182</b>	<b>n=882</b>	
	<b>Homebody Anglers</b>	<b>Segment 1+3+4</b>	<b>Difference</b>
I'd describe myself as a bit of a homebody	70%	48%	<b>22%</b>
I feel really uncomfortable when I'm out of my normal environment	48%	27%	<b>21%</b>
Technology is changing so fast I find it hard to keep up	59%	46%	<b>13%</b>
I like the freedom of not having to comply with rules and regulations	41%	34%	<b>7%</b>
Keeping in close contact with my family is very important to me	82%	88%	<b>-6%</b>
I'm optimistic about the future	59%	67%	<b>-8%</b>
I'm more concerned with what I think, than what other people think of me	62%	71%	<b>-9%</b>
My health and wellbeing is very important to me	88%	97%	<b>-9%</b>
There's a lot more we could be doing to look after our environment	76%	86%	<b>-9%</b>
A sense of space and openness is important to me	85%	94%	<b>-10%</b>
I see myself as a trendsetter	4%	16%	<b>-12%</b>
I think most people that know me well would consider me a competitive person	44%	56%	<b>-13%</b>
A sense of community is an important consideration for me when I'm choosing somewhere to live.	60%	74%	<b>-14%</b>
I consider myself to be a bit of a risk taker	28%	43%	<b>-15%</b>
I don't think Australians are doing enough to combat climate change	42%	58%	<b>-16%</b>
I have a clear idea of my goals in life	67%	84%	<b>-17%</b>

I'd describe myself as adventurous and outgoing	46%	73%	-27%
I think most people that know me well would consider me to be a confident person	54%	85%	-31%
In a group situation I often take the lead	27%	58%	-31%
I have travelled a lot around Australia or overseas	23%	78%	-56%

Table 32 - Segment 2 set 1 statements

## Interpretation of Findings

The sorted on differences report using two-box agreement reveals a number of major differences between the Homebody Anglers' segment and Segments 1+3+4. These differences can be positive, or negative, with differences of 10% or greater being detailed.

### Positive Differences:

**Homebody Description:** The Homebody Anglers' segment is more likely to describe themselves as a bit of a homebody, with 70% stating this, while only 48% of respondents from Segments 1+3+4 share the same self-description. This positive difference of 22% suggests that the Homebody Anglers are more inclined to stay at home and prefer familiar surroundings.

**Uncomfortable in Different Environments:** The Homebody Anglers' segment feels more uncomfortable when they're out of their normal environment, with 48% expressing this sentiment, compared to 27% in Segments 1+3+4. This positive difference of 21% indicates that the Homebody Anglers may have a stronger preference for familiarity and may experience discomfort when faced with new or unfamiliar surroundings.

**Challenges with Keeping Up with Technology:** The Homebody Anglers' segment finds it harder to keep up with rapidly changing technology, with 59% stating this, while 46% of respondents from Segments 1+3+4 share the same challenge. This positive difference of 13% suggests that the Homebody Anglers may be less inclined to adopt and adapt to technological advancements as quickly as the other segments.

### Negative Differences:

**Importance of Space and Openness:** The Homebody Anglers' segment places less importance on a sense of space and openness, with 85% considering it important, while 94% of respondents from Segments 1+3+4 share the same view. This negative difference of 10% suggests that the Homebody Anglers may not prioritise the need for spacious and open environments as much as the other segments.

**Trendsetter Self-Perception:** The Homebody Anglers' segment is less likely to see themselves as trendsetters, with only 4% identifying as such, compared to 16% in Segments 1+3+4. This negative difference of 12% indicates that the Homebody Anglers do not view themselves as being on the cutting edge of trends or fashion.

**Perceived Competitiveness:** The Homebody Anglers' segment is perceived as less competitive by most people who know them well, with only 44% considering them competitive individuals, while 56% of respondents in Segments 1+3+4 share this perception. This negative difference of 12% suggests that the Homebody Anglers may not be seen as highly competitive by their social circles.

**Importance of Community in Choosing a Place to Live:** The Homebody Anglers' segment places less importance on a sense of community when choosing a place to live, with 60% considering it important, while 74% of respondents from Segments 1+3+4 prioritise community aspects. This negative difference of 14% indicates that the Homebody Anglers do not place as much emphasis on community factors when deciding on a living location.

**Risk-Taking Self-Perception:** The Homebody Anglers' segment sees themselves as less of risk-takers, with only 28% considering themselves as such, compared to 43% in Segments 1+3+4. This negative difference of 15% suggests that the Homebody Anglers may perceive themselves as less inclined to take risks in various aspects of life.

**Climate Change Concern:** The Homebody Anglers' segment is less concerned about Australians doing enough to combat climate change, with only 42% expressing this view, while 58% of respondents from Segments 1+3+4 share this concern. This negative difference of 16% indicates that the Homebody Anglers may not be as worried about the efforts made to address climate change.

**Clarity of Life Goals:** The Homebody Anglers' segment has a less clear idea of their goals in life, with 67% having a clear idea, while 84% of respondents from Segments 1+3+4 share this clarity. This negative difference of 17% suggests that the Homebody Anglers may have a slightly less defined sense of direction and purpose in life.

**Adventurous and Outgoing Self-Description:** The Homebody Anglers' segment is less likely to describe themselves as adventurous and outgoing, with only 46% claiming these characteristics, while 73% of respondents from Segments 1+3+4 describe themselves similarly. This negative difference of 27% indicates that the Homebody Anglers may not perceive themselves as highly adventurous and outgoing compared to the other segments.

**Confident Self-Perception:** The Homebody Anglers' segment sees themselves as less confident individuals, with only 54% considering themselves confident, compared to 85% in Segments 1+3+4. This negative difference of 31% suggests that the Homebody Anglers may have a slightly lower level of self-assurance and confidence.

**Taking the Lead in Group Situations:** The Homebody Anglers' segment is less likely to take the lead in group situations, with only 27% stating this characteristic, compared to 58% in Segments 1+3+4. This negative difference of 31% indicates that the Homebody Anglers may be less inclined to assume leadership roles in social settings.

**Travel Experience:** The Homebody Anglers’ segment has significantly less travel experience around Australia or overseas, with only 23% having travelled extensively, while 78% of respondents from Segments 1+3+4 share such experiences. This negative difference of 56% suggests that the Homebody Anglers may not have explored or travelled as much as the other segments

S2 - Segment Statements – Set 2 Fishing Attitudes	n=182	n=882	
	Homebody Anglers	Segment 1+3+4	Difference
I don't consider myself to be a serious fisher	76%	54%	22%
The bigger the fish I catch, the better the trip	41%	33%	9%
The more fish I catch, the happier I am	38%	34%	5%
I trust the government to manage our fisheries	36%	34%	2%
Sharing a fishing experience helps strengthen relationships with family and friends	86%	88%	-2%
A fishing trip can be successful even if you don't catch fish	81%	84%	-2%
Safety is an important consideration when I go fishing	92%	95%	-4%
For me, fishing brings back pleasant childhood memories	75%	79%	-4%
Buying a recognised brand of fishing equipment is important to me	29%	35%	-6%
Most people I know would consider me to be a keen fisher	44%	57%	-13%

Table 33 - Segment 2 set 2 statements

**Positive Difference:**

**Not a Serious Fisher:** The Homebody Anglers’ segment is more likely to not consider themselves as serious fishers, with 76% stating this, while only 54% of respondents from Segments 1+3+4 share the same view. This positive difference of 22% suggests that the Homebody Anglers may be less inclined to see themselves as serious participants in the activity of fishing.

**Negative Difference:**

**Perceived Keen Fisher:** The Homebody Anglers’ segment is perceived as less keen on fishing by most people who know them well, with only 44% considering them keen fishers, while 57% of respondents in Segments 1+3+4 share this perception. This negative difference of 13% indicates that the Homebody Anglers may not be seen as highly enthusiastic about fishing by their social circles.

S2 - Segment Statements – Set 3 Fishing Behaviours	n=182	n=882	
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	Homebody Anglers	Segment 1+3+4	Difference
I buy fishing equipment that's affordable / look for the best deals	85%	77%	8%
I usually fish on my own to get away from people	31%	27%	4%
I usually release most of the fish I catch	50%	49%	1%
I like to browse in a tackle shop and then check online to see if I can get it cheaper	32%	32%	1%
I don't go fishing as often as I would like to	82%	82%	0%
I support both recreational and commercial fishing in Tasmania	71%	71%	0%
I am a responsible fisher and accept fishing rules and regulations even if it means I catch less fish	95%	94%	0%
Time spent fishing is one of the best ways I know to relax and unwind	80%	81%	-1%
I fish for the challenge and enjoyment of catching fish	82%	84%	-2%
I fish to catch trophy sized fish	9%	11%	-2%
I catch fish, lobsters, etc. for food for myself or to share with my friends and family	80%	83%	-3%
Fishing with my friends and family is the best part of going fishing	79%	82%	-3%
I like to compete in fishing competitions	9%	12%	-4%
I aim to catch enough fish for a feed rather than take the bag limit	81%	86%	-5%
I like to support my local tackle shop	65%	72%	-7%
I find fishing rules and regulations easy to understand	70%	77%	-7%
I support fisheries management principles	70%	78%	-8%
When it comes to fishing, I tend to spend a lot of my money on this activity because I love it so much!	27%	42%	-15%

Table 34 - Segment 2 set 3 statements

**Negative Difference:**

**Fishing Expenditure:** The Homebody Anglers' segment tends to spend significantly less money on fishing, with only 27% indicating such spending, while 42% of respondents from Segments 1+3+4 allocate more funds to fishing. This negative difference of 15% suggests that the Homebody Anglers do not prioritise spending on fishing.

**Segment Demographics**

- > The Homebody Anglers' segment comprises individuals who are primarily male and distributed across different age groups. They are mostly married and have diverse family compositions.
- > Occupations vary, with a notable presence of blue-collar workers and individuals involved in home duties. Educational backgrounds span a range of trade/apprenticeship/certificate/diploma and high school or less education. As highlighted below, the Homebody Anglers' segment represents a significant proportion of individuals born in Australia.
- > Gender: In this segment, the majority of respondents are male (76%), while females make up a smaller portion (24%) of the segment.
- > Age Group: The segment is fairly evenly distributed across age groups. The largest age group is 50-64 years, accounting for 32% of respondents, followed by 35-49 years (31%), 18-34 years (20%), and 65+ years (16%).
- > Marital Status: The majority of respondents in this segment are married (58%), indicating a significant presence of individuals in committed relationships. A smaller percentage of respondents fall under the categories of never married (28%), divorced (7%), separated (3%), or widowed (1%).
- > Family Composition: The segment shows a diverse range of family compositions. The most common composition is a couple or family without children living at home (34%), followed closely by a couple or family with children living at home (35%). Other categories include single parents with or without children (5% and 6% respectively), other family compositions (3%), individuals living alone (11%), and group households (3%).
- > Children's Fishing: Among respondents with children (Base 75), a majority of them (71%) have children who fish, indicating that fishing is a shared activity within families.
- > Occupation: The occupation distribution within this segment shows a diverse mix. The largest category is blue-collar workers (33%), followed by individuals involved in home duties (9%), white-collar workers (13%), and retired individuals (21%). Smaller percentages represent professionals/executives (6%), students (2%), or unemployed individuals (4%).
- > Education: Respondents in this segment have varied educational backgrounds. The largest category comprises individuals who have completed a trade/apprenticeship/certificate/diploma (48%), followed by those with high school or less education (37%). A smaller percentage holds a bachelor's degree or higher (14%).
- > Household Income: The income distribution in this segment shows a relatively balanced representation across income brackets. The highest percentage falls within the range of \$40,000 to <\$80,000 (31%), followed by \$80,000 to <\$130,000 (26%), less than \$40,000 (15%), and \$130,000 or more (14%).

- > Country of Birth: The vast majority of respondents in this segment were born in Australia (96%), with the remaining 4% representing individuals born in other countries.

## **Specific Fishing Related Behaviours**

This section details the Homebody Anglers specific fishing related behaviours:

- > Out of the 182 respondents in Segment 2, 82% of them have engaged in recreational fishing in Tasmania in the last 12 months.
- > In total, 71% of Segment 2 respondents mainly fish in saltwater, while 26% fish in freshwater or a combination of saltwater and freshwater.
- > In total, 67% of Segment 2 respondents are planning to fish in saltwater, while 30% are planning to fish in freshwater or a combination of saltwater and freshwater.
- > Based on the responses of 145 Segment 2 respondents, the average number of days spent fishing in saltwater in Tasmania in the last 12 months is 13.3 days.
- > Based on the responses of 78 Segment 2 respondents, the average number of days spent fishing in freshwater in Tasmania in the last 12 months is 9.0 days.
- > Among 145 Segment 2 respondents, 28% mainly fish in saltwater in the North West and West Coast regions, 23% mainly fish in the North East region, 41% mainly fish in the East and Central regions, and 37% mainly fish in the South East region.
- > Among 145 Segment 2 respondents, 32% mainly fish in freshwater in the North West and West Coast regions, 22% mainly fish in the North East region, 44% mainly fish in the East and Central regions, and 21% mainly fish in the South East region.
- > Among 145 Segment 2 respondents, the top species they mainly fish for in saltwater in Tasmania are Flathead (87%), Calamari/Squid (47%), Australian Salmon (40%), Rock Lobster (29%), Tuna (21%), King George Whiting (15%), Snapper (13%), Trumpeter (15%), Kingfish (15%), Abalone (12%), Black Bream (9%), and other species (5%).
- > Among 78 Segment 2 respondents, the top species they mainly fish for in freshwater in Tasmania are Brown Trout (77%), Rainbow Trout (67%), Australian Salmon (26%), Brook Trout (9%), and other species (3%).
- > Among 145 Segment 2 respondents, the preferred platforms for saltwater fishing are Beach (33%), Jetty or Wharf (43%), Rocks (32%), Boat (70%), and other platforms (1%).
- > Among 78 Segment 2 respondents, the preferred platforms for freshwater fishing are Beach (18%), Jetty or

Wharf (32%), Rocks (40%), Boat (54%), and other platforms (6%).

- > Among 145 Segment 2 respondents, the typical fishing locations in saltwater are a location close to their home (66%), a location close to a holiday home or shack they own (22%), a location close to a holiday home or shack they rent, borrow, or visit (10%), a location close to a designated campsite (13%), a location close to a non-designated campsite (10%), a location close to a caravan/cabin or RV park (10%), and other locations (6%).
- > Among 78 Segment 2 respondents, the typical fishing locations in freshwater are a location close to their home (68%), a location close to a holiday home or shack they own (13%), a location close to a holiday home or shack they rent, borrow, or visit (9%), a location close to a designated campsite (18%), a location close to a non-designated campsite (21%), a location close to a caravan/cabin or RV park (8%), and other locations (4%).
- > Out of 182 respondents in Segment 2, 55% of them own a boat used for recreational fishing in saltwater.
- > Among 36 Segment 2 respondents, 58% acquired fishing equipment from a major outlet such as BCF, Anaconda, or Tackleworld, 34% acquired it from the local bait and tackle store where they live, 25% acquired it from an online store such as Amazon or eBay, 24% acquired it from a department store such as Big W or Kmart, 14% acquired it from the local bait and tackle store where they fish, 10% acquired it by buying second-hand fishing equipment, 0% acquired it by swapping things they own in exchange for fishing equipment, 1% acquired it through another way, and 23% haven't bought or swapped any fishing gear in the last 12 months.

## **Segment Persona**

*Name: Cam, the 'Calm and Contented' Homebody Angler*

*Age: 42*

*Occupation: Process worker at vegetable processing factory*

Cam works hard as a process worker at the local factory, alongside his dad and cousin. He enjoys life's simple pleasures and, as a member of the Homebody Anglers' segment, takes comfort in the familiarity of home and surroundings.

Growing up in the local area, he is most comfortable in his shed or at the kitchen table with his young lad, Jack.

Cam has never felt the need to travel far and wide but enjoys a couple of camping trips a year and the annual pilgrimage to AGFest for a couple of bargains before escaping the huge crowds. He has no idea why people would want to go to Sydney; too many people, too much noise, and not enough footy.

The town where Cam grew up hasn't changed that much that he can remember, and he still has the same mates he went to school with. It's easy to be himself in this place.

Cam relied on Jack to help him set up his smartphone, but he still has no idea how to get his credit card inside it. Cam finds it challenging to keep up with rapidly changing technology. He struggles to adopt and adapt to the latest advancements. While he appreciates technology for its conveniences, he prefers to focus on the things he knows and understands well.

Cam does not consider himself a serious fisher, enjoying fishing as a leisurely and relaxing activity with his son rather than a competitive pursuit. Fishing provides him with an opportunity to wander up to the local jetty and spend time with his son catching a few calamari.

When not working, Cam enjoys keeping the garden looking neat and tidy and working on his dad's old Falcon in the shed, and generally spending quality time with his loved ones. These activities bring him contentment.

Cam values the sense of security and peace that familiar surroundings provide. He takes comfort in the routines and traditions he has established in his home and community. The familiarity of his environment allows him to feel grounded and at ease, creating a sense of stability in his life.

Overall, Cam's contentedness as a Homebody Angler reflects his desire for a peaceful and familiar lifestyle. He cherishes the comforts of home, finds joy in leisure activities, and seeks relaxation in nature through fishing. His appreciation for familiarity and his preference for a slower pace of life bring him fulfillment and contentment.

## **Segment Summary**

In summary, the Homebody Anglers' segment consists of individuals who highly value personal space and familiarity. While not as adventurous or outgoing as other segments, they possess a moderate level of confidence. Family is of utmost importance to them, but they are less certain of their life goals. They appreciate their independence from strict rules and the opinions of others. Fishing is not a serious pursuit for them, but they enjoy it as a means of strengthening relationships with loved ones. The Homebody Anglers are less certain if they should trust government on fisheries management but believe in fisheries management principles and prioritise safety when fishing. They aim to catch enough fish for a satisfying meal and practice responsible fishing by releasing most of what they catch. They value recognised brands but prioritise affordability when purchasing fishing equipment. Fishing brings them relaxation and moments shared with family and friends as the best part of the experience.

## Segment 3 - Outgoing Adventurers (24%)

### Segment Story

The Outgoing Adventurers' segment represents individuals who value a sense of space and openness in their lives. They are outgoing, adventurous, and make the most of the opportunities that life presents them. They prioritise their own thoughts and opinions over the opinions of others and are the most competitive and confident of all the segments.

The most optimistic of all the segments, these individuals have a clear vision of their life goals and often take the lead in group situations. They have a high level of comfort in unfamiliar environments and place a very high importance on their own health and wellbeing.

Keen travellers, they have explored various parts of Australia and overseas, and they value a sense of community when choosing a place to live. Once they choose a community to settle into, they are houseproud and can often be found working in their gardens or on home improvements.

Tech savvy, the Outgoing Adventurers know how to use everything from their sound systems and smartphones to boat sounders effectively.

When it comes to fishing, sharing the activity with friends and family is very important to the Outgoing Adventurers, and it is the quality of the experience rather than the catch that is important to them. They recognise that a fishing trip can be successful even without catching fish, or the biggest fish. That said, due to the success of their fishing trips, the Outgoing Adventurers will also typically keep more of their catch. They consider themselves serious fishers and so do their friends. Their children are also highly likely to keep fishing.

The most likely of all the segments to own and fish from a boat and hold a saltwater fishing licence, they thrive on the enjoyment and challenge of catching fish. They are the most likely to be in a fishing club and compete in a fishing tournament. They appreciate catching enough fish for a meal, and they enjoy sharing their catch but often release the majority of their catch, showcasing their responsible fishing practices. The Outdoor Adventurers also prioritise fishing and boating safety.

They have the lowest level of trust in the government to manage fisheries responsibly but strongly believe in fisheries management principles. They have a deep respect for fishing rules and regulations, accepting them even if it means catching fewer fish. They support both commercial and recreational fishing in Tasmania.

The Outdoor Adventurers are the big spenders of Tasmania's recreational fishers. They are the most likely to support their local tackle shop and buying recognised brands is more important to them than the other segments. While they are willing to spend money on fishing, their focus is on the experience and the relaxation it

brings.

Overall, the Outgoing Adventurers' segment embodies individuals who enjoy an active and adventurous lifestyle. They see fishing as an opportunity to connect with others, challenge themselves, and appreciate the beauty of nature. Their enthusiasm for fishing is driven by the joy of spending time with loved ones and the satisfaction of taking part in a meaningful outdoor activity.

### Sorted On Differences Analysis

The following highlights the differences between the two datasets by placing them side-by-side in a two-box agreement table. To enhance readability, colour coding has been used in the 'Difference' column, with green signifying significantly higher and red signifying significantly lower. This visual aid provides a quick overview of where the significant variations lie.

<b>S3 - Segment Statements – Set 1 General Attitudes</b>	<b>n=255</b>	<b>n=809</b>	
	<b>Outgoing Adventurers</b>	<b>Segment 1+2+4</b>	<b>Difference</b>
In a group situation I often take the lead	73%	46%	27%
I have travelled a lot around Australia or overseas	87%	63%	25%
I'd describe myself as adventurous and outgoing	86%	63%	23%
I think most people that know me well would consider me to be a confident person	95%	75%	21%
I have a clear idea of my goals in life	94%	77%	17%
I think most people that know me well would consider me a competitive person	67%	50%	16%
Keeping in close contact with my family is very important to me	95%	85%	11%
I'm optimistic about the future	74%	63%	11%
A sense of community is an important consideration for me when I'm choosing somewhere to live.	76%	70%	6%
A sense of space and openness is important to me	96%	92%	5%
My health and wellbeing is very important to me	99%	94%	5%

I see myself as a trendsetter	16%	13%	3%
I consider myself to be a bit of a risk taker	42%	40%	2%
I'm more concerned with what I think, than what other people think of me	71%	70%	1%
There's a lot more we could be doing to look after our environment	80%	85%	-5%
I don't think Australians are doing enough to combat climate change	44%	59%	-15%
I like the freedom of not having to comply with rules and regulations	20%	40%	-20%
Technology is changing so fast I find it hard to keep up	33%	53%	-20%
I feel really uncomfortable when I'm out of my normal environment	14%	36%	-22%
I'd describe myself as a bit of a homebody	27%	60%	-32%

Table 35 - Segment 3 set 1 statements

## Interpretation of Findings

The sorted on differences report using two-box agreement reveals a number of major differences between the Outgoing Adventurers' segment and Segments 1+2+4. These differences can be positive, or negative, with differences of 10% or greater being detailed.

### Positive Differences:

**Taking the Lead in Group Situations:** The Outgoing Adventurers' segment is more likely to take the lead in group situations, with 73% stating this characteristic, while only 46% of respondents from Segments 1+2+4 share this tendency. This positive difference of 27% indicates that the Outgoing Adventurers are more inclined to assume leadership roles in social settings.

**Extensive Travel Experience:** The Outgoing Adventurers' segment has significantly more travel experience around Australia or overseas, with 87% having travelled extensively, while only 63% of respondents from Segments 1+2+4 share such experiences. This positive difference of 25% suggests that the Outgoing Adventurers are more adventurous and well-travelled individuals.

**Adventurous and Outgoing Self-Description:** The Outgoing Adventurers' segment is more likely to describe themselves as adventurous and outgoing, with 86% using these characteristics, while only 63% of respondents from Segments 1+2+4 describe themselves similarly. This positive difference of 23% indicates that the Outgoing



Adventurers perceive themselves as more adventurous and outgoing compared to the other segments.

**Confident Self-Perception:** The Outgoing Adventurers' segment sees themselves as more confident individuals, with 95% considering themselves confident, while only 75% of respondents in Segments 1+2+4 share this self-perception. This positive difference of 21% suggests that the Outgoing Adventurers have a higher level of self-assurance and confidence.

**Clarity of Life Goals:** The Outgoing Adventurers' segment has a clearer idea of their goals in life, with 94% having a clear idea, while 77% of respondents from Segments 1+2+4 share this clarity. This positive difference of 17% suggests that the Outgoing Adventurers have a more defined sense of direction and purpose in life.

**Perceived Competitiveness:** The Outgoing Adventurers' segment is perceived as more competitive by most people who know them well, with 67% considering them competitive individuals, while only 50% of respondents in Segments 1+2+4 share this perception. This positive difference of 16% indicates that the Outgoing Adventurers may be seen as more driven by competition by their social circles.

**Importance of Family Contact:** The Outgoing Adventurers' segment places more importance on keeping in close contact with their family, with 95% considering it very important, while 85% of respondents from Segments 1+2+4 share this view. This positive difference of 11% suggests that the Outgoing Adventurers prioritise frequent communication with family members.

**Optimism about the Future:** The Outgoing Adventurers' segment is more optimistic about the future, with 74% expressing this sentiment, while only 63% of respondents in Segments 1+2+4 share this positive outlook. This positive difference of 11% indicates that the Outgoing Adventurers are more hopeful and positive about future prospects.

#### **Negative Differences:**

**Concern about Climate Change:** The Outgoing Adventurers' segment is less likely to think that Australians are not doing enough to combat climate change, with only 44% expressing this concern, while 59% of respondents from Segments 1+2+4 share the same view. This negative difference of 15% indicates that the Outgoing Adventurers may be less worried about the collective efforts to address climate change.

**Preference for Freedom from Rules and Regulations:** The Outgoing Adventurers' segment is less likely to value the freedom of not having to comply with rules and regulations, with only 20% enjoying this aspect, while 40% of respondents from Segments 1+2+4 share the same preference. This negative difference of 20% suggests that the Outgoing Adventurers may not prioritise the desire for freedom from restrictions as much as the other segments.

**Difficulty Keeping Up with Technology:** The Outgoing Adventurers' segment finds it easier to keep up with rapidly changing technology, with 33% stating this challenge, while 53% of respondents from Segments 1+2+4 share the same difficulty. This negative difference of 20% indicates that the Outgoing Adventurers may face less

challenges in keeping pace with technological advancements.

**Discomfort in Unfamiliar Environments:** The Outgoing Adventurers’ segment feels less uncomfortable when they’re out of their normal environment, with 14% expressing this sentiment, compared to 36% in Segments 1+2+4. This negative difference of 22% suggests that the Outgoing Adventurers are likely to have less preference for familiar surroundings and experience less discomfort in new or unfamiliar environments.

**Homebody Self-Description:** The Outgoing Adventurers’ segment is less likely to describe themselves as a bit of a homebody, with only 27% using this self-description, while 60% of respondents from Segments 1+2+4 share this characteristic. This negative difference of 32% indicates that the Outgoing Adventurers do not view themselves as homebodies compared to the other segments.

S3 - Segment Statements – Set 2 Fishing Attitudes	n=255	n=809	
	Outgoing Adventurers	Segment 1+2+4	Difference
Most people I know would consider me to be a keen fisher	91%	43%	48%
Buying a recognised brand of fishing equipment is important to me	43%	31%	12%
For me, fishing brings back pleasant childhood memories	85%	76%	9%
Sharing a fishing experience helps strengthen relationships with family and friends	94%	86%	8%
Safety is an important consideration when I go fishing	98%	94%	5%
A fishing trip can be successful even if you don’t catch fish	83%	83%	-1%
I trust the government to manage our fisheries	29%	36%	-7%
The more fish I catch, the happier I am	27%	37%	-10%
The bigger the fish I catch, the better the trip	20%	38%	-18%
I don’t consider myself to be a serious fisher	24%	68%	-44%

Table 36 - Segment 3 set 2 statements

**Positive Differences:**

**Perceived Keen Fisher:** The Outgoing Adventurers’ segment is perceived as much keener on fishing by most people who know them well, with 91% considering them keen fishers, while only 43% of respondents from Segments 1+2+4 share this perception. This positive difference of 48% indicates that the Outgoing Adventurers are seen as highly enthusiastic about fishing by their social circles.

**Importance of Recognised Brand Fishing Equipment:** The Outgoing Adventurers’ segment places more

importance on buying recognised brands of fishing equipment, with 43% considering it important, while only 31% of respondents from Segments 1+2+4 share the same value. This positive difference of 12% suggests that the Outgoing Adventurers prioritise the use of recognised fishing gear brands.

**Negative Differences:**

**Happiness from Catching Fish:** The Outgoing Adventurers’ segment is less likely to experience happiness from catching more fish, with only 27% stating this sentiment, while 37% of respondents from Segments 1+2+4 share the same feeling. This negative difference of 10% suggests that the Outgoing Adventurers may not derive as much happiness from catching more fish compared to the other segments.

**Emphasis on Catching Bigger Fish:** The Outgoing Adventurers’ segment places less emphasis on the size of the fish they catch determining the quality of their trip, with only 20% associating the size of the catch with trip quality, while 38% of respondents from Segments 1+2+4 share this view. This negative difference of 18% indicates that the Outgoing Adventurers may not prioritise catching larger fish as much as the other segments when evaluating the success of their fishing trips.

**Serious Fisher Self-Perception [Negative Statement]:** The Outgoing Adventurers’ segment members are more likely to consider themselves serious fishers, with the majority identifying as such (24% do not consider themselves to be serious fishers), compared to 32% in Segments 1+2+4 (68% do not consider themselves to be serious fishers). This negative difference of 44% suggests that the Outgoing Adventurers consider themselves to be serious participants in the activity of fishing to a much greater extent than the other segments.

<b>S3 -Segment Statements – Set 3 Fishing Behaviours</b>	<b>n=255</b>	<b>n=809</b>	
	<b>Outgoing Adventurers</b>	<b>Segment 1+2+4</b>	<b>Difference</b>
When it comes to fishing, I tend to spend a lot of my money on this activity because I love it so much!	59%	34%	<b>26%</b>
Time spent fishing is one of the best ways I know to relax and unwind	94%	76%	<b>17%</b>
I fish for the challenge and enjoyment of catching fish	95%	80%	<b>14%</b>
I like to support my local tackle shop	81%	68%	<b>13%</b>
I like to compete in fishing competitions	20%	9%	<b>10%</b>
I catch fish, lobsters, etc. for food for myself or to share with my friends and family	89%	80%	<b>9%</b>
I aim to catch enough fish for a feed rather than take the bag limit	91%	83%	<b>7%</b>
Fishing with my friends and family is the best part of going fishing	86%	80%	<b>6%</b>

I like to browse in a tackle shop and then check online to see if I can get it cheaper	34%	31%	<b>2%</b>
I find fishing rules and regulations easy to understand	77%	75%	<b>2%</b>
I don't go fishing as often as I would like to	83%	82%	<b>1%</b>
I support fisheries management principles	78%	77%	<b>1%</b>
I support both recreational and commercial fishing in Tasmania	72%	71%	<b>1%</b>
I fish to catch trophy sized fish	11%	10%	<b>0%</b>
I usually fish on my own to get away from people	26%	28%	<b>-2%</b>
I usually release most of the fish I catch	47%	50%	<b>-3%</b>
I am a responsible fisher and accept fishing rules and regulations even if it means I catch less fish	92%	95%	<b>-3%</b>
I buy fishing equipment that's affordable / look for the best deals	74%	80%	<b>-6%</b>

Table 37 - Segment 3 set 3 statements

**Positive Differences:**

**Fishing Expenditure:** The Outgoing Adventurers' segment tends to spend significantly more money on fishing because of their love for the activity, with 59% indicating such spending, while only 34% of respondents from Segments 1+2+4 allocate more funds to fishing. This positive difference of 26% suggests that the Outgoing Adventurers are more willing to invest financially in their passion for fishing.

**Fishing as Relaxation Method:** The Outgoing Adventurers' segment considers fishing as one of the best ways to relax and unwind, with 94% finding it a soothing activity, while only 76% of respondents from Segments 1+2+4 share this perspective. This positive difference of 17% indicates that the Outgoing Adventurers see fishing as a particularly effective method for relaxation.

**Motivation for Fishing:** The Outgoing Adventurers' segment primarily fishes for the challenge and enjoyment of catching fish, with 95% citing this as their motivation, while only 80% of respondents from Segments 1+2+4 share the same reasons. This positive difference of 14% suggests that the Outgoing Adventurers are driven by the thrill of the catch and derive enjoyment from the fishing experience.

**Support for Local Tackle Shop:** The Outgoing Adventurers' segment is more likely to support their local tackle shop, with 81% indicating this preference, while 68% of respondents from Segments 1+2+4 share the same inclination. This positive difference of 13% indicates that the Outgoing Adventurers value and actively support their nearby fishing equipment supplier.

**Participation in Fishing Competitions:** The Outgoing Adventurers' segment is more likely to enjoy competing

in fishing competitions, with 20% expressing this interest, while only 9% of respondents from Segments 1+2+4 participate in such events. This positive difference of 10% suggests that the Outgoing Adventurers may be more enthusiastic about engaging in fishing competitions.

## Segment Demographics

The Outgoing Adventurers' segment comprises predominantly male respondents who are distributed across different age groups. They are mostly married and have diverse family compositions. Retired individuals make up a significant portion of this segment, while professionals/executives, blue-collar workers, and white-collar workers are also present. The segment represents a mix of educational backgrounds, with a notable presence of individuals with trade/apprenticeship/certificate/diploma qualifications. As shown below, the majority of respondents were born in Australia, indicating a strong local presence:

- > Gender: In this segment, the vast majority of respondents are male (94%), while females make up a smaller percentage (6%) of the segment.
- > Age Group: The segment is well-distributed across age groups. The largest age group is 50-64 years, accounting for 38% of respondents, followed by 65+ years (34%), 35-49 years (19%), and 18-34 years (8%).
- > Marital Status: The majority of respondents in this segment are married (73%), indicating a significant presence of individuals in committed relationships. Other categories include divorced (11%), never married (10%), widowed (4%), and separated (2%).
- > Family Composition: The segment primarily consists of couples or families without children living at home (45%), followed by couples or families with children living at home (35%). Smaller percentages represent single parents with or without children (4% and 4% respectively), other family compositions (3%), individuals living alone (7%), and no respondents in group households.
- > Children's Fishing: Among respondents with children (Base 98), the vast majority (92%) have children who fish, suggesting that fishing is a popular activity shared within families.
- > Occupation: The occupation distribution within this segment shows a diverse mix. The largest category is retired individuals (40%), followed by professionals/executives (20%), blue-collar workers (20%), and white-collar workers (10%). Only a very small percentage represents unemployed individuals (1%), with no respondents in home duties or student categories.
- > Education: Respondents in this segment have varied educational backgrounds. The highest percentage falls within the category of trade/apprenticeship/certificate/diploma (44%), followed by those with high school or less education (29%). A smaller percentage holds a bachelor's degree or higher (26%).
- > Household Income: The income distribution in this segment shows a relatively balanced representation

across income brackets. The highest percentage falls within the range of \$130,000 or more (31%), followed by \$80,000 to <\$130,000 (26%), \$40,000 to <\$80,000 (18%), and less than \$40,000 (12%).

- > Country of Birth: The majority of respondents in this segment were born in Australia (91%), with the remaining 8% representing individuals born in other countries.

## **Specific Fishing Related Behaviours**

This section details the Outgoing Adventurers specific fishing related behaviours:

- > Out of 255 respondents in Segment 3, 99% of them have engaged in recreational fishing in Tasmania in the last 12 months.
- > In total, 67% of Segment 3 respondents mainly fish in saltwater, while 33% fish in freshwater or a combination of saltwater and freshwater.
- > In total, 65% of Segment 3 respondents are planning to fish in saltwater, while 35% are planning to fish in freshwater or a combination of saltwater and freshwater.
- > Based on the responses of 253 Segment 3 respondents, the average number of days spent fishing in saltwater in Tasmania in the last 12 months is 21.2 days.
- > Based on the responses of 126 Segment 3 respondents, the average number of days spent fishing in freshwater in Tasmania in the last 12 months is 14.1 days.
- > Among 253 Segment 3 respondents, 19% mainly fish in saltwater in the North West and West Coast regions, 22% mainly fish in the North East region, 53% mainly fish in the East and Central regions, and 37% mainly fish in the South East region.
- > Among 253 Segment 3 respondents, 23% mainly fish in freshwater in the North West and West Coast regions, 14% mainly fish in the North East region, 67% mainly fish in the East and Central regions, and 16% mainly fish in the South East region.
- > Among 253 Segment 3 respondents, the top species they mainly fish for in saltwater in Tasmania are Flathead (92%), Calamari/Squid (68%), Australian Salmon (58%), Rock Lobster (47%), Tuna (45%), King George Whiting (30%), Snapper (24%), Trumpeter (31%), Kingfish (31%), Abalone (29%), Black Bream (24%), and other species (11%).
- > Among 126 Segment 3 respondents, the top species they mainly fish for in freshwater in Tasmania are Brown Trout (87%), Rainbow Trout (71%), Australian Salmon (12%), Brook Trout (17%), and other species (6%).

- > Among 253 Segment 3 respondents, the preferred platforms for saltwater fishing are Beach (31%), Jetty or Wharf (28%), Rocks (25%), Boat (88%), and other platforms (2%).
- > Among 126 Segment 3 respondents, the preferred platforms for freshwater fishing are Beach (18%), Jetty or Wharf (7%), Rocks (38%), Boat (63%), and other platforms (21%).
- > Among 253 Segment 3 respondents, the typical fishing locations in saltwater are a location close to their home (59%), a location close to a holiday home or shack they own (29%), a location close to a holiday home or shack they rent, borrow, or visit (17%), a location close to a designated campsite (13%), a location close to a non-designated campsite (8%), a location close to a caravan/cabin or RV park (8%), and other locations (10%).
- > Among 126 Segment 3 respondents, the typical fishing locations in freshwater are a location close to their home (39%), a location close to a holiday home or shack they own (12%), a location close to a holiday home or shack they rent, borrow, or visit (25%), a location close to a designated campsite (25%), a location close to a non-designated campsite (27%), a location close to a caravan/cabin or RV park (9%), and other locations (12%).
- > Out of 255 respondents in Segment 3, 80% of them own a boat used for recreational fishing in saltwater.
- > Among 30 Segment 3 respondents, 79% acquired fishing equipment from a major outlet such as BCF, Anaconda, or Tackleworld, 60% acquired it from the local bait and tackle store where they live, 35% acquired it from an online store such as Amazon or eBay, 22% acquired it from a department store such as Big W or Kmart, 28% acquired it from the local bait and tackle store where they fish, 18% acquired it by buying second-hand fishing equipment, 2% acquired it by swapping things they own in exchange for fishing equipment, 3% acquired it through another way, and 7% haven't bought or swapped any fishing gear in the last 12 months.

## **Segment Persona**

*Name: Dave, the 'Making the most of Life' Outgoing Adventurer*

*Age: 71*

*Occupation: Semi-Retired (Business Owner)*

Dave is a highly accomplished individual who started his own business after spotting a gap in the market. Built from scratch, the now thriving business is managed mainly by his daughter. Building a market for his product, a business and a team, showcased his strong leadership skills and helped him develop the confident demeanour that has earned him respect among his peers and colleagues. After many years of hard work and dedication, Dave has decided to step back from the day to day running of the business and embrace part-time retirement so he can explore new horizons.

Dave describes himself as an adventurous and outgoing individual. Semi-retirement has given him the freedom to pursue thrilling experiences that he didn't have the time for while he built his business. He thrives on seeking new challenges and enjoys meeting people from diverse backgrounds. Travelling extensively around Australia and overseas has broadened his perspective and enriched his life with unforgettable memories.

Dave exudes confidence in everything he does. Semi-retirement hasn't dampened his drive for success; in fact, it has allowed him to set clear life goals and take action towards achieving them. He knows precisely what he wants from his retirement and is determined to make the most of this new chapter in his life.

Fishing holds a special place in Dave's heart, and he is known among his social circles as a keen fishing enthusiast. He spends much of his leisure time on the water, casting lines, setting pots and seeking the thrill of a good catch. The challenge and enjoyment of fishing have become integral to his lifestyle.

Dave's competitive spirit remains strong, even after stepping away from the business world. He enjoys fishing competitions with the local game fishing club, where he can showcase his skills. He enjoys the sense of community with fellow anglers. His optimistic outlook on life keeps him motivated to explore new fishing spots, master different techniques, and enjoy each fishing adventure.

Fishing is a family affair with Dave, and he regularly heads out with extended family and could not be prouder of his, now adult, children's fishing skills. There's always plenty of talk about the catch and boats at the end of the day. Not surprisingly, a lot of Dave's social network are also keen fishers, and he enjoys building friendships with like-minded individuals who share his passion for fishing and outdoor activities.

For Dave, fishing is more than just a recreational activity; it is a constant source of motivation and joy in his life as well as a way of finding peace and relaxation.

Dave actively supports his local tackle shop, both near home and near his shack at St Helens, recognising the importance of these establishments in fostering the fishing community. Everyone at the tackle shop knows Dave and he values the expertise and personalised service they offer. His loyalty to them reflects his commitment to preserving the fishing culture.

Dave, the Outgoing Adventurer, exemplifies his fulfilling semi-retirement by embracing new opportunities, fishing with family, and enjoying the sense of community it brings. His confident and outgoing nature allows him to take the lead in group settings and engage in fishing competitions with enthusiasm. Semi-retirement has provided him with the chance to follow his passions wholeheartedly, making each day an exciting and fulfilling journey.



## Segment Summary

In summary, members of the Outgoing Adventurers' segment are the serious fishers and comprise adventurous and outgoing individuals who prioritise personal space and openness in their lives. They are optimistic, value their own thoughts and opinions, are confident in their life goals, and enjoy taking risks. They are the most tech savvy of all the segments and believe in the importance of their health and wellbeing. Fishing is viewed as a family activity that strengthens relationships, and they also enjoy the challenge and enjoyment it brings. They understand fisheries management but have relatively low levels of trust in government to manage them. They follow fishing rules responsibly, and prioritise safety during their fishing adventures. They endorse both commercial and recreational fishing. The Outgoing Adventurers appreciate catching enough fish for a meal and practice responsible fishing by releasing most of what they catch but due to the frequency and success of their fishing, they are keeping more of their catch. They tend to be older and are the big spenders in recreational fishing with a focus on recognised brands and supporting their local tackle stores.

## **Segment 4 – Daring Enthusiasts (27%)**

### **Segment Story**

The Daring Enthusiasts' segment comprises individuals who have an adventurous spirit, an outgoing nature and are enthusiastic fishers. Size matters to members of this segment who believe that the size of their catch directly correlates with the quality of their fishing trips. These enthusiasts also measure their happiness by the number of fish they catch, always seeking to improve their fishing skills and experiences.

Daring Enthusiasts are quite confident and competitive, don't shy away from taking the lead in group situations and tend to be more optimistic than the other segments.

Whilst the Daring Enthusiasts embrace the latest in fishing equipment, they tend to feel overwhelmed by the rapid pace of technological advancements and sometimes struggle to keep up with the latest innovations.

The Daring Enthusiasts describe themselves as risk-takers and enjoy the freedom of breaking away from rules and regulations. They tend to trust the government to manage fisheries, and value a sense of community.

Brand recognition is vital to this segment when it comes to fishing equipment. They place importance on buying recognised and reputable brands, and value the assurance of quality and performance in their fishing gear. Affordability is also important with this segment more likely to be looking for discounts and specials on the brands and equipment they value. They are regularly purchasing equipment and will shop at 'big box' stores and their local tackle shops, particularly if near where they live. This segment doesn't hesitate to invest significantly in their fishing pursuits because their love for the activity knows no bounds. For them, spending money on fishing is a worthwhile and fulfilling investment, as it brings them immense joy and satisfaction.

Overall, the Daring Enthusiasts are outgoing, risk taking, fishing enthusiasts who embrace fishing as a way to challenge themselves. They tend to trust the government to manage fisheries while at the same time prefer the freedom of not having to comply with rules and regulations. The Daring Enthusiasts are driven by their passion for fishing, striving to catch trophy-sized fish, supporting local tackle shops, willingly investing a significant amount of money in their beloved activity for the joy and fulfillment it brings them.

## Sorted On Differences Analysis

The following highlights the differences between the two datasets by placing them side-by-side in a two-box agreement table. To enhance readability, colour coding has been used in the 'Difference' column, with green signifying significantly higher and red signifying significantly lower. This visual aid provides a quick overview of where the significant variations lie.

S4 -Segment Statements – Set 1 General Attitudes	n=291	n=773	
	Daring Enthusiasts	Segment 1+2+3	Difference
Technology is changing so fast I find it hard to keep up	65%	42%	<b>23%</b>
I'd describe myself as adventurous and outgoing	82%	63%	<b>19%</b>
I consider myself to be a bit of a risk taker	53%	36%	<b>17%</b>
I like the freedom of not having to comply with rules and regulations	46%	31%	<b>14%</b>
I think most people that know me well would consider me a competitive person	63%	51%	<b>12%</b>
I'm optimistic about the future	75%	62%	<b>12%</b>
A sense of community is an important consideration for me when I'm choosing somewhere to live.	80%	69%	<b>11%</b>
I have a clear idea of my goals in life	88%	78%	<b>10%</b>
I think most people that know me well would consider me to be a confident person	87%	77%	<b>10%</b>
In a group situation I often take the lead	60%	50%	<b>10%</b>
I see myself as a trendsetter	20%	12%	<b>8%</b>
Keeping in close contact with my family is very important to me	91%	86%	<b>5%</b>
My health and wellbeing is very important to me	98%	95%	<b>3%</b>
I feel really uncomfortable when I'm out of my normal environment	33%	30%	<b>3%</b>
A sense of space and openness is important to me	95%	92%	<b>2%</b>
I'd describe myself as a bit of a homebody	52%	52%	<b>0%</b>
I have travelled a lot around Australia or overseas	67%	69%	<b>-2%</b>

There's a lot more we could be doing to look after our environment	83%	85%	-2%
I'm more concerned with what I think, than what other people think of me	66%	71%	-5%
I don't think Australians are doing enough to combat climate change	51%	57%	-6%

Table 38 - Segment 4 set 1 statements

## Interpretation of Findings

The sorted on differences report using two-box agreement reveals a number of major differences between the Daring Enthusiasts' segment and Segments 1+2+3. These differences can be positive, or negative, with differences of 10% or greater being detailed.

### Positive Differences:

**Challenge of Keeping up with Technology:** The Daring Enthusiasts' segment finds it harder to keep up with rapidly changing technology, with 65% stating this challenge, while only 42% of respondents from Segments 1+2+3 share the same difficulty. This positive difference of 23% suggests that the Daring Enthusiasts may face more challenges in keeping pace with technological advancements.

**Adventurous and Outgoing Self-Description:** The Daring Enthusiasts' segment is more likely to describe themselves as adventurous and outgoing, with 82% claiming these characteristics, while only 63% of respondents from Segments 1+2+3 describe themselves similarly. This positive difference of 19% indicates that the Daring Enthusiasts perceive themselves as more adventurous and outgoing compared to the other segments.

**Risk-Taking Tendency:** The Daring Enthusiasts' segment considers themselves to be more risk-takers, with 53% stating this characteristic, while only 36% of respondents from Segments 1+2+3 share the same view. This positive difference of 17% suggests that the Daring Enthusiasts are more inclined to take risks in their pursuits.

**Preference for Freedom from Rules and Regulations:** The Daring Enthusiasts' segment places more importance on the freedom of not having to comply with rules and regulations, with 46% enjoying this aspect, while only 31% of respondents from Segments 1+2+3 share the same preference. This positive difference of 14% indicates that the Daring Enthusiasts may prioritise the desire for freedom from restrictions more than the other segments.

**Perceived Competitiveness:** The Daring Enthusiasts' segment is perceived as more competitive by most people who know them well, with 63% considering them competitive individuals, while only 51% of respondents in Segments 1+2+3 share this perception. This positive difference of 12% indicates that the Daring Enthusiasts may be seen as more driven by competition by their social circles.

**Optimism about the Future:** The Daring Enthusiasts' segment is more optimistic about the future, with 75% expressing this sentiment, while only 62% of respondents in Segments 1+2+3 share this positive outlook. This positive difference of 12% suggests that the Daring Enthusiasts are more hopeful and positive about future prospects.

**Importance of Community in Choosing a Place to Live:** The Daring Enthusiasts' segment places more importance on a sense of community when choosing where to live, with 80% considering it important, while only 69% of respondents from Segments 1+2+3 share this view. This positive difference of 11% suggests that the Daring Enthusiasts value community aspects more when making living arrangements.

**Clarity of Life Goals:** The Daring Enthusiasts' segment has a clearer idea of their goals in life, with 88% having a clear idea, while 78% of respondents from Segments 1+2+3 share this clarity. This positive difference of 10% suggests that the Daring Enthusiasts have a more defined sense of direction and purpose in life.

**Confident Self-Perception:** The Daring Enthusiasts' segment sees themselves as more confident individuals, with 87% considering themselves confident, while only 77% of respondents in Segments 1+2+3 share this self-perception. This positive difference of 10% indicates that the Daring Enthusiasts have a higher level of self-assurance and confidence.

**Leadership in Group Situations:** The Daring Enthusiasts' segment is more likely to take the lead in group situations, with 60% stating this characteristic, while only 50% of respondents from Segments 1+2+3 share this tendency. This positive difference of 10% indicates that the Daring Enthusiasts are more inclined to assume leadership roles in social settings.

S4 - Segment Statements – Set 2 Fishing Attitudes	n=291	n=773	
	Daring Enthusiasts	Segment 1+2+3	Difference
The bigger the fish I catch, the better the trip	60%	24%	35%
The more fish I catch, the happier I am	59%	25%	34%
Buying a recognised brand of fishing equipment is important to me	51%	28%	23%
I trust the government to manage our fisheries	44%	30%	14%
Most people I know would consider me to be a keen fisher	65%	51%	14%
For me, fishing brings back pleasant childhood memories	84%	76%	8%
Sharing a fishing experience helps strengthen relationships with family and friends	87%	88%	-1%
Safety is an important consideration when I go fishing	93%	96%	-3%
A fishing trip can be successful even if you don't catch fish	79%	85%	-6%

I don't consider myself to be a serious fisher	49%	61%	-11%
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Table 39 - Segment 4 set 2 statements

**Positive Differences:**

**Trip Satisfaction and Catch Size:** The Daring Enthusiasts' segment places more importance on the size of the fish they catch determining the quality of their trip, with 60% associating the size of the catch with trip satisfaction, while only 24% of respondents from Segments 1+2+3 share this view. This positive difference of 35% suggests that the Daring Enthusiasts prioritise catching larger fish for a more enjoyable fishing experience.

**Happiness from Catching Fish:** The Daring Enthusiasts' segment derives greater happiness from catching more fish, with 59% stating this sentiment, while only 25% of respondents from Segments 1+2+3 share the same feeling. This positive difference of 34% indicates that the Daring Enthusiasts experience greater joy and satisfaction from successful catches.

**Preference for Recognised Brand Fishing Equipment:** The Daring Enthusiasts' segment places more importance on buying recognised brands of fishing equipment, with 51% considering it important, while only 28% of respondents from Segments 1+2+3 share the same value. This positive difference of 23% suggests that the Daring Enthusiasts prioritise the use of recognised fishing gear brands.

**Trust in Government Fisheries Management:** The Daring Enthusiasts' segment trusts the government more to manage fisheries, with 44% expressing this trust, while only 30% of respondents from Segments 1+2+3 share the same level of trust. This positive difference of 14% indicates that the Daring Enthusiasts have greater confidence in the government's ability to handle fisheries management.

**Perceived Keen Fisher:** The Daring Enthusiasts' segment is perceived as keener on fishing by most people who know them well, with 65% considering them keen fishers, while only 51% of respondents from Segments 1+2+3 share this perception. This positive difference of 14% indicates that the Daring Enthusiasts are seen as highly enthusiastic about fishing by their social circles.

**Negative Difference:**

**Serious Fisher Self-Perception [Negative Statement]:** The Daring Enthusiasts' segment is more likely to consider themselves serious fishers, with 51% identifying as such (49% do not consider themselves serious fishers), compared to 39% of respondents from Segments 1+2+3 (61% do not consider themselves serious fishers). This negative difference of 11% suggests that the Daring Enthusiasts view themselves as serious participants in the activity of fishing when compared to the other segments.

S4 -Segment Statements – Set 3 Fishing Behaviours	n=291	n=773	
	Daring Enthusiasts	Segment 1+2+3	Difference

When it comes to fishing, I tend to spend a lot of my money on this activity because I love it so much!	57%	33%	<b>23%</b>
I like to support my local tackle shop	80%	67%	<b>13%</b>
I fish to catch trophy sized fish	19%	7%	<b>12%</b>
I don't go fishing as often as I would like to	88%	80%	<b>9%</b>
I like to browse in a tackle shop and then check online to see if I can get it cheaper	38%	29%	<b>9%</b>
I usually fish on my own to get away from people	33%	26%	<b>8%</b>
I like to compete in fishing competitions	18%	10%	<b>8%</b>
Time spent fishing is one of the best ways I know to relax and unwind	87%	78%	<b>8%</b>
I fish for the challenge and enjoyment of catching fish	89%	82%	<b>7%</b>
I support both recreational and commercial fishing in Tasmania	74%	70%	<b>5%</b>
I buy fishing equipment that's affordable / look for the best deals	79%	78%	<b>2%</b>
I support fisheries management principles	78%	76%	<b>2%</b>
I catch fish, lobsters, etc. for food for myself or to share with my friends and family	82%	82%	<b>1%</b>
I find fishing rules and regulations easy to understand	76%	75%	<b>1%</b>
Fishing with my friends and family is the best part of going fishing	82%	82%	<b>1%</b>
I usually release most of the fish I catch	49%	49%	<b>0%</b>
I am a responsible fisher and accept fishing rules and regulations even if it means I catch less fish	93%	95%	<b>-2%</b>
I aim to catch enough fish for a feed rather than take the bag limit	82%	86%	<b>-4%</b>

Table 40 - Segment 4 set 3 statements

**Positive Differences:**

**Fishing Expenditure:** The Daring Enthusiasts' segment tends to spend significantly more money on fishing because of their love for the activity, with 57% indicating such spending, while only 33% of respondents from Segments 1+2+3 allocate more funds to fishing. This positive difference of 23% suggests that the Daring Enthusiasts are more willing to invest financially in their passion for fishing.

**Support for Local Tackle Shop:** The Daring Enthusiasts' segment members are more likely to support their local tackle shop, with 80% indicating this preference, while 67% of respondents from Segments 1+2+3 share

the same inclination. This positive difference of 13% indicates that the Daring Enthusiasts value and actively support their nearby fishing equipment supplier.

**Motivation to Catch Trophy Fish:** The Daring Enthusiasts' segment fishes with the goal of catching trophy-sized fish more often, with 19% stating this motivation, while only 7% of respondents from Segments 1+2+3 share the same intent. This positive difference of 12% suggests that the Daring Enthusiasts are more driven by the pursuit of catching large, trophy-sized fish than respondents from Segments 1+2+3.

## Segment Demographics

The Daring Enthusiasts' segment consists primarily of male respondents, distributed across different age groups. They are mostly married and have diverse family compositions. Retired individuals and blue-collar workers make up a significant portion of this segment, while professionals/executives and white-collar workers are also present. The segment represents a mix of educational backgrounds, with a notable presence of individuals with trade/apprenticeship/certificate/diploma qualifications. As highlighted below, the majority of respondents were born in Australia, indicating a strong local presence:

- > Gender: The majority of respondents in this segment are male (90%), while females make up a smaller percentage (10%) of the segment.
- > Age Group: The segment is fairly evenly distributed across age groups. The largest age group is 50-64 years, accounting for 32% of respondents, followed by 65+ years (24%), 35-49 years (22%), and 18-34 years (21%).
- > Marital Status: The majority of respondents in this segment are married (63%), indicating a significant presence of individuals in committed relationships. Other categories include never married (20%), divorced (7%), widowed (2%), and separated (2%).
- > Family Composition: The segment consists of diverse family compositions. The largest category is couples or families without children living at home (46%), followed by couples or families with children living at home (31%). Smaller percentages represent single parents with or without children (3% and 3% respectively), other family compositions (1%), individuals living alone (11%), and group households (3%).
- > Children's Fishing: Among respondents with children (Base 99), a significant percentage (67%) have children who fish, indicating that fishing is a common activity within families.
- > Occupation: The occupation distribution within this segment shows a varied mix. The largest category is retired individuals (26%), followed by blue-collar workers (31%), professionals/executives (15%), and white-collar workers (11%). Smaller percentages represent students (3%), unemployed individuals (2%), and those with home duties (1%).
- > Education: Respondents in this segment have diverse educational backgrounds. The highest percentage



falls within the category of trade/apprenticeship/certificate/diploma (44%), followed by those with high school or less education (34%). A smaller percentage holds a bachelor's degree or higher (20%).

- > Household Income: The income distribution in this segment shows a relatively balanced representation across income brackets. The highest percentage falls within the range of \$40,000 to <\$80,000 (29%), followed by \$80,000 to <\$130,000 (25%), \$130,000 or more (22%), and less than \$40,000 (12%).
- > Country of Birth: The majority of respondents in this segment were born in Australia (90%), with the remaining 9% representing individuals born in other countries.

## **Specific Fishing Related Behaviours**

This section details the Daring Enthusiasts specific fishing related behaviours:

- > Out of 192 respondents in Segment 4, 88% of them have engaged in recreational fishing in Tasmania in the last 12 months.
- > In total, 70% of Segment 4 respondents mainly fish in saltwater, while 27% fish in freshwater or a combination of saltwater and freshwater.
- > In total, 67% of Segment 4 respondents are planning to fish in saltwater, while 31% are planning to fish in freshwater or a combination of saltwater and freshwater.
- > Based on the responses of 249 Segment 4 respondents, the average number of days spent fishing in saltwater in Tasmania in the last 12 months is 17.3 days.
- > Based on the responses of 141 Segment 4 respondents, the average number of days spent fishing in freshwater in Tasmania in the last 12 months is 11.2 days.
- > Among 249 Segment 4 respondents, 25% mainly fish in saltwater in the North West and West Coast regions, 20% mainly fish in the North East region, 42% mainly fish in the East and Central regions, and 36% mainly fish in the South East region.
- > Among 249 Segment 4 respondents, 24% mainly fish in freshwater in the North West and West Coast regions, 16% mainly fish in the North East region, 50% mainly fish in the East and Central regions, and 23% mainly fish in the South East region.
- > Among 249 Segment 4 respondents, the top species they mainly fish for in saltwater in Tasmania are Flathead (90%), Calamari/Squid (55%), Australian Salmon (40%), Rock Lobster (31%), Tuna (27%), King George Whiting (22%), Snapper (21%), Trumpeter (20%), Kingfish (18%), Abalone (18%), Black Bream (15%), and other species (14%).

- > Among 141 Segment 4 respondents, the top species they mainly fish for in freshwater in Tasmania are Brown Trout (77%), Rainbow Trout (67%), Australian Salmon (25%), Brook Trout (13%), and other species (3%).
- > Among 249 Segment 4 respondents, the preferred platforms for saltwater fishing are Beach (33%), Jetty or Wharf (35%), Rocks (29%), Boat (72%), and other platforms (2%).
- > Among 141 Segment 4 respondents, the preferred platforms for freshwater fishing are Beach (18%), Jetty or Wharf (23%), Rocks (40%), Boat (52%), and other platforms (18%).
- > Among 249 Segment 4 respondents, the typical fishing locations in saltwater are a location close to their home (68%), a location close to a holiday home or shack they own (23%), a location close to a holiday home or shack they rent, borrow, or visit (16%), a location close to a designated campsite (13%), a location close to a non-designated campsite (10%), a location close to a caravan/cabin or RV park (7%), and other locations (11%).
- > Among 141 Segment 4 respondents, the typical fishing locations in freshwater are a location close to their home (53%), a location close to a holiday home or shack they own (11%), a location close to a holiday home or shack they rent, borrow, or visit (19%), a location close to a designated campsite (19%), a location close to a non-designated campsite (18%), a location close to a caravan/cabin or RV park (8%), and other locations (9%).
- > Out of 291 respondents in Segment 4, 56% of them or someone in their household own a boat used for recreational fishing in saltwater.
- > Among 23 Segment 4 respondents, 62% acquired fishing equipment from a major outlet such as BCF, Anaconda, or Tackleworld, 51% acquired it from the local bait and tackle store where they live, 24% acquired it from an online store such as Amazon or eBay, 24% acquired it from a department store such as Big W or Kmart, 22% acquired it from the local bait and tackle store where they fish, 16% acquired it by buying second-hand fishing equipment, 3% acquired it by swapping things they own in exchange for fishing equipment, 1% acquired it through another way, and 15% haven't bought or swapped any fishing gear in the last 12 months.

## **Segment Persona**

*Name: Mark, the 'Ultimate' Daring Enthusiast*

*Age: 50*

*Occupation: Plumber*

Mark is a hardworking and outgoing individual who works for the big local plumbing company. He has a strong work ethic and enjoys taking on challenges in both his personal and professional life. Mark is known for

confident nature, always seeking new experiences and thrills.

Mark embraces an active lifestyle, and there aren't too many weekends that he isn't camping, and, of course, fishing. His free-spirited nature and love for the outdoors have earned him the nickname 'Drop Bear' among his friends and family.

Mark is a hands-on person in his career, and sometimes finds it challenging to keep up with rapidly changing technology. He recently got a new iPhone which took ages for him to figure out how it all worked. Luckily the apprentice onsite at his latest job sorted him out pretty quickly.

Mark has been known to take the occasional risk or two and is known as the camp prankster. He didn't get the nickname of Drop Bear for nothing, and his practical jokes are legendary. He enjoys pushing boundaries and stepping out of his comfort zone to experience the thrill of adventure. Whether it's trying out new fishing techniques or exploring uncharted fishing spots, he is always eager to take calculated risks.

Camping and the outdoor really taps into the freedom that Mark highly values. These are places where he doesn't have to conform to strict rules and regulations. He enjoys the independence that comes with his outdoor pursuits, where he can explore nature on his terms, free from limitations. This sense of freedom resonates deeply with his outgoing nature, and he's not afraid to take the lead, both at work and when with a group of friends.

Mark loves where he lives, and as a natural chatterer he's well known in the local shop and amongst his neighbours. He chops a load of wood for old Mick who lives around the corner from time to time, and will often be helping his mates out with jobs around their homes (and vice versa). Community is important to him and a sense of belonging, and camaraderie is crucial to him, making him actively seek like-minded individuals to share his experiences with.

Fishing is Mark's passion, and you can tell from his social media posts that he is proud of his catches, regularly sharing photos on his own account and in online fishing groups. He derives immense happiness and satisfaction from each catch. He's not only motivated by the challenge of catching fish but also by the joy it brings him.

Mark pops into his local tackle shop about once a week or so, often just for a chat so he can hear about everything that's happening in recreational fishing, from both the guys in the shop, and the people that come in. He enjoys getting expert advice on the latest gear and he knows when they have their sales and is often first in the door.

Mark, the ultimate Daring Enthusiast, embodies a zest for life, seeking and valuing new experiences. As a plumber, he cherishes his free time, spending it exploring the great outdoors and pursuing his passion for fishing. His leadership qualities, and love for the environment make him a lively and interesting individual to be around. He is certainly someone who never shies away from embracing new challenges and experiences.

## **Segment Summary**

In summary, the Daring Enthusiasts' segment consists of passionate and adventurous individuals with an outgoing nature who find immense joy in fishing, particularly in the pursuit of larger fish. They firmly believe that the size of their catch directly impacts the overall quality of their fishing experiences, and they relish the thrill of their fishing experiences. While they eagerly embrace the latest fishing gear, they often feel overwhelmed by the rapid pace of technological change. Brand recognition is crucial to them, as they value the assurance of quality and performance in their fishing gear. Interestingly, they consider themselves risk-takers and relish the freedom of breaking away from rules and regulations while at the same time trusting the government to manage fisheries. This segment values a sense of community and exhibits optimism and confidence in their pursuit of clear life goals. They are perceived as competitive and keen fishers, and fishing holds a significant place in their lives as passionate fishing enthusiasts.

## Research Findings Detail

This section provides the full set of research results analysed by each of the four segments, compared against the total result.

Significance testing has been undertaken between each segment column and the total, with any significantly higher outcomes highlighted in bold and blue on each of the tables, and any significantly lower outcomes highlighted in orange. Testing for significance is undertaken using column proportions (Z-test) at 95% confidence, with a significant outcome determined by the p-value being less than 0.05.

### S1. Postcode of your main residence

- Note, Postcodes have been coded into the four regions of Tasmania:

Region Where Reside	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	<b>1,064</b>	<b>336</b>	<b>182</b>	<b>255</b>	<b>291</b>
<b>North West and West Coast</b>	19%	16%	21%	18%	20%
<b>North East</b>	19%	18%	18%	18%	21%
<b>East &amp; Central</b>	23%	21%	28%	22%	23%
<b>South East</b>	39%	44%	34%	41%	36%

Table 41 - Region where reside

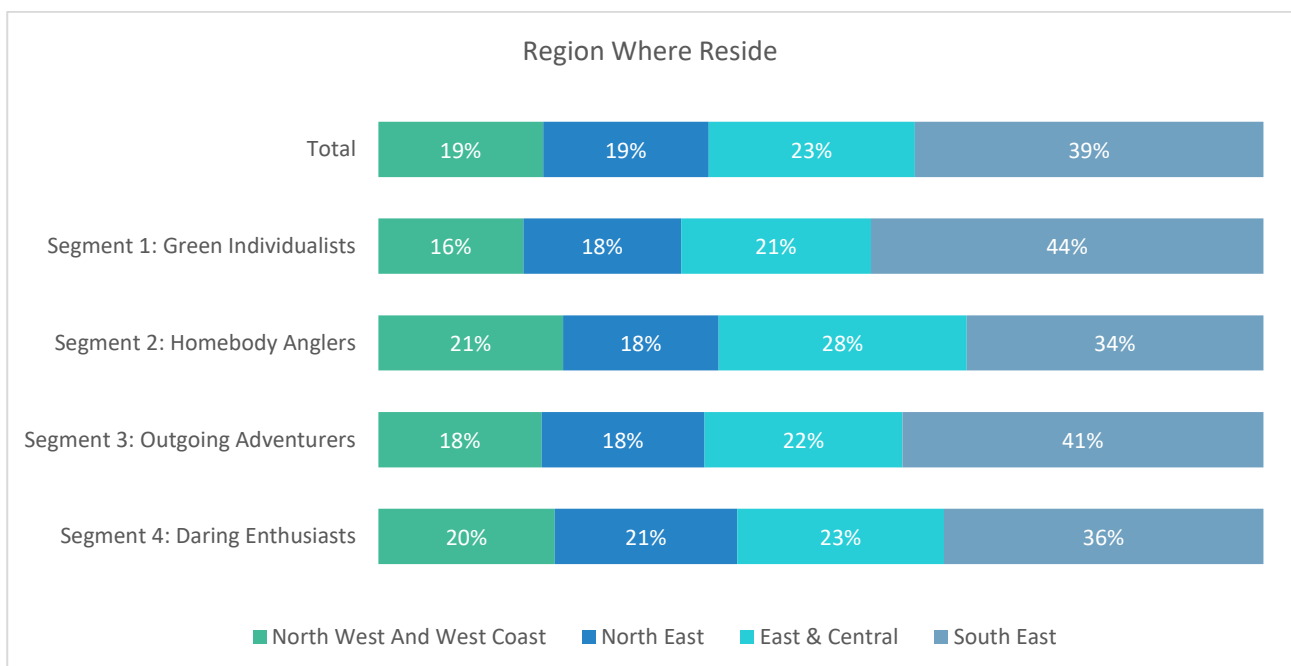


Figure 3 - Region where reside

Overall, two-fifths (39%) of survey respondents reside in the South East (including Hobart, Clarence and Huon Valley council areas), and approximately a fifth reside in each of the other three areas including 19% in North West and West (including Devonport and Burnie), 19% in North East (including Launceston), and 23% in East and Central (including the Tasman Peninsula).

Very similar outcomes are achieved within each segment, with a slightly higher proportion of 'Homebody Anglers' located in East & Central, and a lower proportion of this segment within the South East.

## S2. TARFish Membership

- Note, question S2 was only asked of those who were not from the sample provided by TARFish. The results below are the combined outcome for the full sample showing the total number of TARFish members included in the research.

TARFish Membership	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	1,064	336	182	255	291
<b>TARFish member</b>	30%	18%	24%	<b>51%</b>	29%
<b>Non-member</b>	70%	<b>82%</b>	76%	49%	71%

Table 42 - TARFish membership

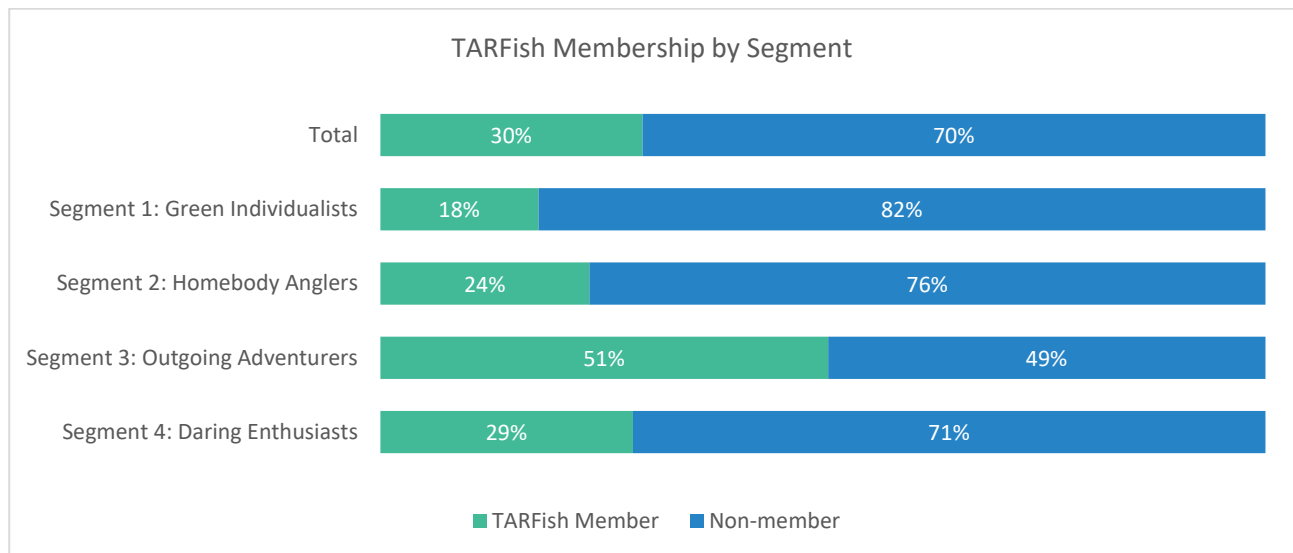


Figure 4 - TARFish membership by segment

Overall, just under a third (30%) of the sample indicated they are TARFish members. Among the segments, TARFish members are more likely to be classified as 'Outgoing Adventurers' (51%, significantly higher), and less likely to be classified as 'Green Individualists' (18%, significantly lower).

Within TARFish members only, the proportion of each segment is as follows:

Segment Size within TARFish Membership	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	315	60	43	129	83
<b>Percentage</b>	100%	19%	14%	41%	26%

Table 43 - Segment size within TARFish membership

'Outgoing Adventurers' make up two-fifths (41%) of TARFish members, followed by 'Daring Enthusiasts' making up a quarter (26%) of TARFish members. 'Green Individualists' make up 19%, followed by 'Homebody Anglers' making up the remaining 14%.

#### S4. Total Fishing Club/Association Membership

- Note, question S4 was designed to capture additional fishing club or association membership (in addition to TARFish). The result below has combined TARFish membership with any additional fishing club or association membership to provide a 'Total Members' vs 'Total Non-members' percentage.

Total Membership	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	1,064	336	182	255	291
<b>A fishing club/association member</b>	33%	21%	24%	57%	31%
<b>Non-member</b>	67%	79%	76%	43%	69%

Table 44 - Total membership

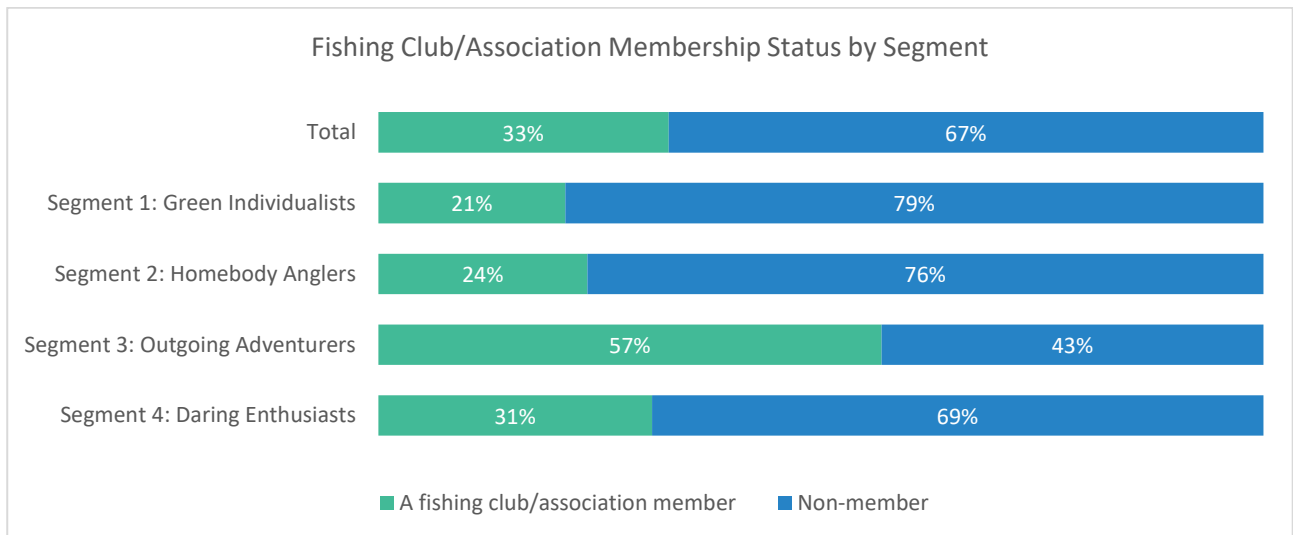


Figure 5 - Fishing club/association membership status

Overall, a third of the sample (33%) indicated they are TARFish members or members of another fishing club or association.

Among the segments, fishing club or association membership is significantly higher for 'Outgoing Adventurers' (57%). Non-members is significantly higher for 'Green Individualists' and 'Homebody Anglers'.

**S6. Do you hold a current Tasmania recreational sea fishing licence (such as rock lobster, abalone, scallop, or setline) and/or freshwater fishing licence?**

- Note, this question was only asked in Phase 2 of the research.

Licence Status	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	940	304	170	205	261
<b>Yes – Salt Water Licence</b>	33%	21%	31%	<b>52%</b>	35%
<b>Yes, Freshwater Licence</b>	27%	17%	23%	<b>43%</b>	30%
<b>No</b>	50%	<b>67%</b>	53%	24%	48%
<b>Unsure</b>	1%	1%	1%	0%	2%

Table 45 - Licence status

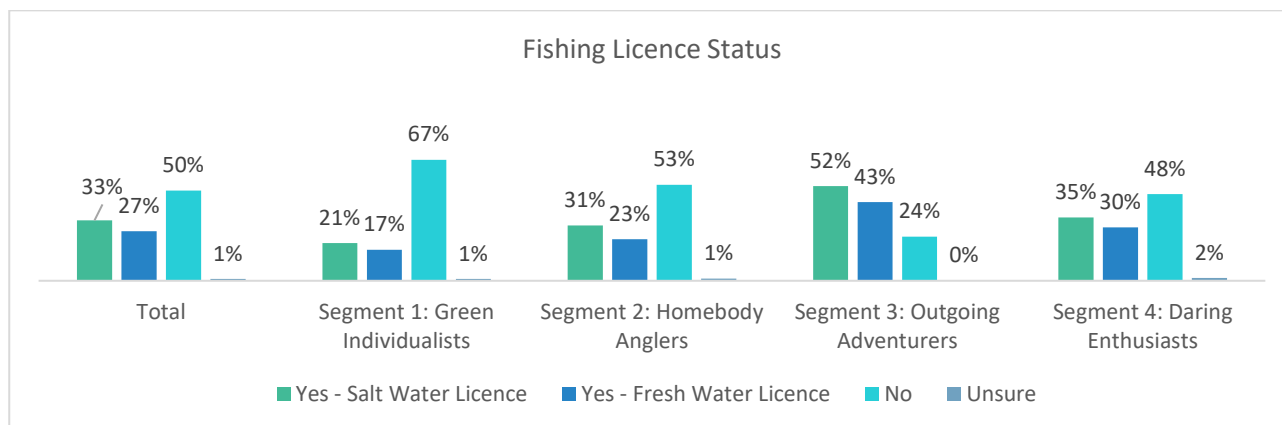


Figure 6 - Fishing licence status

Overall, approximately half of the respondents hold either a saltwater and/or freshwater fishing licence. A third indicated they hold a saltwater fishing licence, and just over a quarter (27%) indicated they hold a freshwater fishing licence.

Amongst the segments, 'Green Individualists' (67%, significantly higher) and 'Homebody Anglers' (53%) are more likely to not hold a fishing licence, whereas 'Outgoing Adventurers' and 'Daring Enthusiasts' are more likely to be licence holders. 'Outgoing Adventurers' are significantly more likely to be licence holders, with three quarters indicating they hold either a saltwater or freshwater licence.



**Q1A. Have you recreationally fished in Tasmania in the last 12 months?**

Fished Recreationally Last 12 Months	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	1,064	336	182	255	291
<b>Yes</b>	86%	76%	82%	<b>99%</b>	88%
<b>No</b>	14%	<b>24%</b>	18%	1%	12%

Table 46 - Fished recreationally L12M

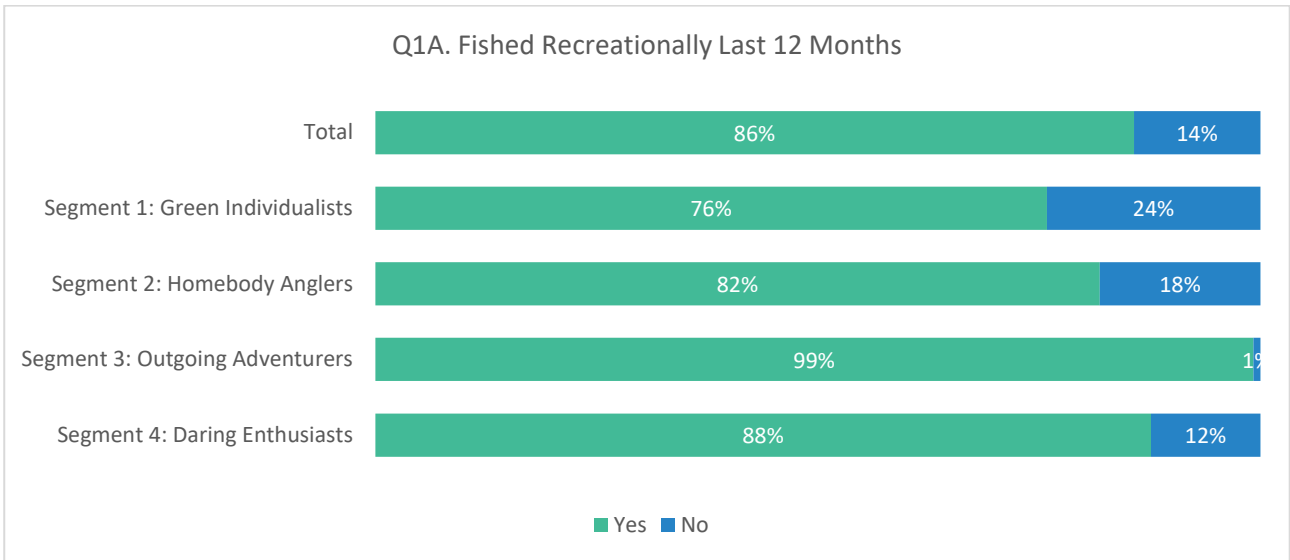


Figure 7 - Fished recreationally L12M

Overall, 86% have fished recreationally in Tasmania in the last 12 months.

Among the segments, the clear majority within each segment have fished recreationally in Tasmania in the last 12 months. Almost all of the 'Outgoing Adventurers' segment have fished in the last 12 months (a significantly higher outcome), through to three quarters of the 'Green Individualists' having fished in the last 12 months (noting that this is a significantly lower outcome).

Note, to qualify for the research, a respondent must have either fished recreationally in Tasmania in the last 12 months, or are intending to fish recreationally in Tasmania in the next 12 months.

**Q1B. Please select which of the following options best describe you:**

- Note, this question was asked only of those who have fished recreationally in Tasmania in the last 12 months.

Saltwater vs Freshwater fishing Last 12 months	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<i>Base</i>	912	255	149	253	255
<b>I fish <u>only</u> in saltwater</b>	43%	<b>53%</b>	41%	39%	39%
<b>I fish <u>mainly</u> in saltwater</b>	29%	25%	30%	28%	31%
<b>I fish <u>equally</u> in saltwater and freshwater</b>	18%	12%	14%	23%	20%
<b>I fish <u>mainly</u> in freshwater</b>	9%	7%	12%	10%	8%
<b>I fish <u>only</u> in freshwater</b>	2%	3%	3%	0%	2%

Table 47 - Saltwater vs Freshwater fishing L12M

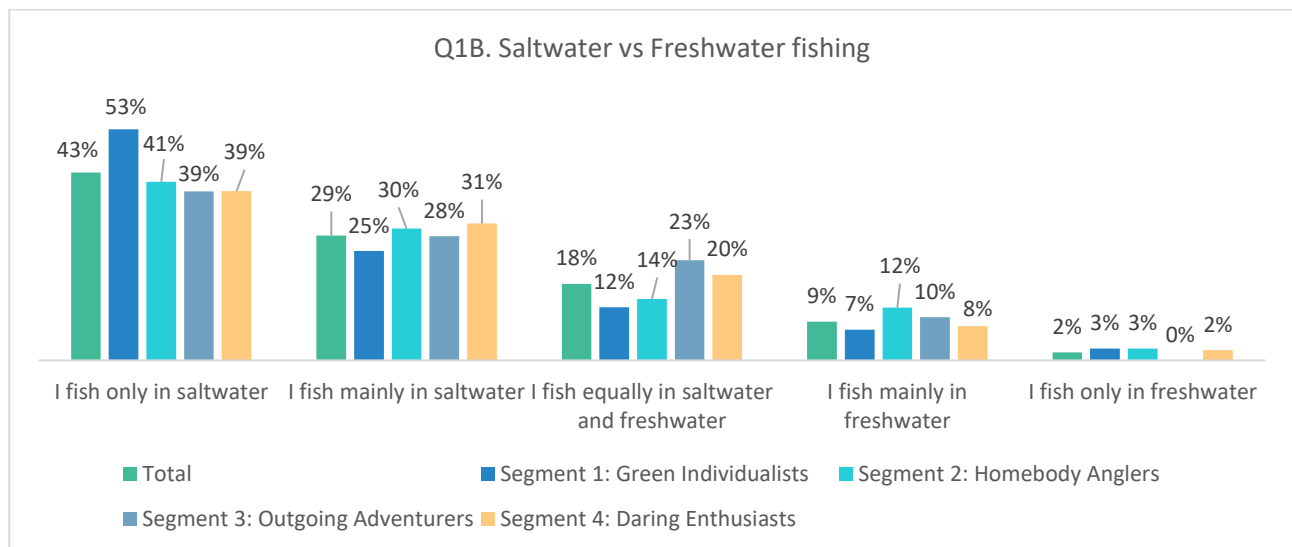


Figure 8 - Saltwater v Freshwater fishing

Overall, the majority of respondents either fishing only (43%) or mainly (29%) in saltwater. Only 2% indicate they only fish in freshwater, with a further 9% indicating they mainly fish in freshwater.

Among the segments, all segments are undertaking the majority of their fishing in saltwater. 'Outgoing Adventurers' are more likely than the other segments to undertake freshwater fishing, with this likely to be as part of their 'mix' of fishing experiences throughout the year. 'Green Individualists' are significantly more likely to fish only in saltwater.

**Q1C. Are you intending to recreationally fish in Tasmania in the next 12 months?**

- Note this question was changed in Phase 2. The results for Phase 1 and Phase 2 are presented below.

Intention to Fish Next 12 Months (Phase 1)	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	124	32	12	50	30
<b>Yes</b>	100%	100%	100%	100%	100%
<b>No</b>	0%	0%	0%	0%	0%

Table 48 - Intention to fish N12M

Intention to Fish Next 12 Months (Phase 2)	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	940	304	170	205	261
<b>Yes, only in saltwater</b>	39%	42%	39%	40%	34%
<b>Yes, mainly in saltwater</b>	27%	24%	28%	25%	32%
<b>Yes, equally in saltwater and freshwater</b>	20%	19%	14%	25%	21%
<b>Yes, mainly in freshwater</b>	9%	9%	12%	9%	7%
<b>Yes, only in freshwater</b>	3%	4%	4%	0%	4%
<b>No, I don't intend to fish next 12 months</b>	2%	2%	3%	0%	2%

Table 49 - Intention to fish N12M (phase 2)

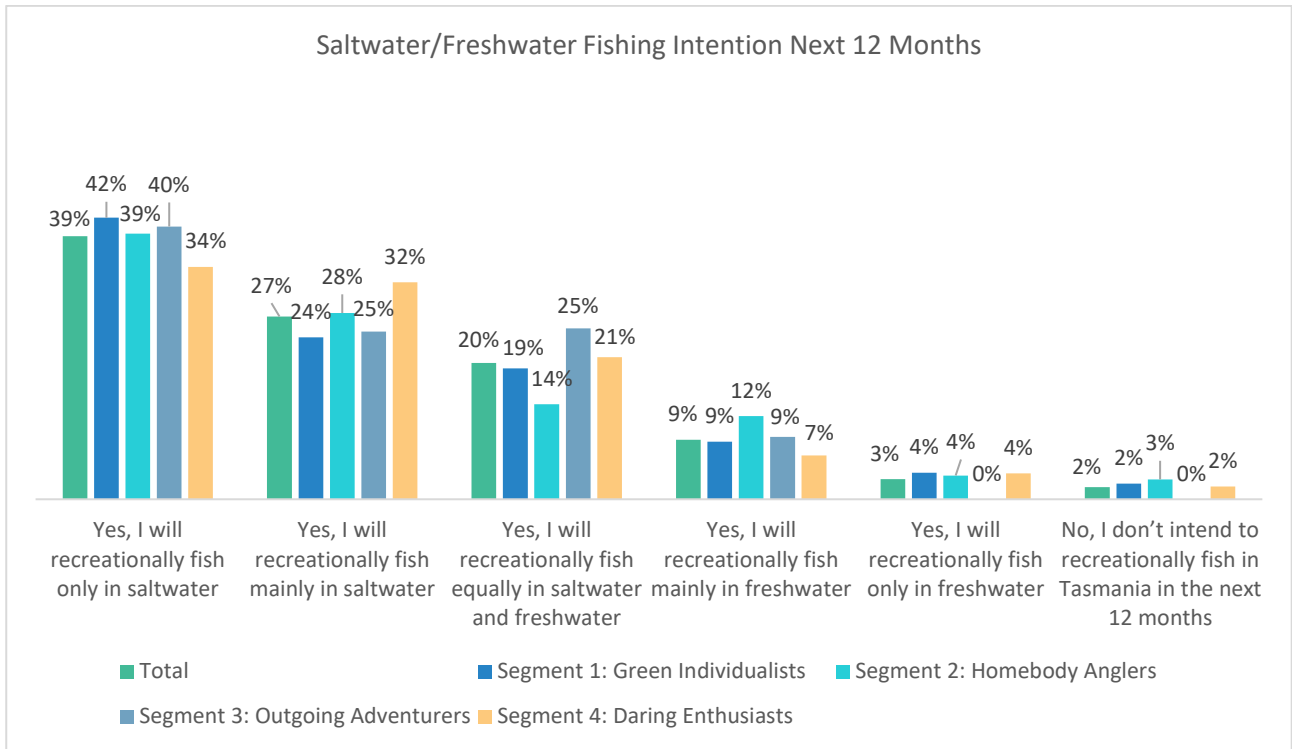


Figure 9 - Saltwater/Freshwater fishing intention N12M

Overall, the majority of respondents are intending to either only fish in saltwater (39%) or mainly fish in saltwater (27%) in the next 12 months. Only 3% are intending to only fish in freshwater, with a further 95 intending to mainly fish in freshwater.

Among the segments, all segments are intending to fish in saltwater in the next 12 months. A higher proportion of 'Outgoing Adventurers' will split their fishing equally between saltwater and freshwater fishing (25%, not significantly).

**Q2A. Thinking about your fishing in saltwater specifically, how many days did you recreationally fish in saltwater in Tasmania in the last 12 months?**

- Note, respondents were given a definition of 'days' for this question: 'Please note that 'days' refers to any day on which you have gone fishing regardless of the duration or the number of times you have gone fishing in a single day.'
- This question was asked of those who indicated they fish recreationally in saltwater, and the average has been calculated by using a mid-point factor of the ranges provided. These are provided in brackets next to the respondent categories below.

Number of Days Fished in Saltwater	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	895	248	145	253	249
<b>0 days (0)</b>	2%	1%	4%	0%	2%
<b>1 to 10 days (5)</b>	41%	<b>56%</b>	45%	26%	39%
<b>11 to 20 days (15)</b>	23%	23%	23%	23%	22%
<b>21 to 30 days (25)</b>	16%	10%	14%	<b>23%</b>	16%
<b>31 days or more (40)</b>	17%	9%	10%	<b>26%</b>	20%
<b>Not sure (0)</b>	1%	0%	<b>3%</b>	0%	0%
<b>Average Number of days</b>	<b>16.4 days</b>	<b>12.3 days</b>	<b>13.3 days</b>	<b>21.2 days</b>	<b>17.3 days</b>

Table 50 - Number of days fished in saltwater

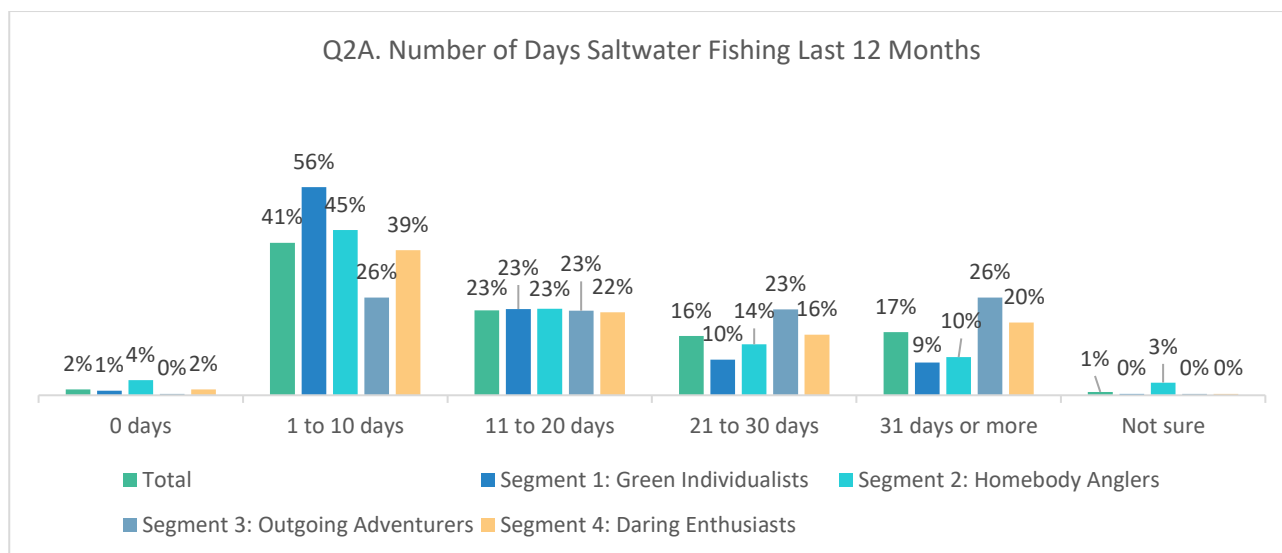


Figure 10 - Number of days saltwater fishing L12M

Overall, the average number of days fished in saltwater in a year is 16.4 days. Among the segments, this is higher for 'Outgoing Adventurers' at 21.2 days per year, and lower for the 'Green Individualists' (12.3 days) and the 'Homebody Anglers' (13.3 days).

**Q2B. Thinking about your fishing in freshwater specifically, how many days did you recreationally fish in freshwater in Tasmania in the last 12 months?**

- Note, respondents were given a definition of 'days' for this question: 'Please note that 'days' refers to any day on which you have gone fishing regardless of the duration or the number of times you have gone fishing in a single day.'
- This question was asked of those who indicated they fish recreationally in freshwater, and the average has been calculated by using a mid-point factor of the ranges provided. These are provided in brackets next to the respondent categories below.

Number of Days Fished in Freshwater	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	454	109	78	126	141
<b>0 days (0)</b>	16%	17%	21%	13%	15%
<b>1 to 10 days (5)</b>	46%	<b>62%</b>	41%	38%	45%
<b>11 to 20 days (15)</b>	20%	16%	22%	21%	21%
<b>21 to 30 days (25)</b>	7%	3%	3%	12%	10%
<b>31 days or more (40)</b>	9%	3%	8%	15%	9%
<b>Not sure (0)</b>	2%	0%	<b>6%</b>	0%	1%
<b>Average Number of days</b>	<b>10.7 days</b>	<b>7.2 days</b>	<b>9.0 days</b>	<b>14.1 days</b>	<b>11.2 days</b>

Table 51 - Number of days fished in freshwater

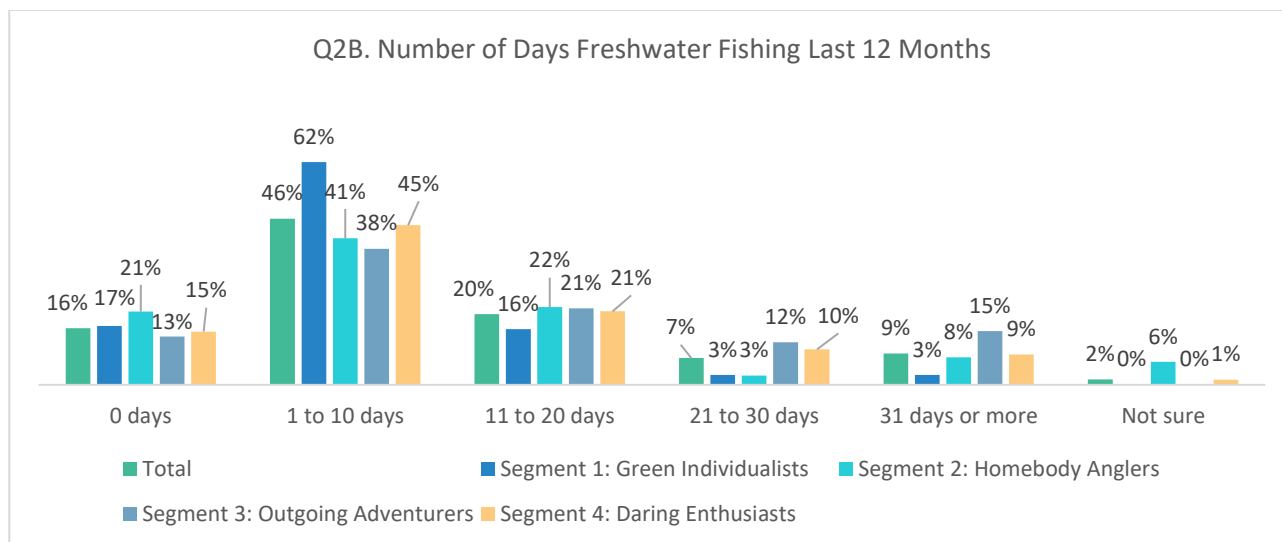


Figure 11 - Number of days freshwater fishing L12M

Overall, the average number of days fished in freshwater in a year is 10.7 days. Among the segments, this is higher for 'Outgoing Adventurers' (14.1 days) and lower for 'Green Individualists' (7.2 days) and 'Homebody Anglers' (9.0 days).

**Q3A. Where in Tasmania do you mainly recreationally fish in saltwater?**

- Note, respondents were presented with a map of Tasmania with the regions defined to assist them in selecting the region they have fished in:

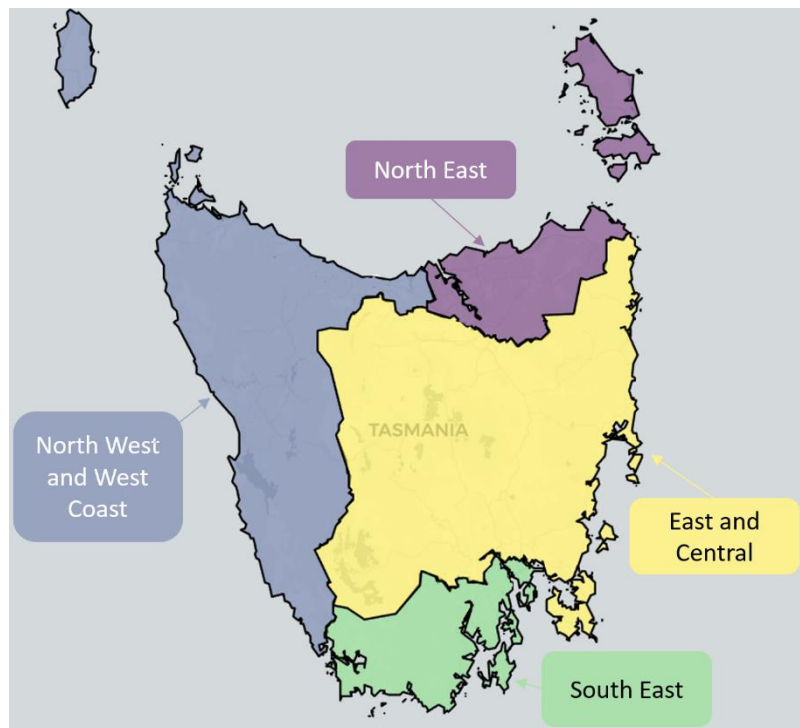


Figure 12 - Tasmania regions

Region Where Fish in Saltwater	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	895	248	145	253	249
<b>North West, and West Coast (including Devenport and Burnie)</b>	22%	20%	28%	19%	25%
<b>North East (including Launceston)</b>	21%	20%	23%	22%	20%
<b>East &amp; Central (including the Tasman Peninsula)</b>	44%	37%	41%	<b>53%</b>	42%
<b>South East (including Hobart, Clarence and Huon Valley council areas)</b>	38%	43%	37%	37%	36%

Table 52 - Regional where fished in saltwater

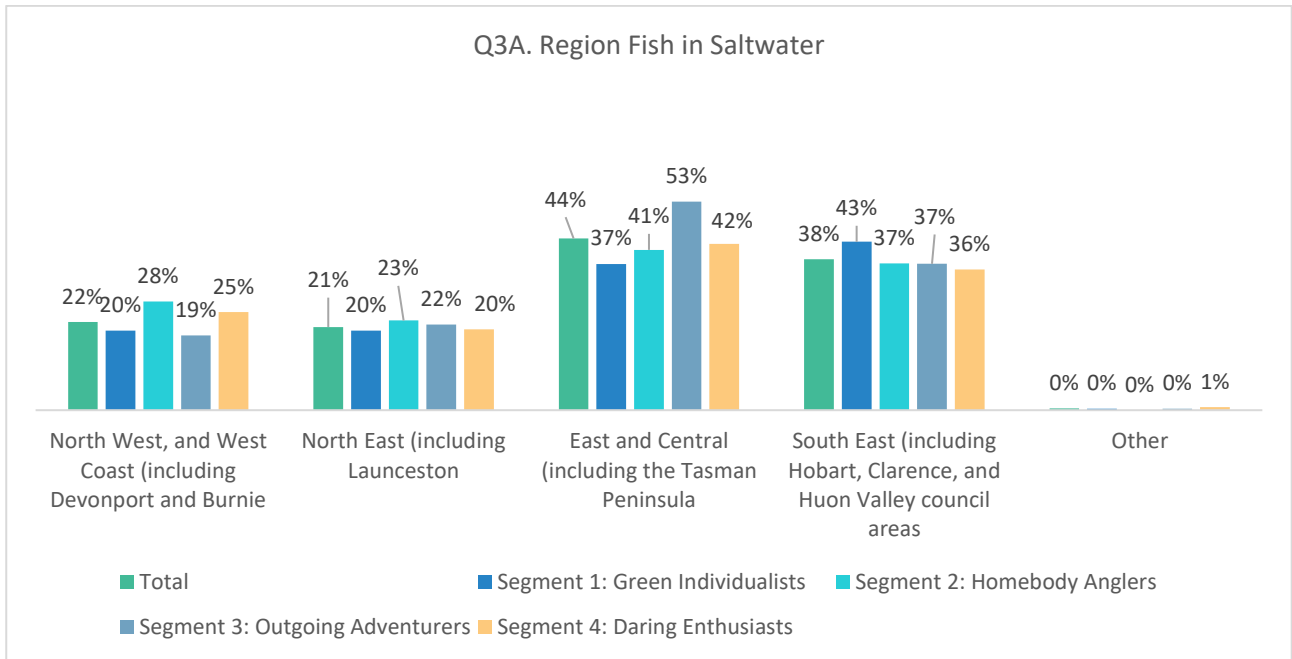


Figure 13 - Regions fished in saltwater

Overall, the majority of saltwater fishing is occurring in East and Central (44%) and the South East (38%).

Among the segments, 'Green Individualists' are more likely to be undertaking saltwater fishing in the South East (43%). 'Outgoing Adventurers' are more likely to undertake their saltwater fishing in the East and Central area (53%, a significantly higher outcome).

A higher proportion of 'Homebody Anglers' are likely to undertake their saltwater fishing in the North West and West Coast region (28%), noting that a slightly higher proportion of this segment also reside in the North West and West Coast region.



**Q3B. Where in Tasmania do you mainly recreationally fish in freshwater?**

- Note: Q3A and Q3B were presented on the same screen to the respondents, so the map was available for respondents to view for both of these questions.

Region Where Fish in Freshwater	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	454	109	78	126	141
<b>North West, and West Coast (including Devenport and Burnie)</b>	26%	27%	32%	23%	24%
<b>North East (including Launceston)</b>	17%	16%	22%	14%	16%
<b>East &amp; Central (including the Tasman Peninsula)</b>	54%	51%	44%	<b>67%</b>	50%
<b>South East (including Hobart, Clarence and Huon Valley council areas)</b>	19%	17%	21%	16%	23%

Table 53 - Region where fished in freshwater

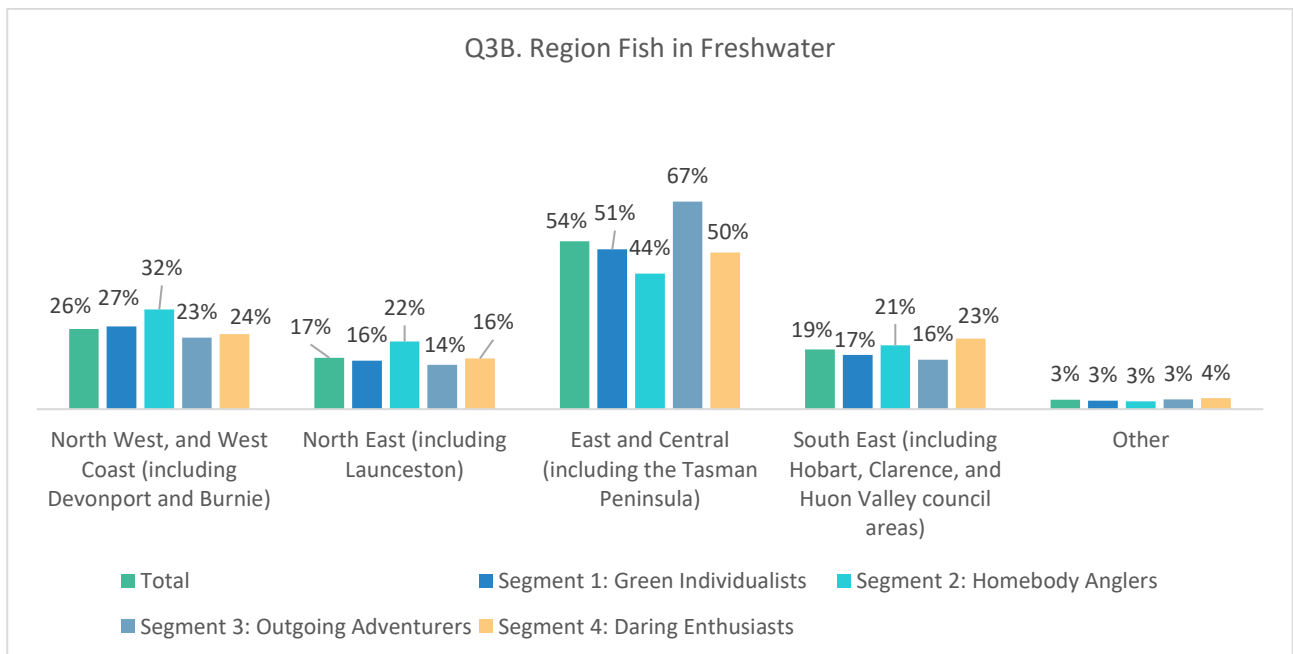


Figure 14 - Regions fished in freshwater

Overall, the majority of freshwater fishing is occurring in the East and Central region (54%), followed by the North West and West Coast region (26%).

Among the segments, East and Central is the most common region for undertaking freshwater for all segments, especially 'Outgoing Adventurers' (67%). Just under a third (32%) of 'Homebody Anglers' are undertaking their freshwater fishing in the North West and West Coast region.

A higher proportion of 'Daring Enthusiasts' are undertaking their freshwater fishing in the South East region (23%) when compared to the total (19%).

#### Q4A. Which of the following species do you mainly recreationally fish in saltwater in Tasmania for?

Species Fish in Saltwater	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	895	248	145	253	249
<b>Flathead</b>	90%	88%	87%	92%	90%
<b>Calamari / Squid</b>	55%	47%	47%	<b>68%</b>	55%
<b>Australian Salmon</b>	48%	50%	40%	<b>58%</b>	40%
<b>Rock Lobster</b>	33%	21%	29%	<b>47%</b>	31%
<b>Tuna</b>	29%	19%	21%	<b>45%</b>	27%
<b>King George Whiting</b>	22%	20%	15%	<b>30%</b>	22%
<b>Kingfish</b>	21%	16%	15%	<b>31%</b>	18%
<b>Trumpeter</b>	21%	13%	15%	<b>31%</b>	20%
<b>Abalone</b>	20%	17%	12%	<b>29%</b>	18%
<b>Snapper</b>	20%	17%	13%	24%	21%
<b>Black Bream</b>	16%	14%	9%	<b>24%</b>	15%
<b>Other</b>	10%	8%	5%	11%	14%

Table 54 - Species of fish in saltwater

Top 5 Species	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>First</b>	Flathead	Flathead	Flathead	Flathead	Flathead
<b>Second</b>	Calamari / Squid	Australian Salmon	Calamari / Squid	Calamari / Squid	Calamari / Squid
<b>Third</b>	Australian Salmon	Calamari / Squid	Australian Salmon	Australian Salmon	Australian Salmon
<b>Fourth</b>	Rock Lobster	Rock Lobster	Rock Lobster	Rock Lobster	Rock Lobster
<b>Fifth</b>	Tuna	King George Whiting	Tuna	Tuna	Tuna

Table 55 - Top 5 saltwater species

Overall, the majority of saltwater fishing targets Flathead (90%) and Calamari / Squid (55%). Australian Salmon is targeted by just under half (48%) of respondents, and Rock Lobster targeted by a third (33%).

Among the segments, the top 3 species are consistent, with Flathead the key species among all segments.

'Outgoing Adventurers' are targeting significantly more species than the other segments.

**Q4B. Which of the following species do you mainly recreationally fish in freshwater in Tasmania for?**

Species Fish in Freshwater	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	454	109	78	126	141
<b>Brown Trout</b>	80%	76%	77%	87%	77%
<b>Rainbow Trout</b>	66%	60%	67%	71%	67%
<b>Australian Salmon</b>	21%	22%	26%	12%	25%
<b>Brook Trout</b>	13%	11%	9%	17%	13%
<b>Other</b>	4%	6%	3%	6%	3%

Table 56 - Species of fish in freshwater

Top 4 Species	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>First</b>	Brown Trout	Brown Trout	Brown Trout	Brown Trout	Brown Trout
<b>Second</b>	Rainbow Trout	Rainbow Trout	Rainbow Trout	Rainbow Trout	Rainbow Trout
<b>Third</b>	Australian Salmon	Australian Salmon	Australian Salmon	Australian Salmon	Australian Salmon
<b>Fourth</b>	Brook Trout	Brook Trout	Brook Trout	Brook Trout	Brook Trout

Table 57 - Top 4 freshwater species

Overall, the majority of freshwater fishing targets Brown Trout (80%) and Rainbow Trout (66%).

Among the segments, the order of species is consistent for all.

**Q5A. When you recreationally fish in saltwater in Tasmania, what platforms do you mainly fish from?**

Saltwater Fishing Platforms	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	895	248	145	253	249
<b>Beach</b>	32%	33%	33%	31%	33%
<b>Jetty or Wharf</b>	35%	38%	43%	28%	35%
<b>Rocks</b>	28%	28%	32%	25%	29%
<b>Boat</b>	76%	72%	70%	<b>88%</b>	72%
<b>Other</b>	2%	3%	1%	2%	2%

Table 58 - Saltwater fishing platforms

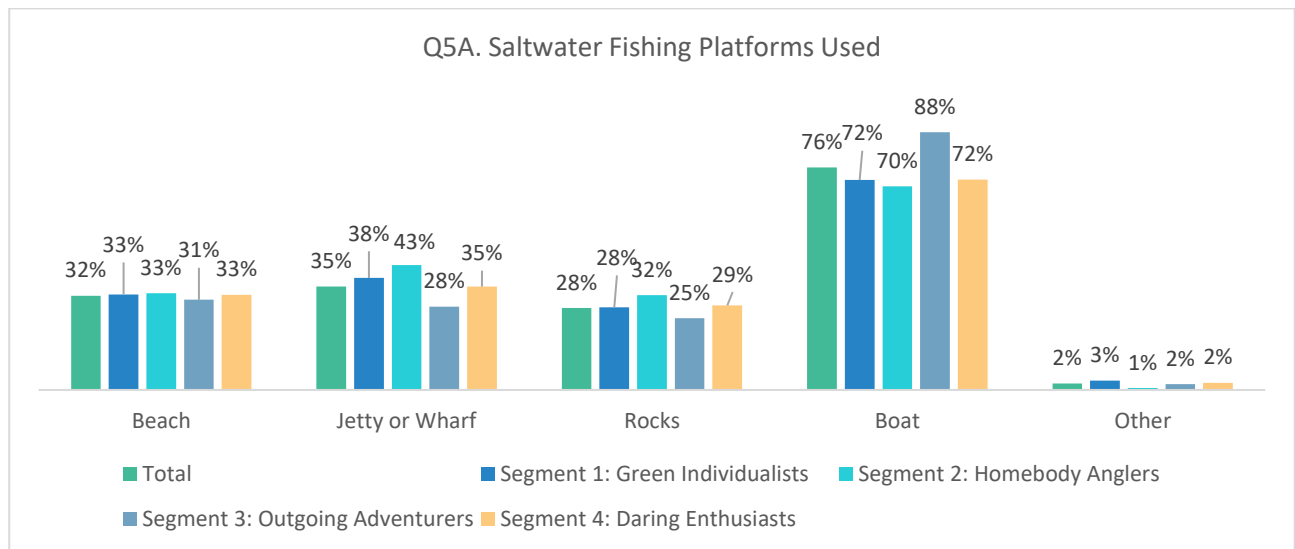


Figure 15 - Saltwater platforms used

Overall, the most common fishing platform for saltwater fishing is a boat (76%). Just over a third (35%) are fishing from a jetty/wharf, and just under a third are fishing from a beach (32%).

Among the segments, all segments are fishing in saltwater using a boat. 'Outgoing Adventurers' are significantly more likely to be fishing from a boat (88%), and significantly less likely to fish from a jetty/wharf (28%).

'Homebody Anglers' are more likely to be fishing from a jetty/wharf (43%) when compared to the total (35%).

**Q5B. When you recreationally fish in freshwater in Tasmania, what platforms do you mainly fish from?**

Freshwater Fishing Platforms	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	454	109	78	126	141
<b>Beach</b>	21%	30%	18%	18%	18%
<b>Jetty or Wharf</b>	19%	19%	32%	7%	23%
<b>Rocks</b>	39%	38%	40%	38%	40%
<b>Boat</b>	52%	39%	54%	63%	52%
<b>Other</b>	19%	28%	6%	21%	18%

Table 59 - Freshwater fishing platforms

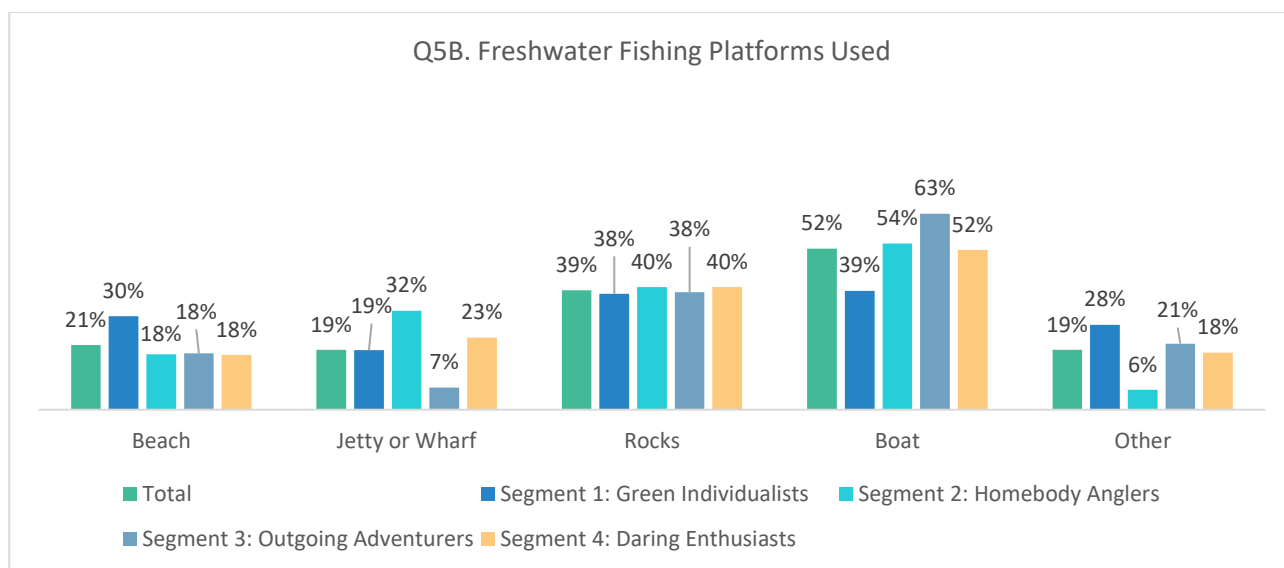


Figure 16 - Freshwater platforms used

Overall, the most common fishing platform for freshwater fishing is a boat (52%), with just under two-fifths (39%) fishing from rocks.

Among the segments, fishing in freshwater using a boat is common for 'Homebody Anglers' (54%), 'Outgoing Adventurers' (63%, significantly higher), and 'Daring Enthusiasts' (52%).

'Green Individualists' also use a boat (39%, however significantly lower), but equally fish in freshwater from rocks (38%), and from a beach (30%, significantly higher).

**Q6A. When you recreationally fish in saltwater in Tasmania, which location do you typically fish from?**

Type of Location Fish From - Saltwater	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<i>Base</i>	895	248	145	253	249
<b>A location close to home</b>	64%	63%	66%	59%	68%
<b>A location close to a holiday home or shack you own</b>	26%	27%	22%	29%	23%
<b>A location close to a holiday home or shack you rent, borrow or visit</b>	15%	16%	10%	17%	16%
<b>A location close to a caravan/cabin or RV park</b>	8%	8%	10%	8%	7%
<b>A location close to a designated campsite</b>	13%	12%	13%	13%	13%
<b>A location close to a campsite that is not designated (e.g. bush campsite)</b>	9%	7%	10%	8%	10%
<b>Other</b>	9%	7%	6%	10%	11%
<b>TOTAL Holiday Home/Shack</b>	<b>39%</b>	<b>40%</b>	<b>32%</b>	<b>45%</b>	<b>38%</b>
<b>TOTAL Campsite</b>	<b>17%</b>	<b>14%</b>	<b>19%</b>	<b>17%</b>	<b>20%</b>

Table 60 - Type of Location fish from - saltwater

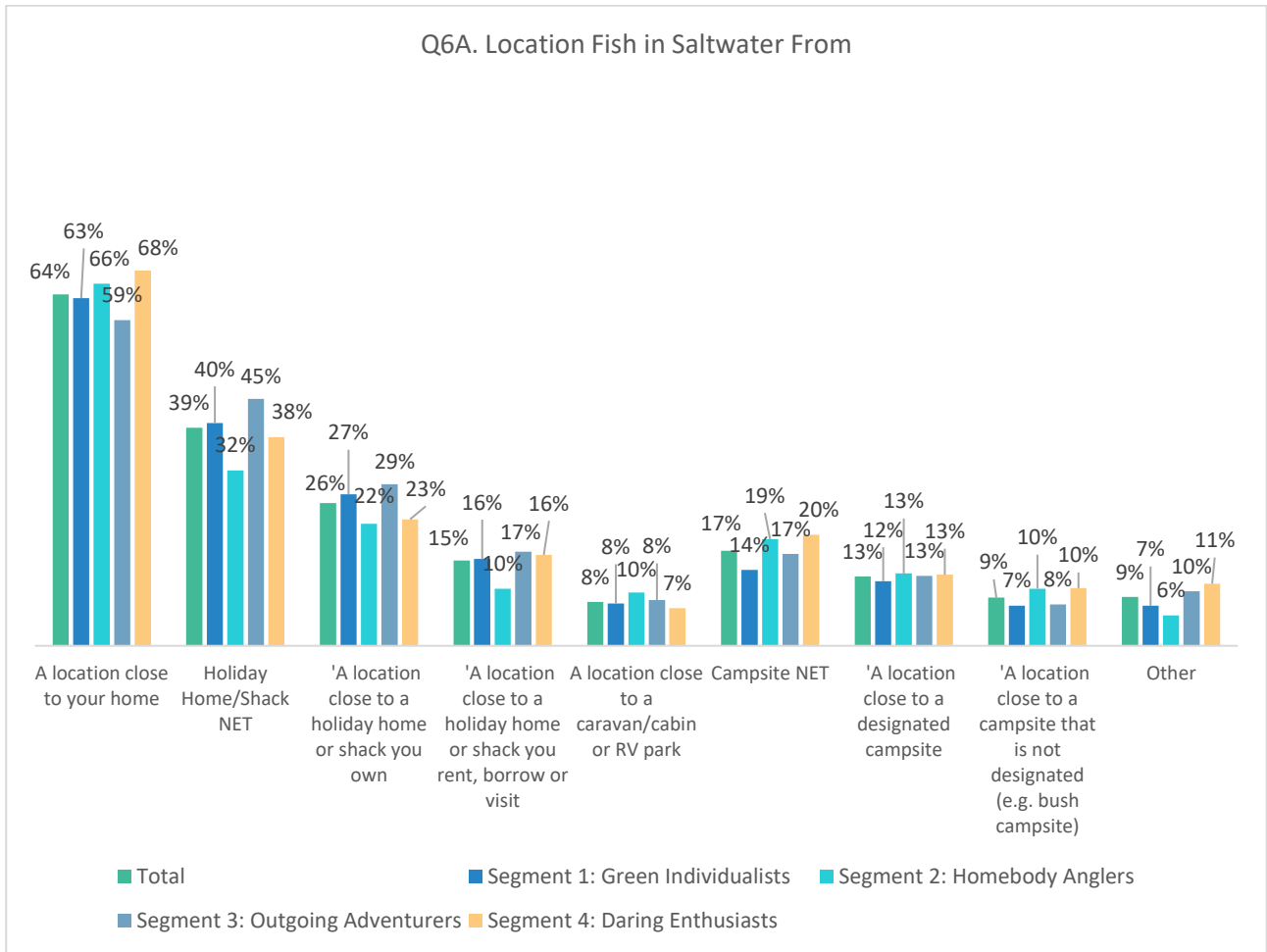


Figure 17 - Location fish in saltwater from

Overall, the majority of fishing occurs at a location close to home (64%). Just under two-fifths (39%) of saltwater fishing occurs from a holiday home/shack, and just under one-fifth (17%) occurs from a campsite.

Among the segments, 'Daring Enthusiasts' are more likely to fish at a location close to their home (68%). 'Outgoing Adventurers' are more likely to fish from a holiday home/shack (45%).

**Q6B. When you recreationally fish in freshwater in Tasmania, which location do you typically fish from?**

Type of Location Fish From - freshwater	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<i>Base</i>	895	248	145	253	249
<b>A location close to home</b>	50%	45%	<b>68%</b>	39%	53%
<b>A location close to a holiday home or shack you own</b>	13%	16%	13%	12%	11%
<b>A location close to a holiday home or shack you rent, borrow or visit</b>	20%	22%	9%	25%	19%
<b>A location close to a caravan/cabin or RV park</b>	9%	11%	8%	9%	8%
<b>A location close to a designated campsite</b>	21%	20%	18%	25%	19%
<b>A location close to a campsite that is not designated (e.g. bush campsite)</b>	21%	18%	21%	27%	18%
<b>Other</b>	9%	9%	4%	12%	9%
<b>TOTAL Holiday Home/Shack</b>	<b>30%</b>	<b>35%</b>	<b>17%</b>	<b>35%</b>	<b>28%</b>
<b>TOTAL Campsite</b>	<b>35%</b>	<b>29%</b>	<b>33%</b>	<b>43%</b>	<b>34%</b>

Table 61 - Type of location fish from - freshwater



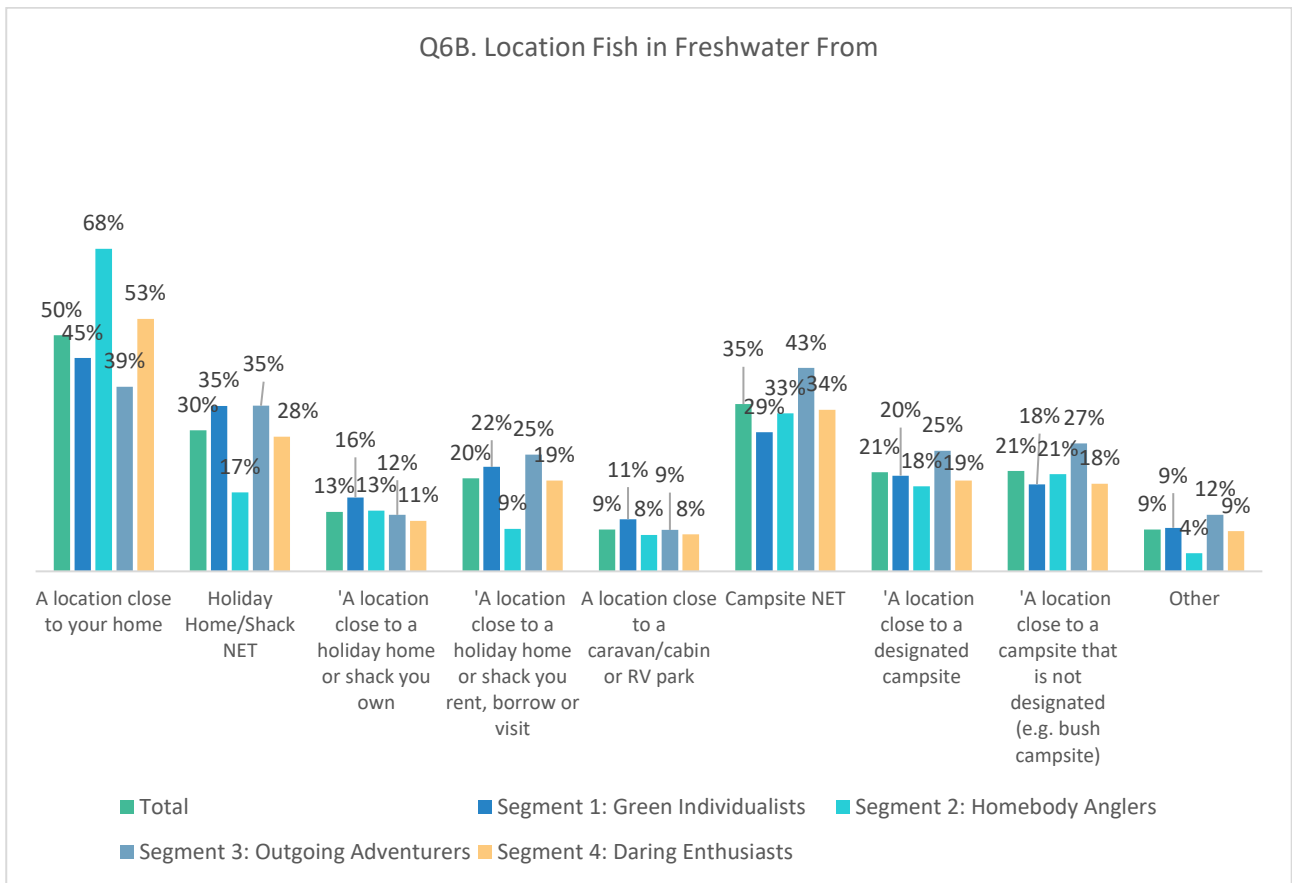


Figure 18 - Location fish in freshwater from

Overall, freshwater fishing is undertaken by the majority at a location close to home (50%). This is followed by a campsite (35%), and from a location close to a holiday home/shack (30%).

Among the segments, 'Homebody Anglers' are significantly more likely to freshwater fish at a location close to home. 'Outgoing Adventurers' are more likely to fish in freshwater from a campsite (43%, significantly higher), more so than a location close to their home (39%, significantly lower).

**Q7A. We would not like to ask you some questions which will help us better understand the types of people who recreationally fish in Tasmania. These questions are quite general, and we are interested in your opinions so there are no right or wrong answers. We will ask some questions related to fishing in the next question. After you have read each statement, please choose how strongly you agree or disagree with each statement.**

- Note, this question was used as part of the segmentation, and the results for each statement have been used to define each of the four segments (see Segmentation section of this report).
- The results below are for the 'Top 2 Box', which is the sum of Strongly Agree % and Agree %.

<b>Q7A. Attitudinal</b>	<b>Total</b>	<b>Segment 1: Green Individualists</b>	<b>Segment 2: Homebody Anglers</b>	<b>Segment 3: Outgoing Adventurers</b>	<b>Segment 4: Daring Enthusiasts</b>
<i>Base</i>	<i>1,064</i>	<i>336</i>	<i>182</i>	<i>255</i>	<i>291</i>
<b>A sense of space and openness is important to me</b>	93%	93%	85%	96%	95%
<b>I'd describe myself as a bit of a homebody</b>	52%	60%	70%	27%	52%
<b>I'd describe myself as adventurous and outgoing</b>	68%	55%	46%	86%	82%
<b>I consider myself to be a bit of a risk taker</b>	41%	36%	28%	42%	53%
<b>I'm more concerned with what I think, than what other people think of me</b>	70%	77%	62%	71%	66%
<b>My health and wellbeing is very important to me</b>	95%	95%	88%	99%	98%
<b>I have a clear idea of my goals in life</b>	81%	72%	67%	94%	88%
<b>I think most people that know me well would consider me a competitive person</b>	54%	43%	44%	67%	63%
<b>I think most people that know me well would consider me to be a confident person</b>	80%	75%	54%	95%	87%
<b>Keeping in close contact with my family is very important to me</b>	87%	80%	82%	95%	91%
<b>I see myself as a trendsetter</b>	14%	12%	4%	16%	20%
<b>In a group situation I often take the lead</b>	53%	45%	27%	73%	60%
<b>I feel really uncomfortable when I'm out of my normal environment</b>	31%	32%	48%	14%	33%
<b>I like the freedom of not having to comply with rules and regulations</b>	35%	35%	41%	20%	46%
<b>I don't think Australians</b>	55%	74%	42%	44%	51%

<b>are doing enough to combat climate change</b>					
<b>I have travelled a lot around Australia or overseas</b>	69%	81%	23%	87%	67%
<b>A sense of community is an important consideration for me when I'm choosing somewhere to live.</b>	72%	68%	60%	76%	80%
<b>Technology is changing so fast I find it hard to keep up</b>	48%	40%	59%	33%	65%
<b>I'm optimistic about the future</b>	66%	55%	59%	74%	75%
<b>There's a lot more we could be doing to look after our environment</b>	84%	93%	76%	80%	83%

Table 62 - Attitudinal statements

**Q7B. Here are a few more questions that will help us better understand the types of people who recreationally fish in Tasmania. Again, these questions seek your opinion so there are no right or wrong answers. After you have read each statement, please choose how strongly you agree or disagree with each statement.**

- Note, this question was used as part of the segmentation, and the results for each statement have been used to define each of the four segments (see Segmentation section of this report).
- The results below are for the 'Top 2 Box', which is the sum of Strongly Agree % and Agree %.

<b>Q7B. Fishing Attitudes</b>	<b>Total</b>	<b>Segment 1: Green Individualists</b>	<b>Segment 2: Homebody Anglers</b>	<b>Segment 3: Outgoing Adventurers</b>	<b>Segment 4: Daring Enthusiasts</b>
<b>Base</b>	<i>1,064</i>	<i>336</i>	<i>182</i>	<i>255</i>	<i>291</i>
<b>Sharing a fishing experience helps strengthen relationships with family and friends</b>	88%	84%	86%	94%	87%
<b>A fishing trip can be successful even if you don't catch fish</b>	83%	88%	81%	83%	79%
<b>The bigger the fish I catch, the better the trip</b>	34%	18%	41%	20%	60%
<b>The more fish I catch, the happier I am</b>	34%	17%	38%	27%	59%
<b>I trust the government to manage our fisheries</b>	34%	28%	36%	29%	44%
<b>Buying a recognised brand of fishing equipment is important to me</b>	34%	15%	29%	43%	51%
<b>Safety is an important consideration when I go fishing</b>	95%	96%	92%	98%	93%
<b>I don't consider myself to be a serious fisher</b>	58%	80%	76%	24%	49%
<b>Most people I know would consider me to be a keen fisher</b>	55%	25%	44%	91%	65%
<b>For me, fishing brings back pleasant childhood memories</b>	78%	69%	75%	85%	84%

Table 63 - Fishing attitudes

**Q8. We would now like to ask you some more questions which are specifically related to fishing. Again, these questions seek your opinions so there are no right or wrong answers. After you have read each statement, please choose how strongly you agree or disagree with each statement.**

- Note, this question was used as part of the segmentation, and the results for each statement have been used to define each of the four segments (see Segmentation section of this report).
- The results below are for the 'Top 2 Box', which is the sum of Strongly Agree % and Agree %.

<b>Q8. Fishing Behaviours</b>	<b>Total</b>	<b>Segment 1: Green Individualists</b>	<b>Segment 2: Homebody Anglers</b>	<b>Segment 3: Outgoing Adventurers</b>	<b>Segment 4: Daring Enthusiasts</b>
<b>Base</b>	<b>1,064</b>	<b>336</b>	<b>182</b>	<b>255</b>	<b>291</b>
<b>I catch fish, lobsters, etc. for food for myself or to share with my friends and family</b>	82%	78%	80%	89%	82%
<b>I fish for the challenge and enjoyment of catching fish</b>	84%	72%	82%	95%	89%
<b>I usually fish on my own to get away from people</b>	28%	22%	31%	26%	33%
<b>I like to compete in fishing competitions</b>	12%	2%	9%	20%	18%
<b>I fish to catch trophy sized fish</b>	10%	4%	9%	11%	19%
<b>I aim to catch enough fish for a feed rather than take the bag limit</b>	85%	86%	81%	91%	82%
<b>I usually release most of the fish I catch</b>	49%	50%	50%	47%	49%
<b>I don't go fishing as often as I would like to</b>	82%	76%	82%	83%	88%
<b>I like to browse in a tackle shop and then check online to see if I can get it cheaper</b>	32%	25%	32%	34%	38%
<b>I like to support my local tackle shop</b>	71%	58%	65%	81%	80%
<b>I buy fishing equipment that's affordable / look for the best deals</b>	78%	77%	85%	74%	79%
<b>I support fisheries management principles</b>	77%	79%	70%	78%	78%
<b>I support both recreational and commercial fishing in Tasmania</b>	71%	67%	71%	72%	74%
<b>I am a responsible fisher and accept fishing rules and regulations even if it means I catch less fish</b>	94%	97%	95%	92%	93%
<b>When it comes to fishing, I tend to spend a lot of my money on this activity because I love it so much!</b>	40%	17%	27%	59%	57%

Q8. Fishing Behaviours	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	<b>1,064</b>	<b>336</b>	<b>182</b>	<b>255</b>	<b>291</b>
I find fishing rules and regulations easy to understand	76%	77%	70%	77%	76%
Time spent fishing is one of the best ways I know to relax and unwind	80%	65%	80%	94%	87%
Fishing with my friends and family is the best part of going fishing	82%	79%	79%	86%	82%

Table 64 - Fishing behaviours

**Q9. Do you or anyone in your immediate household own a boat used for recreational fishing?**

Q9. Boat Ownership	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	<b>1,064</b>	<b>336</b>	<b>182</b>	<b>255</b>	<b>291</b>
<b>Yes</b>	60%	51%	55%	<b>80%</b>	56%
<b>No</b>	40%	<b>49%</b>	45%	20%	44%

Table 65 - Boat ownership

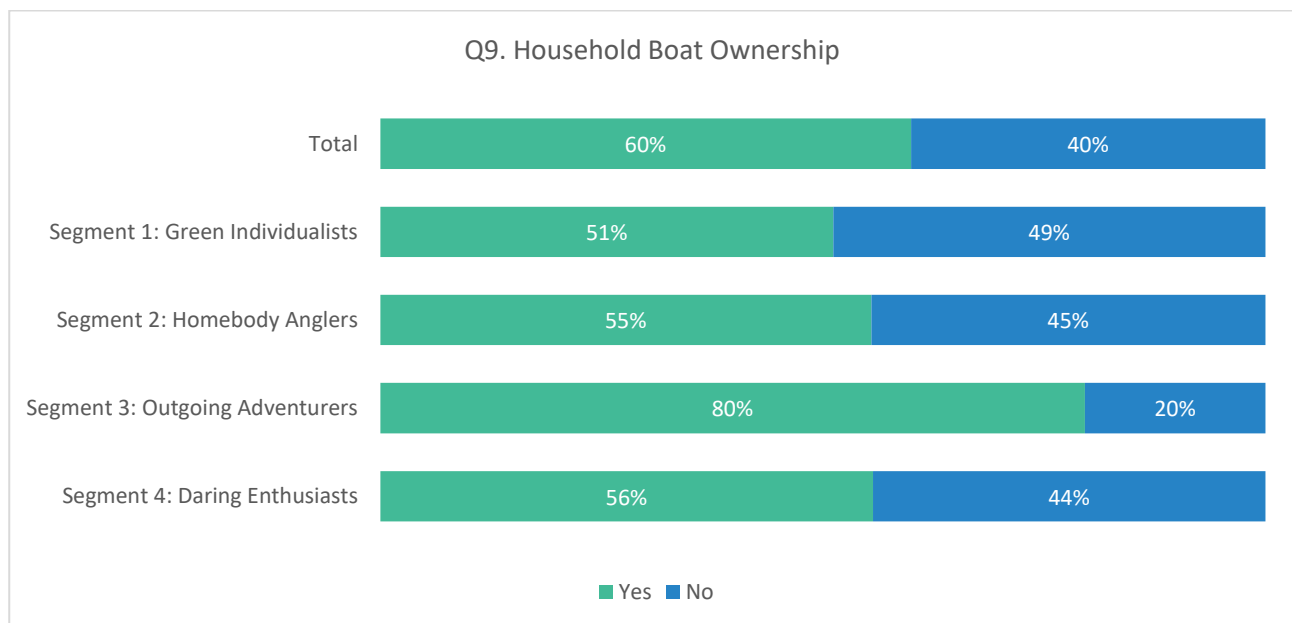


Figure 19 - Boat ownership

Overall, 60% of respondents indicate they have access to a boat for recreational fishing.

Among the segments, more than 50% in each segment indicate they have access to a boat to fish. This is significantly higher for the 'Outgoing Adventurers' with 80% indicating they have access to a boat. Boat ownership is significantly lower for 'Green Individualists'.

**Q10. Thinking about activities you undertake outside of fishing, which of the following types of activities do you undertake regularly, occasionally or not at all?**

- Note, each statement was asked on a scale of 'Undertake regularly', 'Undertake occasionally', 'Don't undertake this type of activity'. The results are presented for the activities they undertake regularly.

Q10. Substitute Activities – Undertake Regularly	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	1,064	336	182	255	291
<b>Outdoor activities (such as camping, hiking, hunting, bird watching)</b>	32%	31%	22%	<b>43%</b>	28%
<b>Indoor fitness activities (such as going to the gym, Pilates or yoga)</b>	18%	21%	15%	16%	18%
<b>Outdoor fitness activities (such as bicycling, running, swimming, or walking)</b>	45%	<b>52%</b>	32%	48%	41%
<b>Team sports (such as cricket, football, tennis, lawn bowls)</b>	12%	10%	13%	11%	14%
<b>Activities at home such as gardening, home improvement or cooking for enjoyment</b>	70%	69%	66%	76%	68%
<b>Other relaxation activities (such as eating out, going to the movies, going to a museum/gallery)</b>	35%	40%	22%	35%	36%
<b>Volunteering (such as at a club, school or church)</b>	23%	24%	16%	24%	24%

Table 66 - Substitute activities

The majority of respondents indicate they undertake activities at home such as gardening, home improvement or cooking for enjoyment on a regular basis (70%). Just under half of respondents (45%) also indicated they undertake outdoor fitness activities (such as bicycling, running, swimming or walking).

Among the segments, the 'Outgoing Adventurers' are more likely to undertake more activities regularly, especially activities at home such as gardening, home improvement or cooking for enjoyment (76% compared to 70% for the total) and outdoor activities (such as camping, hiking, hunting, bird watching) (43% compared to 32% for the total, a significantly higher outcome).

The 'Homebody Anglers' are less likely to undertake additional activities regularly overall.

'Green Individualists' are significantly more likely to undertake outdoor fitness activities (such as bicycling, running, swimming, or walking).

**Q11. How have you acquired fishing equipment in the last 12 months?**

Q11. Purchasing Fishing Equipment	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	1,064	336	182	255	291
<b>From a major outlet such as BCF, Anaconda or Tackleworld</b>	60%	45%	58%	<b>79%</b>	62%
<b>From the local bait and tackle store where you live</b>	44%	30%	34%	<b>60%</b>	<b>51%</b>
<b>From an online store such as Amazon or eBay</b>	23%	12%	25%	<b>35%</b>	24%
<b>From a department store such as Big W or Kmart</b>	21%	18%	24%	22%	24%
<b>From the local bait and tackle store where you fish</b>	19%	14%	14%	<b>28%</b>	22%
<b>By buying second hand fishing equipment</b>	14%	12%	10%	<b>18%</b>	16%
<b>By swapping things you own in exchange for fishing equipment</b>	2%	2%	0%	2%	3%
<b>Another way</b>	2%	3%	1%	3%	1%
<b>I haven't bought or swapped any fishing gear in the last 12 months</b>	21%	<b>37%</b>	23%	7%	15%

Table 67 - Purchasing fishing equipment



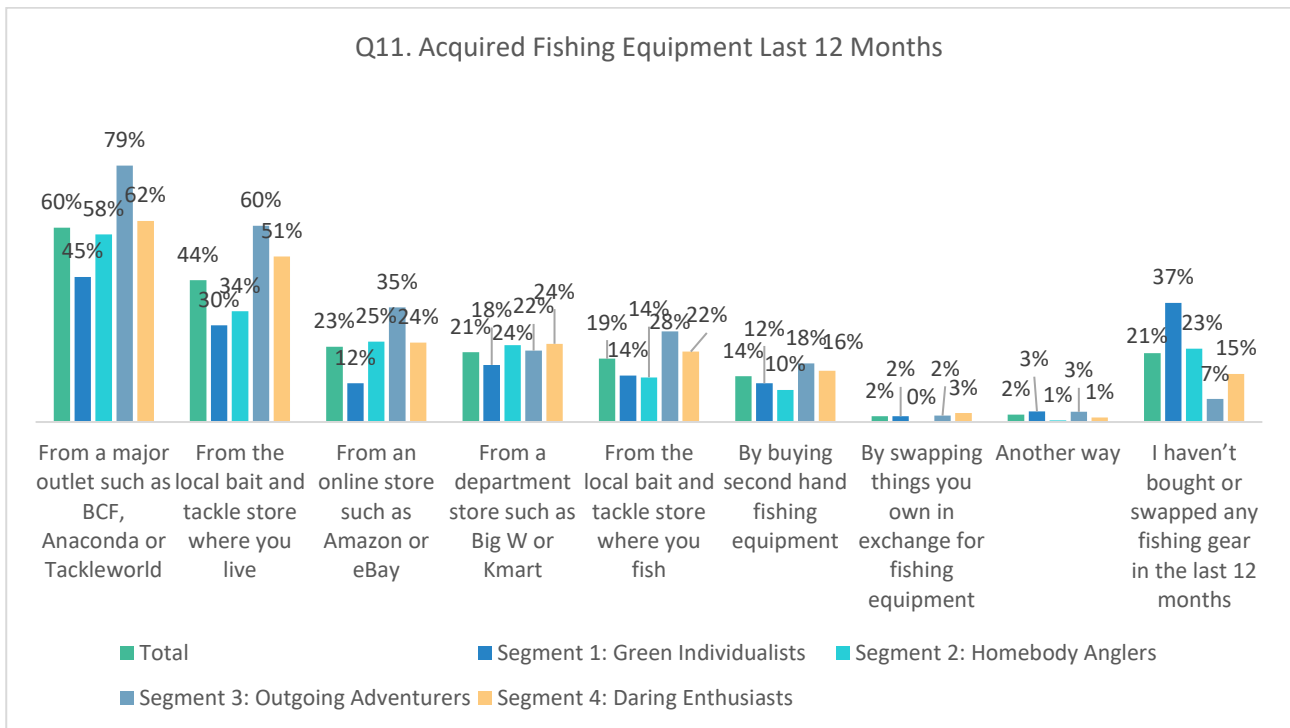


Figure 20 - Acquired fishing equipment L12M

Overall, the majority of fishing equipment purchases (60%) have been made via a major outlet (such as BCF, Anaconda or Tackleworld). This is followed by purchases made from their local bait and tackle store where they live (44%), or online via Amazon or eBay (23%).

Among the segments, the top two methods for purchasing fishing equipment are consistent for all, with a preference for major outlets, over local bait and tackle stores.

'Green Individualists' are significantly less likely to have made a fishing equipment purchase in the last 12 months.

'Outgoing Adventurers' are significantly more likely to have made fishing equipment purchases in the last 12 months, and are strong supporters of the local bait and tackle stores where they live (60% significantly higher than 44% for the total), and the local bait and tackle store where they fish (28% significantly higher than 19% for the total).

'Daring Enthusiasts' are also supporters of their local bait and tackle stores where they live (51% significantly higher than 44% for the total), and where they fish (22% compared to 19% for the total).

**Q12. Which of the following do you access at least weekly?**

Q12. Social Media	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	1,064	336	182	255	291
<b>Facebook</b>	77%	76%	81%	78%	75%
<b>YouTube</b>	59%	60%	53%	64%	57%
<b>Facebook Messenger</b>	56%	58%	57%	57%	53%
<b>Instagram</b>	35%	35%	36%	34%	36%
<b>Snapchat</b>	20%	19%	24%	16%	22%
<b>TikTok</b>	14%	14%	19%	6%	17%
<b>WhatsApp</b>	14%	16%	10%	17%	13%
<b>Twitter</b>	10%	14%	6%	10%	8%
<b>LinkedIn</b>	10%	13%	7%	9%	8%
<b>Pinterest</b>	7%	8%	7%	6%	5%
<b>Reddit</b>	6%	10%	8%	4%	3%
<b>Telegram</b>	2%	3%	1%	1%	3%
<b>Viber</b>	1%	1%	1%	0%	1%
<b>WeChat</b>	1%	1%	0%	0%	1%
<b>None of these / I don't use social media</b>	10%	9%	8%	9%	13%
<b>AVERAGE NUMBER USED</b>	<b>3.1</b>	<b>3.3</b>	<b>3.1</b>	<b>3.0</b>	<b>3.0</b>

Table 68 - Social media used

Top 5 Social Media Platforms	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>First</b>	Facebook	Facebook	Facebook	Facebook	Facebook
<b>Second</b>	YouTube	YouTube	Facebook Messenger	YouTube	YouTube
<b>Third</b>	Facebook Messenger	Facebook Messenger	YouTube	Facebook Messenger	Facebook Messenger
<b>Fourth</b>	Instagram	Instagram	Instagram	Instagram	Instagram
<b>Fifth</b>	Snapchat	Snapchat	Snapchat	WhatsApp	Snapchat

Table 69 - Top 5 social media platforms

Overall, Facebook is the most used social media platform (77%), followed by YouTube (59%), and Facebook Messenger (56%). Just over a third of respondents also use Instagram (35%), and a fifth of respondents use Snapchat (20%).

Among the segments, the top 4 social media platforms (Facebook, YouTube, Facebook Messenger and Instagram) are consistent among all segments. 'Outgoing Adventurers' fifth preference is WhatsApp, whereas Snapchat is the fifth preference for all other segments.

The 'Green Individualists' use more social media platforms overall with an average of 3.3 social media platforms used, and have significantly higher usage of Twitter (14%) and Reddit (10%).

**Q13. Please select your gender**

Q13. Gender	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	1,064	336	182	255	291
<b>Male</b>	86%	83%	76%	<b>94%</b>	90%
<b>Female</b>	13%	16%	<b>24%</b>	6%	10%
<b>Non-binary</b>	0%	1%	0%	0%	0%
<b>Prefer not to say</b>	0%	1%	0%	0%	0%

Table 70 - Gender

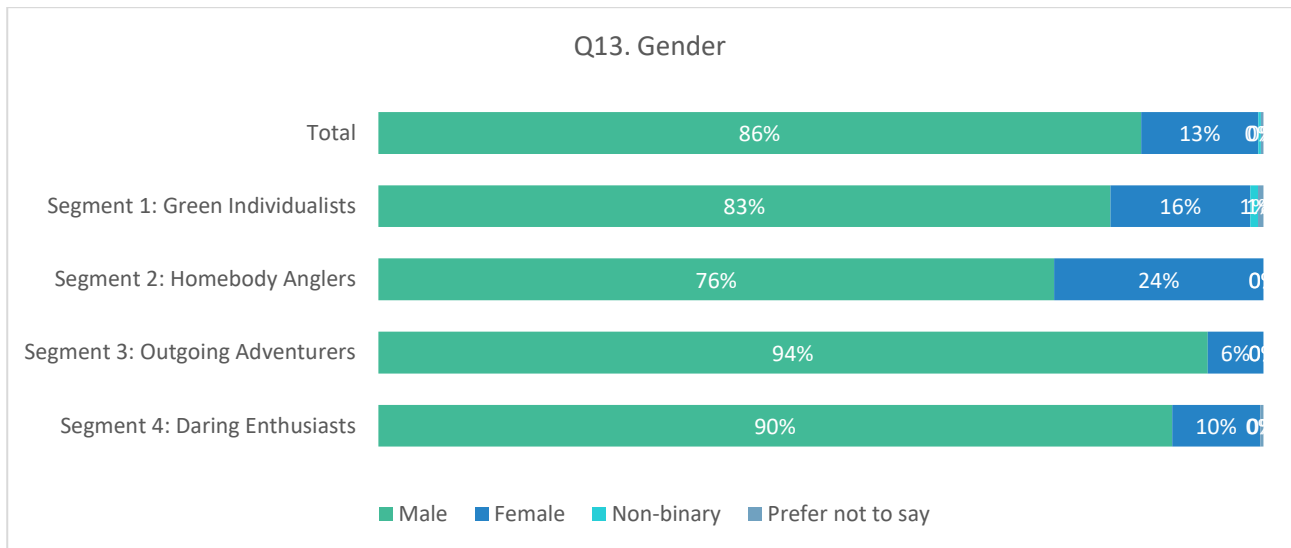


Figure 21 - Gender

Overall, the majority of respondents are Male (86%).

Among the segments, the 'Homebody Anglers' have the highest proportion of Females (24%, significantly), whereas the 'Outgoing Adventurers' much less likely to be Female (6%, significantly).

**Q14. Please select your age group as at your last birthday.**

Q14. Age	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	1,064	336	182	255	291
<b>18-19 years</b>	1%	1%	1%	0%	2%
<b>20-24 years</b>	4%	6%	4%	2%	5%
<b>25-29 years</b>	5%	6%	9%	1%	5%
<b>30-34 years</b>	6%	5%	6%	5%	8%
<b>35-39 years</b>	8%	8%	13%	6%	8%
<b>40-44 years</b>	6%	5%	8%	6%	7%
<b>45-49 years</b>	7%	7%	10%	7%	7%
<b>50-54 years</b>	12%	11%	11%	12%	13%
<b>55-59 years</b>	9%	9%	5%	12%	9%
<b>60-64 years</b>	14%	16%	16%	15%	10%
<b>65-69 years</b>	10%	11%	8%	12%	10%
<b>70-74 years</b>	8%	8%	4%	10%	9%
<b>75-79 years</b>	6%	4%	3%	11%	5%
<b>80-84 years</b>	1%	2%	1%	0%	0%
<b>85 years and over</b>	0%	0%	0%	0%	0%
<b>Prefer not to say</b>	0%	0%	0%	0%	0%
<b>18-34 years</b>	<b>17%</b>	<b>18%</b>	<b>20%</b>	<b>8%</b>	<b>21%</b>
<b>35-49 years</b>	<b>22%</b>	<b>20%</b>	<b>31%</b>	<b>19%</b>	<b>22%</b>
<b>50-64 years</b>	<b>35%</b>	<b>36%</b>	<b>32%</b>	<b>38%</b>	<b>32%</b>
<b>65+ years</b>	<b>26%</b>	<b>26%</b>	<b>16%</b>	<b>34%</b>	<b>24%</b>

Table 71 - Age

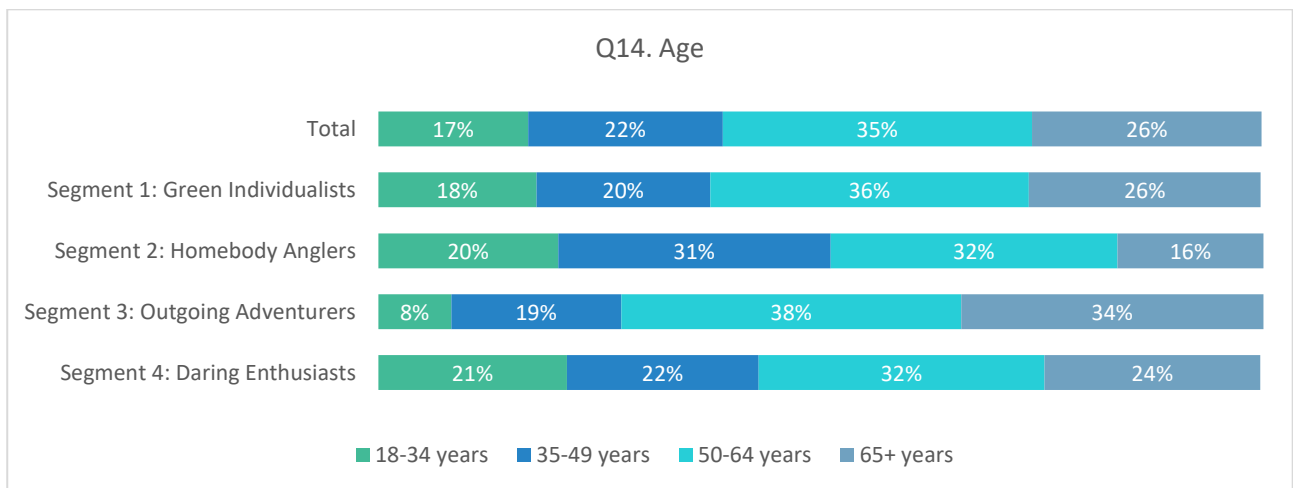


Figure 22 - Age

Overall, just under a fifth are aged 18-34 years (17%), just over a fifth are aged 35-49 years (22%), just over a third are aged 50-64 years (35%) and just over a quarter are aged 65+ years (26%). The majority are therefore aged 50+ years.

Within the segments, the 'Green Individualists' and 'Daring Enthusiasts' have a very similar age profile when

compared to the total result.

'Homebody Anglers' are a slightly younger profile with just under a third aged 35-49 years (31% significantly more than 22% for the total), and a fifth are aged 18-34 years (20% compared with 17% for the total).

'Outgoing Adventurers' are an older profile, with only 8% aged 18-34 years (significantly lower) and 19% aged 35-49 years, leaving the clear majority (72%) aged 50+ years (significantly higher).

**Q15. Which of the following categories best describes your marital status?**

Q15. Marital Status	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	1,064	336	182	255	291
<b>Never married</b>	20%	23%	28%	10%	20%
<b>Widowed</b>	2%	1%	1%	4%	2%
<b>Divorced</b>	7%	4%	7%	11%	7%
<b>Separated</b>	2%	2%	3%	2%	2%
<b>Married</b>	65%	66%	58%	73%	63%
<b>Prefer not to say</b>	3%	4%	3%	2%	5%

Table 72 - Marital status

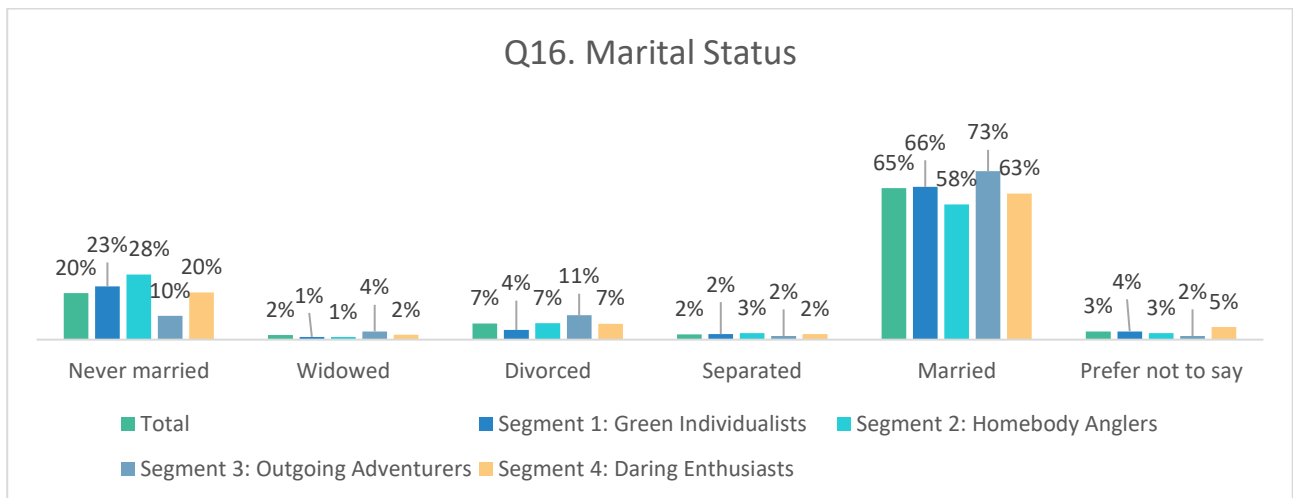


Figure 23 - Marital status

Overall, the majority of respondents are married (65%), with a fifth indicating they have never married (20%).

Among the segments, the majority among all segments are married. This is slightly lower for the 'Homebody Anglers' (58% compared to 65% for the total), and this segment is more likely to have never married (28% compared to 20% for the total, a significant outcome). 'Outgoing Adventurers' are more likely to be married (73% significantly higher than 65% for the total).

**Q16. Which of the following categories best describes your family composition?**

Q16. Household Composition	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	1,064	336	182	255	291
<b>Couple / family without children living at home</b>	45%	50%	34%	45%	46%
<b>Couple / family with children living at home</b>	32%	29%	35%	35%	31%
<b>Single parent without children living at home</b>	3%	1%	5%	4%	3%
<b>Single parent with children living at home</b>	3%	2%	6%	4%	3%
<b>Other family</b>	3%	4%	3%	3%	1%
<b>Single (live alone)</b>	9%	7%	11%	7%	11%
<b>Group household (e.g. share house)</b>	3%	5%	3%	0%	3%
<b>Prefer not to say</b>	2%	2%	3%	2%	2%

Table 73 - Household composition

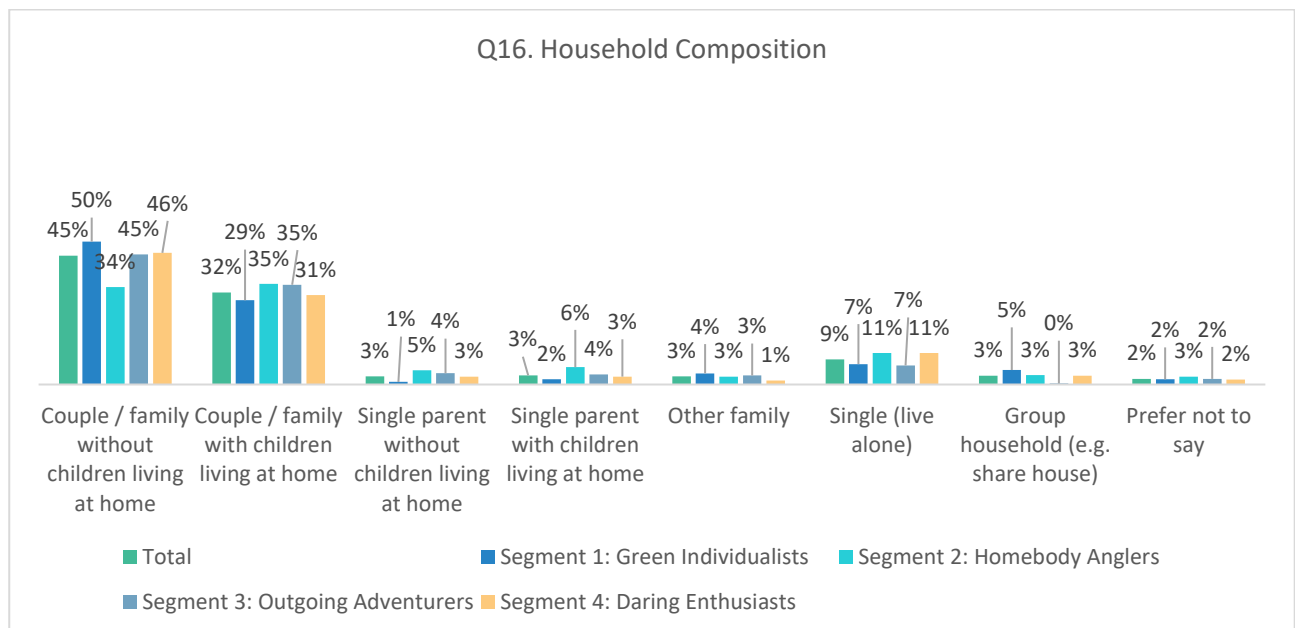


Figure 24 - Household composition

Overall, the majority of households are couples or families without children living at home (45%) or with children living at home (32%). 9% are single and living alone.

Among the segments, the 'Homebody Anglers' are significantly less likely to be in a couple/family without children living at home (34% compared with 45% for the total), and are slightly more likely to be single and living alone (11% compared with 9% for the total), or a single parent with children living at home (6%

significantly higher than 3% for the total).

All other segments are reporting very similar outcomes.

**Q17. Do any of your children fish?**

- Note this was asked of those that indicated they have children living at home.

Q17. Children Fish	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	377	105	75	98	99
<b>Yes</b>	72%	61%	71%	<b>92%</b>	67%
<b>No</b>	25%	<b>36%</b>	27%	8%	30%
<b>Not sure</b>	2%	3%	3%	0%	3%

Table 74 - Children fish

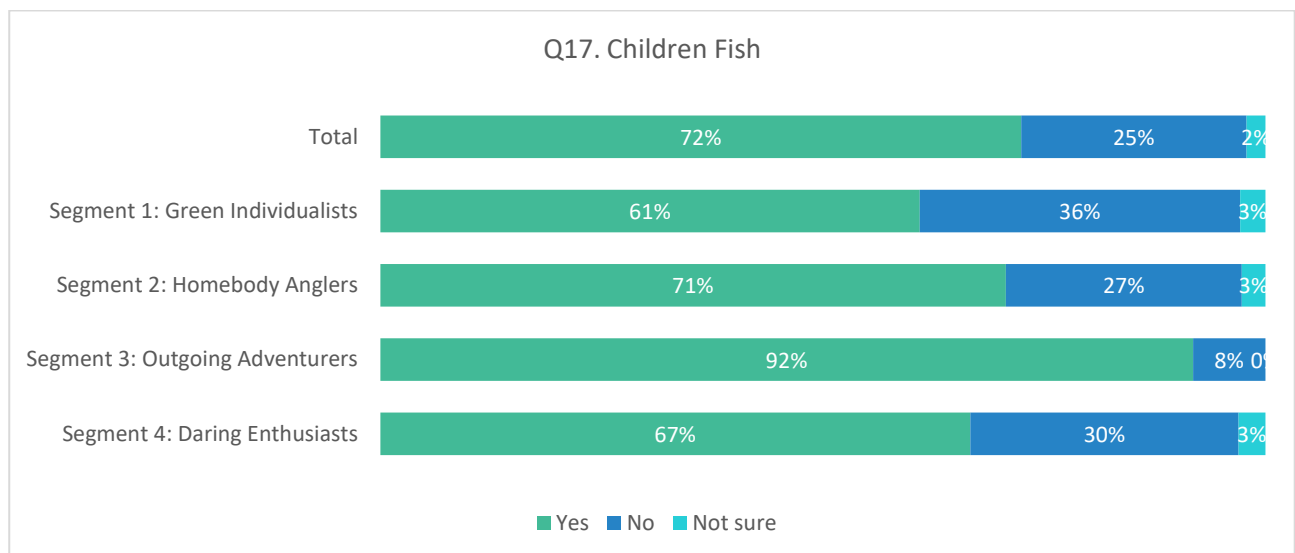


Figure 25 - Children fish

Overall, of those who have children living at home, the majority of those children also undertake recreational fishing in Tasmania (72%).

Among the segments, the majority of children in each segment are also fishing. There is a much higher proportion of children fishing for the 'Outgoing Adventurers' (92%, significantly higher), and lower for the 'Green Individualists' (61%, significantly lower).

**Q18. Are you of Aboriginal or Torres Strait Islander origin?**

Q18. ATSI	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	1,064	336	182	255	291
<b>Yes, Aboriginal origin</b>	4%	4%	8%	3%	4%
<b>Yes, Torres Strait Islander origin</b>	0%	0%	1%	0%	0%
<b>Yes, both Aboriginal and Torres Strait Islander</b>	0%	0%	2%	0%	0%
<b>No – neither</b>	92%	92%	88%	92%	93%
<b>Prefer not to say</b>	3%	4%	2%	5%	3%

Table 75 - ATSI

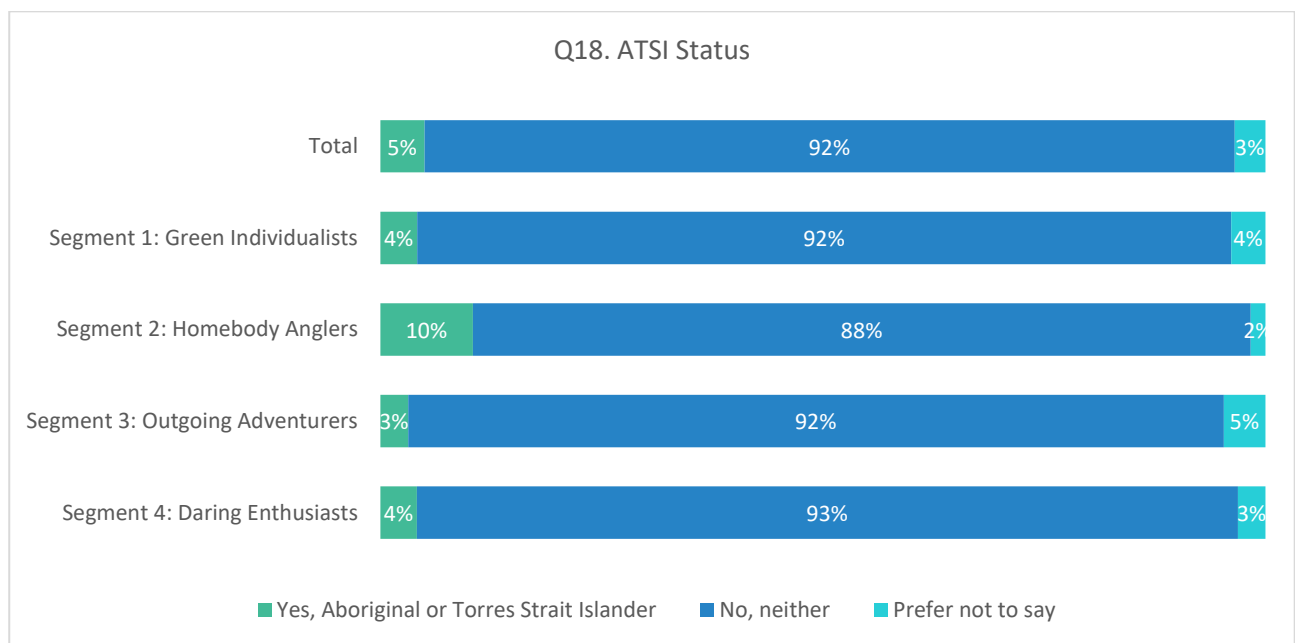


Figure 26 - ATSI Status

Overall, 5% of respondents indicated they are of Aboriginal or Torres Strait Islander origin.

Among the segments, there is a higher proportion of Aboriginal or Torres Strait Islanders among the 'Homebody Anglers' segment (10%, significantly higher proportion).



**Q19. Do you have a disability or impairment (such as physical, intellectual, learning and/or sensory disability)?**

Q19. Disability	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	1,064	336	182	255	291
<b>Yes</b>	10%	10%	14%	6%	10%
<b>No</b>	88%	87%	84%	<b>94%</b>	88%
<b>Prefer not to say</b>	2%	2%	3%	0%	3%

Table 76 - Disability

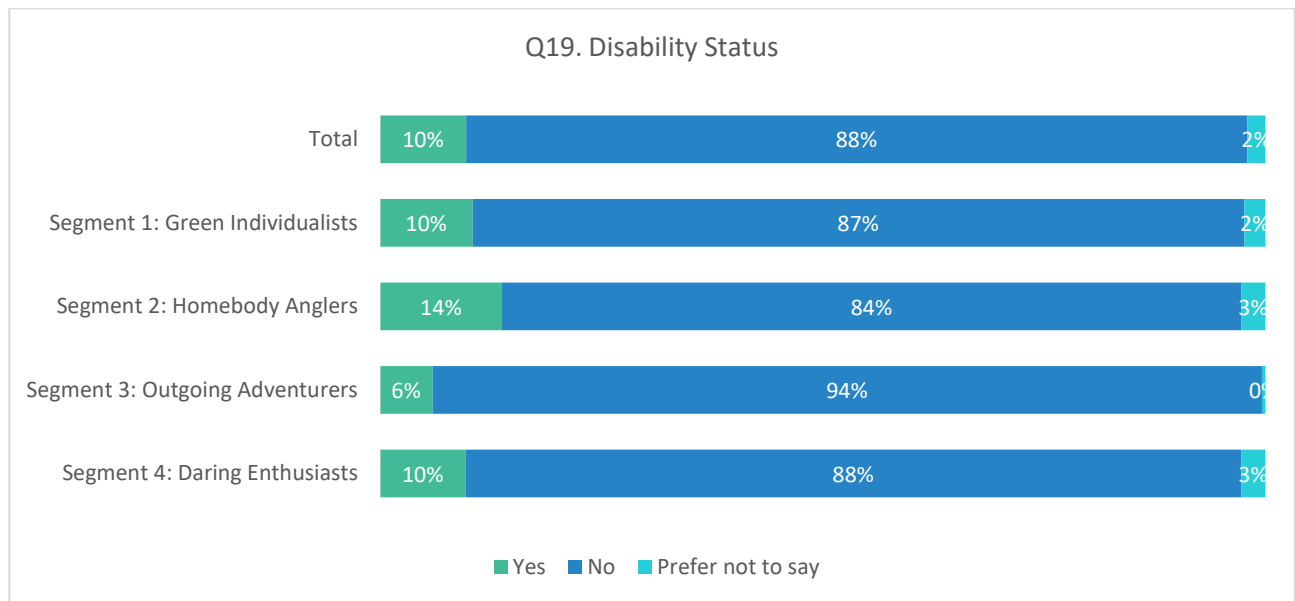


Figure 27 - Disability status

Overall, 10% of respondents indicated they have some form of disability or impairment.

Among the segments, the proportion of those with a disability or impairment is higher among the 'Homebody Anglers' segment (14%, not significantly). There is a significantly lower proportion of those with a disability among the 'Outgoing Adventurers'.

**Q20. Which of the following best describes your occupation?**

Q20. Occupation	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	1,064	336	182	255	291
<b>Professional / executive</b>	16%	18%	6%	20%	15%
<b>White collar</b>	12%	13%	13%	10%	11%
<b>Blue collar</b>	25%	21%	33%	20%	31%
<b>Home duties</b>	3%	3%	9%	0%	1%
<b>Student</b>	3%	5%	2%	0%	3%
<b>Unemployed</b>	2%	2%	4%	1%	2%
<b>Retired</b>	30%	30%	21%	40%	26%
<b>Other</b>	8%	7%	7%	8%	8%
<b>Prefer not to say</b>	2%	1%	5%	1%	3%
<b>TOTAL Employed</b>	<b>53%</b>	<b>53%</b>	<b>52%</b>	<b>49%</b>	<b>57%</b>
<b>TOTAL Not Employed</b>	<b>47%</b>	<b>47%</b>	<b>48%</b>	<b>51%</b>	<b>43%</b>

Table 77 - Occupation

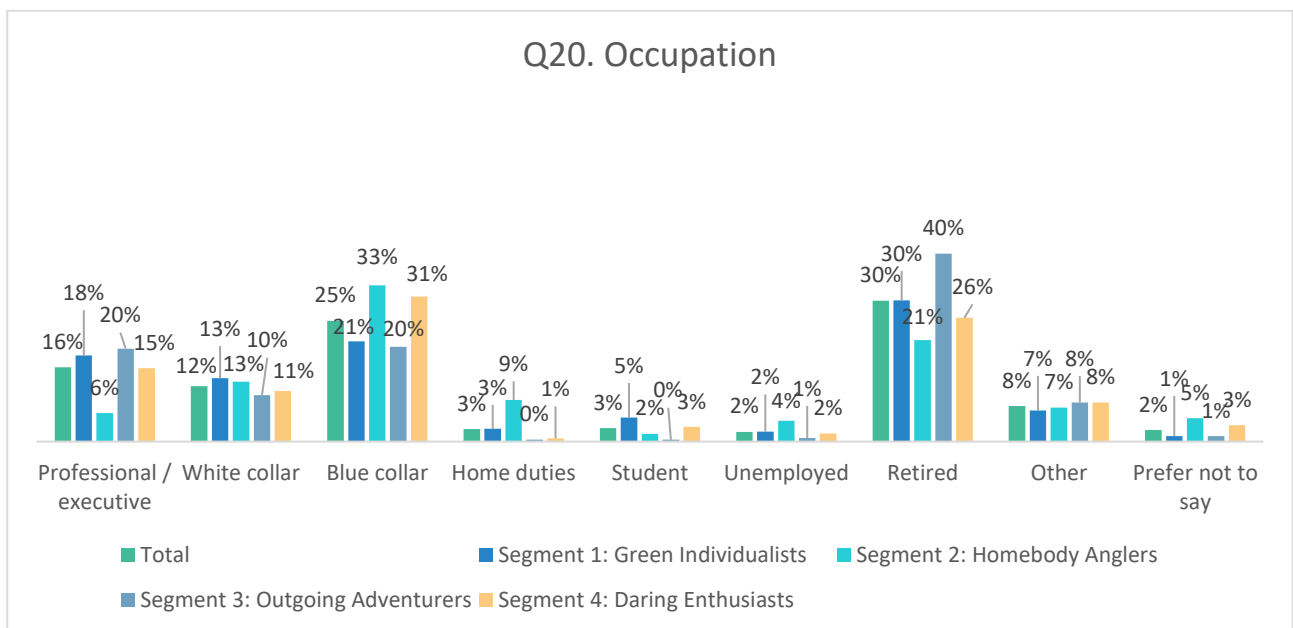


Figure 28 - Occupation

Overall, just over half of the respondents are currently employed (53%). 25% are working in blue collar occupations, with 28% working in white collar or professional executive roles. Just under a third of respondents are retired (30%).

Among the segments, 'Green Individualists' are slightly more likely to be working in white collar or professional/executive roles (31% compared with 28% for the total). 'Homebody Anglers' are more likely to be working in blue collar roles (33% significantly more than 25% for the total), and more likely to be undertaking home duties (9% significantly more than 3% for the total). 'Outgoing Adventurers' are more likely to be retired

(40% significantly more than 30% for the total), and of those employed, are more likely to be working in professional/executive roles (20% compared with 16% for the total). 'Daring Enthusiasts' are more likely to be working in blue collar roles (31% significantly more than 25% for the total).

**Q21. What is the highest level of education you have completed?**

Q21. Education	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	1,064	336	182	255	291
Primary school	0%	0%	0%	1%	0%
Secondary school (Year 7-10)	15%	7%	22%	19%	17%
Secondary School/College (Year 11-12)	13%	13%	15%	9%	17%
Trade/ Apprenticeship	17%	13%	18%	16%	21%
Other TAFE/Technical Certificate	14%	12%	20%	13%	11%
Diploma	13%	15%	10%	15%	11%
Bachelor Degree	15%	22%	9%	14%	11%
Post-Graduate Degree	12%	17%	5%	12%	9%
Other	1%	1%	0%	0%	1%
Prefer not to say	1%	1%	1%	1%	1%
<b>TOTAL High School or less</b>	<b>29%</b>	<b>19%</b>	<b>37%</b>	<b>29%</b>	<b>34%</b>
<b>TOTAL Trade/ Apprenticeship/ Certificate/ Diploma</b>	<b>43%</b>	<b>40%</b>	<b>48%</b>	<b>44%</b>	<b>44%</b>
<b>TOTAL Bachelor Degree or Higher</b>	<b>27%</b>	<b>39%</b>	<b>14%</b>	<b>26%</b>	<b>20%</b>
<b>Other/PNTS</b>	<b>2%</b>	<b>2%</b>	<b>1%</b>	<b>1%</b>	<b>2%</b>

Table 78 - Education

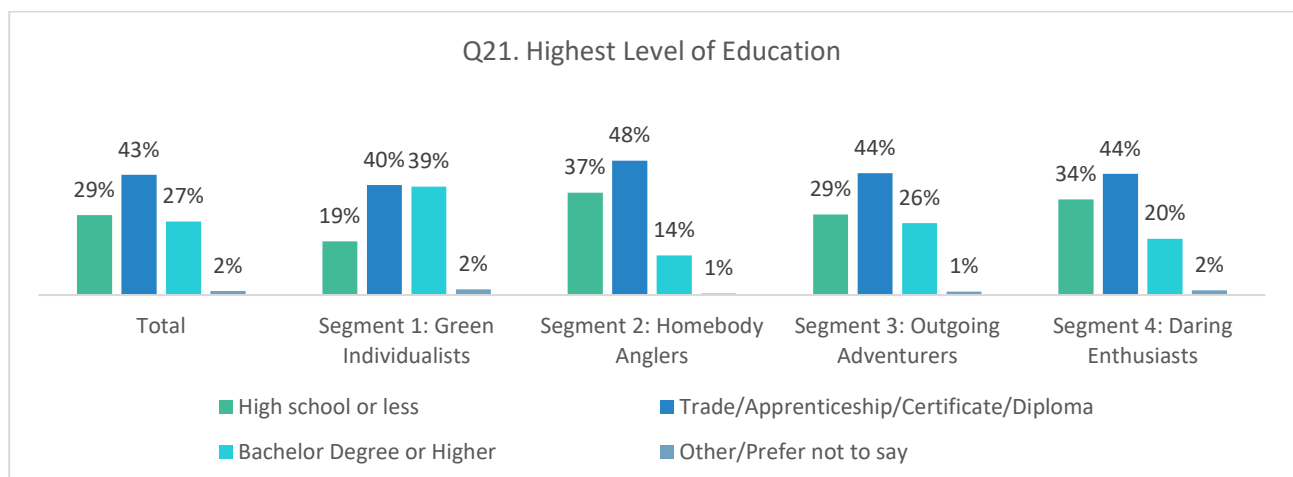


Figure 29 - Education

Overall, just under a third of respondents have completed high school or less (29%), with 43% holding a trade, apprenticeship, certificate or diploma, and just over a quarter (27%) completing tertiary education.

Among the segments, tertiary education is significantly higher for 'Green Individualists' (39%), and significantly lower for 'Homebody Anglers' (14%). 'Homebody Anglers' are significantly more likely to have completed high school or less (37% compared with 29% for the total), or hold a trade, apprenticeship, certificate or diploma (48% compared with 43% for the total).

**Q22. Which of the following best describes your total annual household income before tax?**

Q22. HH Income	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<i>Base</i>	1,064	336	182	255	291
<b>\$0 - \$19,999</b>	3%	3%	3%	3%	3%
<b>\$20,000 - \$39,999</b>	9%	8%	12%	9%	8%
<b>\$40,000 - \$59,999</b>	11%	8%	13%	9%	14%
<b>\$60,000 - \$79,999</b>	14%	14%	18%	10%	14%
<b>\$80,000 - \$99,999</b>	13%	14%	9%	12%	14%
<b>\$100,000 - \$129,999</b>	14%	15%	17%	14%	11%
<b>\$130,000 - \$149,999</b>	9%	11%	5%	10%	10%
<b>\$150,000 - \$249,999</b>	12%	15%	8%	15%	10%
<b>\$250,000 or more</b>	4%	4%	1%	6%	3%
<b>Prefer not to say</b>	12%	10%	14%	13%	13%
<b>Less than \$40,000</b>	12%	11%	15%	12%	12%
<b>\$40,000 to &lt;\$80,000</b>	24%	22%	31%	18%	29%
<b>\$80,000 to &lt;\$130,000</b>	27%	28%	26%	26%	25%
<b>\$130,000 or more</b>	25%	29%	14%	31%	22%
<b>Prefer not to say</b>	12%	10%	14%	13%	13%

Table 79 - HH Income

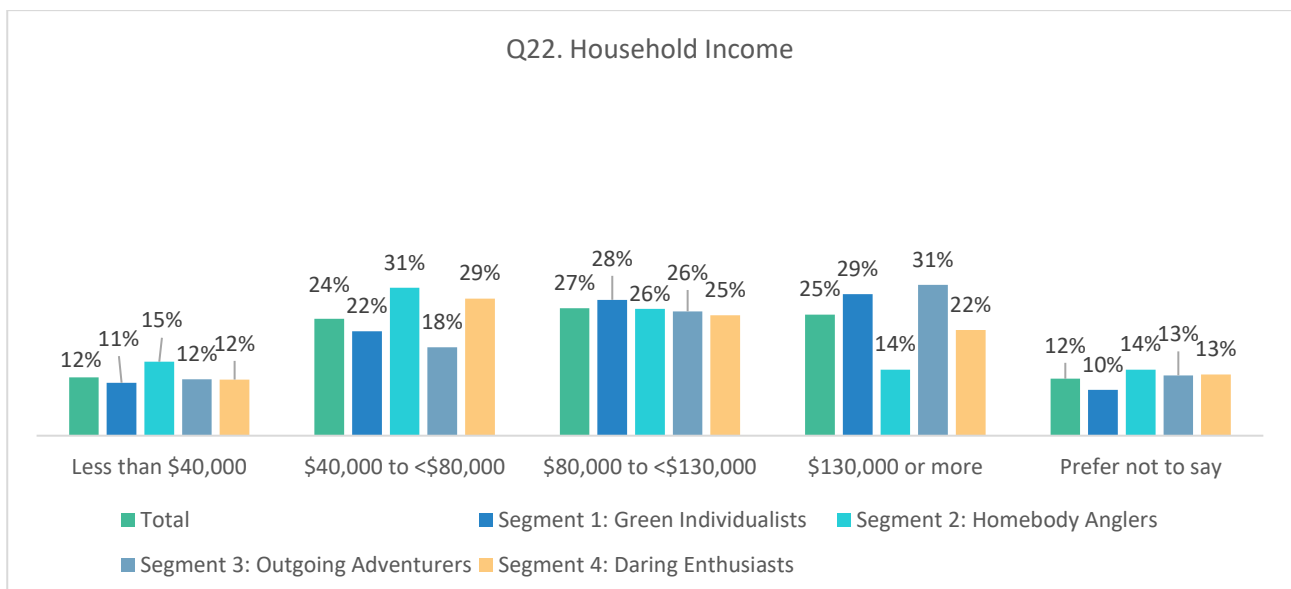


Figure 30 - HH Income

Overall, 12% have a household income below \$40,000 per year, 24% have an income of \$40,000 to less than \$80,000, 27% have an income of \$80,000 to less than \$130,000 and 25% have an income of \$130,000 or more per year.

Among the segments, the 'Green Individualists' are higher income households with 29% indicating their household income is \$130,000 or more per year (compared to 25% for the total). Similarly, the 'Outgoing Adventurers' can be considered higher income households, with 31% indicating their income is \$130,000 or higher (compared with 25% for the total).

'Homebody Anglers' are more likely to be a low-range income household, with 31% indicating their household income is \$40,000 to less than \$80,000 (significantly higher than 24% for the total), and 15% indicate their household income is less than \$40,000 per year (compared with 12% for the total).

**Q23. Do you speak a language other than English at home?**

Q23. Language Other Than English	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	1,064	336	182	255	291
<b>Yes</b>	3%	3%	2%	2%	6%
<b>No</b>	96%	97%	97%	98%	93%
<b>Prefer not to say</b>	0%	1%	1%	0%	1%

Table 80 - Language other than English

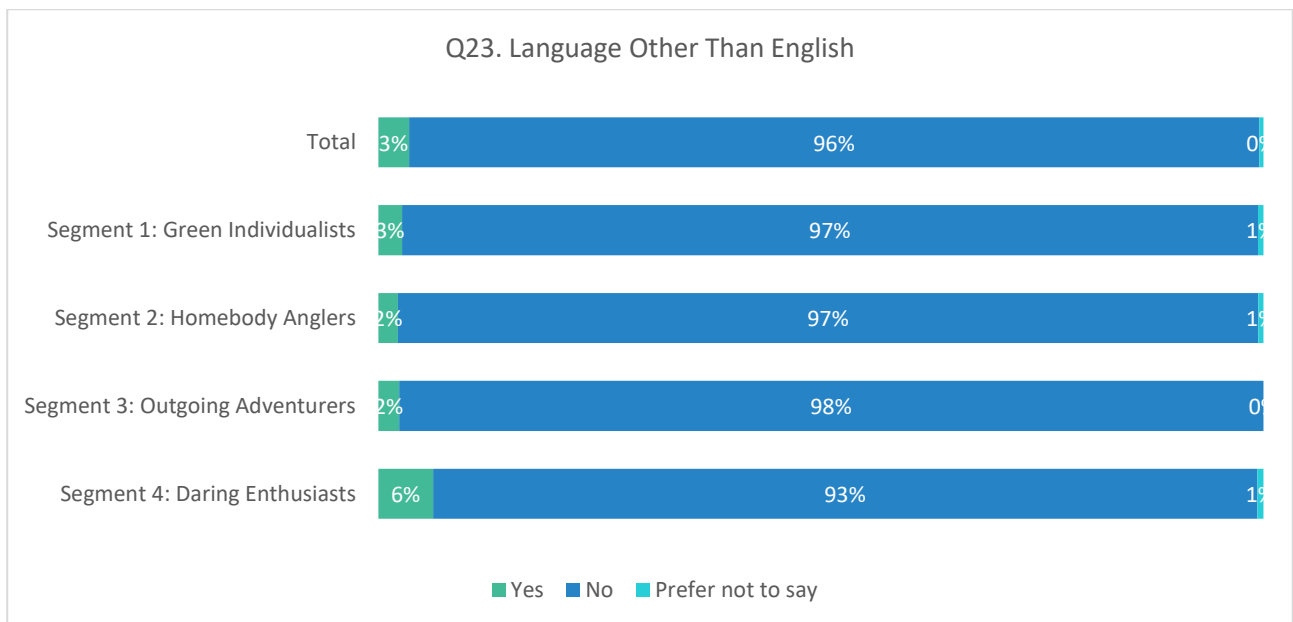


Figure 31 - Language other than English

Overall, 3% of respondents speak a language other than English at home.

Among the segments, a significantly higher proportion of 'Daring Enthusiasts' speak a language other than English at home (6%).

**Q24. What is your country of birth?**

Q24. Country of Birth	Total	Segment 1: Green Individualists	Segment 2: Homebody Anglers	Segment 3: Outgoing Adventurers	Segment 4: Daring Enthusiasts
<b>Base</b>	1,064	336	182	255	291
<b>Australia</b>	90%	87%	<b>96%</b>	91%	90%
<b>Other</b>	9%	<b>13%</b>	4%	8%	9%
<b>Prefer not to say</b>	1%	1%	0%	1%	1%

Table 81 - Country of birth

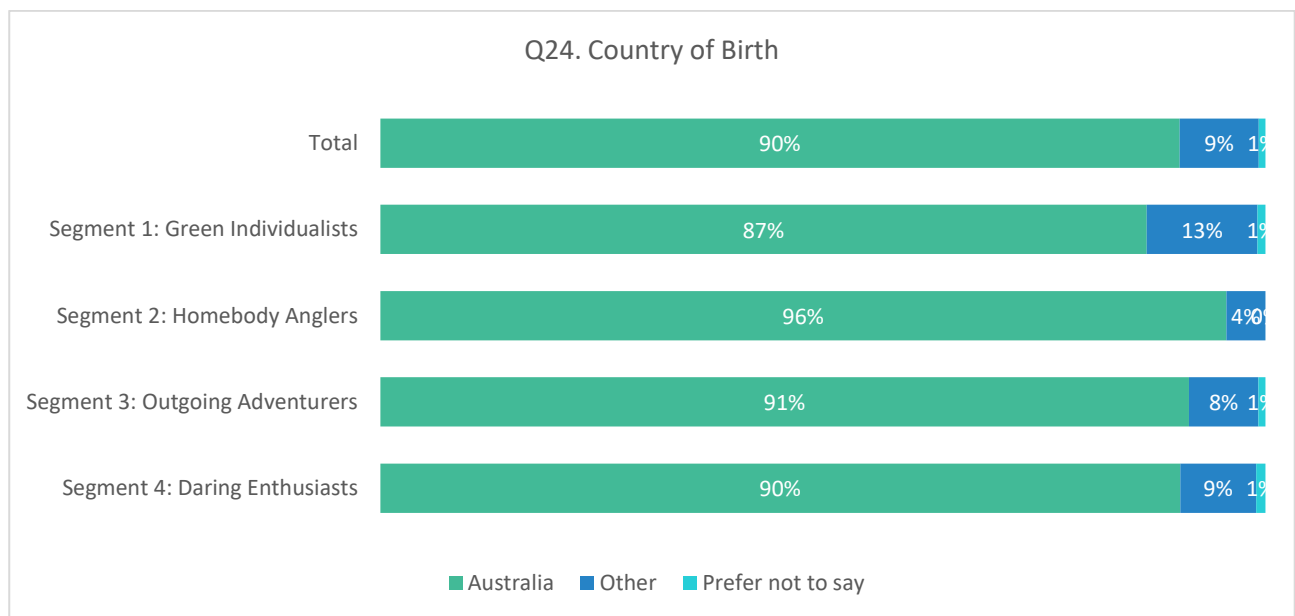


Figure 32 - Country of birth

Overall, 90% of respondents were born in Australia.

Among the segments, there is a significantly higher proportion of respondents born overseas for the 'Green Individualists' segment (13% compared with 9% for the total), and a significantly lower proportion of respondents born overseas for the 'Homebody Anglers' segment (4% compared with 9% for the total).

# Summary and Conclusions

This section provides an overall summary of the key findings relating to the project and documents a process for other Australian states and territories to undertake similar psychographic segmentation studies of their recreational fishing sectors.

## Why Psychographic Segmentation

Psychographic segmentation is of great significance in understanding the preferences, behaviours, and attitudes of recreational fishers because it goes beyond basic demographic characteristics (e.g., age, gender, income) to delve into the underlying motivations, interests, and lifestyle choices that drive their actions. The rationale for considering psychographic segmentation as a research approach follows.

- **In-Depth Understanding:** Psychographic segmentation allows researchers and policymakers to gain a deeper understanding of the diverse and multifaceted nature of recreational fishers. It helps identify distinct groups with unique characteristics and preferences, enabling more targeted and tailored approaches to meet their specific needs and desires.
- **Preferences and Motivations:** By analysing psychographics, researchers can uncover the preferences and motivations behind recreational fishing activities. For example, some fishers prioritise catching trophy fish for the thrill, while others may seek relaxation and a connection to nature. Understanding these motivations is essential for designing appropriate services, facilities, and experiences.
- **Decision-Making Processes:** Psychographic segmentation helps uncover how recreational fishers make decisions related to fishing, equipment purchases, travel destinations, and conservation practices. This insight is invaluable for businesses, tourism operators, and conservation organisations to create effective marketing strategies and educational campaigns.
- **Tailored Marketing and Messaging:** Armed with psychographic insights, businesses and tourism operators can craft targeted marketing messages and offers that resonate with specific segments of recreational fishers. Customising marketing efforts based on psychographics can lead to higher engagement and conversion rates.
- **Sustainable Resource Management:** Different psychographic segments have varying attitudes toward sustainability and conservation. Understanding these attitudes can inform the design of conservation initiatives and regulations that align with the values of different recreational fisher groups, thus encouraging greater compliance and support.
- **Enhancing Experiences:** Knowing the preferences and behaviours of recreational fishers allows the development of fishing experiences that cater to their individual interests. This can lead to improved recreational fisher satisfaction, increased repeat visits, and positive word-of-mouth recommendations.

- **Policy Formulation:** Governments and regulatory bodies can use psychographic insights to develop more effective and equitable fishing policies. Understanding the motivations and concerns of different segments can help strike a balance between preserving natural resources, ensuring recreational access, and supporting local economies.
- **Long-Term Engagement:** Psychographic segmentation helps build long-term relationships with recreational fishers. By continuously assessing and adapting strategies based on evolving psychographics, businesses and organisations can maintain relevance and engagement with their target market segments.

In summary, psychographic segmentation offers a holistic understanding of recreational fishers, shedding light on their preferences, behaviours, and attitudes. This knowledge empowers stakeholders to tailor their offerings, services, and policies, leading to more satisfying fishing experiences, better resource management, and a deeper connection with this essential community of outdoor enthusiasts.

## **Motivations for the Tasmanian Study**

The motivations behind conducting a psychographic segmentation study of the Tasmanian recreational fishing sector was driven by a number of key factors:

- **Understanding Diverse Fisher Preferences:** The Tasmanian recreational fishing sector encompasses a diverse group of individuals with varying interests, motivations, and attitudes towards fishing. Traditional demographic data alone does not provide a comprehensive understanding of these nuances. It was hypothesised that conducting a psychographic segmentation study would allow TARFish, as the leading organisation representing recreational fishers, and policymakers to gain deeper insights into the diverse motivations and preferences of Tasmanian recreational fishers.
- **Tailoring Services and Experiences:** By identifying distinct psychographic segments within the fishing community, businesses, tourism operators, and service providers can tailor their offerings to cater to the specific needs and desires of each segment. This customisation can lead to improved customer satisfaction, increased engagement, and enhanced experiences for recreational fishers.
- **Sustainable Resource Management:** Understanding the psychographics of recreational fishers is crucial for sustainable resource management. As the study found, different segments have varying attitudes towards conservation, catch-and-release practices, and environmental stewardship. By identifying these attitudes, policymakers can develop targeted conservation initiatives and regulations that align with the values of different fishing groups, promoting responsible fishing practices and preserving Tasmania's natural resources.
- **Enhancing Tourism and Local Economy:** Recreational fishing is frequently intertwined with tourism. By better comprehending the psychographic makeup of the fishing community, tourism operators and local



businesses can create tailored marketing strategies and products that attract specific angler segments, leading to increased tourism revenue and economic growth for their respective regions.

- **Policy Development and Management:** The study's insights can inform the formulation and refinement of fishing-related policies in Tasmania. Policymakers can use the psychographic data to create more effective and targeted regulations that address the specific concerns and interests of different angler groups, fostering a positive and inclusive fishing environment.
- **Conservation and Environmental Awareness:** The study also uncovered attitudes and behaviours related to environmental awareness and conservation efforts among recreational fishers. Understanding these aspects can guide educational campaigns and initiatives to promote sustainable fishing practices and increase environmental consciousness within the fishing community.
- **Knowledge Sharing with Other Jurisdictions:** At the outset, it was envisaged that conducting a psychographic segmentation study in Tasmania would potentially serve as a model for other Australian states and territories. This documentation of the process and outcomes enables knowledge sharing and assists other jurisdictions to benefit from similar research approaches which will assist them to better understand and serve their own recreational fishing communities.

In summary, the motivations behind conducting the psychographic segmentation study in the Tasmanian recreational fishing sector encompass a desire to gain a deeper understanding of angler preferences, drive sustainable resource management, enhance tourism, tailor services, and inform policy development. The study also holds the potential to serve as a valuable example for other jurisdictions looking to undertake similar research in their respective recreational fishing sectors

## **Segmentation using Discriminant Analysis**

A Multinomial Logit Modelling (MLM) was used to explore the relationship between the segments and each individual statement used in the segmentation (i.e., 30 attitudinal statements).

Using all 30 statements in MLM, an in-sample classification rate of 84.7% accuracy was obtained (comparing the actual segment to the segment allocation predicted by MLM).

Log likelihood tests were used to assess the contribution of each variable (statement) to the segment allocation prediction. Based on these tests, items with a lower chi square were dropped one at a time. The aim of the exercise was to reduce the number of items as much as possible but retain the predicted classification rate above 80%.

The final set consists of 20 items, yielding an in-sample classification rate of 80.9%. The list of the 20 statements (red highlighted statements were dropped) is presented below:

1. A sense of space and openness is important to me
2. I'd describe myself as a bit of a homebody
3. I'd describe myself as adventurous and outgoing
4. I consider myself to be a bit of a risk taker
5. I'm more concerned with what I think, than what other people think of me
6. My health and wellbeing is very important to me
7. I have a clear idea of my goals in life
8. I think most people that know me well would consider me a competitive person
9. I think most people that know me well would consider me to be a confident person
10. Keeping in close contact with my family is very important to me
11. I see myself as a trendsetter
12. In a group situation I often take the lead
13. I feel really uncomfortable when I'm out of my normal environment
14. I like the freedom of not having to comply with rules and regulations
15. I don't think Australians are doing enough to combat climate change
16. I have travelled a lot around Australia or overseas
17. A sense of community is an important consideration for me when I'm choosing somewhere to live.
18. Technology is changing so fast I find it hard to keep up
19. I'm optimistic about the future
20. There's a lot more we could be doing to look after our environment

1. Sharing a fishing experience helps strengthen relationships with family and friends
2. A fishing trip can be successful even if you don't catch fish
3. The bigger the fish I catch, the better the trip
4. The more fish I catch, the happier I am
5. I trust the government to manage our fisheries
6. Buying a recognised brand of fishing equipment is important to me
7. Safety is an important consideration when I go fishing
8. I don't consider myself to be a serious fisher
9. Most people I know would consider me to be a keen fisher
10. For me, fishing brings back pleasant childhood memories

It is important to note that this is an inference approach looking at the relationship between items and the response variable (segments). If the study is repeated, the revised list of items could be used to aim at obtaining a similar segment structure.

For predictive purposes (i.e., classifying new respondent to the existing segmentation), a slightly different approach would need to be used, looking at out of sample classification using training and validation subsets of the data.

## Segment Priorities

Four attitudinally based market segments have been clearly defined:

- > Segment 1 — Green Individualists 32%
- > Segment 2 — Homebody Anglers 17%

- > Segment 3 — Outgoing Adventurers 24%
- > Segment 4 — Daring Enthusiasts 27%

In terms of strategy development, it is important to prioritise the market segments. This is based on the assumption that there are scarce marketing resources, and these should therefore be deployed where the optimum marketing benefit will be realised. For the purposes of this study, there are two key drivers:

1. Increase the overall number of people participating in recreational fishing in Tasmania (in marketing terms this would be increasing the size of the Tasmanian recreational fishing market).
2. Identify segments that are attractive to potential corporate sponsors in order to optimise private enterprise funding support for the Tasmanian recreational fishing sector.

The table on the following page contains a segment scorecard. The scorecard is based on the following variables:

1. **Leadership** – leadership is an essential element of a high priority market segment.
2. **Spending Propensity** – the propensity to spend on fishing activities and equipment.
3. **Local Support** – support for local tackle stores.
4. **Keen Fisher** – the level of keenness for fishing.

















Segment	Leadership	Spending Propensity	Local Support	Keen Fisher
<b>Green Individualists</b>				
<b>Homebody Anglers</b>				
<b>Outgoing Adventurers</b>				
<b>Daring Enthusiasts</b>				

Table 82 - Segment priorities

As noted above, four distinct market segments have been identified:

1. **Green Individualists (32%):** Prioritise space, openness, and they strongly support environmental preservation and action against climate change. They are confident, have clear life goals, and are largely unaffected by the opinions of others. Experience and exploration are essential to them. Fishing for them is a recreational activity to connect with nature, valuing the experience and bonding with family and friends rather than the number of fish caught. They are responsible and conscious of sustainable fishing practices, supporting fisheries management principles and accepting regulations. Light spenders when it comes to supporting their fishing experience, they will head to a major 'big box' retailer rather than browse the local tackle shop. Fishing serves as a source of relaxation and unwinding from their daily lives, cherished for the camaraderie and shared experiences with friends and loved ones.
2. **Homebody Anglers (17%):** Highly value personal space and familiarity. While not as adventurous or outgoing as other segments, they possess a moderate level of confidence. Family is of utmost importance to them, but they are less certain of their life goals. They appreciate their independence from strict rules and the opinions of others. Fishing is not a serious pursuit for them, but they enjoy it as a means of strengthening relationships with loved ones. The Homebody Anglers are less certain if they should trust government on fisheries management but believe in fisheries management principles and prioritise safety when fishing. They aim to catch enough fish for a satisfying meal and practice responsible fishing by releasing most of what they catch. They value recognised brands but prioritise affordability when purchasing fishing equipment. Fishing brings them relaxation and moments shared with family and friends as the best part of the experience.
3. **Outgoing Adventurers (24%):** Serious fishers and adventurous and outgoing individuals who prioritise personal space and openness in their lives. They are optimistic, value their own thoughts and opinions, are confident in their life goals, and enjoy taking risks. They are the most tech savvy of all the segments and believe in the importance of their health and wellbeing. Fishing is viewed as a family activity that strengthens relationships, and they also enjoy the challenge and enjoyment it brings. They understand fisheries management but have relatively low levels of trust in government to manage them. They follow

fishing rules responsibly, and prioritise safety during their fishing adventures. They endorse both commercial and recreational fishing. The Outgoing Adventurers appreciate catching enough fish for a meal and practice responsible fishing by releasing most of what they catch but due to the frequency and success of their fishing, they are keeping more of their catch. They tend to be older and are the big spenders in recreational fishing with a focus on recognised brands and supporting their local tackle stores.

4. **Daring Enthusiasts (27%):** Passionate and adventurous individuals with an outgoing nature who find immense joy in fishing, particularly in the pursuit of larger fish. They firmly believe that the size of their catch directly impacts the overall quality of their fishing experiences, and they relish the thrill of their fishing experiences. While they eagerly embrace the latest fishing gear, they often feel overwhelmed by the rapid pace of technological change. Brand recognition is crucial to them, as they value the assurance of quality and performance in their fishing gear. Interestingly, they consider themselves risk-takers and relish the freedom of breaking away from rules and regulations while at the same time trusting the government to manage fisheries. This segment values a sense of community and exhibits optimism and confidence in their pursuit of clear life goals. They are perceived as competitive and keen fishers, and fishing holds a significant place in their lives as passionate fishing enthusiasts.

To develop an effective marketing strategy, it is essential to prioritise these market segments due to limited marketing resources. In relation to the two key drivers for strategy development identified above, the recommended strategies are to:

1. **Increase the overall number of people participating in recreational fishing in Tasmania:** The focus should be on attracting and engaging individuals from all segments, creating targeted campaigns that resonate with their specific preferences and values, encouraging more people to participate in recreational fishing.
2. **Attract potential corporate sponsors to support the Tasmanian recreational fishing sector:** The Outgoing Adventurers and Daring Enthusiasts segments, with their adventurous and outgoing natures combined with their propensity to spend, may be attractive to potential corporate sponsors. Tailored partnerships and sponsorship opportunities should be explored to optimise private enterprise funding for the recreational fishing sector.

By understanding and catering to the unique characteristics and preferences of each segment, the marketing efforts can be optimised, ultimately leading to the growth of the Tasmanian recreational fishing market and increased support from private enterprise funding.

Each segment has been prioritised based on the above scorecard:

- Segment 1 — Green Individualists 32% - Tertiary market segment
- Segment 2 — Homebody Anglers 17% - Tertiary market segment
- Segment 3 — Outgoing Adventurers 24% - Primary market segment

- Segment 4 — Daring Enthusiasts 27% - Secondary market segment

On this basis it is recommended that the Outgoing Adventurers are the primary market segment with the Daring Enthusiasts being a secondary market segment. The Green Individualists and the Homebody Anglers share the tertiary market segment.

## Segment Snapshots

The following provides a side-by-side snapshot of the key research findings by segment.

Segment Snapshot – Fishing Demographics	Total	Green Individualists	Homebody Anglers	Outgoing Adventurers	Daring Enthusiasts
<b>Base</b>	<b>100%</b>	<b>32%</b>	<b>17%</b>	<b>24%</b>	<b>27%</b>
<b>TARFish Membership</b>					
<b>TARFish Member</b>	<b>30%</b>	18%	24%	<b>51%</b>	29%
<b>Non-Member</b>	<b>70%</b>	<b>82%</b>	<b>76%</b>	49%	71%
<b>Total Fishing Club/Association Membership</b>					
<b>A fishing club/association member</b>	<b>33%</b>	21%	24%	<b>57%</b>	31%
<b>Non-member</b>	<b>67%</b>	<b>79%</b>	<b>76%</b>	43%	69%
<b>Fishing Licence Status</b>					
<b>Yes – Saltwater Licence</b>	<b>33%</b>	21%	31%	<b>52%</b>	35%
<b>Yes – Freshwater Licence</b>	<b>27%</b>	17%	23%	<b>43%</b>	30%
<b>No Licence</b>	<b>50%</b>	<b>67%</b>	53%	24%	48%
<b>Where Fished Last 12 Months</b>					
<b>Only or Mainly in Saltwater</b>	<b>72%</b>	<b>78%</b>	71%	67%	70%
<b>Equally in Saltwater and Freshwater</b>	<b>18%</b>	12%	14%	<b>23%</b>	20%
<b>Only or Mainly in Freshwater</b>	<b>11%</b>	10%	15%	10%	10%
<b>Where Intending to Fish Next 12 Months</b>					
<b>Only or Mainly in Saltwater</b>	<b>66%</b>	66%	67%	65%	67%
<b>Equally in Saltwater and Freshwater</b>	<b>20%</b>	19%	14%	<b>25%</b>	21%
<b>Only or Mainly in Freshwater</b>	<b>12%</b>	13%	16%	9%	10%
<b>Number of Days Fished</b>					
<b>Average Number of Saltwater Days</b>	<b>16.4 days</b>	12.3 days	13.3 days	<b>21.2 days</b>	17.3 days
<b>Average Number of Freshwater Days</b>	<b>10.7 days</b>	7.2 days	9.0 days	<b>14.1 days</b>	11.2 days
<b>Where Fish in Saltwater</b>					
<b>North West and West Coast</b>	<b>22%</b>	20%	<b>28%</b>	19%	25%
<b>North East</b>	<b>21%</b>	20%	23%	22%	20%
<b>East &amp; Central</b>	<b>44%</b>	37%	41%	<b>53%</b>	42%
<b>South East</b>	<b>38%</b>	<b>43%</b>	37%	37%	36%

Segment Snapshot – Fishing Demographics Continued		Total	Green Individualists	Homebody Anglers	Outgoing Adventurers	Daring Enthusiasts
<b>Base</b>	<b>100%</b>	<b>32%</b>	<b>17%</b>	<b>24%</b>	<b>27%</b>	
<b>Where Fish in Freshwater</b>						
<b>North West and West Coast</b>	<b>26%</b>	27%	<b>32%</b>	23%	24%	
<b>North East</b>	<b>17%</b>	16%	<b>22%</b>	14%	16%	
<b>East &amp; Central</b>	<b>54%</b>	51%	<b>44%</b>	<b>67%</b>	50%	
<b>South East</b>	<b>19%</b>	17%	21%	16%	23%	
<b>Top 3 Saltwater Species</b>						
<b>Top Saltwater Species</b>	<b>Flathead (90%)</b>	Flathead (88%)	Flathead (87%)	Flathead (92%)	Flathead (90%)	
<b>Second Saltwater Species</b>	<b>Calamari / Squid (55%)</b>	Australian Salmon (50%)	Calamari / Squid (47%)	Calamari / Squid <b>(68%)</b>	Calamari / Squid (55%)	
<b>Third Saltwater Species</b>	<b>Australian Salmon (48%)</b>	Calamari / Squid (47%)	Australian Salmon (40%)	Australian Salmon <b>(58%)</b>	Australian Salmon (40%)	
<b>Top 3 Freshwater Species</b>						
<b>Top Freshwater Species</b>	<b>Brown Trout (80%)</b>	Brown Trout (76%)	Brown Trout (77%)	Brown Trout <b>(87%)</b>	Brown Trout (77%)	
<b>Second Freshwater Species</b>	<b>Rainbow Trout (66%)</b>	Rainbow Trout (60%)	Rainbow Trout (67%)	Rainbow Trout <b>(71%)</b>	Rainbow Trout (67%)	
<b>Third Freshwater Species</b>	<b>Australian Salmon (21%)</b>	Australian Salmon (22%)	Australian Salmon <b>(26%)</b>	Australian Salmon (12%)	Australian Salmon (25%)	
<b>Saltwater Fishing Platforms Used</b>						
<b>Boat</b>	<b>76%</b>	72%	70%	<b>88%</b>	72%	
<b>Jetty/Wharf</b>	<b>35%</b>	38%	<b>43%</b>	28%	35%	
<b>Beach</b>	<b>32%</b>	33%	33%	31%	33%	
<b>Rocks</b>	<b>28%</b>	28%	32%	25%	29%	



Segment Snapshot – Fishing Demographics Continued	Total	Green Individualists	Homebody Anglers	Outgoing Adventurers	Daring Enthusiasts
<b>Base</b>	<b>100%</b>	<b>32%</b>	<b>17%</b>	<b>24%</b>	<b>27%</b>
<b>Freshwater Fishing Platforms Used</b>					
<b>Boat</b>	52%	39%	54%	<b>63%</b>	52%
<b>Rocks</b>	39%	38%	40%	38%	40%
<b>Beach</b>	21%	<b>30%</b>	18%	18%	18%
<b>Jetty/Wharf</b>	19%	19%	<b>32%</b>	7%	23%
<b>Location Typically Fish in Saltwater From</b>					
<b>Location close to home</b>	64%	63%	66%	59%	68%
<b>Holiday home/Shack</b>	39%	40%	32%	<b>45%</b>	38%
<b>Location close to a caravan park, cabin, RV</b>	8%	8%	10%	8%	7%
<b>Campsite</b>	17%	14%	19%	17%	20%
<b>Location Typically Fish in Freshwater From</b>					
<b>Location close to home</b>	50%	45%	<b>68%</b>	39%	53%
<b>Holiday home/Shack</b>	30%	<b>35%</b>	17%	<b>35%</b>	28%
<b>Location close to a caravan park, cabin, RV</b>	9%	11%	8%	9%	8%
<b>Campsite</b>	35%	29%	33%	<b>43%</b>	34%
<b>Household Boat Ownership</b>					
<b>Yes</b>	60%	51%	55%	<b>80%</b>	56%
<b>No</b>	40%	<b>49%</b>	<b>45%</b>	20%	44%
<b>Where Acquire Fishing Equipment</b>					
<b>Major Retailers (BCF, Anaconda, Tackleworld)</b>	60%	45%	58%	<b>79%</b>	62%
<b>Local bait and tackle store where they live</b>	44%	30%	34%	<b>60%</b>	<b>51%</b>
<b>Online store (Amazon, eBay)</b>	23%	12%	25%	<b>35%</b>	24%
<b>From a department store such as Big W or Kmart</b>	21%	18%	24%	22%	24%
<b>Local bait and tackle store where they fish</b>	19%	14%	14%	<b>28%</b>	22%

Segment Snapshot – Demographic Profile	Total	Green Individualists	Homebody Anglers	Outgoing Adventurers	Daring Enthusiasts
<b>Base</b>	<b>100%</b>	<b>32%</b>	<b>17%</b>	<b>24%</b>	<b>27%</b>
<b>Where Does Respondent Reside</b>					
<b>North West and West Coast</b>	19%	16%	21%	18%	20%
<b>North East</b>	19%	18%	18%	18%	21%
<b>East &amp; Central</b>	23%	21%	<b>28%</b>	22%	23%
<b>South East</b>	39%	<b>44%</b>	34%	41%	36%
<b>Activities Outside of Fishing Undertaken Regularly (Top 4)</b>					
<b>Activities at home, such as gardening, home improvement or cooking for enjoyment</b>	70%	69%	66%	<b>76%</b>	68%
<b>Outdoor fitness activities (such as bicycling, running, swimming or walking)</b>	45%	<b>52%</b>	32%	48%	41%
<b>Other relaxation activities (such as eating out, going to the movies, going to museum/gallery)</b>	35%	<b>40%</b>	22%	35%	36%
<b>Outdoor activities (such as camping, hiking, hunting, bird watching)</b>	32%	31%	22%	<b>43%</b>	28%
<b>Social Media Sites Accessed At Least Weekly</b>					
<b>Top Social Media Site</b>	<b>Facebook (77%)</b>	Facebook (76%)	Facebook (81%)	Facebook (78%)	Facebook (75%)
<b>Second Social Media Site</b>	<b>YouTube (59%)</b>	YouTube (60%)	Facebook Messenger (57%)	<b>YouTube (64%)</b>	YouTube (57%)
<b>Third Social Media Site</b>	<b>Facebook Messenger (56%)</b>	Facebook Messenger (58%)	<b>YouTube (53%)</b>	Facebook Messenger (57%)	Facebook Messenger (53%)

Segment Snapshot – Demographic Profile	Total	Green Individualists	Homebody Anglers	Outgoing Adventurers	Daring Enthusiasts
<b>Base</b>	<b>100%</b>	<b>32%</b>	<b>17%</b>	<b>24%</b>	<b>27%</b>
<b>Gender</b>					
<b>Male</b>	<b>86%</b>	83%	76%	<b>94%</b>	90%
<b>Female</b>	<b>13%</b>	16%	<b>24%</b>	6%	10%
<b>Age</b>					
<b>18-34 years</b>	<b>17%</b>	18%	20%	8%	21%
<b>35-49 years</b>	<b>22%</b>	20%	<b>31%</b>	19%	22%
<b>50-64 years</b>	<b>35%</b>	36%	32%	38%	32%
<b>65+ years</b>	<b>26%</b>	26%	16%	<b>34%</b>	24%
<b>Marital Status</b>					
<b>Married</b>	<b>65%</b>	66%	58%	<b>73%</b>	63%
<b>Never married</b>	<b>20%</b>	23%	<b>28%</b>	10%	20%
<b>Widowed / Divorced / Separated</b>	<b>11%</b>	7%	11%	<b>17%</b>	11%
<b>Family Composition (Top 3)</b>					
<b>Couple / family without children living at home</b>	<b>45%</b>	<b>50%</b>	34%	45%	46%
<b>Couple / family with children living at home</b>	<b>32%</b>	29%	35%	35%	31%
<b>Single (live alone)</b>	<b>9%</b>	7%	11%	7%	11%
<b>Do Children Fish?</b>					
<b>Yes</b>	<b>72%</b>	61%	71%	<b>92%</b>	67%
<b>No</b>	<b>25%</b>	<b>36%</b>	27%	8%	<b>30%</b>
<b>Aboriginal or Torres Strait Islander (ATSI)</b>					
<b>Yes, ATSI</b>	<b>5%</b>	4%	<b>10%</b>	3%	4%
<b>Non-ATSI</b>	<b>92%</b>	92%	88%	92%	93%
<b>Disability Status</b>					
<b>Yes, have disability/impairment</b>	<b>10%</b>	10%	14%	6%	10%
<b>No</b>	<b>88%</b>	87%	84%	<b>94%</b>	88%

Segment Snapshot – Demographic Profile	Total	Green Individualists	Homebody Anglers	Outgoing Adventurers	Daring Enthusiasts
<b>Base</b>	<b>100%</b>	<b>32%</b>	<b>17%</b>	<b>24%</b>	<b>27%</b>
<b>Occupation</b>					
<b>Total Employed</b>	<b>53%</b>	53%	52%	49%	57%
<b>Professional / executive</b>	<b>16%</b>	18%	6%	20%	15%
<b>White collar</b>	<b>12%</b>	13%	13%	10%	11%
<b>Blue collar</b>	<b>25%</b>	21%	<b>33%</b>	20%	<b>31%</b>
<b>Total Not Employed</b>	<b>47%</b>	47%	48%	51%	43%
<b>Retired</b>	<b>30%</b>	30%	21%	<b>40%</b>	26%
<b>Education Level</b>					
<b>High school or less</b>	<b>29%</b>	19%	<b>37%</b>	29%	<b>34%</b>
<b>Trade, Apprenticeship, Certificate, Diploma</b>	<b>43%</b>	40%	<b>48%</b>	44%	44%
<b>Bachelor Degree or Higher</b>	<b>27%</b>	<b>39%</b>	14%	26%	20%
<b>Household Income</b>					
<b>Less than \$40,000</b>	<b>12%</b>	11%	15%	12%	12%
<b>\$40,000 to &lt;\$80,000</b>	<b>24%</b>	22%	<b>31%</b>	18%	<b>29%</b>
<b>\$80,000 to &lt;\$130,000</b>	<b>27%</b>	28%	26%	26%	25%
<b>\$130,000 or more</b>	<b>25%</b>	29%	14%	<b>31%</b>	22%
<b>Language Other Than English</b>					
<b>Yes</b>	<b>3%</b>	3%	2%	2%	6%
<b>No</b>	<b>96%</b>	97%	97%	98%	93%
<b>Country of Birth</b>					
<b>Australia</b>	<b>90%</b>	87%	<b>96%</b>	91%	90%
<b>Other</b>	<b>9%</b>	13%	4%	8%	9%

Table 83 - Segment snapshot, demographic profiles

## Applicability to other jurisdictions

Replicating the psychographic segmentation study in other Australian states and territories can offer valuable insights into the recreational fishing sectors of each region. To ensure the successful application of this approach, jurisdictions should consider local nuances and research objectives. The following provides a guide to conducting a similar study:

- > **Define Research Objectives:** Clearly outline the specific research objectives that the study aims to address. These objectives most likely will vary from region to region, depending on the unique challenges, opportunities, and interests in each jurisdiction's recreational fishing sector.
- > **Review Existing Literature:** Conduct a thorough review of existing literature and studies related to recreational fishing, psychographic segmentation, and regional fishing dynamics. This review will help researchers gain a better understanding of the relevant factors that influence fishing behaviours and preferences in the target region.
- > **Adapt Research Design:** While the general research framework from the Tasmanian study can serve as a starting point, it is essential to adapt the research design to suit the characteristics and nuances of the target region. This may include adjusting survey questions, sampling methods, and data collection approaches to reflect local fishing culture and practices.
- > **Develop Survey Instruments:** Design comprehensive survey instruments that encompass relevant psychographic variables, such as fishing habits, motivations, preferences, and attitudes. Incorporate demographic questions to capture essential demographic information for cross-referencing with the psychographic segments.
- > **Sampling Strategy:** Select an appropriate sampling strategy that represents the diverse population of recreational fishers in the region. Ensure the sample size is sufficiently large to achieve meaningful psychographic segmentation results.
- > **Data Collection:** Implement data collection through surveys, interviews, focus groups, or a combination of methods. Consider utilising online platforms, fishing associations and clubs, government databases, and other relevant channels to reach a broad and representative sample of recreational fishers.
- > **Data Analysis:** Apply suitable psychographic segmentation techniques to identify distinct segments within the fishing community. Analyse survey responses to understand the preferences, behaviours, and attitudes of each segment.
- > **Segment Profiling:** Profile each psychographic segment, detailing their characteristics, behaviours, motivations, preferred fishing activities, and conservation attitudes. This profiling will provide valuable insights into the diverse angler groups within the region.

- > **Interpretation and Implications:** Interpret the research findings in the context of the region's recreational fishing sector. Depending on the specific outcomes being sought, discuss the implications of the segment profiles for businesses, policymakers, tourism operators, and conservation efforts.
- > **Policy and Marketing Recommendations:** Based on the research outcomes being sought, offer policy recommendations and marketing strategies tailored to each psychographic segment. Ensure that the suggestions align with the region's unique fishing culture, environmental conditions, and regulatory frameworks.

## **Potential Study Modifications or Adaptation**

It is important to recognise that fishing culture, environmental conditions, and regulatory frameworks will potentially differ between regions. Therefore, certain modifications or adaptations may be necessary when applying the psychographic segmentation approach to other states and territories:

- > **Language and Terminology:** Use terminology and language that resonates with the local fishing community. Tailor survey questions to reflect fishing practices and traditions specific to the region. Qualitative research (deep dive interviews and focus groups) are valuable in better understanding language and terminology.
- > **Cultural Sensitivity:** Consider cultural sensitivities and differences that may impact how recreational fishers perceive and respond to survey questions. Addressing these cultural considerations ensures a more accurate representation of the target population.
- > **Environmental Factors:** Account for local environmental factors, such as unique fish species, fishing locations, and environmental conservation efforts. Understanding these factors will help contextualise the motivations and attitudes of recreational fishers within the region.
- > **Regulatory Landscape:** Be aware of the region's existing fishing regulations and policies. Ensure that the study's recommendations align with the regulatory framework and consider the potential impact of suggested changes on resource management and conservation efforts.
- > **Stakeholder Engagement:** Engage with local fishing associations and clubs, organisations, and stakeholders throughout the research process to gain insights and build support for the study. Collaboration with key stakeholders can lead to more relevant and actionable outcomes.
- > By adapting the psychographic segmentation study to accommodate regional differences, jurisdictions can effectively gain a deeper understanding of their recreational fishing communities, potentially leading to more targeted and sustainable management practices, enhanced tourism experiences, and increased engagement with the fishing sector.

## Overall Conclusion

In conclusion, the psychographic segmentation study of the Tasmanian recreational fishing sector has shed light on the diverse motivations, preferences, and attitudes of anglers within the region. By understanding the distinct psychographic segments, namely the Green Individualists, the Homebody Anglers, the Outgoing Adventurers, and the Daring Enthusiasts, stakeholders can tailor their services and experiences to cater to the unique needs of each group.

This approach not only enhances recreational fisher satisfaction and engagement but also contributes to sustainable resource management by addressing varying attitudes towards conservation. Moreover, the study's findings offer valuable insights for policymakers to develop targeted regulations and policies that foster a positive fishing environment.

As the Tasmanian study serves as a model for other Australian states and territories, the step-by-step guide and potential adaptations provided can facilitate knowledge sharing and assist in undertaking similar research in other regions. Ultimately, the application of psychographic segmentation can be indispensable in comprehending the diverse needs and preferences of recreational fishers, paving the way for more effective and sustainable strategies that enrich fishing experiences and enhance the satisfaction levels of recreational fishers.

# Appendices

Appendix 1: 2021-116 Rec Fishers in Tasmania – Literature Review Assessment Final

Appendix 2: 2021-116 Rec Fishers in Tasmania – Phase 1 – Segmentation Study Survey Questionnaire Final

Appendix 3: 2021-116 Rec Fishers in Tasmania – Phase 1 – Segmentation Profile Analysis Final

Appendix 4: 2021-116 Rec Fishers in Tasmania – Phase 1 – Segmentation Tables and Charts Final

Appendix 5: 2021-116 Rec Fishers in Tasmania – Phase 1 – Summary of Key Findings Presentation Final

Appendix 6: 2021-116 Rec Fishers in Tasmania – Phase 2 – Segmentation Study Survey Questionnaire Final

Appendix 7: 2021-116 Rec Fishers in Tasmania – Phase 2 – Segmentation Tables and Charts Final

Appendix 8: 2021-116 Rec Fishers in Tasmania – Phase 2 – Segmentation Overview Presentation Final