



NSW Marine Estate Community Wellbeing Survey Report Coastal Visitors of NSW *Wave 1*

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Abbreviations and acronyms

ACT	Australian Capital Territory
ABS	Australian Bureau of Statistics
CALD	Culturally and linguistically diverse
DPI	Department of Primary Industries
EES	Environment, Energy and Science
EPA	Environmental Protection Authority
MEMA	Marine Estate Management Authority
NPWS	National Parks and Wildlife Service
NSW	New South Wales
NT	Northern Territory
SA	South Australia
TRA	Tourism Research Australia
WA	Western Australia

Executive summary

Executive summary

Research context

Background

The Marine Estate Management Strategy (the Strategy) provides the overarching framework for coordinated management of the marine estate to deliver its vision for ‘a healthy coast and sea, managed for the greatest wellbeing of the community, now and into the future’. Progress towards implementing the Strategy and delivering the vision will be measured and reported through the Marine Integrated Monitoring Program.

Historically, there has been no systematic monitoring of the social, cultural, and economic (or human) dimensions of the NSW marine estate to meet the requirements of the Marine Integrated Monitoring Program. This lack of data was identified by the statewide Threat and Risk Assessment as a key threat and knowledge gap. In order to address this, a body of research was undertaken with 4 key audiences: Coastal Residents, Coastal Visitors, Youth (aged 14–17 years) and Aboriginal communities.

This report presents findings from the NSW Coastal Visitors survey.

Objectives

The key objectives of this research were as follows:

- develop a methodology to collect long-term data for NSW Coastal Visitors that allows for robust analysis of spatial and temporal trends in community wellbeing
- collect baseline data for Coastal Visitors on the benefits and threats to these benefits to compare with future survey waves
- collect baseline data against a suite of relevant outcome indicators identified in the NSW Marine Estate Integrated Monitoring and Evaluation Framework
- fill key social knowledge gaps identified in the statewide Threat and Risk Assessment.

Methodology

An online survey of 15 minutes was co-developed by NSW Department of Primary Industries (DPI) and Ipsos, and a phase of cognitive testing of the survey was undertaken to ensure collection of high-quality data and positive participant experience.

Recruitment of NSW Coastal Visitors for the online survey was conducted through online panels.

To qualify for the survey a Coastal Visitor had to:

- be at least 18 years old
- reside in an Australian postcode
- if residing in NSW, must live further than 5 kilometres from the NSW coast (therefore not being classified as a 'Coastal Resident' for the purposes of this research)
- have visited at least one of the 7 NSW coastal regions in the 12 months prior to completing the survey (and prior to the travel restrictions imposed as a result of COVID-19 or Bushfires). For the purposes of the survey, visitation was defined as any daytrips or overnight trips taken to the NSW Coast.

Fieldwork was conducted between Tuesday 23 February and Monday 22 March 2021. Demographic quotas (based on population data supplied by Tourism Australia Research) were applied during fieldwork to gender, age and location. Data was also weighted during analysis to ensure that findings were representative of the NSW Coastal Visitors population.

The sample size of NSW Coastal Visitors (n = 1,146) enabled subgroup analysis and reporting by Visitor type, age, and culturally and linguistically diverse (CALD) status.

Only instances of relevant statistically significant differences are mentioned in the report.

Further detail of the research methodology is available in Section 1.3.

Findings

Community use of the NSW marine estate and its importance in quality of life

The research showed that coastal visitation varies across the NSW marine estate. More than half (56%) visited the NSW coast at least 3 to 6 times a year, while around one in 3 (30%) visited the NSW coast once or twice a year. The most popular use of coastal areas by Coastal Visitors was picnicking, sightseeing, and visiting coastal cafes (reported by 61% of Coastal Visitors), closely followed by going to the beach (60%) and land-based exercise (48%). Just over a third of Visitors also participated in water sports such as swimming, surfing, and body boarding (35%) and wildlife or nature watching (34%).

Importance of the NSW marine estate for community quality of life

The overall importance of the NSW coast to quality of life was rated 7.4 on a scale from 0 to 10, with 22% of Coastal Visitors indicating that it is very important (i.e., a score of 10).

When asked to explain the ways in which the NSW coast contributes to their quality of life, the most frequently mentioned contributing factors were its calming or relaxing nature (24%) and its utility as a holiday destination or place to visit (23%). Access to the beach also rated highly (20%).

The quotes below illustrate the contribution of the NSW marine estate to Coastal Visitors' wellbeing:

"I enjoy the beautiful beaches there which help me to connect with nature and make me stress free."

"It is a relaxing space that really helps me deal with my mental health issues. It is also super important for my physical health as the recreational exercise I engage in on the coast is extremely beneficial to my fitness. The natural beauty of these places is also incredibly enriching and adds to an increased overall quality of my life (,) as enjoying these spaces is something I consider central to my way of life."

Coastal Visitors rated the NSW coast as an important contributor to their emotional and mental health (a mean score of 7.3 on a scale from 0 to 10), and ability to spend time with family and friends (also 7.3). The NSW coast's contributions to their physical health (6.9) and nutritional needs (6.2) were considered less important.

Further, Coastal Visitors rated their feelings of safety when using the NSW coast relatively highly (a mean score of 7.7 on a scale from 0 to 10).

Community connections to the NSW marine estate

Some Coastal Visitors reported a high degree of connection to the NSW coast, but the overall connection was not strong for many. Just 17% of Coastal Visitors indicated that they strongly agree that they feel a personal connection to the NSW coast (i.e., a score of 10 on a scale from 0 to 10), with a mean response of 6.7. Even fewer (13%) strongly agreed that they have adopted it as part of their identity, with a mean of 6.0.

Community awareness of benefits and threats to the NSW marine estate

Overall, Coastal Visitors reported high levels of awareness of the health and wellbeing benefits of spending time in the natural environment (88% are *at least aware of it*). However, this was the only benefit that at least half of Coastal Visitors (50%) said they were *fully aware* of. Awareness of other benefits was relatively high, with at least three-quarters of Coastal Visitors being *at least aware* of each. Aboriginal cultural fishing is the exception; just 67% said they were aware of its benefits (with just 24% *fully aware*).

Coastal Visitors reported higher levels of detailed knowledge in relation to threats to the NSW coast. At least 79% said they were *at least aware* of each of the threats tested in the survey. The impact of marine litter was most keenly understood. Seven in 10 (64%) said they were *fully aware* of the threat of marine litter to wildlife and 50% said they were *fully aware* that most marine litter comes from land sources. Almost half (49%) were also *fully aware* of human disturbance impacts to wildlife, and of nutrients and sediments ending up in waterways (49%).

Community perceptions of environmental health

In line with the high levels of self-reported understanding of threats to the NSW coast, just under three-quarters of Coastal Visitors reported being at least moderately concerned about global environmental problems (72%) and local environmental problems that impact the way they use and value the NSW coast (74%). At least 2 in 5 Visitors are extremely concerned about each of these issues.

While Coastal Visitors were clearly concerned about environmental threats, the vast majority (75%) consider the NSW coast to be in good health. This perception was driven for many by the clean appearance of the coast. When those who rated the health of the coast as *good* or *very good* were asked to explain the reason for their rating, 22% mentioned the clean environment, 16% mentioned a lack of litter/pollution, 11% mentioned clean water, and 8% mentioned clean beaches. One in 5 Visitors (19%) mentioned proactive management by government.

Among the 8% who rated the health of the NSW coast as poor, rubbish or litter was the main reason mentioned for the rating (40%). This again underlines the importance of visual evidence in perceptions of coastal health. Polluted water also rated highly (31%), while other commonly reported reasons included visitors ignoring regulations (22%) and erosion (16%).

Community stewardship of the marine estate

Coastal Visitors reported a moderately high perception of personal responsibility towards maintaining a healthy NSW coast (a mean score of 7.2 on a scale from 0 to 10). One in 5 (21%) gave a rating of 10, indicating that they *strongly agree* that they feel responsible for helping to maintain a healthy NSW coast.

Coastal Visitors' knowledge around environmental rules and regulations relating to the marine estate varied considerably. The rules and regulations were best understood in relation to recreational fishing (80% said they know these rules at least *fairly well*), recreational boating (78%) and disposal of different types of rubbish (70%). Rules around stormwater best-management (e.g., raingardens, stormwater treatment, erosion control) were least well known (41% said they know these rules at least *fairly well*).

The majority of Coastal Visitors reported participating in environmental best practices in relation to the coast, although to varying degrees depending on the behaviour in question. Among those who said each behaviour is relevant to them, 82% said they *always* disposed of rubbish appropriately, 73% *always* followed rules and guidelines to minimise disturbance to coastal and marine wildlife, and 70% have *always* been mindful not to impact others' enjoyment of the coast. Adherence to recreational fishing and boating rules was slightly lower (68% and 67% respectively *always* follow the rules) and only 54% reported they had *always* taken care to reduce erosion and minimise use of fertiliser and garden chemicals.

Impacts of key threats on community experience of the NSW marine estate

Overall, Coastal Visitors rated the current impact of key threats (identified in the statewide Threat and Risk Assessment) to their coastal experiences as moderate. Coastal Visitors were more likely to perceive that their personal experience of the NSW coast was most impacted by litter on shorelines or in the water, with an average score of 6.3 on a scale from 0 to 10. One in 5 (18%) rated it as a severe impact (i.e., a rating of 10). Coastal Visitors were also more likely to report that overcrowding (average of 6.0) and illegal behaviour or activities (5.9) impacted their experience of the NSW coast.

The following quotes describe aspects of these threats in more detail:

“Having to pick up other people's rubbish on the beach so my family will enjoy the beauty of the beach.”

“This just ruins the experience, there are too many people. Instead of enjoying nature time is spent in traffic, finding (a) carpark and waiting in lines”

“Such activities increase the dangers involved in being in an area - e.g., risk of injury from broken glass, discarded needles (,) etc.(.) - and littering poses a health risk as well as a huge danger to wildlife.”

Climate change, including sea-level rise, storm surges, heat waves (5.7), a decline in wildlife to appreciate (5.7), loss of natural habitats (e.g. coastal bushlands, wetlands (5.6)), and poor water quality (e.g. sewage, stormwater, and farmland runoff (5.5)), also had moderate impacts on Coastal Visitors' experiences of the NSW coast. These threats impact Coastal Visitors' experience of the marine estate by affecting their connection with nature, impacting emotional and mental health and enjoyment of the marine estate.

Coastal Visitors felt that that they were least impacted by lack of access to locations due to management (4.7) and not enough coastal infrastructure, e.g., boat ramps, jetties (4.3).

Importance of managing different aspects of the NSW marine estate

When presented with a range of reasons for managing the coast (e.g., for recreation, business, cultural use, environmental protection), Coastal Visitors rated all as being important, with the lowest mean score being 7.6 on a scale from 0 to 10 (where 10 is *very important*). However, the highest importance scores related to environmental aspects including passing on a healthy NSW coast to future generations (8.6), preserving nature even though it may never be used or seen by humans (8.4), and providing a place where people can connect with nature (8.3).

Awareness and perception of marine estate management

Coastal Visitors' knowledge of key terms and organisations related to the management of the marine estate was low. Slightly less than 2 in 5 (38%) Coastal Visitors were aware of the term 'Marine estate', and only a third

(29%) were aware of the term ‘Sea Country’. Only 12% were aware of the Marine Estate Management Authority (MEMA).

Despite this lack of detailed knowledge, confidence in NSW Government’s management of the coast was relatively strong. Overall, 89% of Coastal Visitors who were aware of MEMA reported confidence in the Government to achieve the vision of *“A healthy coast and sea, managed for the greatest wellbeing of the community, now and into the future”*.

Awareness of the agencies involved in the management of the marine estate was mixed. Just over half (51%) of Coastal Visitors were aware that DPI Fisheries is involved. More than 4 in 10 were aware of Transport for NSW’s involvement. Less than a third were aware of the involvement of Crown Land (31%), Local Land Services (28%), Environment, Energy and Science (25%) and Planning and Assessment (22%).

Knowledge of the top responsibilities of each agency, as reported by Coastal Visitors, was:

- DPI Fisheries: Fisheries and aquaculture (89%) and marine park and aquatic reserve management (52%)
- Transport for NSW: Boating, maritime safety and ports, including infrastructure (60%)
- Crown Land: Land management and native title support (62%)
- Local Land Services: Delivering services to farmers to support sustainable land management (26%)
- Environment, Energy and Science: Water Quality and litter (68%) and marine mammals, birds and reptiles (54%)
- Planning and Assessment: Land-use planning, major development & infrastructure (70%).

Demographic differences

The research highlighted some key differences in knowledge, attitudes and behaviours based on location across Australia.

Visitor type differences

The profile of activities undertaken by Visitors differed depending on where they are from. Those from states other than NSW were more likely to take part in recreational boating (15%), snorkelling or SCUBA diving (13%) and environmental work (9%). They were also less likely to take part in land-based exercise as their main activity.

The level of connection to the NSW coast was higher among Visitors from NSW than those from other states. Visitors from NSW were more likely to attribute a higher level of importance to the NSW coast in their quality of life (mean score of 7.6), to agree that the NSW coast is part of their identity (6.3) and to rate the NSW coast’s contribution to their physical health (7.0) and nutritional needs (7.0) as more important. Visitors from NSW were also more aware of the roles of DPI Fisheries (54%), Transport for NSW (46%) and Crown Land (34%) in managing the NSW marine estate, compared to Visitors from other states.

Key differences in knowledge, attitudes and behaviours based on age and cultural and linguistic diversity were also found and are highlighted throughout the report.

Research context

1 Research context

1.1 Background

The NSW marine estate includes the state's coastal waters out to 3 nautical miles. It includes estuaries, coastal lakes and lagoons, coastal wetlands and adjacent coastal lands influenced by oceanic processes, including beaches, dunes, headlands and rock platforms. The NSW community derives social, cultural, and economic benefits from the marine estate, underpinned by good water quality, healthy habitats, and diverse and abundant marine life.

A statewide Threat and Risk Assessment was undertaken in 2017 to identify and prioritise the threats to community benefits and environmental assets.

The outcomes of the Threat and Risk Assessment informed the development of the [NSW Marine Estate Management Strategy 2018–2028 \(the Strategy\)](#). The Strategy provides the overarching framework for coordinated management of the marine estate to deliver its vision for 'a healthy coast and sea, managed for the greatest wellbeing of the community, now and into the future' and to implement reforms to the way the marine estate is managed.

Progress towards implementing the Strategy and delivering the vision will be measured and reported through the Marine Integrated Monitoring Program.

The primary objectives of the Marine Integrated Monitoring Program are to:

- 1) monitor the condition and trend of environmental assets and community benefits to inform a five-year health check
- 2) evaluate the effectiveness of management initiatives and actions that aim to reduce priority threats and risks
- 3) fill knowledge gaps that were identified as part of the statewide Threat and Risk Assessment process.

Historically, there has been no systematic monitoring of the social, cultural and economic (or human) dimensions of the NSW marine estate to meet the requirements of the Marine Integrated Monitoring Program. A lack of data for these dimensions was considered as a key threat and knowledge gap in the statewide Threat and Risk Assessment.

A body of research was undertaken to address this knowledge gap. It comprised 4 surveys: a NSW Coastal Residents survey, a NSW Coastal Visitors survey, a survey of NSW Coastal Aboriginal communities, and a Youth survey of NSW Coastal Residents aged 14–17 years.

This report presents findings from the NSW Coastal Visitors survey.

1.2 Objectives

The NSW Coastal Visitors survey aimed to provide insights into community needs, preferences and behaviours that will inform the NSW marine estate’s strategic decision-making into the future.

In order to continue long-term monitoring, a strong evidence base is needed. Innovative forms of data collection and research is required (with the aim to contribute to previous research).

The key objectives of this research were as follows:

- develop a methodology to collect long-term data for NSW Coastal Visitors that allows for robust analysis of spatial and temporal trends in NSW Coastal Visitors’ wellbeing
- collect baseline data for Coastal Visitors on benefits and threats to these benefits to compare with future survey waves
- collect data against a suite of relevant outcome indicators identified in the [NSW Marine Estate Integrated Monitoring and Evaluation Framework](#)¹
- fill key social knowledge gaps identified in the statewide Threat and Risk Assessment.

1.3 Methodology

The fieldwork approach was designed to provide a ‘future proof’ survey instrument that facilitates the collection of robust and comparable data in future waves. Therefore, an online data collection method was adopted with the NSW Coastal Visitors’ audience. In addition, cognitive testing tested the survey’s validity, structure and content with the intended population for the survey, ensuring the collection of high-quality data and positive participant experience. This process ensured a reliable tool was produced for future waves. For more detail, please see Section 1.3.1.2 Cognitive testing below.

Following cognitive testing, an online survey of 15 minutes was developed, and fieldwork conducted between Tuesday 23 February and Monday 22 March 2021. Quotas were applied to the fieldwork based on the latest Australian Bureau of Statistics (ABS) census data (i.e., from the 2016 Census). Data was also weighted during analysis to ensure that findings were representative of the NSW Coastal Visitors’ population. Details on the quotas and weighting are provided below.

1.3.1 Questionnaire development

A 15-minute online survey was co-developed by NSW Department of Primary Industries (DPI) and Ipsos.

¹ Report - Integrated monitoring and evaluation framework for the Marine Integrated Monitoring Program (MIMP), Aither, 2019. https://www.marine.nsw.gov.au/data/assets/pdf_file/0004/1193296/MIMP-Framework.pdf.

The survey was designed to provide information to track priority indicators designed to monitor the condition and trend of community benefits and impacts to these benefits and collect data on relevant outcome indicators identified in the NSW Marine Estate Integrated Monitoring and Evaluation Framework.

The design of questions and response options allowed for the calculation of means and standard errors (where appropriate) and considered the spatial and temporal scale in which questions were posed (e.g., ‘in your local area’, ‘in the last 12 months’) to accurately reflect community experiences. This allowed the priority indicators to be tracked over time in a user-friendly manner – the variation of a mean score over time is a simple concept to understand.

A copy of the final questionnaire is included in Appendix B: Questionnaire. The priority indicators captured in the survey are outlined in the questionnaire below each corresponding question.

1.3.1.1 Scale logic

Within the survey, we used different ratings scales for different types of questions.

An 11-point scale is particularly useful for ratings questions where it is beneficial to have a greater degree of sensitivity and variability within responses than is achieved in a 5-point or 7-point rating scale.

5-point and 7-point scales were used for some questions, as they reduce burden on respondents. They are appropriate when there is typically variation found across response options and provide enough detail to determine levels of variability within a sample.

In addition to the size of the scale, the type of data generated was also a key consideration. Numerical scales allowed for the calculation of mean scores and standard errors providing greater insight than could be deduced from categorical scales.

1.3.1.2 Cognitive testing

A body of cognitive testing was conducted with NSW Coastal Residents and NSW Coastal Visitors as the questionnaires for these 2 audiences were developed in parallel. Six cognitive interviews were undertaken across both audiences and across 2 testing stages with an even distribution of interviews undertaken (3 NSW Coastal Residents and 3 NSW Coastal Visitors). Two NSW Coastal Residents and one NSW Coastal Visitor were interviewed in Stage 1 and one NSW Coastal Resident, and 2 NSW Coastal Visitors were interviewed in Stage 2.

For the purposes of this report, the following text will refer to the cognitive interviewing of NSW Coastal Visitors only.

Interviews were conducted with NSW Coastal Visitors in order to investigate how they interpreted and responded to the draft versions of the questionnaire. Recruitment was undertaken with Ipsos’ recruitment partner, Qualitative Recruitment Australia. Participant selection ensured a mix of age groups and genders were represented. Additional selection criteria required that interviewees must not work in market research or for local, state and Australian Government (nor members of their immediate family) and must not have participated in market research in the last 6 months. Further detail of the recruitment can be found in the recruitment screener. A copy is included in Appendix C: Cognitive Interviewing Recruitment Screener.

Phase 1 interviews were conducted between Monday 13 July and Tuesday 14 July 2020. Phase 2 interviews were conducted between Thursday 23 July and Friday 24 July 2020. All interviews were held over videoconference and were 45 minutes in length. Each participant received an \$80 EFTPOS card to thank them for their time.

The aim of cognitive testing was to ensure:

- the questionnaire was valid (i.e., that questions were understood, consistently interpreted and measured what they were intended to measure)
- the questionnaire flowed in a logical order
- individual questions were relevant and no crucial question areas were missing.

As programming of the survey was scheduled to begin following cognitive testing, it was not possible to simulate a self-completion online survey during the interviews. Instead, participants received their own copy of the questionnaire to refer to and read from during the interview, to replicate the self-completion nature of the study design. The questionnaire was sent at the time of interview via email by an Ipsos project team member.

During the interviews, NSW Coastal Visitors were asked to read the questions out loud and talk the interviewer through their thought process when interpreting and answering each question. The interviews were conducted in a ‘stop start’ manner, allowing time for the interviewer to probe for more insight around question interpretation or any non-verbal cues such as facial expression or hesitation observed during the interview.

Different versions of the NSW Coastal Visitors survey were tested in Stage 1 and Stage 2 of testing. Questions identified as problematic in the first stage were redrafted or removed by DPI and Ipsos, and a revised questionnaire was tested in the second stage. Following the completion of the cognitive interviews, Ipsos finalised the questionnaire with input from DPI.

1.3.2 Sampling approach

Recruitment of NSW Coastal Visitors for the online survey was conducted through online panels. This was the recommended approach, largely as other methods of recruitment, such as telephone recruitment and interviewing, are more costly to collect data at scale.

Online panel sampling allowed a larger sample size to be achieved within the given budget, enabling more robust analysis to be conducted on the data (including within specific subgroups) and conclusions to be made with greater confidence.

A blended approach of 5 different online panels was utilised in order to complete targets within agreed timeframe and budget. Ipsos’ online panel providers set limits to achieve the desired quotas, and results were reported back to Ipsos on a daily basis in order for any necessary adjustments to be made. For more detail on the implementation of the survey please see Section 1.3.3 Survey implementation.

To qualify for the Coastal Visitors survey a Coastal Visitor had to:

- be at least 18 years old
- reside in an Australian postcode
- if residing in NSW, must live further than 5 kilometres from the NSW coast (therefore not classified as a 'Coastal Resident' for the purposes of this research)
- have visited at least one of the 7 NSW coastal regions in the 12 months prior to completing the survey (and prior to the travel restrictions imposed as a result of COVID-19 or Bushfires). For the purposes of the survey, visitation was defined as any daytrips or overnight trips taken to the NSW Coast. A map of the 7 coastal regions can be seen in Figure 1.

Figure 1. The 7 coastal regions of NSW



Quotas

Demographic quotas were applied on gender and age based on the ABS 2016 census data.

Location quotas were based on population data sourced from Tourism Research Australia in November 2020. The data covered visitation of the NSW coast for the year July 2019 – June 2020. The location quotas therefore represent rates of tourism to the NSW Coast.

Using the Tourism Australia Research population data, each state was attributed a quota based on its population as a proportion of the total population Australia-wide. The postcodes provided by Visitors in the survey were used to identify the Australian state in which each Visitor lived, based on ABS postcode concordance tables.

Quota table

Table 1 below summarises the quotas used during fieldwork for the Coastal Visitors' survey.

Table 1. NSW Coastal Visitors quota table

Sample details		Count	Proportion ¹
Total sample		1,000	100%
Gender	Male	51%	512
	Female	49%	488
Age	18–24	13%	135
	25–39	26%	263
	40–59	34%	344
	60+	26%	258
State	NSW	646	65%
	VIC	121	12%
	QLD	138	14%
	SA, WA, TAS, NT and ACT ²	95	10%

¹Quota based on population data sourced from Tourism Research Australia (2019 – 2020 FY)

²SA, WA, TAS, NT and ACT combined because there is no data available at the state level

1.3.3 Survey implementation

1.3.3.1 Survey programming and testing

Following approval of the final questionnaire, the survey was programmed by the Ipsos data processing team. The survey was tested to ensure all skip instructions, screening questions and question wording had been implemented correctly. The survey was also tested across both PC and mobile devices to ensure the survey layout was able to be viewed correctly on both large and small screens. The survey programming link was shared with DPI to obtain final approval. The final survey link was then shared with Ipsos' online panel partners

for their dispersion to individuals across their panels. Individuals were invited to participate using a unique survey link so that we were able to verify that each completed survey was from a unique individual. Use of unique survey links also provided participants the option of starting the survey and saving progress to return at a later time.

1.3.3.2 Fieldwork pilot phase and full launch

Fieldwork commenced with a pilot phase, whereby the survey is launched but responses are capped to no more than 10% of the total sample size. Following achievement of an adequate pilot sample, fieldwork was paused to facilitate thorough checks of the survey data to ensure the programming was working as expected, e.g., that any individuals who did not meet selection criteria were unable to complete the survey. Following completion of all data checks, DPI were informed of the outcome of the pilot phase and approved the survey for a full launch.

The final incidence rate (the percentage of persons eligible to participate in the survey (this is calculated by the total number of persons eligible to participate in the survey divided by the number of persons who were screened to participate (i.e., both those who qualified and those who did not qualify)) was 30% and the average survey completion time was 17 minutes.

1.3.3.3 Data quality checks

Following completion of the target sample size for the NSW Coastal Visitors survey, fieldwork was paused to allow Ipsos to conduct a second set of data checks on the full dataset. This included the identification and removal of any cases known as 'skimmers' that have completed the survey in a non-serious manner, such as rushing through questions (identified by an interview length of less than 5 minutes) or nonsense responses given at open-ended questions. Following removal of these skimmer cases, fieldwork was re-commenced in order to make up final numbers in addition to an extra number of completes to bolster the sample size, following the second identification and removal of skimmers.

1.3.4 Sample profile

Participants in this survey represent a sample of the total population of interest – this means we cannot be certain that the results of a question are exactly the same as if everybody within that population had taken part ('true values'). However, we can predict the variation between the results of a question and the true value by using the size of the sample on which results are based and the number of times a particular answer is given.

The total sample size for the 2021 NSW Coastal Visitors survey was 1,146. As the final sample size exceeded the original target of 1,000, the unweighted and weighted sample counts and unweighted proportions presented in Table 2 are not identical to the quotas in Table 1.

For consistency with the findings from the NSW Coastal Residents report, 3 age categories were used for analysis of findings (18–29, 30–49 and 50+). These differ from the 4 age group categories utilised for the survey's quotas (18–24, 25–39, 40–59 and 60+).

Table 2 below provides the unweighted sample sizes and effective sample sizes after weighting, in addition to the unweighted and weighted sample proportions.

The effective sample sizes have been shown in order to provide a measure of the statistical survey's precision after weights are applied. For example, the effective sample size of $n = 1,137$ for the total sample indicates has the same statistical power as an unweighted sample of this size.

Table 2. Sample profile (weighted and unweighted)

Sample		Count		Proportion	
		Unweighted	Effective sample size	Unweighted	Weighted
Sample type					
Total		1,146	1,137	100%	100%
Gender	Male	556	552	49%	51%
	Female	585	581	51%	49%
	Other	3	0	0%	0%
	Prefer not to say	2	0	0%	0%
Age	18–29	277	272	24%	24%
	30–49	414	410	36%	36%
	50+	455	452	40%	40%
State	NSW	775	771	68%	65%
	VIC	125	124	11%	12%
	QLD	146	145	13%	14%
	SA, WA, TAS, NT and ACT ²	100	99	9%	10%

²SA, WA, TAS, NT and ACT combined because there is no data available at the state level

1.3.4.1 Preparation of final dataset

A final datafile was prepared by the Ipsos data processing team, which involved a second data checking process followed by a thorough data cleaning process, including checks such as ensuring question and response option wording was identical to wording in the questionnaire. Following coding of the open-ended questions, the coded data was added to the final dataset and weighting was applied. Please see further detail of these processes in Section 1.3.4.2 Weighting and Section 1.3.7 Coding of open-ended questions and 'other (specify)' options.

1.3.4.2 Weighting

In addition to applying quotas during fieldwork, the final sample data was weighted prior to analysis to reflect the demographic profile (i.e., age, gender, and state) of the population of interest (NSW Coastal Visitors, as defined by this research).

This ensured the results yielded from analysis were representative of the NSW Coastal Visitors. With weighting applied, the effective sample size was $n = 1,137$ (margin of error ± 2.91).

1.3.5 Interpreting the data

1.3.5.1 Subgroups of interest

The sample size of $n = 1,146$ (effective $n = 1,137$) for NSW Coastal Visitors enabled subgroup analysis and reporting for the following groups:

- Visitor type:
 - NSW Residents
 - Visitors from other states.
- Age:
 - 18–29
 - 30–49
 - 50+.
- CALD status:
 - CALD
 - Non-CALD.

Subheadings of ‘Visitor type differences’ and ‘Subgroup differences’ have been used to signpost to meaningful differences in the data at each question.

1.3.5.2 Confidence intervals

As discussed in Section 1.3.4 Sample profile, we can predict the variation between the results of a question and the true value by using the size of the sample on which results are based and the number of times a particular answer is given.

The confidence with which we make this prediction is 95% – that is, the chances are 95 in 100 that the true value will fall within a specified range (the ‘95% confidence interval’). The estimated margin of error for this survey is $\pm 2.91\%$. For example, if 50% of Coastal Visitors surveyed indicated that they agree it is important to maintain the abundance and diversity of marine life in the marine estate, there is a 95% likelihood that the true value (which would have been obtained if the whole population had been surveyed) will fall within the range of ± 2.91 (i.e. that between 47.09% and 52.91% of all Coastal Visitors think it is important).

It should be noted that these estimates are based on the assumption that the surveyed population has no substantial differences to the population at large. We sought to minimise the differences between the survey population and the broader population by having the surveyed sample mirror the demographics of the population (through quotas and weighting) so that any differences are minimised.

1.3.6 Interpretation of numerical scales

Within the report, questions with numerical 11-point scales are presented in bar charts broken into discrete categories to aid in visualisation of the data, with mean scores and standard errors also provided. The mean scores are the sum of all values divided by the total number of values in a given set (e.g., for a given questions). The standard error measures how much discrepancy there is likely to be in a sample's mean compared with the actual populations mean.

The anchoring points in each scale (0, 5 and 10) are presented as individual categories with the points in between broken into categories containing 2 numerical values on the scale (e.g., 1–2 and 3–4). The size of each category allows for a more detailed examination of variation within these particular measures.

1.3.7 Coding of open-ended questions and 'other (specify)' options

Open-ended questions have been analysed via coding. The process of coding involves sorting typed verbatim responses into thematic categories appropriate to the question in order to present them in the same format as other non-open-ended questions (i.e., as a chart). A similar approach was taken for questions with an open-ended option for 'other' responses, where respondents specified what their 'other response' was. These 'other' verbatims were either sorted into one of the existing response options (if applicable) or were sorted into new response options. Remaining 'other' responses that were not able to be categorised in either of these ways form the 'other' response option.

75% of the verbatims for open-ended questions and 'other specify' response options were coded. Where questions consisted of a number of sub-questions, such as a list of statements each requiring an answer on a scale, this proportion (75%) is spread across the various sub-questions, resulting in a smaller proportion of coded responses per sub-question.

1.3.8 Usage and treatment of verbatim quotes

Analysis of open-ended questions has also been supported by the usage of a selection of verbatim quotes. Verbatim text has not been edited, with the exception of missing words or letters which have been indicated by the use of parentheses.

1.3.9 Statistical analyses

Significance testing was undertaken by testing the proportion of Coastal Visitors from a particular group who gave a particular response, against the proportion of all other Coastal Visitors who gave that same response.

Two-sided t-tests for numerical data were used, with a significance level (α) of 0.05. The False Discovery Rate correction was applied to minimise type one errors (false positives) in multiple comparisons.

Where the responses of 2 subgroups are compared (e.g., NSW Residents and Visitors from other states), we can say that the subgroups are significantly different from each other. Where the analysis compares more than 2 subgroups (e.g., age groups), a response reported in the findings as 'different' is significantly different from the average for all other subgroups for that question.

Only instances where relevant statistically significant differences were detected are mentioned in the report.

Significant differences are denoted by directional arrows (▲▼) showing statistically higher or lower responses than the average of all other groups (or statistically higher or lower than the other subgroup, where only 2 responses are compared).

1.3.10 Charting conventions

Base statements for each chart present the question text and sample size only, unless question-specific notes are deemed relevant, in which case they are clearly indicated within the base statement. A number of standard conventions were applied to the charts in this report, which are listed below for reference:

- analysis was not conducted on base sizes less than $n = 30$
- where 'don't know' or 'not applicable' response options were included in questions with a scale, this data was removed prior to analysis and charting to allow accurate calculation of mean scores
- findings under 3% were not shown in stacked bar charts in order to de-clutter the chart for ease of reference
- bar charts are sorted in descending order, with the exception of 'don't know', 'none' and 'other' response options which are always found at the bottom of the chart
- stacked bar charts without mean scores showing only nationwide data are sorted in descending order of the NET figures on the right-hand side of the chart
- stacked bar charts showing nationwide, regional and subgroup data are sorted in this order
- stacked bar charts with mean scores showing only nationwide data are sorted in descending order of the mean scores on the right-hand side of the chart
- where a question had multiple response options, the chart and corresponding table (if applicable), present the data from the 10 response options with the highest frequency of response, in addition to 'don't know', 'none' and/or 'other' response options. Use of this convention is indicated in the base statement.

2 Findings

2.1 Sample profile

This section presents the demographic profile of Coastal Visitors surveyed. The data shown is unweighted in order to present the true demographic distribution present in this sample of Coastal Visitors. Refer to research context table and Appendix A: Demographics.

2.2 Community use of the NSW marine estate

2.2.1 Frequency of visitation

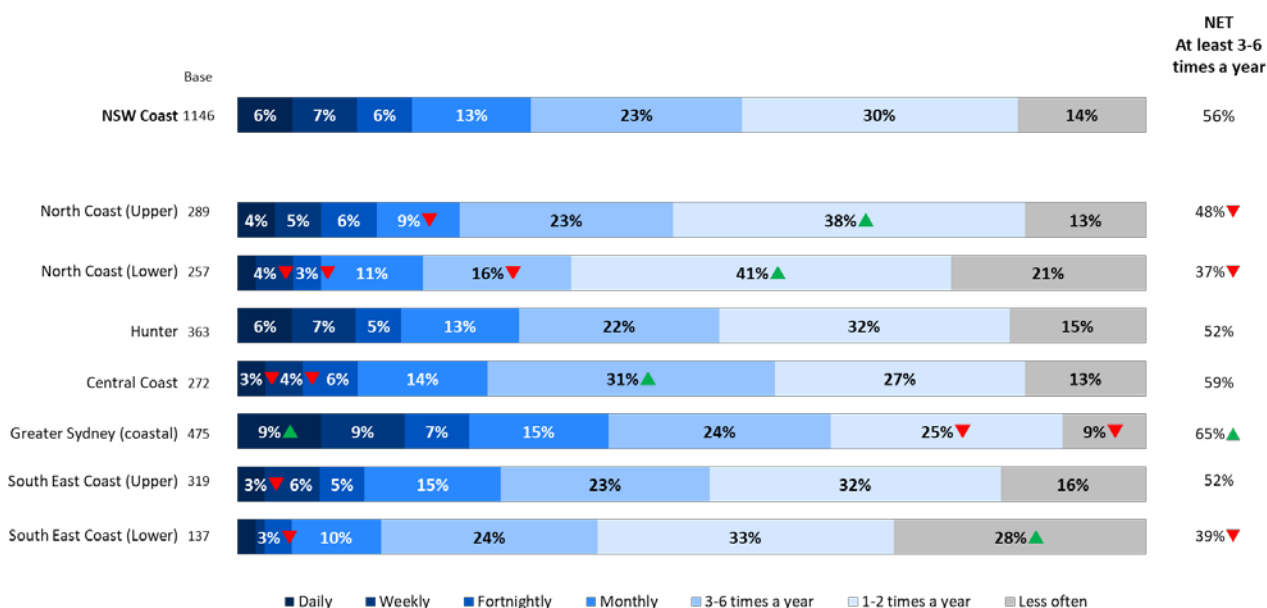
Visitation to the NSW Coast

Coastal Visitors were asked how often they visit the NSW coast (Figure 2). More than half (56%) visited the NSW coast at least 3 to 6 times a year, while around one in 3 (30%) visited the NSW coast once or twice a year. Around one in 8 visited monthly (13%), and nearly one in 4 visited 3–6 times a year (23%). Only a minority reported visiting on a daily (6%), weekly (7%) or fortnightly (6%) basis.

Differences by NSW Coastal region visited

Coastal Visitors to the Greater Sydney (coastal) region were more likely to have visited at least 3 to 6 times a year (65%) with nearly two-thirds reporting this. This is mostly driven by significantly higher daily visitation (9%). In contrast, Coastal Visitors to the regions of North Coast (Upper) (48%), North Coast (Lower) (37%) and South Coast (Lower) (39%) were less likely to have reported visiting at least 3 to 6 times a year. Coastal Visitors to the North Coast (Upper) (38%) and North Coast (Lower) (41%) were more likely to have visited once or twice a year, while Coastal Visitors to the South Coast (Lower) were more likely to have visited less often, with more than one in 4 reporting this (28%).

Figure 2. Frequency of visitation to the NSW coast overall, and by Coastal region



Base: Total Visitors 1,146

Q1. How often do you visit the following local coastal area(s)?

2.2.2 Activities undertaken on the NSW coast

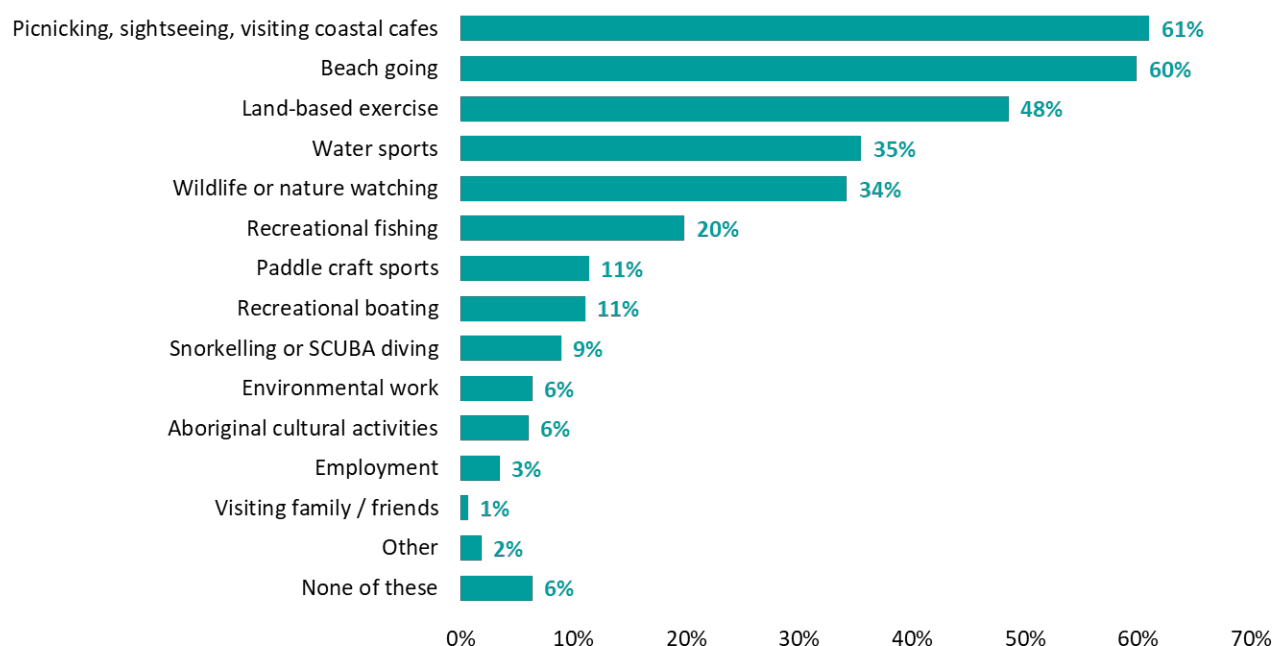
Coastal Visitors were asked about their participation in a range of coastal, recreational, cultural and employment activities when they visited the NSW coast in the past 12 months.

The 3 most common activities (Figure 3) undertaken by Coastal Visitors were:

- picnicking, sightseeing, visiting coastal cafes (61%)
- beach going (e.g., going in the water and sun-bathing) (60%)
- land-based exercise (e.g., walking, jogging, yoga and bike riding) (48%).

The least common activities undertaken by Coastal Visitors on the NSW coast were Aboriginal Cultural activities (6%), employment (3%) and visiting family and friends (1%).

Figure 3. Activities undertaken by Coastal Visitors on the NSW coast in the past 12 months



Base: Total Visitors n = 1,146

Q3. Which, if any, of the following activities have you done in the past 12 months when you visited the NSW coast?

Visitor type differences

When broken down by Visitor type (Table 3), Visitors from other states were more likely to undertake recreational boating (15%), snorkelling or SCUBA diving (13%) and environmental work (9%), while NSW Residents were less likely to undertake these activities.

Subgroup differences

Coastal Visitors aged 18–29 years old reported participating in a wider range of activities than other age groups, including beach going (75%), water sports (46%) and recreational fishing (26%). Visitors aged 30–49 years old were more likely to undertake wildlife and nature watching (39%), paddle craft sports (16%), snorkelling or SCUBA diving (13%) and environmental work (10%). Older Coastal Visitors aged 50+ years were less likely to undertake almost all activities. There were no meaningful differences dependent on CALD status.

Table 3. Activities undertaken by Coastal Visitors on the NSW coast in the past 12 months (total visitors, visitor type and subgroup level)

	Total Visitors	Visitor type		Age			CALD status	
		NSW Residents	Visitors from other states	18-29	30-49	50+	CALD	Non-CALD
Base	1,146	775	371	277	414	455	214	912
Picnicking, sightseeing, visiting coastal cafes	61%	60%	63%	62%	59%	62%	62%	61%
Beach going	60%	58%	64%	75% ▲	64%	47% ▼	62%	60%
Land-based exercise	48%	48%	50%	50%	47%	49%	46%	49%
Water sports	35%	34%	37%	46% ▲	40%	25% ▼	35%	36%
Wildlife or nature watching	34%	32%	39%	35%	39% ▲	29% ▼	38%	33%
Recreational fishing	20%	20%	20%	26% ▲	21%	15% ▼	18%	20%
Paddle craft sports	11%	12%	11%	17% ▲	16% ▲	4% ▼	10%	12%
Recreational boating	11%	9% ▼	15% ▲	15%	14% ▲	6% ▼	8%	12%
Snorkelling or SCUBA diving	9%	6% ▼	13% ▲	11%	13% ▲	4% ▼	9%	9%
Environmental work	6%	5% ▼	9% ▲	8%	10% ▲	2% ▼	8%	6%
Aboriginal Cultural activities	6%	5%	8%	10% ▲	9% ▲	1% ▼	5%	6%
Employment	3%	3%	5%	5%	5% ▲	1% ▼	5%	3%
Visiting family / friends	1%	1%	0%	0%	0%	1%	0%	1%
Other, please specify	2%	2%	2%	0% ▼	1%	4% ▲	1%	2%
None of these	6%	7%	5%	2% ▼	4%	11% ▲	3%	7%

Base: Total visitors n = 1,146

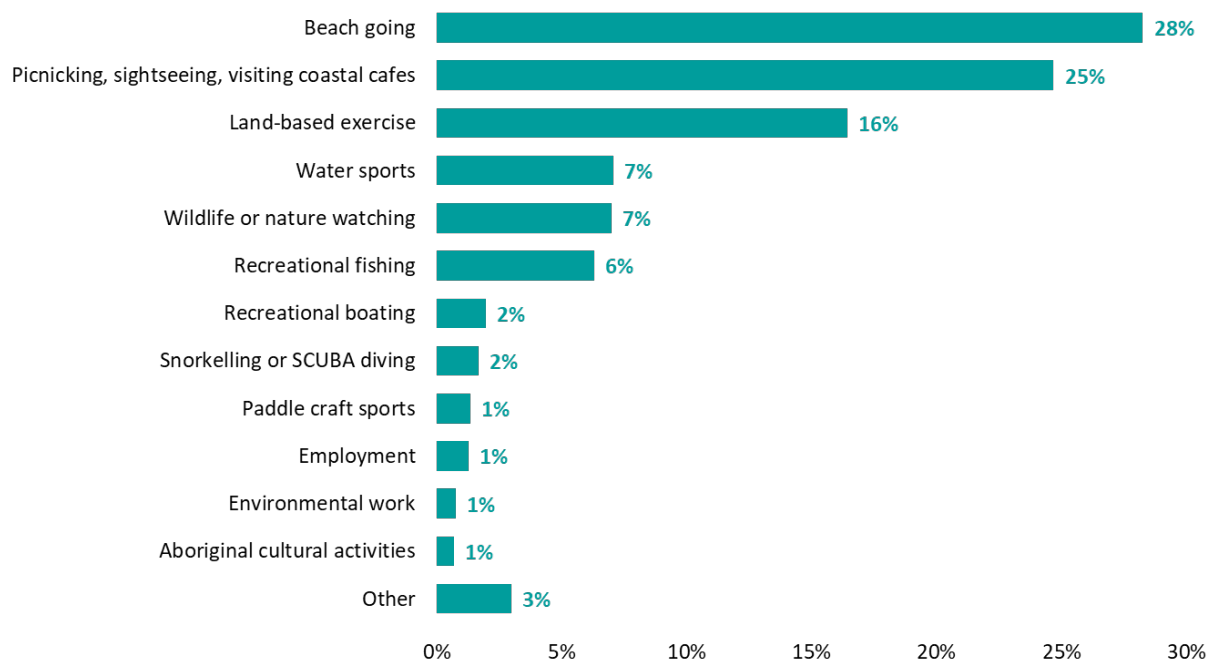
Q3. Which, if any, of the following activities have you done in the past 12 months when you visited the NSW coast?

2.2.3 Main activity undertaken on the NSW coast

Coastal Visitors were then asked to identify the main activity they participated when visiting the NSW coast.

Beach going was the most prevalent activity, with 28% of Coastal Visitors indicating this was their main activity (Figure 4). Picnicking, sightseeing, and visiting local cafes ranks second with 25% of Coastal Visitors selecting this as their main activity, followed by land-based exercise (16%), water sports (7%) and wildlife or nature watching (7%).

Figure 4. Main activity undertaken on the coast



Base: Those who participated in coastal activities n = 1,072

Q6. What is your main activity?

Visitor type differences

There were no meaningful differences by visitor type.

Subgroup differences

The most popular main activity, beach going was significantly more common among Coastal Visitors who were aged 18–29 (36%) and 30–49 years (34%), compared to those aged 50 years+ (17%) (Table 4). Older Coastal Visitors were instead more likely to report picnicking, sightseeing, and visiting coastal cafes (33%) or land-based exercise (21%) as their main activity. There were no meaningful differences dependant on CALD status.

Table 4. Main activity undertaken by Coastal Visitors to the NSW coast (total visitors, visitor type and subgroup level)

	Total Visitors	Visitor type		Age			CALD status	
		NSW Residents	Visitors from other states	18-29	30-49	50+	CALD	Non-CALD
Base	1,072	718	354	271	395	406	207	847
Beach going	28%	29%	28%	36%▲	34%▲	17%▼	30%	28%
Picnicking, sightseeing, visiting coastal cafes	25%	24%	25%	19%	20%	33%▲	28%	24%
Land-based exercise	16%	19%▲	12%▼	14%	13%	21%▲	13%	18%
Water sports	7%	7%	7%	8%	9%	5%	6%	7%
Wildlife or nature watching	7%	6%	8%	6%	6%	8%	8%	7%
Recreational fishing	6%	6%	6%	7%	6%	7%	4%	7%
Recreational boating	2%	1%▼	5%▲	2%	3%	1%	1%	2%
Snorkelling or SCUBA diving	2%	2%	2%	3%	2%	1%	3%	1%
Paddle craft sports	1%	1%	1%	2%	1%	1%	2%	1%
Employment	1%	1%	2%	2%	2%	1%	3%	1%▼
Environmental work	1%	0%	2%	0%	2%▲	0%	1%	1%
Aboriginal cultural activities	1%	1%	0%	1%	1%	0%	0%	1%
Other	3%	3%	2%	0%▼	1%	5%▲	1%	3%

Base: Total visitors n = 1,146

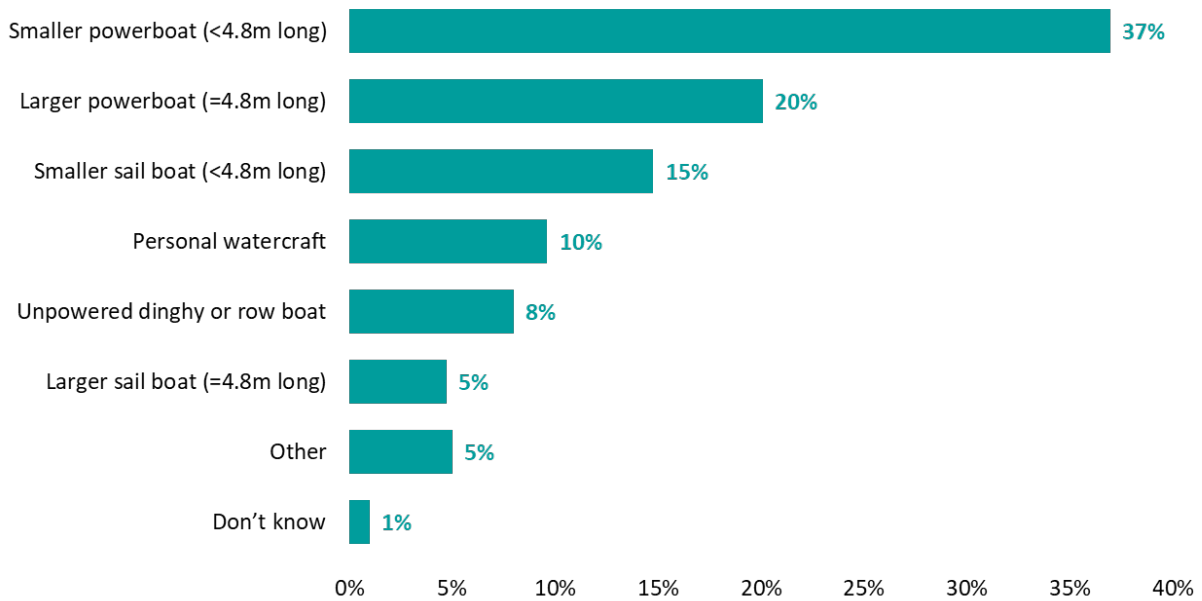
Q6. What is your main activity?

2.2.4 Recreational boating

Types of vessels used for recreational boating

Coastal Visitors who indicated they do recreational boating on the coast were then asked what type of vessel they use (Figure 5). Coastal Visitors were more likely to use smaller powerboats (< 4.8-metres long), with nearly 2 in 4 (37%) Coastal Visitors reporting this as their main vessel.

Figure 5. Main vessel used for recreational boating



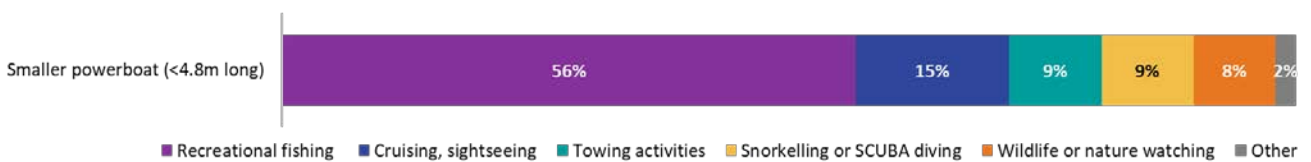
Base: Those who have participated in recreational boating n = 124
 Q4. What is the main vessel you use?

Main reason for undertaking recreational boating

Coastal Visitors who indicated they participated in recreational boating on the NSW coast were asked which activity described the main reason they used their main vessel (Figure 6).

Coastal Visitors who used a smaller powerboat (< 4.8-metres long) were most likely to have used it for recreational fishing (56%), than for cruising or sightseeing (15%).

Figure 6. Main reason for undertaking recreational boating



Base: Those who have participated in recreational boating n = 124 | Smaller powerboat n = 46; Larger powerboat n = 25; Smaller sailboat n = 18; Personal watercraft n = 12; Unpowered dinghy or row boat n = 10; Larger sail boat n = 6

Q5. Which one of the following activities best describes the main reason why you use this vessel? cross-analysed by Q4. What is the main vessel you use?

Note: Only the activities selected at Q4 were prompted at Q5. Therefore, base sizes for each vessel vary depending on number of respondents who selected the vessel at Q4. ‘Larger powerboat (≥4.8-metres long)’, ‘Smaller sail boat (<4.8m long)’, ‘Personal watercraft’, ‘Unpowered dinghy or rowboat’ and ‘Larger sail boat (≥4.8 m long) findings not included due to low base sizes (i.e. n < 30).

2.3 Importance of the NSW marine estate for community quality of life

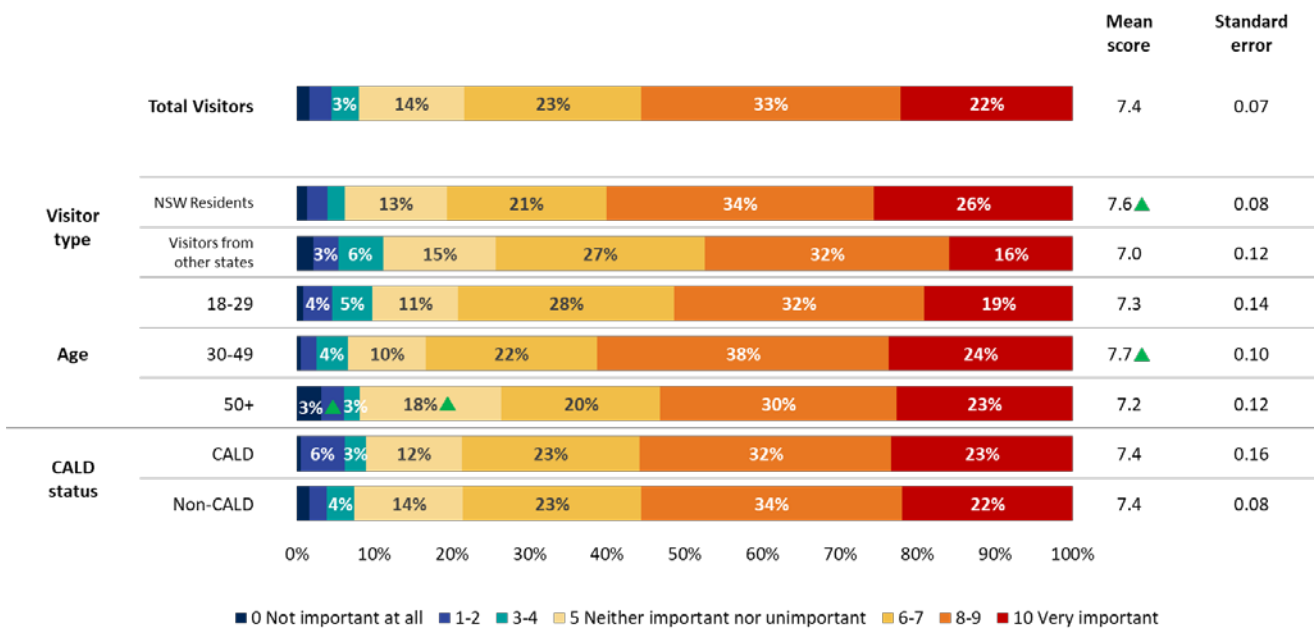
2.3.1 Contribution of the NSW marine estate to quality of life

Quality of life

Coastal Visitors were asked how important the NSW coast is in contributing to their quality of life on a scale of 0 (not important at all) to 10 (very important)

The mean score of perceived importance was high at 7.4 for Coastal Visitors (Figure 7).

Figure 7. Contribution of the NSW coast to Coastal Visitors’ quality of life (total visitors, visitor type and subgroup level)



Base: Total visitors n = 1,146 | NSW Residents n = 775; Visitors from other states n = 371; 18–29 years n = 277; 30–49 years n = 414; 50+ years n = 455; CALD n = 214; non-CALD n = 912

Q10. How important is the NSW coast in contributing to your quality of life?

Visitor type differences

NSW Residents were more likely to attribute a higher level of importance to the NSW coast (mean score of 7.6).

Subgroup differences

Coastal Visitors aged 30–49 were more likely to place a higher level of importance on the coast as a contributor to their quality of life (7.7). There were no meaningful differences dependant on CALD status.

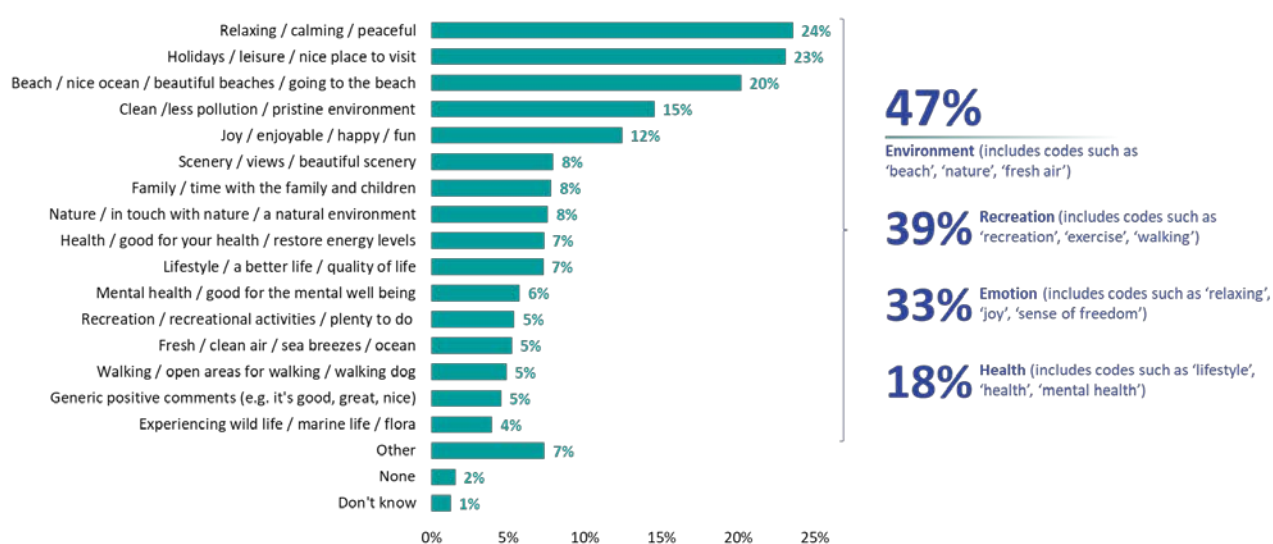
How the NSW coast contributes to Coastal Visitors’ quality of life

Coastal Visitors were then asked to elaborate on how the NSW coast contributed to their quality of life. The most frequently mentioned contributing factors directly related to the environmental qualities of the coast (47%), which included mentions such as ‘beach’, ‘nature’ and ‘fresh air’ (Figure 8).

The 3 most common contributing factors were:

- Relaxing / calming / peaceful (24%)
- Holidays / leisure / nice place to visit (23%)
- Beach / nice ocean / beautiful beaches / going to the beach (20%).

Figure 8. How the NSW coast contributes to Coastal Visitors’ quality of life



Base: Total Visitors coded respondents for Q11 n = 981.

Q11 Please explain how the NSW coast contributes to your quality of life.

The following quotes describe the contribution the NSW coast to Coastal Visitors’ wellbeing in more detail:

“I believe a healthy NSW coast contributes to our quality of life, specifically my ability to enjoy an environment that has a positive impact on my mental wellbeing (,) and which motivates me to be outside and active.”

“Great scenery. It's refreshing to reset from the hustle and bustle of concrete jungle city life. Just staring out into nature, or eating by the coast, really puts life into perspective and is calming.”

“I enjoy the beautiful beaches there which help me to connect with nature and make me stress free.”

“It's the best place to do a variety of exercises so that I can stay healthy. It's for mental health too; being able to sit and watch the waves roll in is relaxing and helps me practice mindfulness. It's also a social place for my little family whether we're seeing extended family or friends it's a wonderful

place to gather and enjoy a day. We don't usually have money for cafes or restaurants so picnics at the beach are our go-to for socialising."

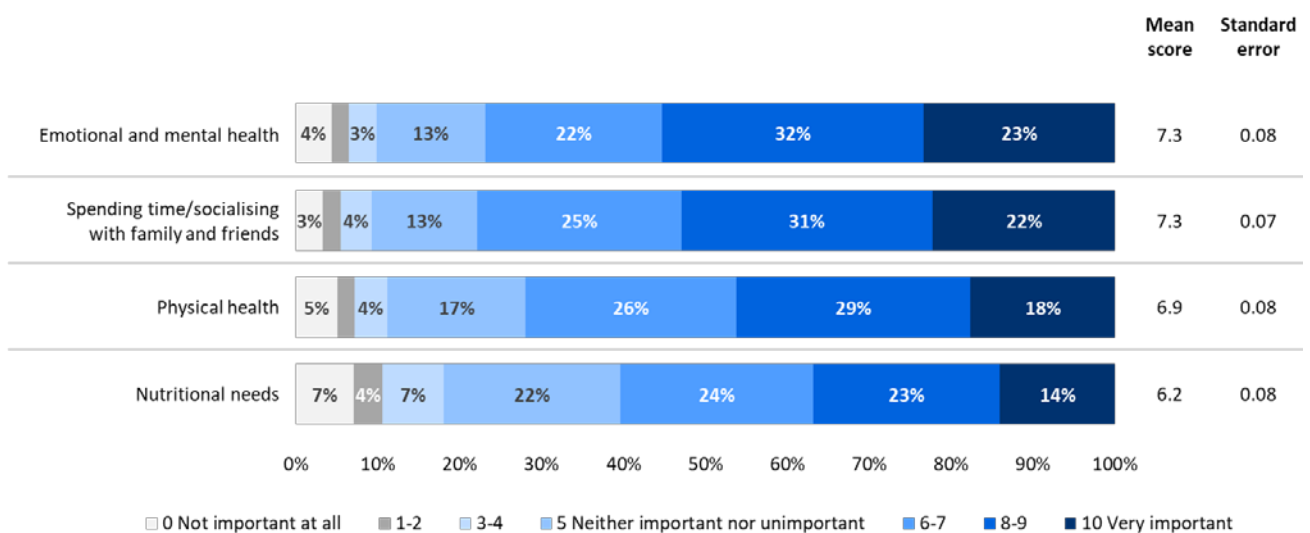
"It is a relaxing space that really helps me deal with my mental health issues. It is also super important for my physical health as the recreational exercise I engage in on the coast is extremely beneficial to my fitness. The natural beauty of these places is also incredibly enriching and adds to an increased overall quality of my life (,) as enjoying these spaces is something I consider central to my way of life."

2.3.2 Contribution of the NSW marine estate to personal health

Coastal Visitors were asked about their perceptions of the NSW marine estate’s contribution to 4 key areas relating to their personal health (Figure 9) on a scale of 0 (not important at all) to 10 (very important).

The NSW coast was seen by a number of Coastal Visitors as being an important contributor to all elements of their personal health (mean score of 6.2 or higher for all elements). The NSW coast’s contribution to emotional and mental health was rated as the most important aspect (7.3). The importance of the NSW coast in contributing to nutritional needs (i.e., eating seafood from NSW waters) was rated by Coastal Visitors as the least important (6.2).

Figure 9. Contribution of the NSW coast to Coastal Visitors’ personal health



Base: Total Visitors n = 1,146

Q12. How important is the NSW coast in contributing to the following aspects of your life?

Visitor type differences

Visitors from other states rated the importance of the NSW coast in contributing to their emotional and mental health (7.0) physical health (6.6) as less important (Table 5), while NSW Residents rated the latter as more important (7.0).

Subgroup differences

Coastal Visitors aged 18–29 years rated the importance of the NSW coast to their social life as very important (7.6). In contrast, Coastal Visitors aged 50+ years, rated this as less important (6.9), in addition to the NSW coast’s contribution to their emotional and mental (6.9) and physical health (6.6). Conversely, younger Coastal Visitors aged 30–49 rated the NSW coast’s contribution to their emotional and mental (7.5) and physical health (7.2) highly in comparison. There were no meaningful differences dependent on CALD status.

Table 5. Contribution of the NSW coast to Coastal Visitors' personal health (total visitors, visitor type and subgroup level)

	Total Visitors	Mean score						
		Visitor type		Age			CALD status	
		NSW Residents	Visitors from other states	18-29	30-49	50+	CALD	Non-CALD
Base	1,146	775	371	277	414	455	214	912
Emotional and mental health	7.3	7.4	7.0 ▼	7.5	7.5 ▲	6.9 ▼	7.6	7.2
Spending time/socialising with family and friends	7.3	7.3	7.2	7.6 ▲	7.4	6.9 ▼	7.6	7.2
Physical health	6.9	7.0 ▲	6.6 ▼	6.9	7.2 ▲	6.6 ▼	7.2	6.8
Nutritional needs	6.2	6.4 ▲	6.0 ▼	6.2	6.4	6.1	6.4	6.2

Base: Total Visitors n = 1,146

Q12. How important is the NSW coast in contributing to the following aspects of your life?

2.3.3 Feelings of safety when using the NSW marine estate

Coastal Visitors were asked how important it is for them to ‘feel safe when using the NSW coast’. Higher scores on a scale of ‘0 strongly disagree’ to ‘10 strongly agree’ indicate higher levels of perceived safety.

Figure 10 shows the extent to which Coastal Visitors believe they feel safe when using the NSW coast. Feelings of safety are shown to be high among Coastal Visitors, with a mean score of 7.7 on the 0–10 rating scale.

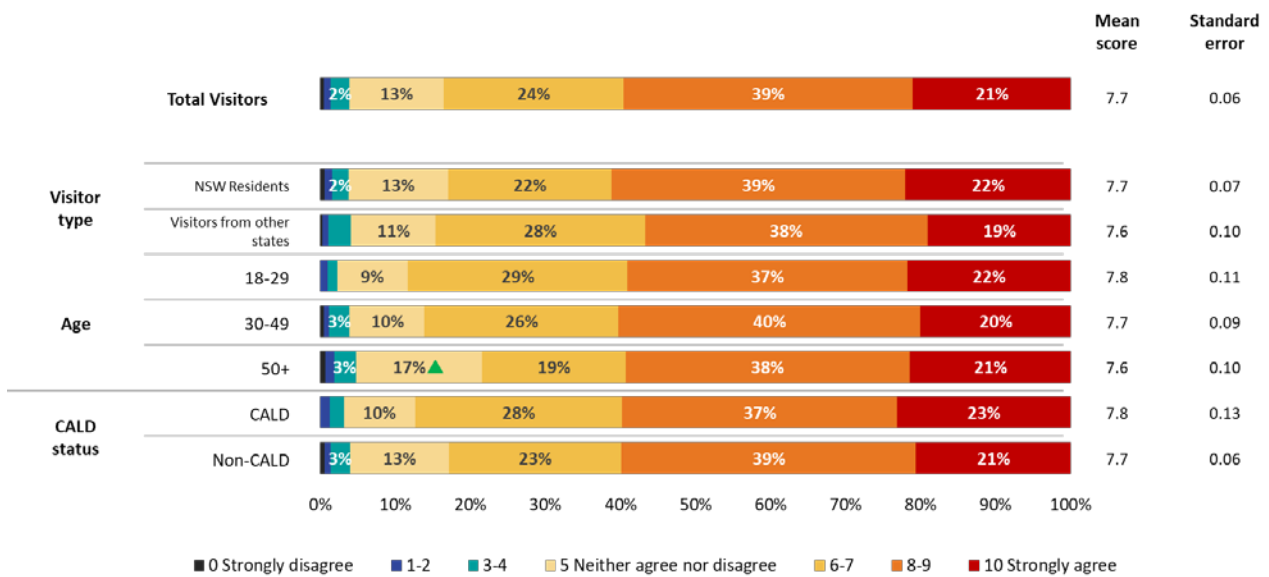
Visitor type differences

There were no meaningful differences by Visitor type.

Subgroup differences

There were no meaningful differences dependent on age group or CALD status.

Figure 10. Feelings of safety when using the NSW coast (Total Visitors, Visitor type and subgroup level)



Base: Total visitors n = 1,146 | NSW Residents n = 775; Visitors from other states n = 371; 18–29 years n = 277; 30–49 years n = 414; 50+ years n = 455; CALD n = 214; non-CALD n = 912

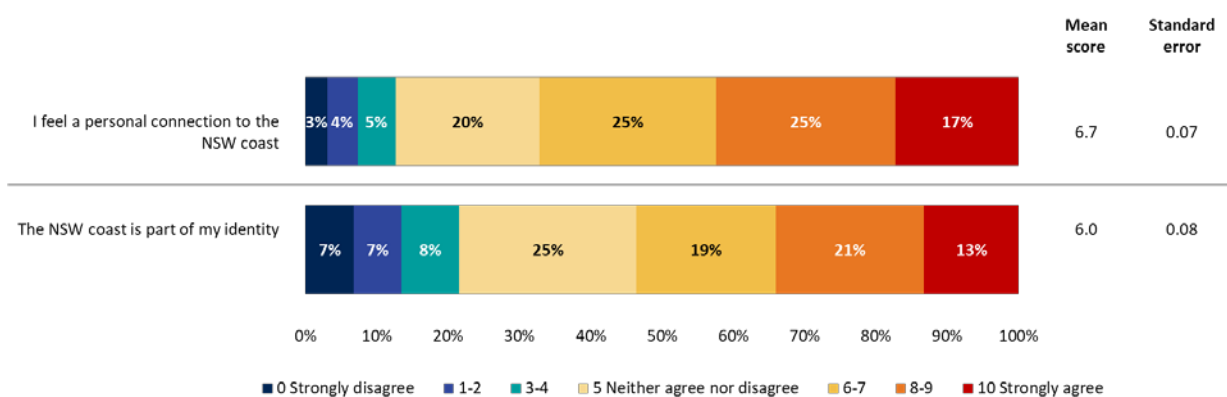
Q13. How much do you agree or disagree with... Statement ‘I feel safe when using the NSW coast’.

2.4 Community connections to the NSW marine estate

Coastal Visitors were asked to rate their agreement on a series of statements describing their connection to the NSW coast (Figure 11) on a scale from 0 ‘Strongly Disagree’ to 10 ‘Strongly Agree’.

Coastal Visitors agreed that they feel a personal connection to the NSW coast, with a mean rating of 6.7 and around half of Coastal Visitors agreed that the NSW coast is part of their identity (6.0).

Figure 11. Community connections to the NSW coast



Base: Total Visitors n = 1,146

Q13. How much do you agree or disagree with the following statements

Visitor type differences

NSW Residents (Table 6) were more likely to agree that the NSW coast is part of their identity (mean agreement score of 6.3) than Visitors from other states (mean agreement score of 5.5).

Subgroup differences

Similarly, to Visitors from other states, those aged 50+ were also less likely to agree that the NSW coast is part of their identity (mean agreement score of 5.5). There was no difference in mean scores dependent on CALD status.

Table 6. Community connections to the NSW coast (total visitors, visitor type and subgroup level)

	Total Visitors	Mean score						
		Visitor type		Age			CALD status	
		NSW Residents	Visitors from other states	18-29	30-49	50+	CALD	Non-CALD
Base	1,146	775	371	277	414	455	214	912
I feel a personal connection to the NSW coast	6.7	6.9	6.5	6.9	6.8	6.5	6.8	6.7
The NSW coast is part of my identity	6.0	6.3 ▲	5.5 ▼	6.4	6.3	5.5 ▼	6.1	5.9

Base: Total visitors n = 1,146

Q13. How much do you agree or disagree with the following statements ...

2.5 Community awareness of benefits and threats to the NSW marine estate

2.5.1 Benefits

Coastal Visitors were asked about their level of awareness of a range of social, cultural, and economic benefits of the NSW marine estate (Figure 12). The proportion who were aware of each benefit ('at least aware of it', comprised of fully aware or aware but not in detail) is shown on the right of the chart.

Most of the benefits presented in the survey were known to a large majority of Coastal Visitors (75–88% 'at least aware of it'), with the exception of 'Aboriginal cultural fishing, is important for passing on cultural knowledge to younger generations' (67% 'at least aware of it'). However, for almost all benefits, around half of Coastal Visitors were not aware of the details.

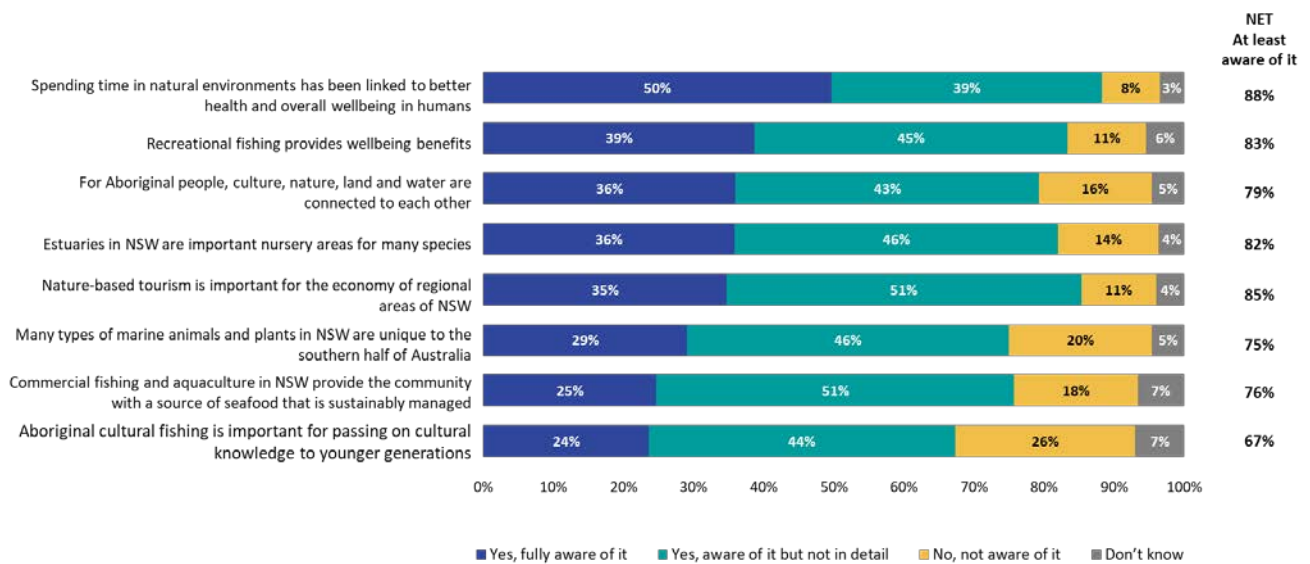
Considering the benefits that Coastal Visitors were fully aware of, 'spending time in natural environments has been linked to better health and overall wellbeing in humans' was the most widely known (50%).

Smaller proportions of Coastal Visitors were fully aware of:

- Recreational fishing provides wellbeing benefits (39%)
- For Aboriginal people, culture, nature, land and water are connected to each other (36%)
- Estuaries in NSW are important nursery areas for many species (36%)
- Nature-based tourism is important for the economy of regional areas of NSW (35%).

Awareness was lowest in relation to ‘Aboriginal cultural fishing is important for passing on cultural knowledge to younger generations’; just 24% of Coastal Visitors were fully aware of the benefit, and 26% were not at all aware.

Figure 12. Community awareness of benefits associated with the NSW coast



Base: Total Visitors n = 1,146

Q17. How much, if anything, would you say you know about each of the following benefits associated with the NSW coast?

Visitor type differences

There were no meaningful differences by Visitor type.

Subgroup differences

Coastal Visitors aged 50+ were more likely to be aware of a range of benefits (Table 7), such as recreational fishing (89% at least aware of it), that Estuaries in NSW are important nursery areas for many species (88%) and that commercial fishing and aquaculture in NSW provides the community with a source of seafood that is sustainably managed (81%). There were no meaningful differences dependent on CALD status.

Table 7. Community awareness of benefits associated with the NSW coast (total visitors, visitor type and subgroup level)

	Total Visitors	At least aware of it						
		Visitor type		Age			CALD status	
		NSW Residents	Visitors from other states	18-29	30-49	50+	CALD	Non-CALD
Base	1,146	775	371	277	414	455	214	912
Spending time in natural environments has been linked to better health and overall wellbeing in humans	88%	88%	88%	88%	85%	91%	89%	88%
Recreational fishing provides wellbeing benefits	83%	85%	81%	79%	80%	89%▲	80%	84%
Estuaries in NSW are important nursery areas for many species	82%	84%	79%	75%	80%	88%▲	79%	83%
For Aboriginal people, culture, nature, land and water are connected to each other	79%	81%	76%	80%	77%	81%	80%	79%
Nature-based tourism is important for the economy of regional areas of NSW	85%	88%	81%	85%	84%	87%	83%	86%
Many types of marine animals and plants in NSW are unique to the southern half of Australia	75%	77%	71%	78%	73%	75%	71%	76%
Commercial fishing and aquaculture in NSW provide the community with a source of seafood that is sustainably managed	76%	78%	72%	73%	71%	81%▲	73%	77%
Aboriginal cultural fishing is important for passing on cultural knowledge to younger generations	67%	70%	63%	71%	68%	65%	68%	67%

Base: Total visitors n = 1,146

Q17. How much, if anything, would you say you know about each of the following benefits associated with the NSW coast?

2.5.2 Threats

Coastal Visitors were also asked about their level of awareness of a range of threats to the marine estate (Figure 13). The proportion who were aware of each threat ('at least aware of it' comprised of fully aware or aware but not in detail) is shown on the right of the chart.

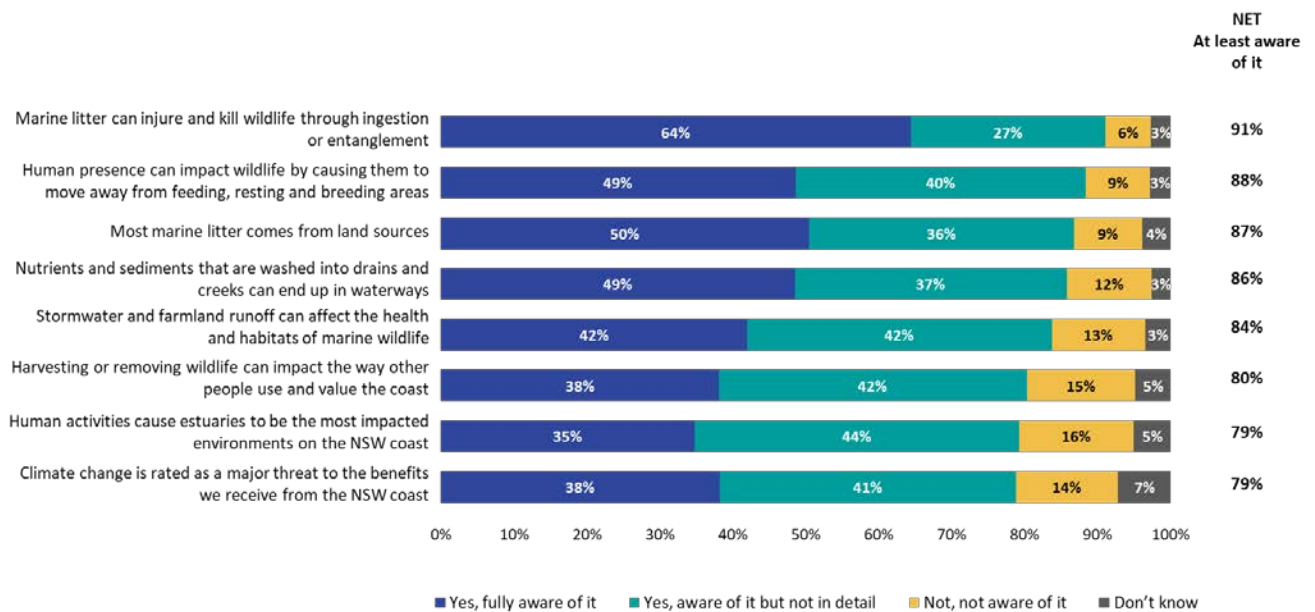
Each of the threats presented in the survey were known to a large majority of Coastal Visitors (79–91% 'at least aware of it').

Examining the threats that Coastal Visitors are fully aware of, 'Injury and death of wildlife caused by marine litter ingestion or entanglement' was the most widely known, by nearly two-thirds (64%).

Around half of Coastal Visitors were fully aware that:

- Human presence can impact wildlife by causing them to move away from feeding, resting and breeding areas (49%)
- Most marine litter comes from land sources (50%)
- Nutrients and sediments that are washed into drains and creeks can end up in waterways (49%).

Figure 13. Community awareness of threats associated with the NSW coast



Base: Total Visitors n = 1,146

Q18. How much, if anything, would you say you know about each of the following threats associated with the NSW coast?

Visitor type differences

There were no meaningful differences by Visitor type.

Subgroup differences

Coastal Visitors aged 30–49 (Table 8) were less likely to be aware of a range of threats to the marine estate, such as the impacts of marine litter on wildlife (86%), that most marine litter comes from land sources (82%), in addition to the effects of nutrients and sediments entering waterways (81%) and the impact of stormwater and farmland run-off on the health and habitats of marine wildlife (78%). In contrast, Coastal Visitors aged 50+ were more likely to be aware of these threats. There were no meaningful differences dependent on CALD status.

Table 8. Community awareness of threats associated with the NSW coast (total visitors, visitor type and subgroup level)

	Total Visitors	At least aware of it						
		Visitor type		Age			CALD status	
		NSW Residents	Visitors from other states	18-29	30-49	50+	CALD	Non-CALD
Base	1,146	775	371	277	414	455	214	912
Marine litter can injure and kill wildlife through ingestion or entanglement	91%	92%	90%	89%	86%▼	97%▲	90%	91%
Most marine litter comes from land sources	87%	88%	85%	85%	82%▼	92%▲	86%	87%
Human presence can impact wildlife by causing them to move away from feeding, resting and breeding areas	88%	89%	87%	87%	87%	91%	88%	89%
Nutrients and sediments that are washed into drains and creeks can end up in waterways	86%	88%	83%	81%	81%▼	93%▲	82%	87%
Stormwater and farmland runoff can affect the health and habitats of marine wildlife	84%	85%	81%	82%	78%▼	90%▲	85%	84%
Climate change is rated as a major threat to the benefits we receive from the NSW coast	79%	79%	79%	84%	78%	76%	81%	79%
Harvesting or removing wildlife can impact the way other people use and value the coast	80%	81%	80%	81%	80%	80%	78%	81%
Human activities cause estuaries to be the most impacted environments on the NSW coast	79%	79%	80%	76%	80%	80%	80%	79%

Base: Total Visitors n = 1,146

Q18. How much, if anything, would you say you know about each of the following threats associated with the NSW coast?

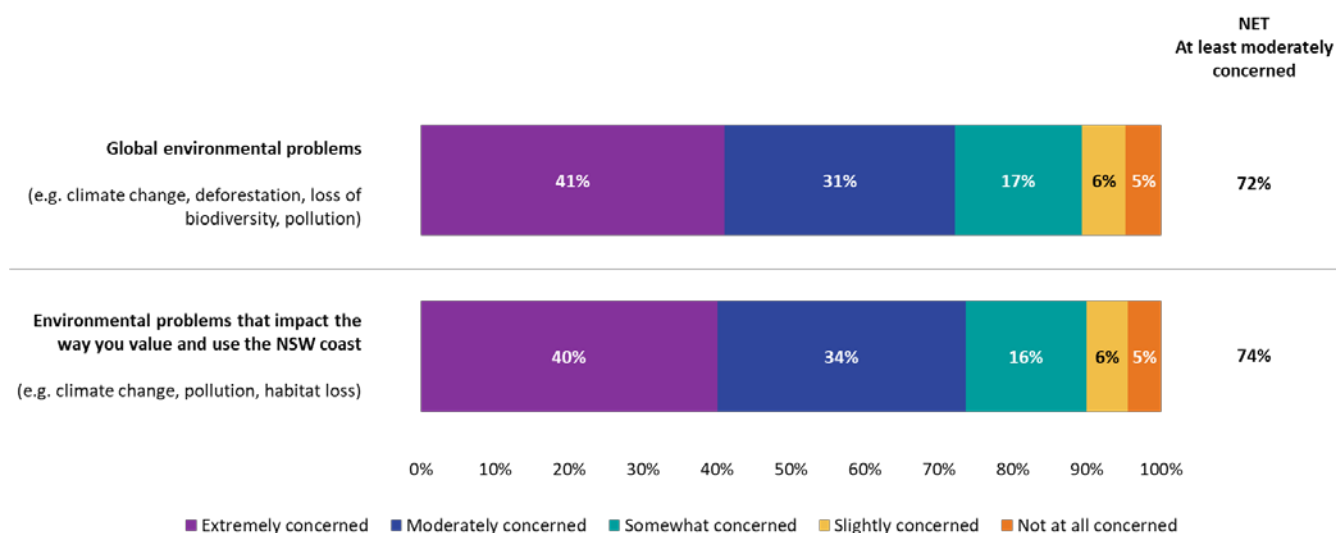
2.6 Community perceptions of environmental health

2.6.1 Concern about environmental problems

Coastal Visitors were asked about their level of concern about global environmental problems in general, and environmental problems that impact the way the way they use and value the NSW coast.

Levels of concern were similar for both, with close to three-quarters (72%) of Coastal Visitors reporting they were at least moderately concerned (Figure 14) and 2 in 5 (40%) reporting they were extremely concerned about environmental problems.

Figure 14. Concern about environmental problems



Base: Total Visitors n = 1,146

Q9. How concerned are you about the following?

Visitor type differences

There were no meaningful differences by visitor type.

Subgroup differences

The results were broadly consistent across age groups (Table 9); however, Coastal Visitors aged 50+ were less likely to be concerned about global environmental problems. There were no meaningful differences dependent on CALD status.

Table 9. Concern about environmental problems (total visitors, visitor type and subgroup level)

	Total Visitors	At least 'moderately concerned'						
		Visitor type		Age			CALD status	
		NSW Residents	Visitors from other states	18-29	30-49	50+	CALD	Non-CALD
Base	1,146	775	371	277	414	455	214	912
Global environmental problems	72%	72%	72%	79%	75%	66% ▼	77%	72%
Environmental problems that impact the way you value and use the NSW coast	74%	74%	73%	80%	74%	70%	81%	72%

Base: Total visitors n = 1,146

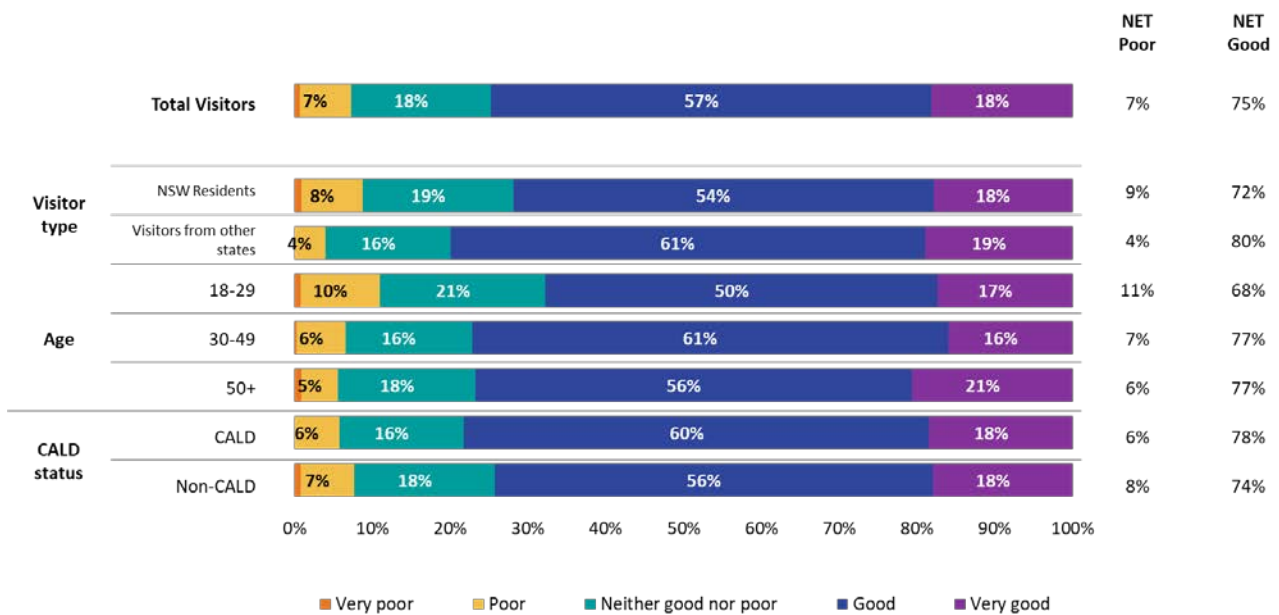
Q9. How concerned are you about the following?

2.6.2 Perceptions of current health of the NSW coast

Coastal Visitors were asked to rate the current health of the natural coastal environment on the NSW coast including aspects such as the cleanliness of beaches, water quality, and coastal habitats and wildlife in their

local coastal area (Figure 15). Three-quarters (75%) of Coastal Visitors rated the current health of their local natural environment on the NSW coast as ‘good’ or ‘very good’.

Figure 15. Rating of the current health of the natural environment on the NSW coast (total visitors, visitor type and subgroup level)



Base: Total visitors n = 1,084 | NSW Residents n = 735; Visitors from other states n = 349; 18–29 years n = 267, 30–49 years n = 397; 50+ years n = 420; CALD n = 208; non-CALD n = 857.

Q14. How would you rate the current health of the natural environment on the NSW coast?

Visitor type differences

There were no meaningful differences by visitor type.

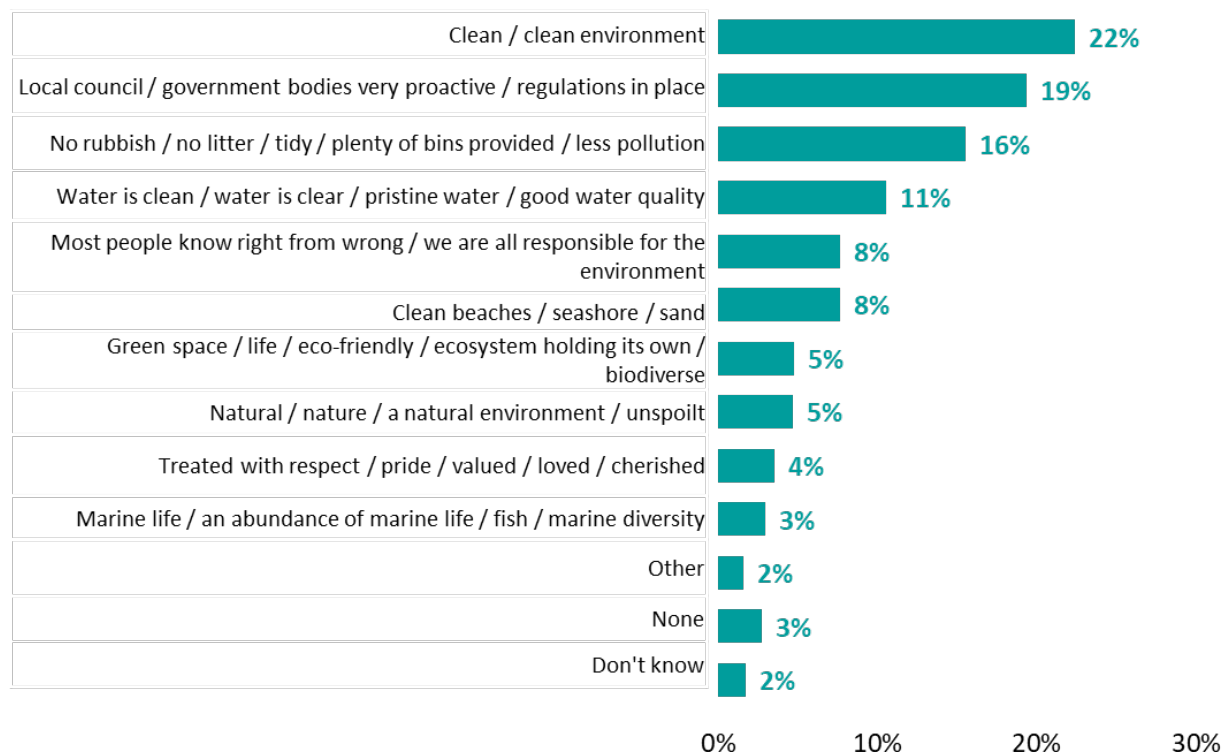
Subgroup differences

There were no meaningful differences in results by age group or CALD status.

2.6.2.1 Reasons for positive rating of current health of the natural coastal environment

Coastal Visitors were asked to explain their reasoning behind their rating of the health of the natural coastal environment on the NSW coast. Figure 16 presents the reasons for positive ratings (defined as a rating of ‘good’ or ‘very good’). 22% of Coastal Visitors indicated that they gave a positive rating because the environment they visited on the NSW coast was clean. The next most common reasons were that the local council or governing bodies on the NSW coast are very proactive and help keep regulations in place (19%), the absence or low amount of litter and pollution (16%), and because the coastal water was clean (11%).

Figure 16. Reasons for a positive rating of the health of the natural coastal environment on the NSW coast



Base: Those who rated the current health of the NSW coast as either ‘Good’ or ‘Very good’ n = 755

Q15 Please explain why you think the health of the natural coastal environment on the NSW coast is RESPONSE FROM Q14>

The following quotes describe Coastal Visitors’ positive ratings in more detail:

“There is not a lot of pollution, and the natural environment is beautiful.”

“There seems to be less rubbish around the area. The beaches and surrounding areas are in good condition and appear near enough to pristine.”

“I think that the local council does well in taking care of our natural coastal environment as it always encourages recycling and healthy habits of picking up rubbish and taking care of our environment and plants.”

Visitor type differences

There were no meaningful differences by visitor type.

Subgroup differences.

Coastal Visitors aged 50+ were more likely to list the local council or governing body (25%) and clean coastal water (15%) as a reason for their positive rating (Table 10). There was no variation in concern dependent on CALD status.

Table 10. Reasons for a positive rating of the health of the natural coastal environment on the NSW coast (total visitors, visitor type and subgroup level)

	Total Visitors	Visitor type		Age			CALD status	
		NSW Residents	Visitors from other states	18-29	30-49	50+	CALD	Non-CALD
Base	755	505	250	173	284	298	151	595
Clean / clean environment	22%	21%	25%	24%	24%	20%	24%	22%
Local council / government bodies very proactive / regulations in place	19%	20%	18%	16%	15%	25%▲	14%	21%
No rubbish / no litter / tidy / plenty of bins provided / less pollution	16%	17%	14%	15%	17%	15%	13%	16%
Water is clean / water is clear / pristine water / good water quality	11%	13%	7%	8%	7%	15%▲	10%	11%
Most people know right from wrong / we are all responsible for the environment	8%	8%	6%	10%	8%	6%	6%	8%
Clean beaches / seashore / sand	8%	8%	6%	2%	8%	11%	6%	8%
Green space / life / eco-friendly / ecosystem holding its own / biodiverse	5%	4%	7%	3%	4%	7%	3%	5%
Natural / nature / a natural environment / unspoilt	5%	4%	6%	4%	7%	3%	6%	4%
Treated with respect / pride / valued / loved / cherished	4%	4%	3%	3%	4%	4%	2%	4%
Marine life / an abundance of marine life / fish / marine diversity	3%	3%	3%	2%	2%	4%	3%	3%
None	2%	2%	2%	1%	2%	2%	3%	1%
Don't know	3%	2%	4%	3%	3%	2%	2%	3%

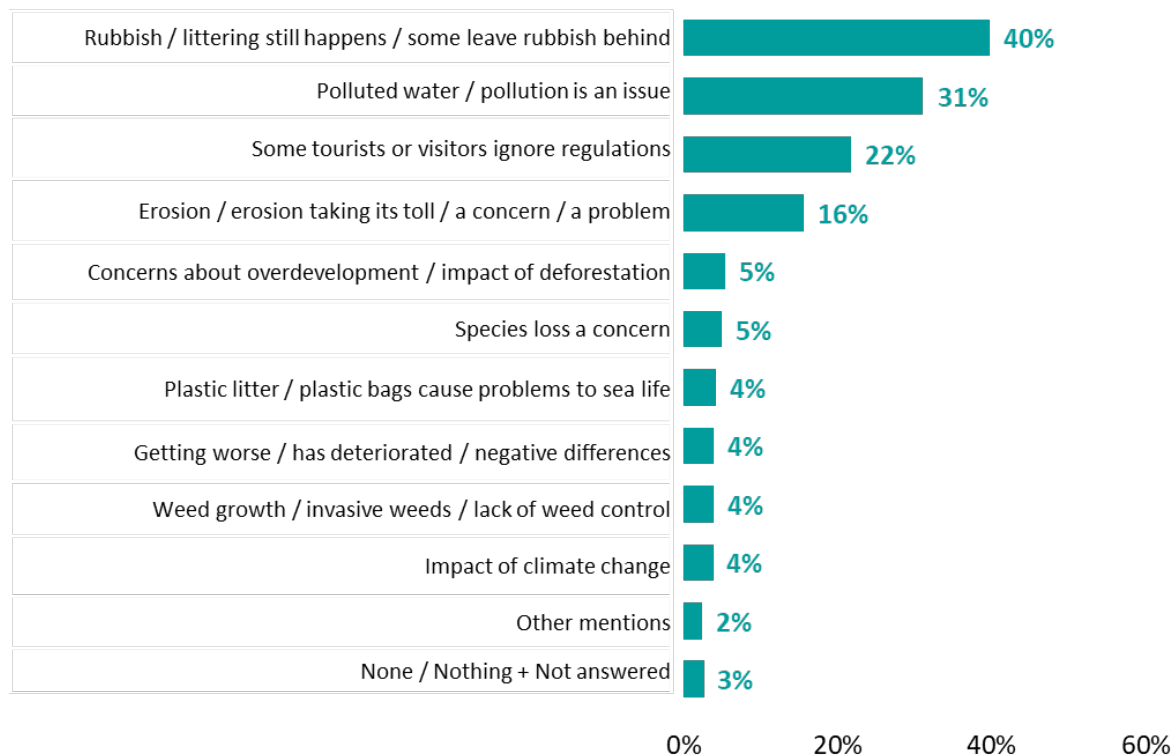
Base: Those who rated the current health of the NSW coast as either 'Good' or 'Very good' n = 755

Q15 Please explain why you think the health of the natural coastal environment in your local area is <RESPONSE FROM Q14>

2.6.2.2 Reasons for negative rating of current health of the natural coastal environment

Figure 17 presents the reasons for Coastal Visitors' negative ratings (defined as a rating of 'poor' or 'very poor') of the health of the natural coastal environment on the NSW coast. 40% of Coastal Visitors listed littering as a reason for their negative rating, and nearly one-third (31%) of Coastal Visitors indicated that they gave a negative rating because the coastal water was polluted. The third most common reason was other visitors ignoring regulations, with 22% Coastal Visitors attributing this to their rating.

Figure 17. Reasons for a negative rating of the health of the natural coastal environment on the NSW coast



Base: Those who rated the current health of the NSW coast as either 'Poor' or 'Very poor' n = 77

Q15 Please explain why you think the health of the natural coastal environment in your local area is <RESPONSE FROM Q14>

The following quotes describe Coastal Visitors' negative ratings in more detail:

“Coastal erosion, pollution and overdevelopment of the coastline is affecting the health of the environment.”

“There is still too much plastic and rubbish around, and now too many masks thrown on the ground.”

“Some people still don't respect our environment and don't understand that they are contributing to the deterioration of our coastal environment and that they are polluting animals(') natural habitat and therefore impacting them negatively too.”

Visitor type and subgroup differences

Due to low base sizes (> 30) among Visitor types and subgroups, Visitor type and subgroup findings are not presented below, and significance testing was not conducted.

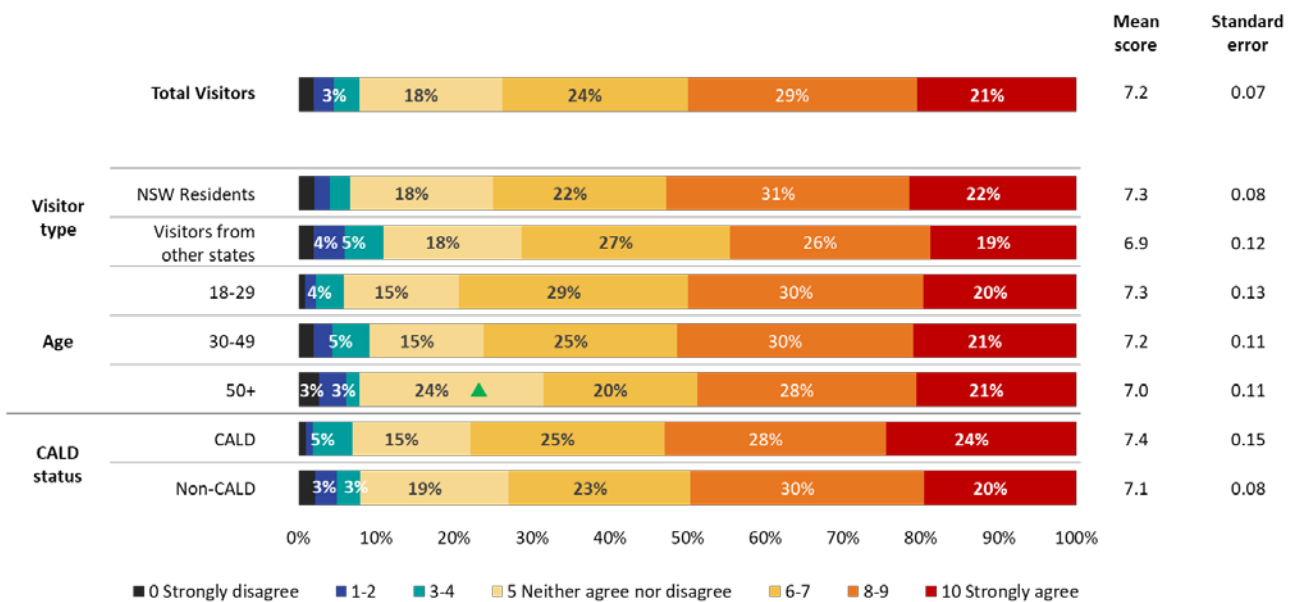
2.7 Community stewardship of the NSW marine estate

2.7.1 Sense of responsibility towards maintaining a healthy coast

Coastal Visitors were asked to rate their agreement with feeling ‘responsible for helping to maintain a healthy NSW coast’ on a scale from 0 ‘Strongly Disagree’ to 10 ‘Strongly Agree’ (Figure 18).

Coastal Visitors reported relatively high levels of agreement that they felt responsible for helping to maintain a healthy NSW coast, with an average score of 7.2.

Figure 18. Sense of responsibility towards maintaining the health of the coast (total visitors, visitor type and subgroup level)



Base: Total visitors n = 1,146 | NSW Residents n = 775; Visitors from other states n = 371; 18–29 years n = 277; 30–49 years n = 414; 50+ years n = 455; CALD n = 214; non-CALD n = 912

Q13. How much do you agree or disagree with the statement ‘I feel responsible for helping to maintain a healthy NSW coast’.

Visitor type differences

There were no meaningful differences by visitor type.

Subgroup differences

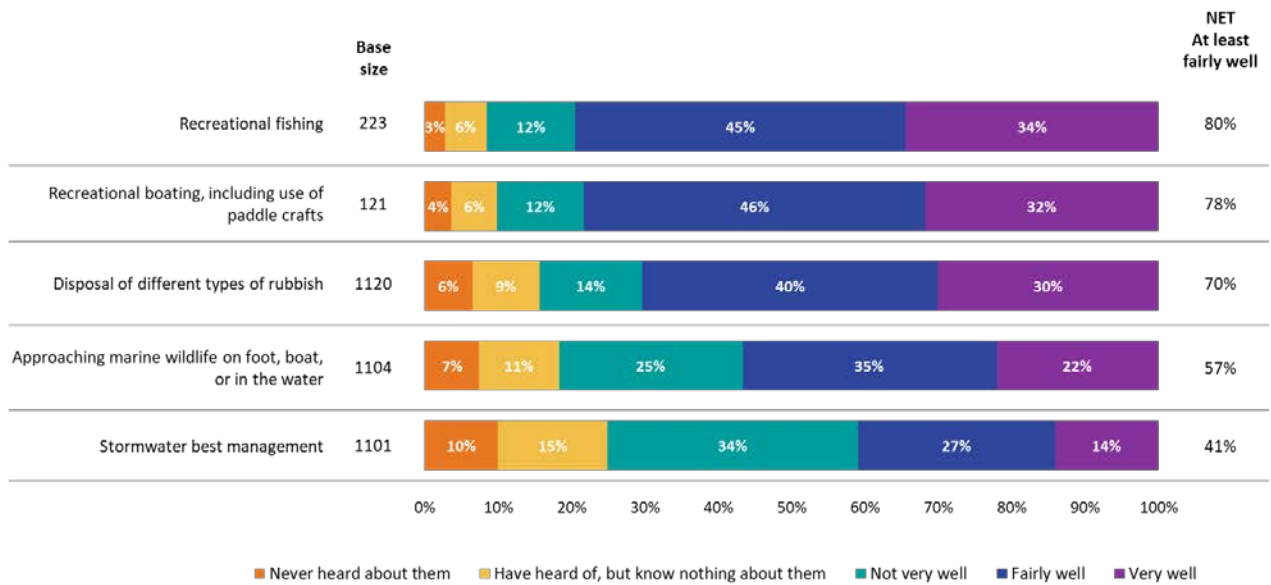
There were no meaningful differences in results by age group or CALD status.

2.7.2 Understanding of environmental rules

Coastal Visitors were asked about their understanding of environmental rules and regulations related to the NSW coast (Figure 19).

Coastal Visitors’ understanding varies considerably (between 41% and 80% at least fairly well) between the different rules and regulations. Understanding was highest in relation to rules and regulations of recreational fishing (80% at least fairly well) and lowest regarding stormwater best management (e.g., raingardens, stormwater treatment, erosion control) (41% at least fairly well).

Figure 19. Understanding of environmental rules



Base: Total visitors sample n = 1,146, with exception of ‘Recreational fishing’ answer option (only asked if recreational fishing undertaken in last 12 months, i.e., Q3 = 06) and ‘Recreational boating, including use of paddle crafts’ answer option (only asked if recreational boating, including use of paddle crafts undertaken in last 12 months, i.e., Q3 = 02). Q26. Understanding of the rules and regulations related to the NSW coast

Visitor type differences

There were no meaningful differences by visitor type.

Subgroup differences

There were no meaningful differences in results by age group or CALD status.

Table 11. Understanding of environmental rules (total visitors, visitor type and subgroup level)

	Total Visitors	NET At least fairly well						
		Visitor type		Age			CALD status	
		NSW Residents	Visitors from other states	18-29	30-49	50+	CALD	Non-CALD
Base	223	153	70	69	85	69	37	182
Recreational fishing	80%	79%	80%	72%	78%	89%	72%	82%
Base	121	67	54	38	56	27	15	103
Recreational boating, including use of paddle crafts	78%	80%	77%	82%	72%	23	13	78%
Base	1120	757	363	266	409	445	211	890
Disposal of different types of rubbish	70%	71%	69%	73%	71%	69%	65%	72%
Base	1104	749	355	263	399	442	207	878
Approaching marine wildlife on foot, boat, or in the water	57%	56%	57%	58%	57%	56%	50%	59%
Base	1101	750	351	265	400	436	206	877
Stormwater best management	41%	41%	41%	45%	45%	35%	40%	41%

Base: Total Visitors sample n = 1,146, with exception of 'Recreational fishing' answer option (only asked if recreational fishing undertaken in last 12 months, i.e., Q3 = 06) and 'Recreational boating, including use of paddle crafts' answer option (only asked if recreational boating, including use of paddle crafts undertaken in last 12 months, i.e., Q3 = 02).

Q26. How well do you feel you understand the following the rules and regulations related to the NSW coast?

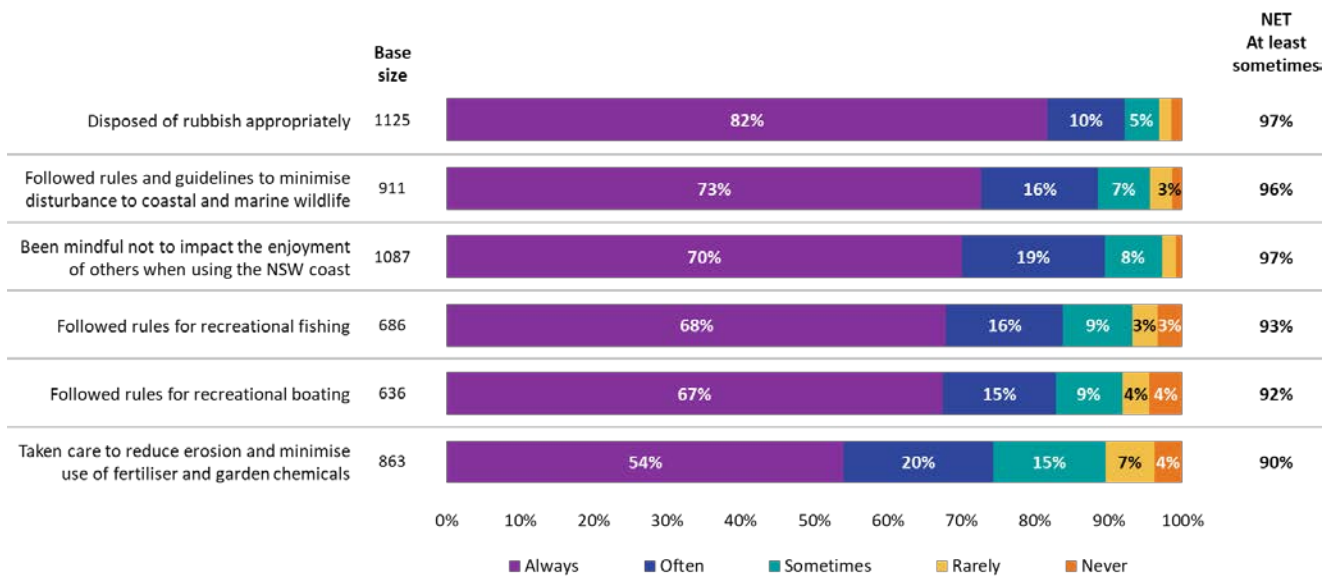
Note: Rules and regulations ranked in descending order based on At least fairly well at total sample level. Not applicable results are excluded.

2.7.3 Participation in environmental best practices

Coastal Visitors were asked about their level of participation in a number of prompted environmental best practices in the previous 12 months (Figure 20).

Participation in each of the prompted best practices was high (90–97% at least sometimes). Considering the behaviours that Coastal Visitors reported to 'always' participate in, the most frequently reported were disposing of rubbish appropriately (82% always), following rules and guidelines to minimise disturbance to coastal and marine wildlife (73% always), and being mindful not to impact the enjoyment of others when using the NSW coast (70%). In contrast, just over half of Coastal Visitors (54%) always take care to reduce erosion and minimise use of fertiliser and garden chemicals.

Figure 20. Participation in environmental best practices



Base: Total visitors n = 1,146
 Q8. And how often, if at all, have you done the following in the past 12 months?
 Note 'Don't know' and 'Not applicable' responses excluded.

Visitor type differences

There were no meaningful differences by visitor type.

Subgroup differences

Coastal Visitors aged 50+ were more likely to have disposed of rubbish appropriately 'at least sometimes' (99%) in the last 12 months, while they were less likely to have followed rules for recreational boating (87%) (Table 12).

There were no meaningful differences in results by CALD status.

Table 12. Participation in environmental best practices (total visitors, visitor type and subgroup level)

	Total Visitors	At least sometimes						
		Visitor type		Age			CALD status	
		NSW Residents	Visitors from other states	18-29	30-49	50+	CALD	Non-CALD
Base	1125	764	361	275	407	443	211	896
Disposed of rubbish appropriately	97%	98%	95%	96%	95%	99%▲	94%	97%
Base	911	597	314	254	358	299	186	709
Followed rules and guidelines to minimise disturbance to coastal and marine wildlife	96%	95%	97%	96%	95%	96%	97%	95%
Base	1087	730	357	270	398	419	208	862
Been mindful not to impact the enjoyment of others when using the NSW coast	97%	98%	96%	97%	96%	98%	96%	97%
Base	686	442	244	205	296	185	138	536
Followed rules for recreational fishing	93%	94%	92%	93%	93%	93%	91%	94%
Base	636	404	232	196	280	160	139	484
Followed rules for recreational boating	92%	92%	91%	93%	94%	87%▼	90%	93%
Base	863	574	289	223	333	307	163	687
Taken care to reduce erosion and minimise use of fertiliser and garden chemicals	90%	90%	89%	86%	89%	92%	90%	90%

Base: Total visitors n = 1,146

Q8. And how often, if at all, have you done the following in the past 12 months?

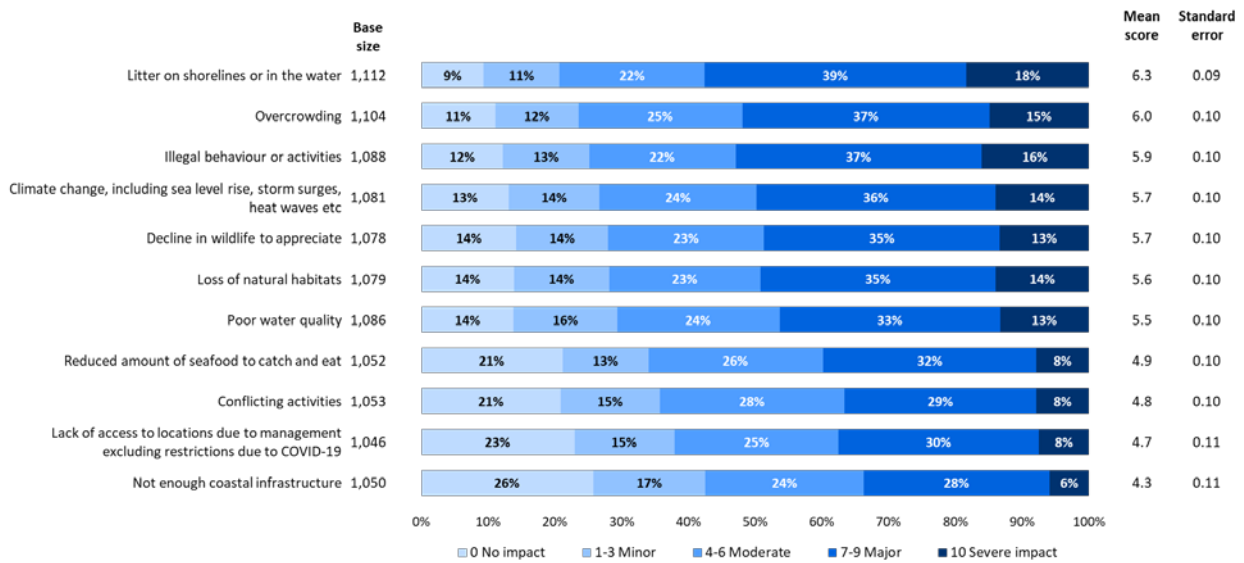
2.8 Impacts of key threats on community experience of the NSW marine estate

The purpose of this section was to assess the level of impact of key threats identified in the NSW Marine Estate Threat and Risk Assessment to the community health, safety, and use of the NSW coast. Coastal Visitors were asked about the level of impact that specific threats were currently having on their personal experience of the NSW coast (Figure 21). Coastal Visitors reported the impact of the threats on an 11-point scale from 0 'No impact' meaning 'you never noticed it' to 10 'Severe impact' meaning 'it always affects your experience to the point that you had to stop doing the activity'.

Coastal Visitors felt that they were most impacted by litter on shorelines or in the water, with an average score of 6.3, followed by overcrowding (6.0) and illegal behaviour or activities (i.e., other people not following rules) (5.9).

Coastal Visitors felt that they were least impacted by not enough coastal infrastructure, e.g., boat ramps, jetties (4.3), and lack of access to locations due to management (e.g., no-fishing zones, no-anchoring zones, private development, or land ownership) excluding restrictions due to COVID-19 (4.7).

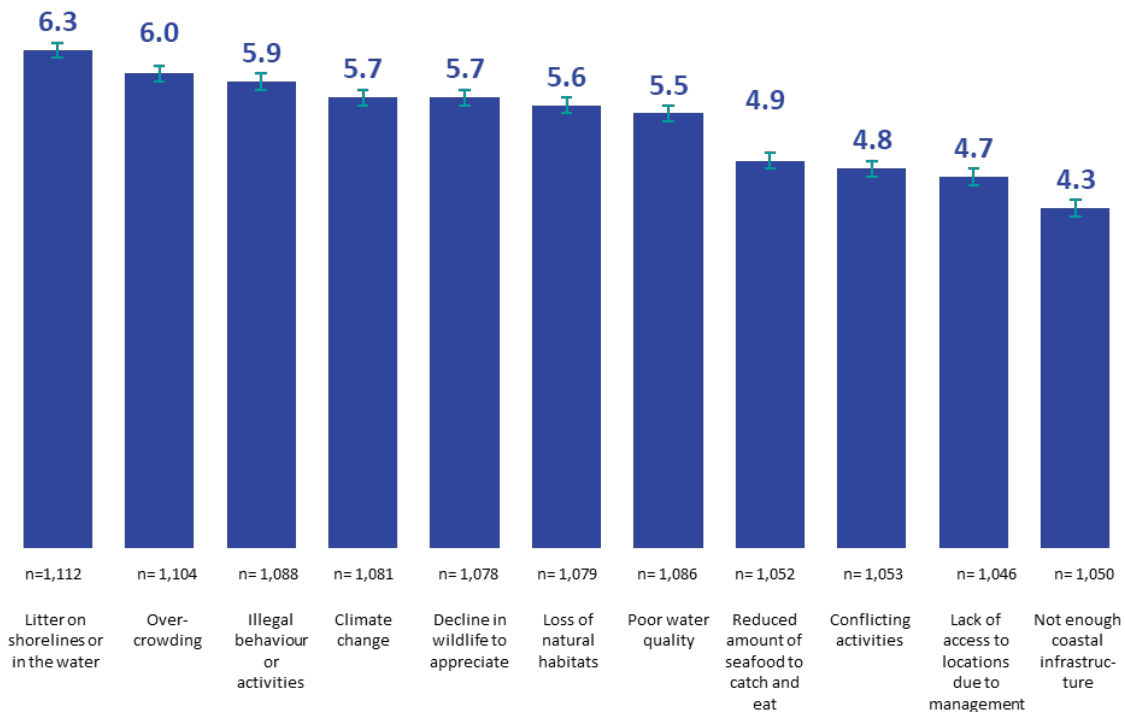
Figure 21. Impacts of key threats on community experience of the NSW coast



Base: Total visitors n = 1,146

Q19. How much of an impact do you think the following aspects currently have on your experience of the NSW coast in the past 12 months?

Figure 22. Impacts to the community experience of the NSW coast mean score and standard error



Base: Total visitors n = 1,146

Q19. How much of an impact do you think the following aspects currently have on your experience of the NSW coast in the past 12 months?

Visitor type differences

There were no meaningful differences by visitor type.

Subgroup differences

Coastal Visitors aged 50 years+ were less likely to report that all threats were impacting their experience with a significantly lower average score recorded for each threat (Table 13). Conversely, those aged 30–49 years old were more likely to think that they were impacted by all threats, and younger Coastal Visitors aged 18–29 were also more likely to think they were impacted by the majority of threats.

Coastal Visitors from a CALD background were significantly more likely to report that all threats impact their experience of the NSW coast compared to those from a non-CALD background.

Table 13. Impacts to the community experience of the NSW coast (total visitors, visitor type and subgroup level)

	Total Visitors	Mean score						
		Visitor type		Age			CALD status	
		NSW Residents	Visitors from other states	18-29	30-49	50+	CALD	Non-CALD
Base	1112	750	362	266	400	446	208	888
Litter on shorelines or in the water	6.3	6.5	6.1	6.8▲	6.7▲	5.8▼	7.1▲	6.1▼
Base	1104	742	362	266	401	437	207	880
Overcrowding	6.0	6.0	5.9	6.5▲	6.6▲	5.2▼	6.9▲	5.8▼
Base	1088	731	357	263	392	433	204	866
Illegal behaviour or activities	5.9	6.0	5.8	6.3	6.3▲	5.4▼	6.8▲	5.7▼
Base	1081	725	356	265	387	429	198	866
Climate change, including sea level rise, storm surges, heat waves etc	5.7	5.7	5.7	6.3▲	6.3▲	4.9▼	6.7▲	5.5▼
Base	1078	721	357	264	390	424	202	859
Decline in wildlife to appreciate	5.7	5.7	5.7	6.3▲	6.1▲	5.0▼	6.5▲	5.5▼
Base	1079	724	355	263	387	429	204	858
Loss of natural habitats	5.6	5.6	5.7	6.1▲	6.1▲	5.0▼	6.5▲	5.4▼
Base	1086	731	355	260	394	432	208	861
Poor water quality	5.5	5.6	5.5	5.9	6.1▲	4.8▼	6.3▲	5.3▼
Base	1052	705	347	259	378	415	193	842
Reduced amount of seafood to catch and eat	4.9	4.8	5.1	5.0	5.6▲	4.3▼	5.8▲	4.7▼
Base	1053	703	350	253	382	418	198	839
Conflicting activities	4.8	4.6	5.0	5.2▲	5.6▲	3.8▼	5.7▲	4.6▼
Base	1046	705	341	255	375	416	195	836
Lack of access to locations due to management excluding restrictions due to COVID-19	4.7	4.7	4.7	5.1▲	5.6▲	3.7▼	5.8▲	4.4▼
Base	1050	709	341	254	386	410	197	838
Not enough coastal infrastructure	4.3	4.3	4.5	5.0▲	5.3▲	3.1▼	5.3▲	4.1▼

Base: Total visitors n = 1,146

Q19. How much of an impact do you think the following aspects currently have on your experience of the NSW coast in the past 12 months?

2.8.1 Key threats – visitor type variation and factors impacting experiences

The following section summarises visitor type differences in impact scores for each threat. It also provides an overview of the main aspects of experience that were mentioned by Coastal Visitors collectively when asked to describe in more detail how that aspect had impacted their experience of the NSW coast.

Litter on shorelines or in the water

Figure 23 breaks down the ratings of the level of impact that litter on shorelines or in the water have had on Coastal Visitors’ experience of the NSW coast, by visitor type. There were no meaningful differences in mean score by region. The aspect of this threat that was most commonly cited by Coastal Visitors was ‘too much rubbish / rubbish in waterways / plastic waste’, with more than one in 4 (29%) reporting this.

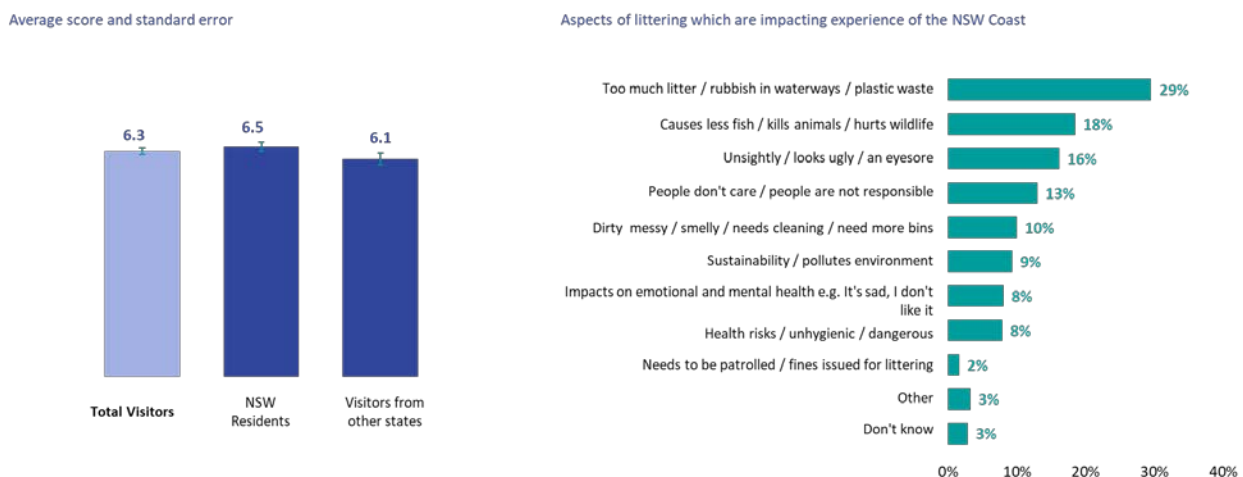
The following quotes describe aspects of this threat in more detail:

“Having to pick up other people’s rubbish on the beach so my family will enjoy the beauty of the beach.”

“Litter on the shorelines and water in NSW is a disgusting and sad consequence of unthinking & unfeeling humans. It cont(ri)butes to the sickness and ultimate decline in numbers leading to extinction of plants & animals.”

“Litter prevents enjoyment of the land and water and threatens wildlife.”

Figure 23. Litter on shorelines or in the water impact (total visitors and visitor type) and aspects affecting experience



Average score and standard error chart

Base: Total visitors n = 1,112 | NSW Residents n = 750; Visitors from other states n = 362

Q19. How much of an impact do you think the following aspects currently have on your experience of the NSW coast in the past 12 months? Litter on shorelines or in the water.

Aspects of litter on shoreline or in the water which are impacting experience of the NSW coast

Base: Total visitors coded respondents for Q20_Litter on shorelines or in the water n = 186.

Q20. Please describe in more detail how the following aspects you selected have impacted your experience. Litter on shorelines or in the water.

Overcrowding

Figure 24 breaks down the ratings of the level of impact that overcrowding has had on Coastal Visitors’ experience of the NSW coast, by visitor type. There were no meaningful differences in mean score by visitor type.

The most frequently cited impact was ‘overpopulated / too many people / beaches too crowded’, which was reported by a third of Coastal Visitors (33%).

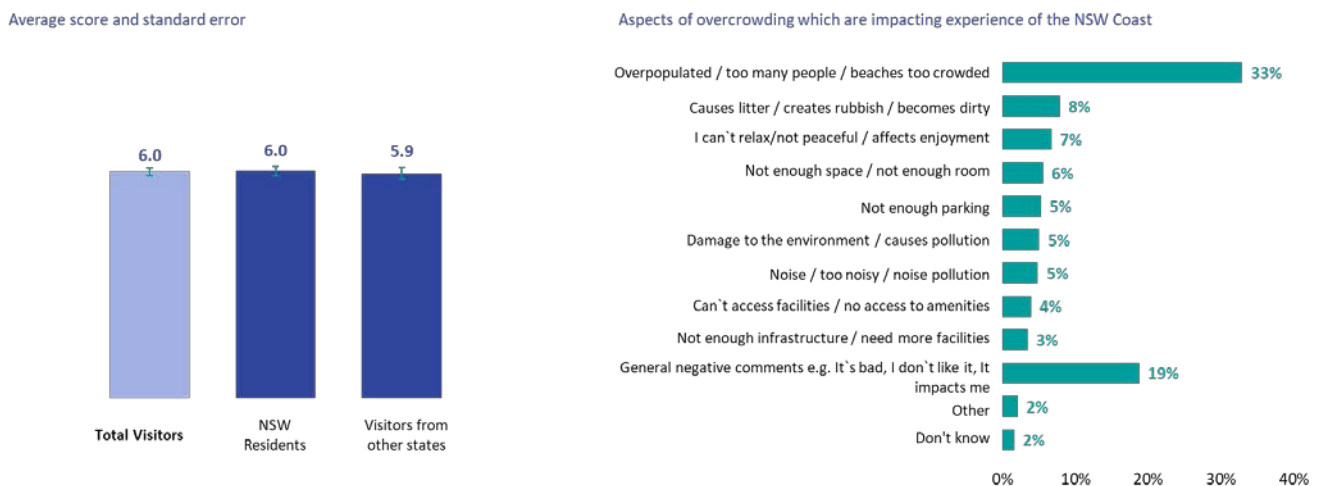
The following quotes describe aspects of this threat in more detail:

“Lots of people in a small area results in more pollution, with a growing population the problem is getting worse. With more people at my local beach, there are more people interrupting the wildlife and surrounding bushland.”

“This just ruins the experience, there are too many people. Instead of enjoying nature time is spent in traffic, finding (a) carpark and waiting in lines”

“It can be difficult to enjoy the beach in a safe manner. Hard to find shade, and sometimes people run into you in the water, and this can make you feel the need to spread out in the water and so you may not swim between the flags which is incredibly dangerous.”

Figure 24. Overcrowding (total visitors and visitor type) and aspects affecting experience



Average score and standard error chart

Base: Total visitors n = 1,104 | NSW Residents n = 742; Visitors from other states n = 362.

Q19. How much of an impact do you think the following aspects currently have on your experience of the NSW coast in the past 12 months? Overcrowding

Aspects of overcrowding which are impacting experience of the NSW coast

Base: Total visitors coded respondents for Q20_Overcrowding n = 182.

Q20. Please describe in more detail how the following aspects you selected have impacted your experience. Overcrowding.

Illegal behaviour or activities

Figure 25 breaks down the ratings of the level of impact that illegal behaviour or activities have had on Coastal Visitors’ experience of the NSW coast by visitor type. There were no meaningful differences in mean score by Visitor type.

The aspect of this threat that was most frequently cited by Coastal Visitors was that this ‘puts me off going / spoils it for others / people don’t care’, with around one in 5 reporting this (21%).

The following quotes describe aspects of this threat in more detail:

“Such activities increase the dangers involved in being in an area - e.g., risk of injury from broken glass, discarded needles (,) etc(.) - and littering poses a health risk as well as a huge danger to wildlife.”

“People (,) for example (,) camping where it(‘)s not allowed along the coast and littering makes it hard to enjoy the natural coastline.”

“Fires, drinking and littering, dangerous people lingering, trashing the place (,) thinking they own it, fights/crowd disturbances.”

Figure 25. Illegal activities or behaviour (total visitors and visitor type) and aspects affecting experience



Average score and standard error chart

Base: Total visitors n = 1,088 | NSW Residents n = 731; Visitors from other states n = 357

Q19. How much of an impact do you think the following aspects currently have on your experience of the NSW coast in the past 12 months? Illegal behaviour or activities

Aspects of illegal behaviour or activities which are impacting the experience of the NSW coast

Base: Total visitors coded respondents for Q20_Illegal Behaviour n = 185

Q20. Please describe in more detail how the following aspects you selected have impacted your experience. Illegal behaviour or activities.

Climate change (including sea level rise, storm surges, heat waves etc.)

Figure 26 breaks down the ratings of the level of impact that climate change, including sea level rise, storm surges, heat waves etc. had on Coastal Visitors’ experience of the NSW coast by Visitor type. There were no meaningful differences in mean score by Visitor type.

Coastal Visitors reported that climate change had impacted their experience of the NSW coast in many ways, the most commonly cited aspect of this impact was ‘it’s hot / heat waves / higher temperatures’ (17%), which was cited by around one in 6 Coastal Visitors.

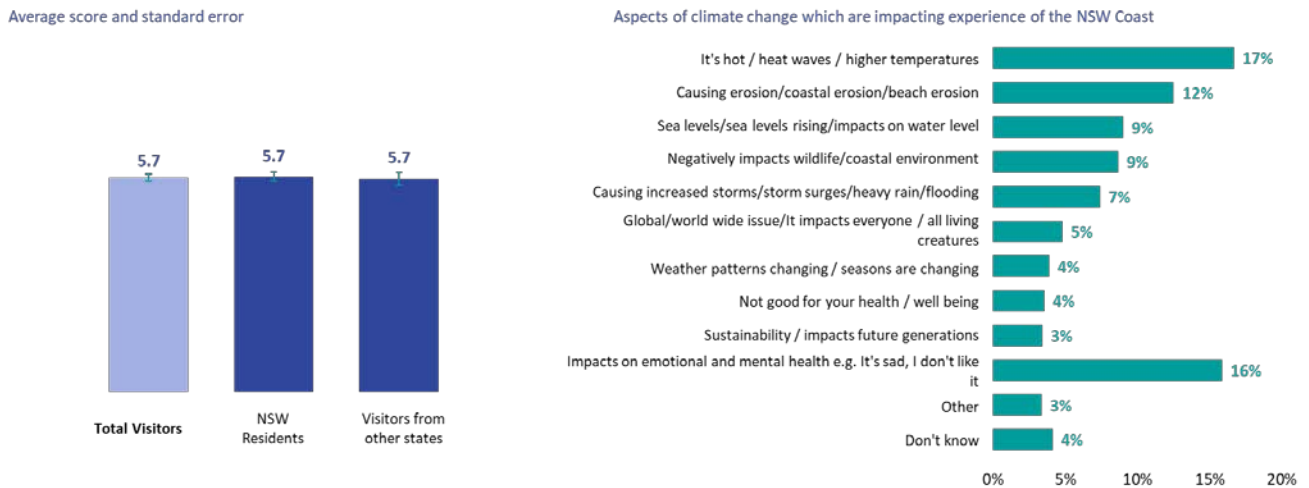
The following quotes describe aspects of this threat in more detail:

“This is a big issue that should be addressed to minimise impacts in the future. Some of the biggest impacts we are already seeing relating to extreme weather and severe bushfires are already impacting people (’)s lives.”

“My area was severely affected by the January 2020 bushfires - both as immediate personal cost and a continuing environment(al) cost. Bird and animal life is still a long way from recovering. Beach erosion seems to be gradually worsening.”

“Heat waves make life more uncomfortable and more expensive, and climate change in general makes me very afraid for the future of our world.”

Figure 26. Climate change (total visitors and visitor type) and aspects affecting experience



Average score and standard error chart

Base: Total visitors n = 1,081 | NSW Residents n = 725; Visitors from other states n = 356

Q19. How much of an impact do you think the following aspects currently have on your experience of the NSW coast in the past 12 months? Climate change

Aspects of climate change which are impacting experience of the NSW coast

Base: Total visitors coded respondents for Q20_Climate Change n = 195

Q20. Please describe in more detail how the following aspects you selected have impacted your experience. Climate Change

Decline in wildlife

Figure 27 breaks down the ratings of the level of impact that the decline in wildlife to appreciate had on Coastal Visitors’ experience of the NSW coast by visitor type. There were no meaningful differences in mean score by Visitor type.

The most commonly cited impact of this threat was ‘Decline in wildlife / less fish / turtles / birds to appreciate / more needs to be done to protect wildlife’, mentioned by more than one in 3 Coastal Visitors (36%).

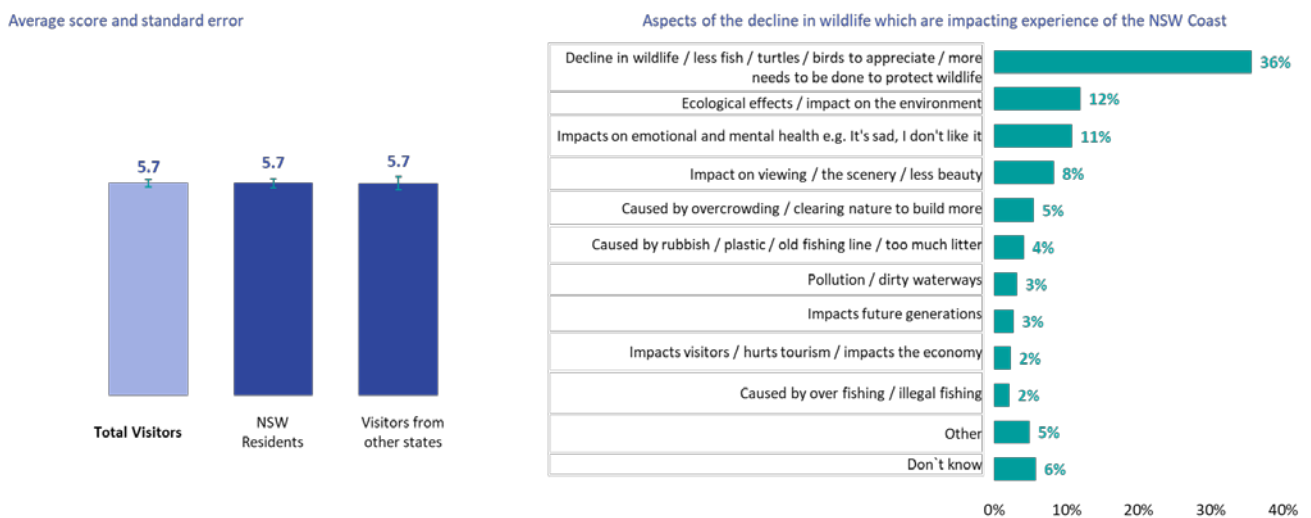
The following quotes describe aspects of this threat in more detail:

“Loss of species and loss of habitat is having a catastrophic effect on our world - as well as reducing my personal enjoyment of nature.”

“This is disappointing to see when wildlife populations are negatively impacted by human activities and can be distressing.”

“It's sad that there's not as many turtles, as I often used to see them surface for a breath while fishing in the ocean, but don't see them much now.”

Figure 27. Decline in wildlife (total visitors and visitor type) and aspects affecting experience



Average score and standard error chart

Base: Total visitors n = 1,078 | NSW Residents n = 721; Visitors from other states n = 357

Q19. How much of an impact do you think the following aspects currently have on your experience of the NSW coast in the past 12 months? Decline in wildlife to appreciate

Aspects of decline in wildlife which are impacting experience of the NSW coast

Base: Total visitors coded respondents for Q20_Decline in Wildlife n = 184

Q20. Please describe in more detail how the following aspects you selected have impacted your experience. Decline in wildlife

Loss of natural habitats

Figure 28 breaks down the ratings of the level of impact that loss of natural habitats has had on Coastal Visitors’ experience of the NSW coast by visitor type. There were no meaningful differences in mean score by visitor type.

The most commonly cited impacts of this threat were ‘less natural areas affects connection with nature’ (19%) and ‘Wildlife/ecosystem affected / loss of wildlife/biodiversity’ (18%).

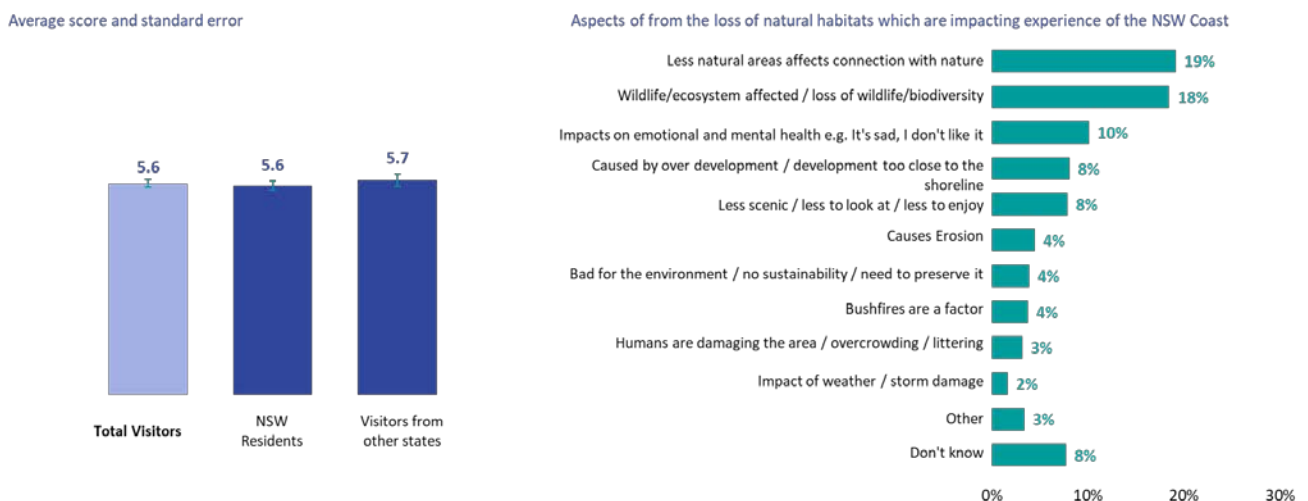
The following quotes describe aspects of this threat in more detail:

“I know this can impact biodiversity and the ecosystem for native wildlife and can also reduce the natural space that people enjoy.”

“It’s sad to see things change over time and it (is) concerning for the wildlife.”

“It worries me and makes me sad and frightened about the future.”

Figure 28. Loss of natural habitats (total visitors and visitor type) and aspects affecting experience



Average score and standard error chart

Base: Total visitors n = 1,079 | NSW Residents n = 724; Visitors from other states n = 355

Q19. How much of an impact do you think the following aspects currently have on your experience of the NSW coast in the past 12 months? Loss of natural habitats

Aspects of loss of natural habitats which are impacting experience of the NSW coast

Base: Total visitors coded respondents for Q20_Loss of natural habitats n = 180

Q20. Please describe in more detail how the following aspects you selected have impacted your experience. Loss of natural habitats.

Poor water quality

Figure 29 breaks down the ratings of the level of impact that poor water quality has had on Coastal Visitors’ experience of the NSW coast by Visitor type. There were no meaningful differences in mean score by Visitor type.

The most commonly cited impact of poor water quality was ‘issues with runoff / farm land runoff / pollution’ (16%), which was reported by around one in 6 Coastal Visitors.

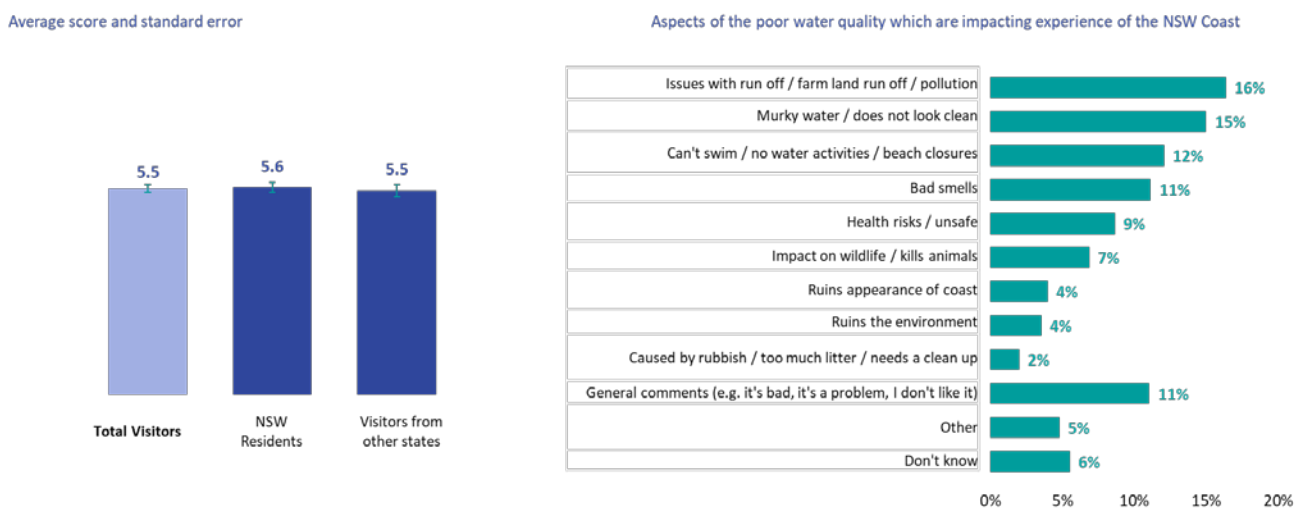
The following quotes describe aspects of this threat in more detail:

“In some places it smelt of sewage and has put off my experience in visiting the area and be(ing) able to enjoy the waters within that region.”

“Poor water quality causes so many problem(s) including its impact on human health.”

“Water can be dirty and not pleasant to swim in. Particularly in the bay areas as there is not as much tidal flow.”

Figure 29. Poor water quality (total visitors and visitor type) and aspects affecting experience



Average score and standard error chart

Base: Total visitors n = 1,086 | NSW Residents n = 731; Visitors from other states n = 355.

Q19. How much of an impact do you think the following aspects currently have on your experience of the NSW coast in the past 12 months? Poor water quality

Aspects of poor water quality which are impacting experience of the NSW coast

Base: Total visitors coded respondents for Q20 Poor water quality n = 193.

Q20. Please describe in more detail how the following aspects you selected have impacted your experience. Poor water quality.

Reduced amount of seafood to eat

Figure 30 breaks down the ratings of the level of impact that the reduced amount of seafood to catch and eat had on Coastal Visitors’ experience of the NSW coast by visitor type. There were no meaningful differences in mean score by Visitor type.

The most commonly cited impact of a reduced amount of seafood to catch and eat that was perceived by around one in 8 Coastal Visitors was that this was ‘Less fish / shortage of fish / need more seafood’ (13%).

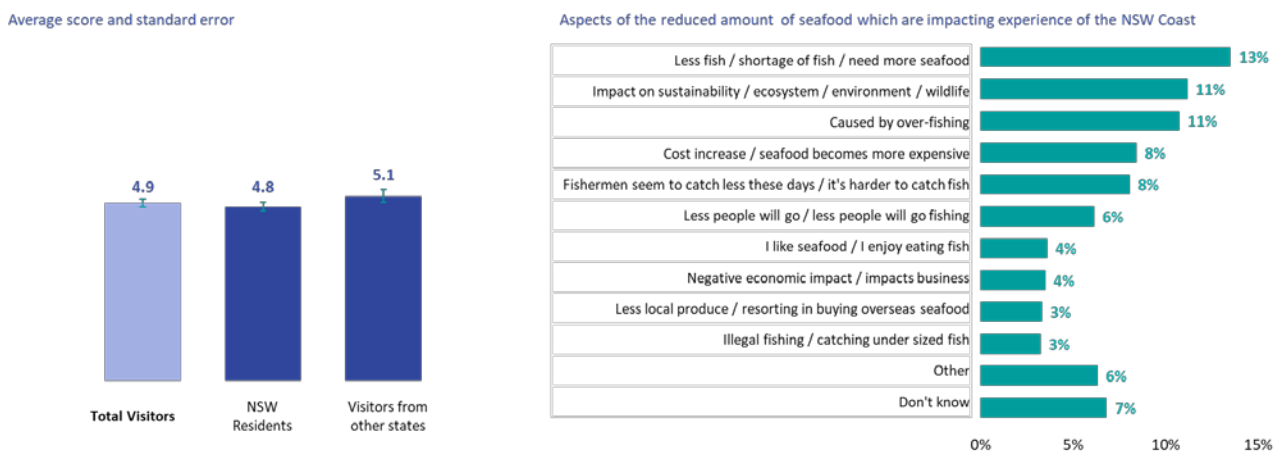
The following quotes describe aspects of this threat in more detail:

“I enjoy eating local seafood and sometimes it's not available, or of a poorer quality.”

“Some days you sit out there all day and just don't catch anything which is frustrating when you are looking forward to cooking and eating it.”

“It's a big problem as most of the seafood I consume comes from here, so there will be shortage of seafood and the price will go up.”

Figure 30. Reduced amount of seafood to eat (total visitors and visitor type) and aspects affecting experience



Average score and standard error chart

Base: Total visitors n = 1,052 | NSW Residents n = 705; Visitors from other states n = 347.

Q19. How much of an impact do you think the following aspects currently have on your experience of the NSW coast in the past 12 months? Reduced amount of seafood to catch and eat.

Aspects of Reduced amount of seafood to eat which are impacting experience of the NSW coast

Base: Total visitors coded respondents for Q20_Reduced amount of seafood to catch and eat n = 205.

Q20. Please describe in more detail how the following aspects you selected have impacted your experience. Reduced amount of seafood to catch and eat.

Conflicting activities

Figure 31 breaks down the ratings of the level of impact that conflicting activities had on Coastal Visitors' experience of the NSW coast by visitor type. There were no meaningful differences in mean score by Visitor type.

The most commonly cited impact of conflicting activities was that this was 'caused by overcrowding / too many people' (21%).

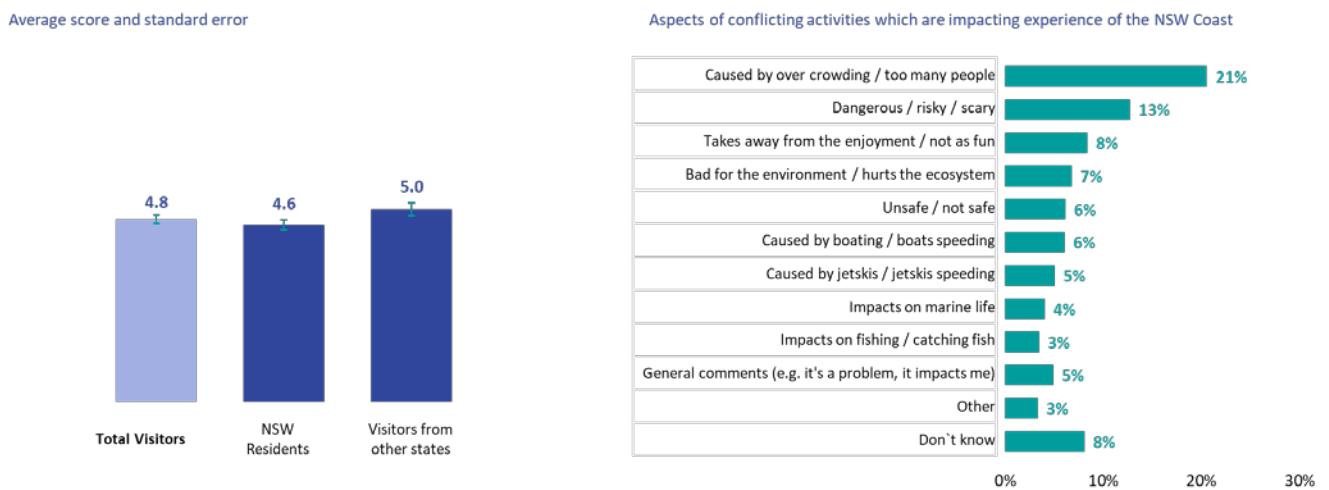
The following quotes describe aspects of this threat in more detail:

“This can have a big impact on how enjoyable the coast is when visiting. It can be overcrowded and make it a little more stressful.”

“I hate the use of noisy jet-skis in any area where people want to swim or just relax in peace and quiet.”

“Too many people in one area wishing to enjoy their particular pleasure with little regard for other users.”

Figure 31. Conflicting activities (total visitors and visitor type) and aspects affecting experience



Average score and standard error chart

Base: Total visitors n = 1,053 | NSW Residents n = 703; Visitors from other states n = 350.

Q19. How much of an impact do you think the following aspects currently have on your experience of the NSW coast in the past 12 months? Conflicting activities.

Aspects of conflicting activities which are impacting experience of the NSW coast

Base: Total residents coded respondents for Q20_Conflicting activities n = 203.

Q20. Please describe in more detail how the following aspects you selected have impacted your experience. Conflicting activities.

Lack of access to locations due to management

Figure 32 breaks down the ratings of the level of impact that lack of access to locations due to management had on Coastal Visitors’ experience of the NSW coast by visitor type. There were no meaningful differences in mean score by Visitor type.

The most frequently cited impacts of access to locations due to management were that ‘too much private development has affected access’ (10%), with one in 10 Coastal Visitors reporting this.

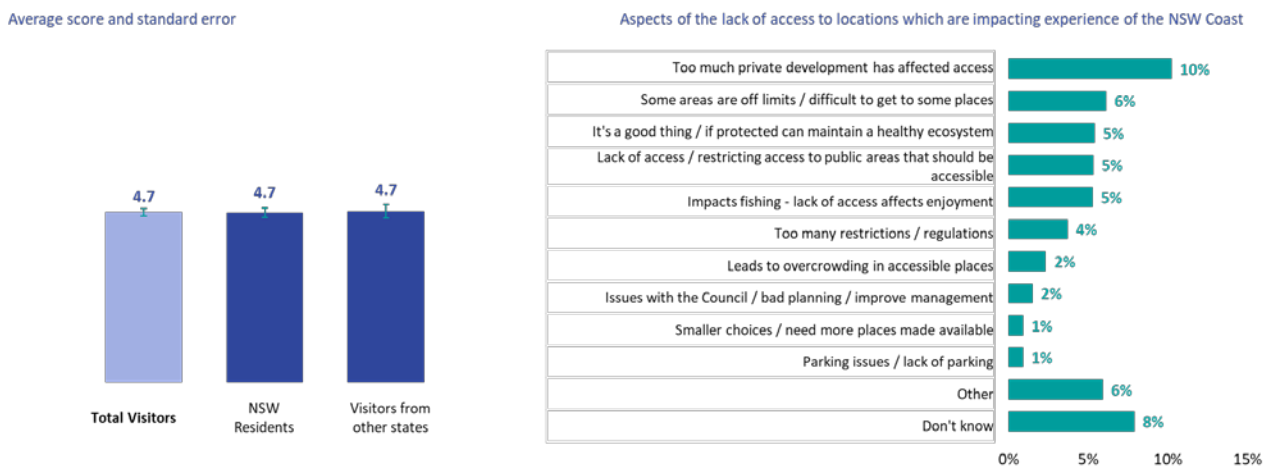
The following quotes describe aspects of this threat in more detail:

“More and more dev(e)lopment of coastlines have affected access to the remote and natural areas.”

“Environment protection areas limits access to some areas, however that is a positive in some locations to preserve the areas for future generations.”

“Private land ownership can impact enjoyment especially when you get diverted away from the shoreline etc(.) to move around privately held spaces.”

Figure 32. Lack of access to locations due to management (total visitors and visitor type) and aspects affecting experience



Average score and standard error chart

Base: Total visitors n = 1,046 | NSW Residents n = 705; Visitors from other states n = 341

Q19. How much of an impact do you think the following aspects currently have on your experience of the NSW coast in the past 12 months? Lack of access to locations due to management.

Aspects of lack of access to locations due to management which are impacting experience of the NSW coast

Base: Total visitors coded respondents for Q20_Lack of access to locations due to management n = 197

Q20. Please describe in more detail how the following aspects you selected have impacted your experience. Lack of access to locations due to management.

Not enough coastal infrastructure

Figure 33 breaks down the ratings of the level of impact that not enough coastal infrastructure had on Coastal Visitors’ experience of the NSW coast by visitor type. There were no meaningful differences in mean score by Visitor type.

Coastal Visitors reported that their experience of the NSW coast had been impact by there not being enough coastal infrastructure – the aspects most commonly cited by Coastal Visitors were ‘not enough ramps / need better ramps’ and that this ‘leads to overcrowding / too busy / have to wait a long time’ (both 10%).

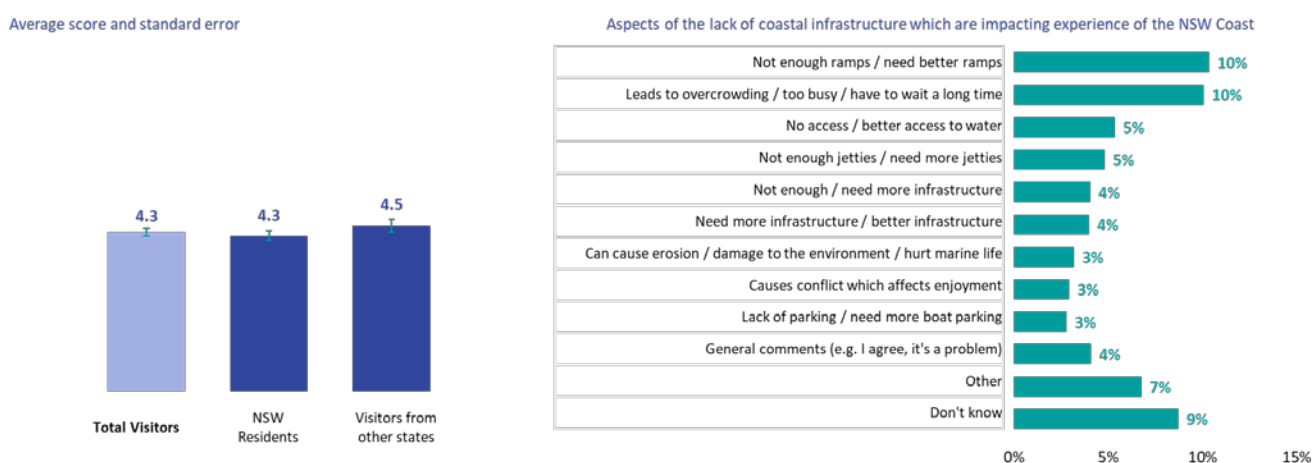
The following quotes describe aspects of this threat in more detail:

“Big increase of visitors to the coast leads to long waits and not enough parking at existing infrastructure.”

“More boat ramps are needed to provide easy safe access to a growing population.”

“Boats cluster together, queue for ramps, increase noise and pollution.”

Figure 33. Not enough coastal infrastructure (total visitors and visitor type) and aspects affecting experience



Average score and standard error chart

Base: Total visitors n = 1,050 | NSW Residents n = 709; Visitors from other states n = 341

Q19. How much of an impact do you think the following aspects currently have on your experience of the NSW coast in the past 12 months? Not enough coastal infrastructure.

Aspects of Not enough coastal infrastructure which are impacting experience of the NSW coast

Base: Total visitors coded respondents for Q20_Not enough coastal infrastructure n = 217

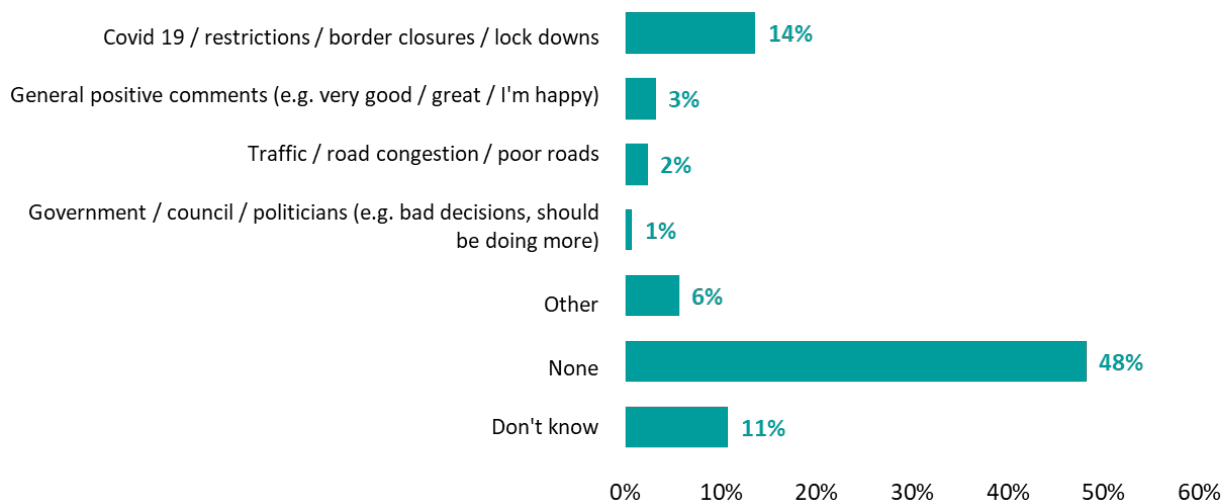
Q20. Please describe in more detail how the following aspects you selected have impacted your experience. Not enough coastal infrastructure.

Other aspects impacting experience of the NSW coast

Coastal Visitors were asked if there were any other aspects or functions that were having a severe impact on their experience of their local coastal areas in the past 12 months (Figure 34).

Nearly one in 2 (48%) said there were no other aspects or functions having a severe level of impact on their experience of the NSW coast. The most commonly reported impact was COVID-19 related restrictions, mentioned by 14% of Coastal Visitors.

Figure 34. Other aspects severely impacting experience of the NSW coast



Base: Total coded respondents for Q20A n = 686

Q20A. Which other aspects or functions, if any, do you think has been having a severe impact on your experience of the NSW coast in the past 12 months?

Note: Non-relevant codes that were the same as those listed in Q20 (e.g. Climate change) have not been included.

2.9 Importance of managing different aspects of the NSW marine estate

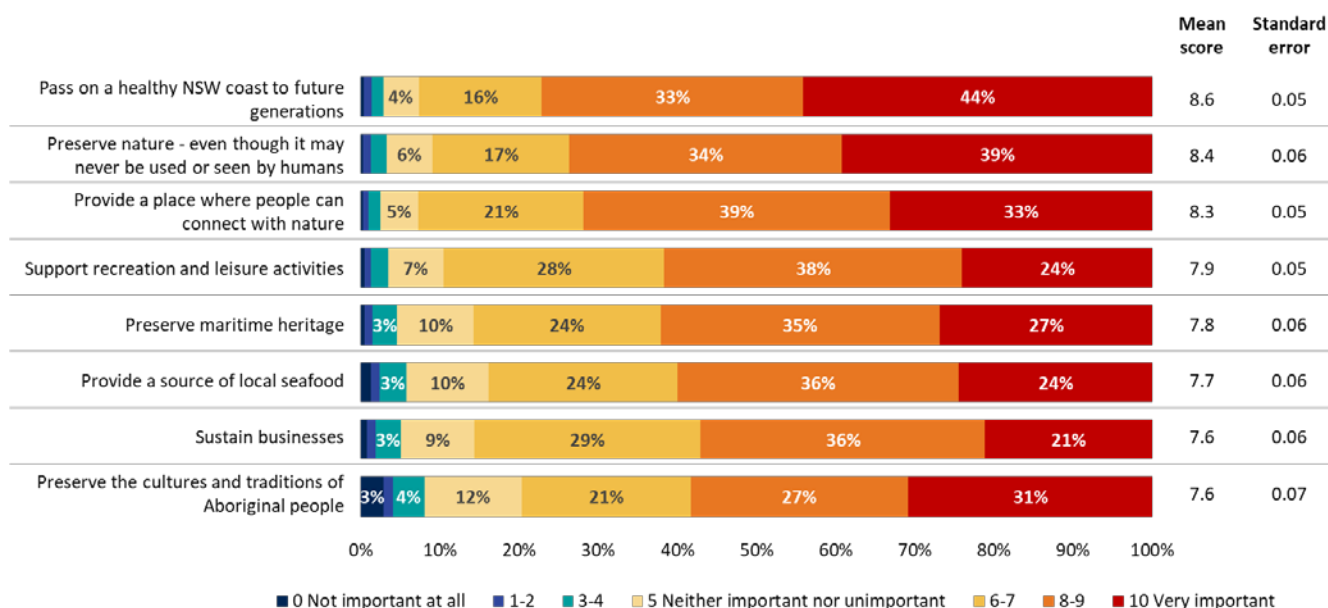
Coastal Visitors were presented with a list of important reasons for managing the NSW coast and were asked to rate the importance of each aspect on a scale from 0 'Not important at all' to 10 'Very important' (Figure 35).

Most Coastal Visitors thought all aspects for managing the NSW coast were relatively important with a mean score of at least 7.6 (ranging up to 8.6).

The 3 aspects perceived as most important centred around ensuring the health of the natural environment was maintained were as follows:

- Pass on a healthy NSW coast to future generations (8.6)
- Preserve nature – even though it may never be used or seen by humans (8.4)
- Provide a place where people can connect with nature (8.3).

Figure 35. Perceived importance of managing different aspects of the coast



Base: Total Visitors n = 1,146

Q16. There are many important reasons for managing the NSW coast, some of which are listed below. Thinking about your personal preference, how would you rate the importance of each aspect?

Visitor type differences

There were no meaningful differences by Visitor type.

Subgroup differences

Coastal Visitors aged 50+ placed higher levels of importance compared to other regions on the following aspects (Table 14):

- Pass on a healthy NSW coast to future generations (9.0)
- Preserve nature – even though it may never be used or seen by humans (8.6)
- Preserve maritime heritage (8.1)
- Provide a source of local seafood (8.0)
- Sustain businesses (7.9).

There were no meaningful differences dependant on CALD status.

Table 14. Perceived importance of managing different aspects of the coast (total visitors, visitor type and subgroup level)

	Mean score							
	Total Visitors	Visitor type		Age			CALD status	
		NSW Residents	Visitors from other states	18-29	30-49	50+	CALD	Non-CALD
Base	1146	775	371	277	414	455	214	912
Pass on a healthy NSW coast to future generations	8.6	8.6	8.4	8.4	8.2 ▼	9.0 ▲	8.4	8.6
Preserve nature - even though it may never be used or seen by humans	8.4	8.4	8.3	8.2	8.2	8.6 ▲	8.3	8.4
Provide a place where people can connect with nature	8.3	8.4	8.1	8.2	8.2	8.5	8.3	8.3
Support recreation and leisure activities	7.9	8.0	7.7	7.7	7.8	8.0	7.9	7.9
Preserve maritime heritage	7.8	7.9	7.7	7.6	7.8	8.1 ▲	7.7	7.9
Provide a source of local seafood	7.7	7.7	7.6	7.3 ▼	7.6	8.0 ▲	7.5	7.7
Preserve the cultures and traditions of Aboriginal people	7.6	7.7	7.5	7.9	7.6	7.5	7.7	7.6
Sustain businesses	7.6	7.6	7.6	7.4	7.5	7.9 ▲	7.5	7.7

Base: Total visitors n = 1,146

Q16. How would you rate the importance of each aspect?

2.10 Awareness and perception of marine estate management

2.10.1 Awareness of key terminology

Marine estate

Coastal Visitors were asked about their awareness of the term 'marine estate' (Figure 36). Nearly half (47%) of Coastal Visitors were not aware of the term 'marine estate' while 38% were aware.

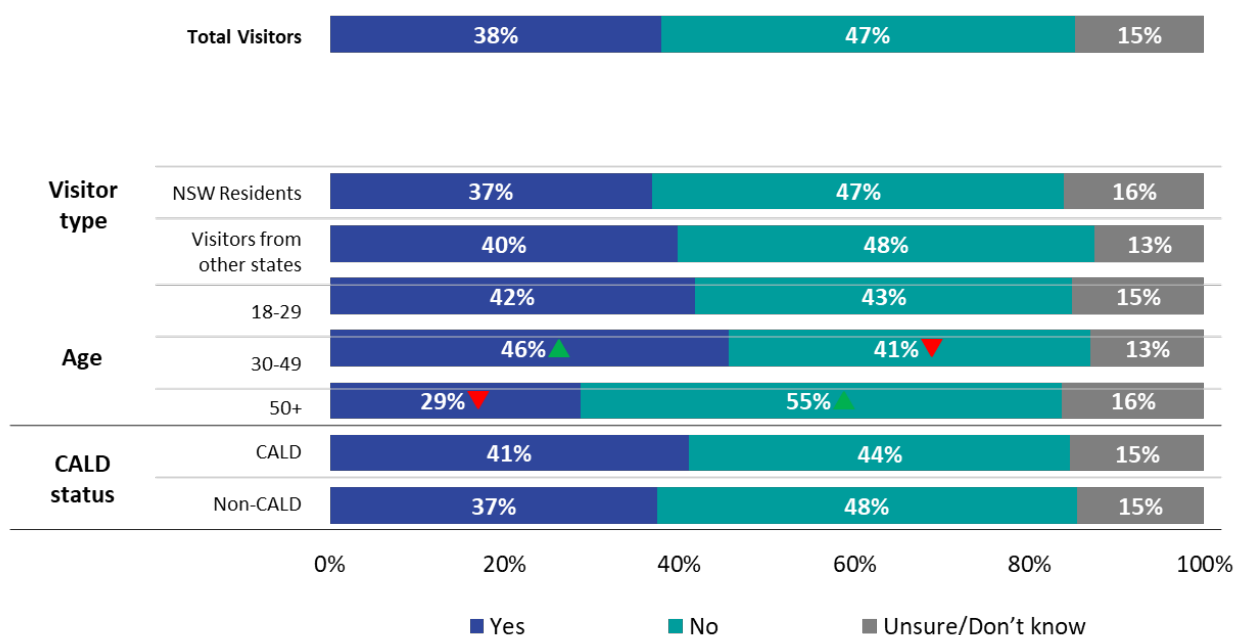
Visitor type differences

There were no meaningful differences by Visitor type.

Subgroup differences

Coastal Visitors aged 30–49 were more likely to be aware of the term, with nearly half (46%) being aware. In contrast, those aged 50+ were less likely to be aware of the term with less than one in 3 being aware. There were no meaningful differences dependant on CALD status.

Figure 36. Awareness of the term marine estate (total visitors, visitor type and subgroup level)



Base: Total visitors n = 1,146 | NSW Residents n = 775; Visitors from other states n = 371; 18–29 years n = 277; 30–49 years n = 414; 50+ years n = 455; CALD n = 214; non-CALD n = 912.

Q2. Before today, had you heard of the following terms? ‘marine estate’.

Sea Country

Coastal Visitors surveyed were also asked about their awareness of the term ‘Sea Country’ (Figure 37). Awareness of the term ‘Sea Country’ was lower than the awareness for the previously mentioned term ‘marine estate’ (38% aware of marine estate, 29% aware of Sea Country).

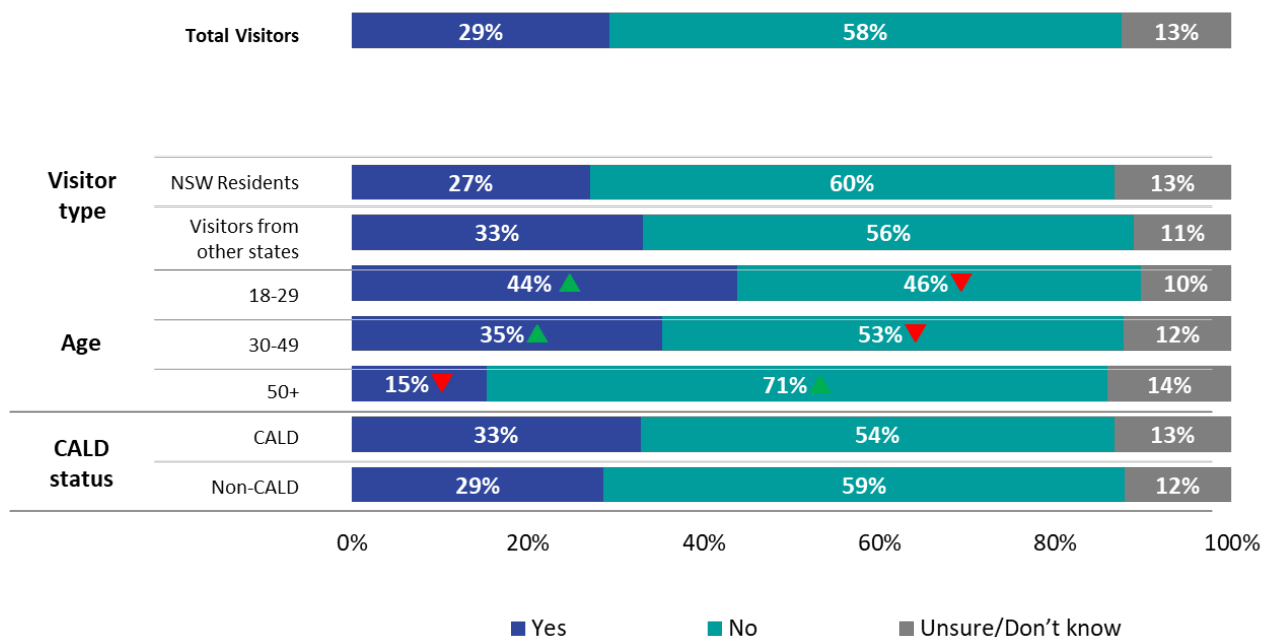
Visitor type differences

There were no meaningful differences by Visitor type.

Subgroup differences

Similar to the findings on ‘marine estate’, Coastal Visitors aged 50+ were less likely to be aware (15%) of the term compared to the other age groups (44% for 18–29 year olds and 35% for 30–39 year olds). There were no meaningful differences dependant on CALD status.

Figure 37. Awareness of the term Sea Country (total visitors, visitor type and subgroup level)



Base: Total visitors n = 1,146 | NSW Residents n = 775; Visitors from other states n = 371; 18–29 years n = 277; 30–49 years n = 414; 50+ years n = 455; CALD n = 214; non-CALD n = 912

Q2. Before today, had you heard of the following terms? ‘Sea Country’.

2.10.2 Awareness of the Marine Estate Management Authority

Coastal Visitors surveyed were also asked about their awareness of the Marine Estate Management Authority (MEMA), an authority that advises the NSW Government on the management of the NSW coast (Figure 38).

Awareness of MEMA was very low, with around one in 10 Coastal Visitors (12%) reporting they were aware of the Marine Estate Management Authority (MEMA).

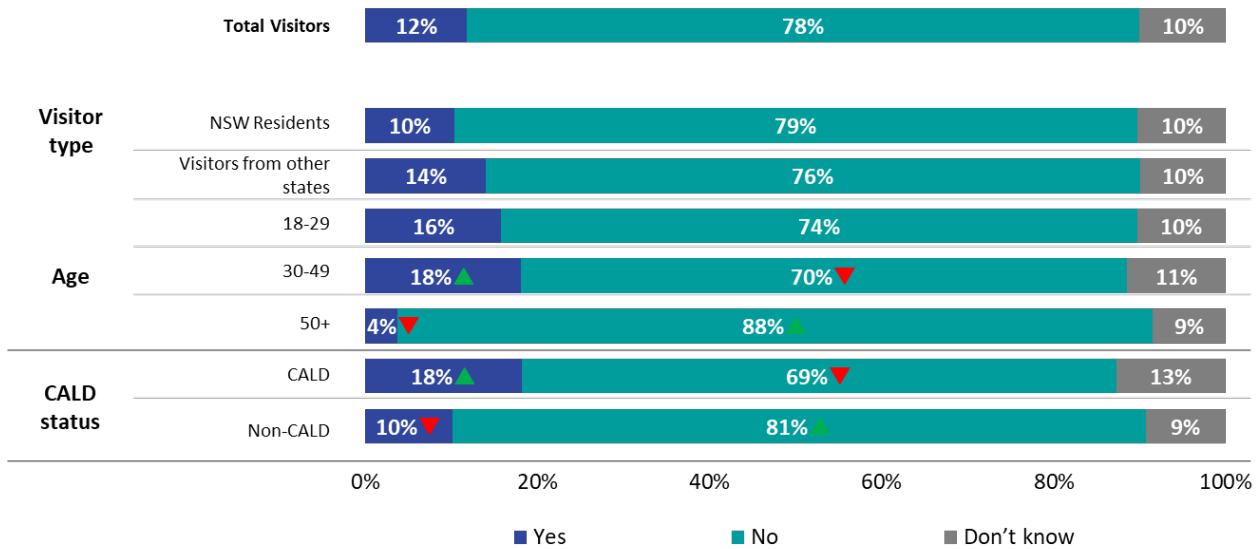
Visitor type differences

There were no meaningful differences by visitor type.

Subgroup differences

In line with awareness of ‘marine estate’, Coastal Visitors aged 50 years+ were least likely to be aware of MEMA (4%), and those aged 30–49 years were most likely (18%). Coastal Visitors from a CALD background (18%) were more likely to be aware than those from a non-CALD background (10%).

Figure 38 Awareness of MEMA (total visitors, visitor type and subgroup level)



Base: Total visitors n = 1,146 | NSW Residents n = 775; Visitors from other states n = 371; 18–29 years n = 277; 30–49 years n = 414; 50+ years n = 455; CALD n = 214; non-CALD n = 912

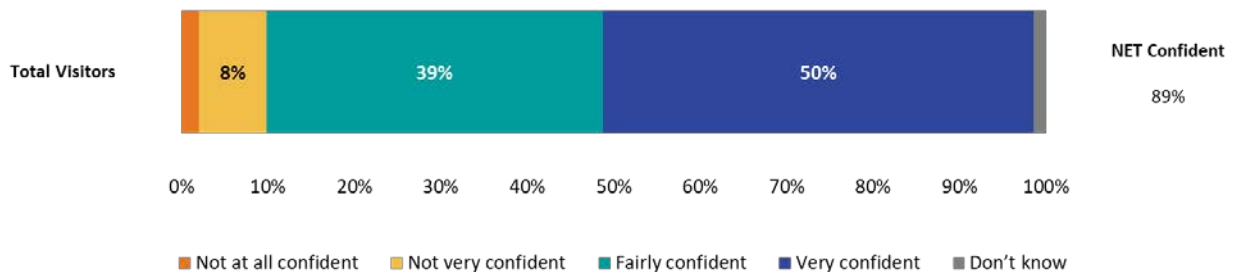
Q23. Before today, had you heard of the Marine Estate Management Authority (MEMA)?

2.10.3 Trust in the NSW Government

Coastal Visitors who were aware of MEMA were then asked how confident they were that the NSW Government was on track to achieve the vision of “A healthy coast and sea, managed for the greatest wellbeing of the community, now and into the future” (Figure 39).

Most Coastal Visitors were confident that the NSW Government would be able to achieve this vision (89%).

Figure 39. Trust in the NSW Government to achieving vision



Base: Those aware of MEMA n = 133

Q24. How confident are you that the NSW Government is on track to ensure this vision is achieved?

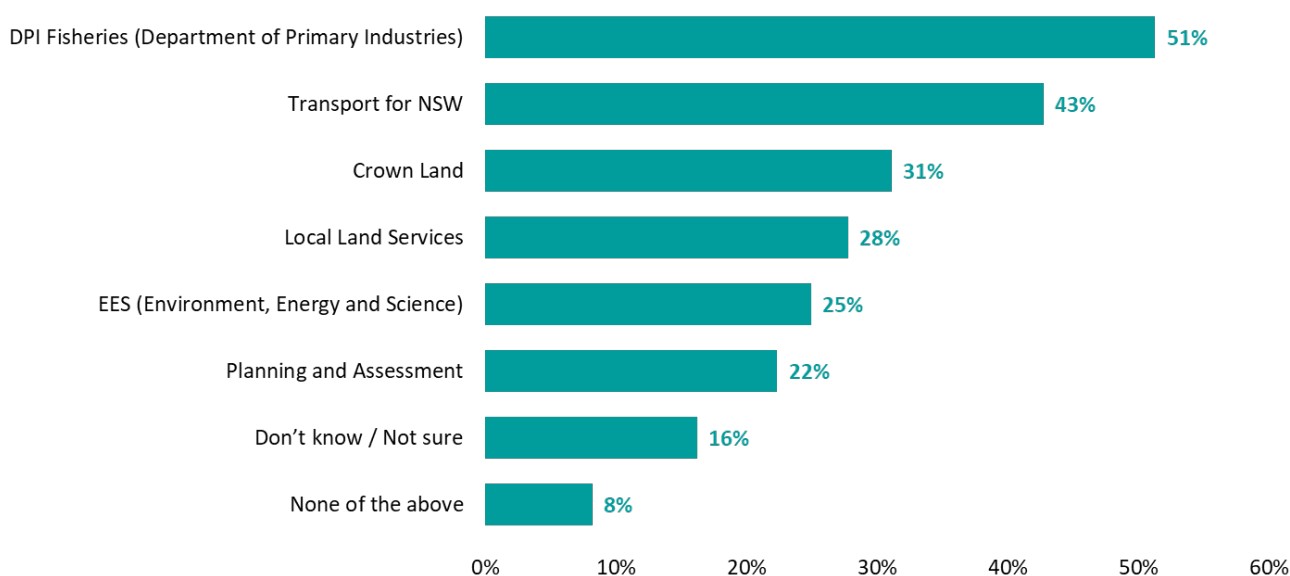
Note: Low base sizes for regions and subgroups, therefore proportions are not shown.

2.10.4 Awareness of NSW Government agencies and authorities managing the NSW marine estate

Coastal Visitors were presented with a range of agencies and authorities that manage the NSW coast and were asked which of the prompted agencies or authorities they were aware of (Figure 40).

Around half (51%) of Coastal Visitors were aware of Department of Primary Industries (DPI Fisheries), this was followed by Transport for NSW (43%) and Crown Land (31%).

Figure 40. Awareness of government agencies and authorities managing the NSW coast



Base: Total Visitors n = 1,146

Q21. Which, if any, of the following NSW Government agencies or authorities that manage the NSW coast are you aware of?

Visitor type differences

Awareness of DPI Fisheries (Table 15) was higher for NSW Residents, with around half (54%) reporting awareness, while Visitors from other states were less likely to be aware (45%). NSW Residents were also more likely to be aware of Crown Land (34%), with Visitors from other states being less likely to be aware of almost all agencies.

Subgroup differences

Similar results were observed among Coastal Visitors from a non-CALD background, who were also more likely to be aware of DPI (Fisheries) (54%) and Crown Land (34%), while Visitors from a CALD background were less likely to be aware.

Table 15. Awareness of government agencies and authorities managing the NSW coast (Total Visitors, Visitor type and subgroup level)

	Total Visitors	Visitor type		Age			CALD status	
		NSW Residents	Visitors from other states	18-29	30-49	50+	CALD	Non-CALD
Base	1,146	775	371	277	414	455	214	912
DPI Fisheries (Department of Primary Industries)	51%	54%▲	45%▼	31%▼	42%▼	72%▲	39%▼	54%▲
Transport for NSW	43%	46%▲	36%▼	44%	38%	46%	43%	43%
Crown Land	31%	34%▲	26%▼	14%▼	25%▼	47%▲	21%▼	34%▲
Local Land Services	28%	30%	23%▼	25%	26%	30%	24%	29%
EES (Environment, Energy and Science)	25%	26%	23%	19%▼	26%	27%	26%	25%
Planning and Assessment	22%	25%	18%▼	16%▼	23%	25%	25%	22%
Don't know / Not sure	16%	16%	17%	16%	18%	15%	19%	15%
None of the above	8%	6%▼	12%▲	13%▲	11%	3%▼	9%	8%

Base: Total visitors n = 1,146

Q21. Which, if any, of the following NSW Government agencies or authorities that manage the NSW coast are you aware of?

2.10.5 Knowledge of government agencies' responsibilities

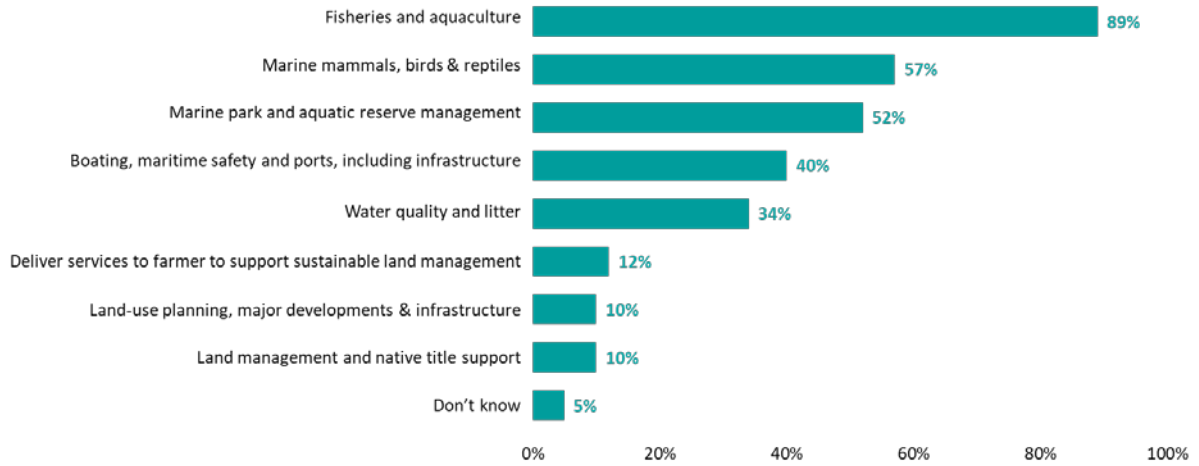
Those Coastal Visitors who were aware that a particular agency was involved in the management of the NSW coast were then asked about their knowledge of the responsibilities of that agency.

Department of Primary Industries - Fisheries

DPI-Fisheries is primarily responsible for managing fisheries and aquaculture as well as marine park and aquatic reserve management (Figure 41). A large proportion of Coastal Visitors (89%) correctly thought DPI were responsible for managing fisheries and aquaculture, and marine park and aquatic reserve management (52%).

Figure 41. Knowledge of DPI Fisheries responsibilities

DPI Fisheries



Base: Those aware of DPI Fisheries n = 589.

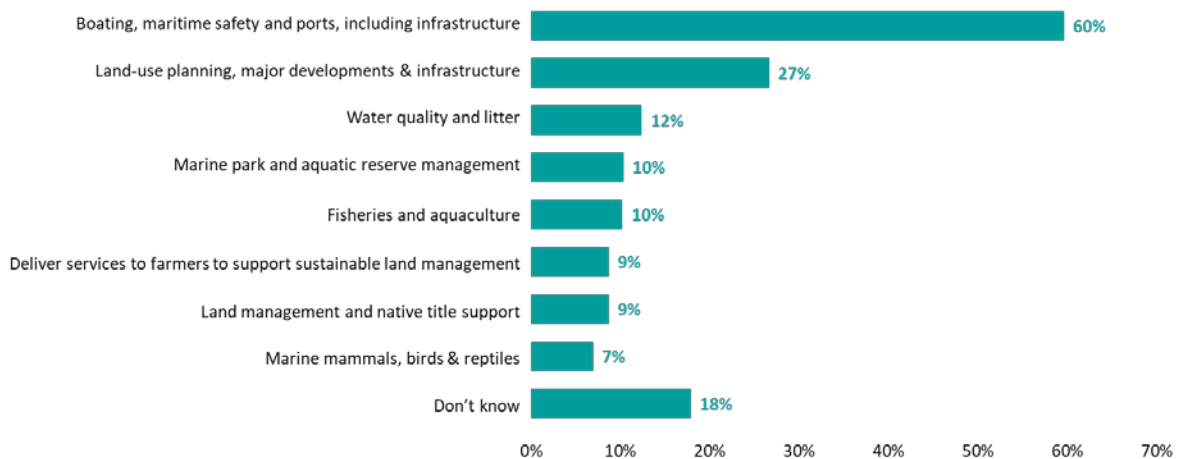
Q22. To the best of your knowledge, what do you think DPI Fisheries is responsible for managing?

Transport for NSW

Transport for NSW is primarily responsible for managing boating, maritime safety and ports, including infrastructure (Figure 42). Three in 5 Coastal Visitors (60%) correctly identified this.

Figure 42. Knowledge of Transport for NSW responsibilities

Transport for NSW



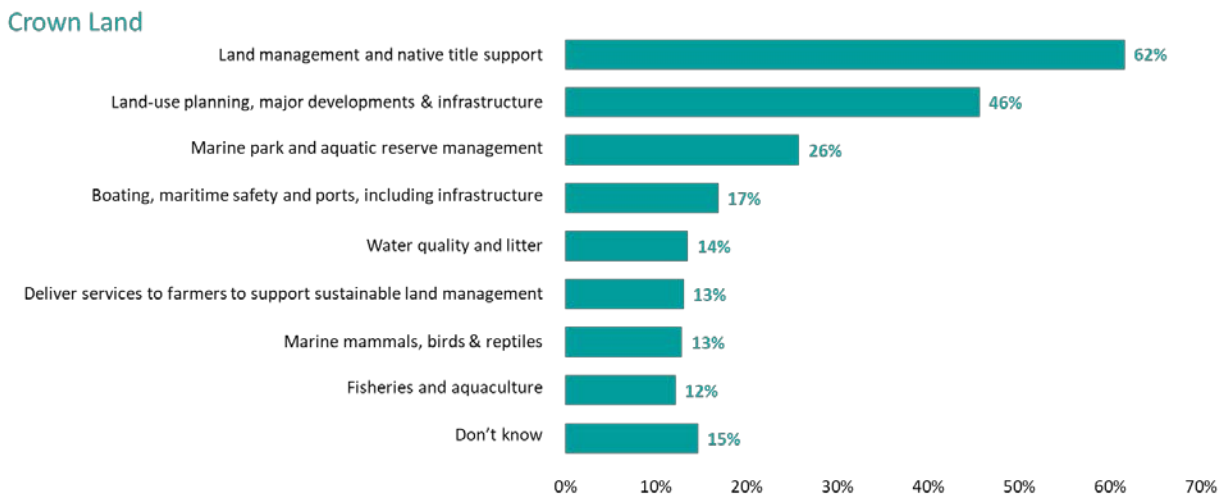
Base: Those aware of Transport NSW n = 493.

Q22. To the best of your knowledge, what do you think Transport for NSW is responsible for?

Crown Land

Crown Land is primarily responsible for land management and native title support (Figure 43). Over 3 in 5 Coastal Visitors (62%) correctly identified this.

Figure 43. Knowledge of Crown Land responsibilities



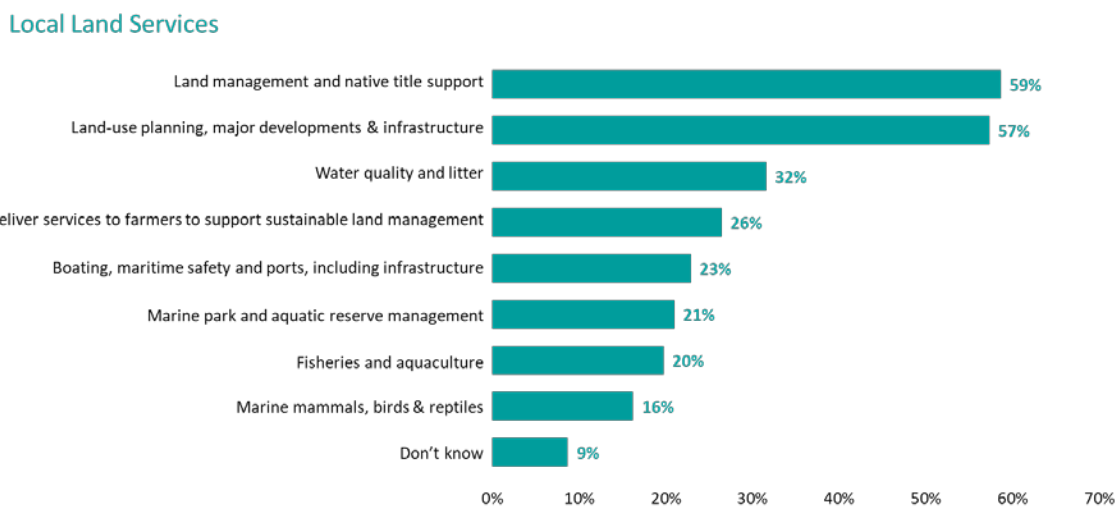
Base: Those aware of Crown Land n = 357.

Q22. To the best of your knowledge, what do you think Crown Land is responsible for?

Local Land Services

Local Land Services is primarily responsible for delivering services to farmers to support sustainable land management (Figure 44). Only 26% of Coastal Visitors correctly identified this.

Figure 44. Knowledge of Local Land Services responsibilities



Base: Those aware of Local Land Services n = 321

Q22. To the best of your knowledge, what do you think Local Land Services is responsible for?

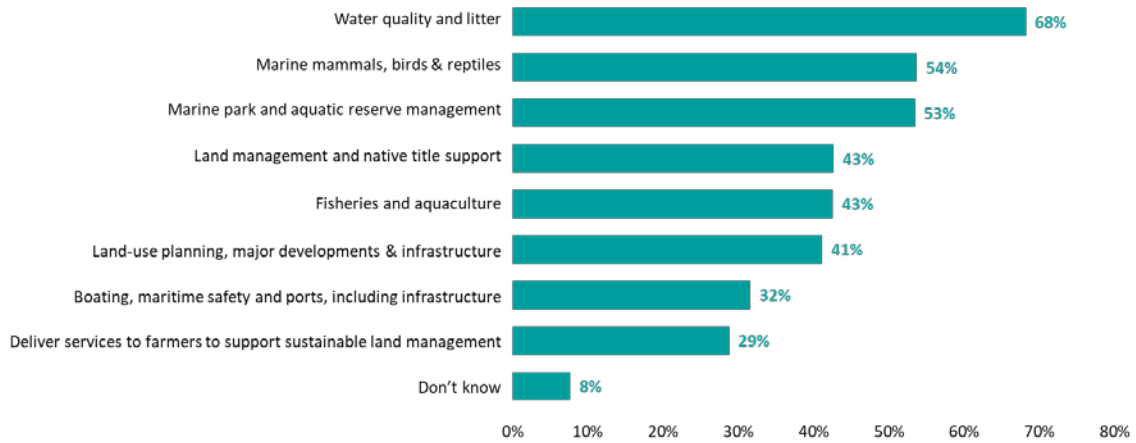
EES (Environment, Energy and Science)

The Environment, Energy and Science Group is part of the Department of Planning and Environment and is primarily responsible in the NSW marine estate for water quality and litter, marine mammals, birds and reptiles (Figure 45). Around two-thirds (68%) of Coastal Visitors thought that EES is responsible for water quality and

litter, with just over half (54%) reporting it is responsible for marine mammals, birds and reptiles. A similar amount (53%) of Coastal Visitors also thought that EES is responsible for marine park and aquatic reserve management.

Figure 45. Knowledge of ESS (Environment, Energy, and Science) responsibilities

EES



Base: Those aware of EES n = 287.

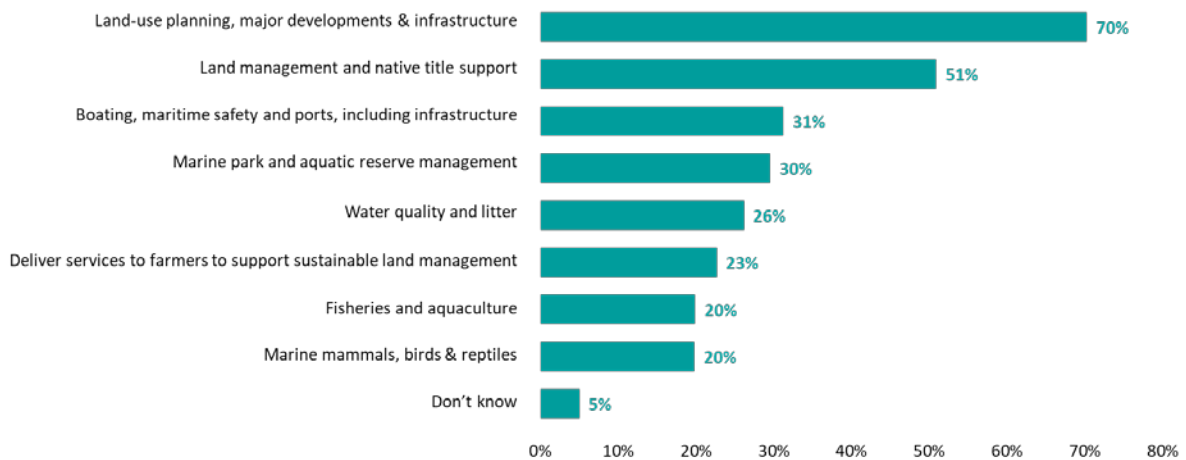
Q22. To the best of your knowledge, what do you think EES is responsible for?

Planning and Assessment

The Department of Planning and Assessment is primarily responsible for land-use planning, major developments, and infrastructure (Figure 46). The majority of Coastal Visitors correctly identified this (70%).

Figure 46. Knowledge of Planning and Assessment responsibilities

Planning and Assessment



Base: Those aware of Planning and Assessment n = 256.

Q22. To the best of your knowledge, what do you think Planning and Assessment is responsible for?

2.11 Life satisfaction

Coastal Visitors were asked to rate their general satisfaction with life on a scale from 0 (no at all satisfied) to 10 (very satisfied). This question measures a person’s overall wellbeing using the Global Life Satisfaction measure, widely used in Australian and international wellbeing surveys (Figure 47).

Coastal Visitors were satisfied with their life as a whole, with an average rating of 7.3.

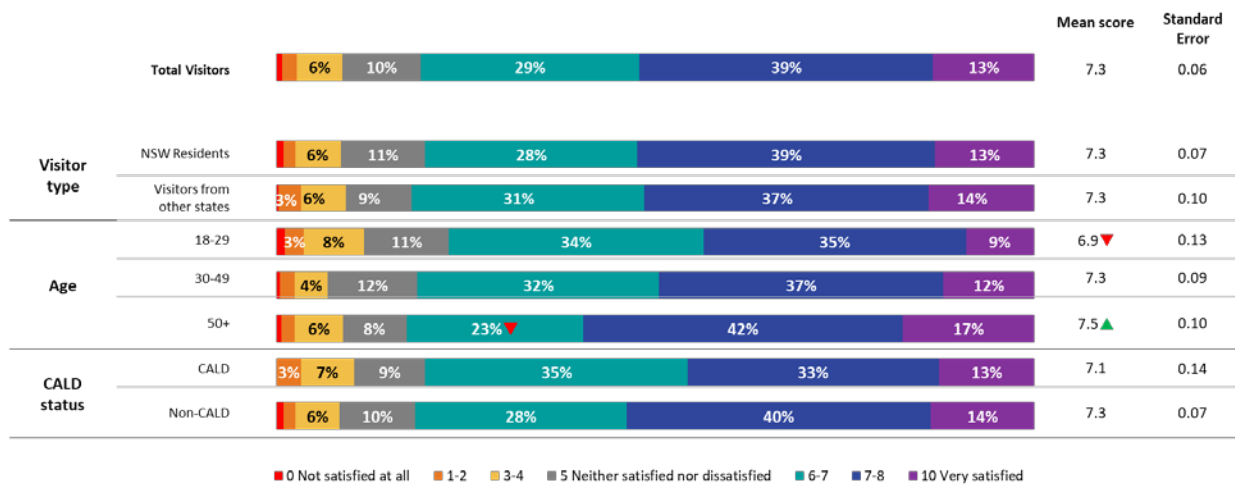
Visitor type differences

There were no meaningful differences by Visitor type.

Subgroup differences

Coastal Visitors aged 50 years + reported a higher life satisfaction with an average score of 7.5, while those aged 18–29 years reported a lower life satisfaction, with an average score of 6.9. There were no meaningful differences dependant on CALD status.

Figure 47. Satisfaction with life as a whole (total visitors, visitor type and subgroup level)



Base: Total visitors sample n = 1,146 | NSW Residents n = 775; Visitors from other states n = 371; 18–29 years n = 277; 30–49 years n = 414; 50+ years n = 455; CALD n = 214; non-CALD n = 912.

Q27. How satisfied are you with your life as a whole?

3 Appendices

3.1 Appendix A: Demographics

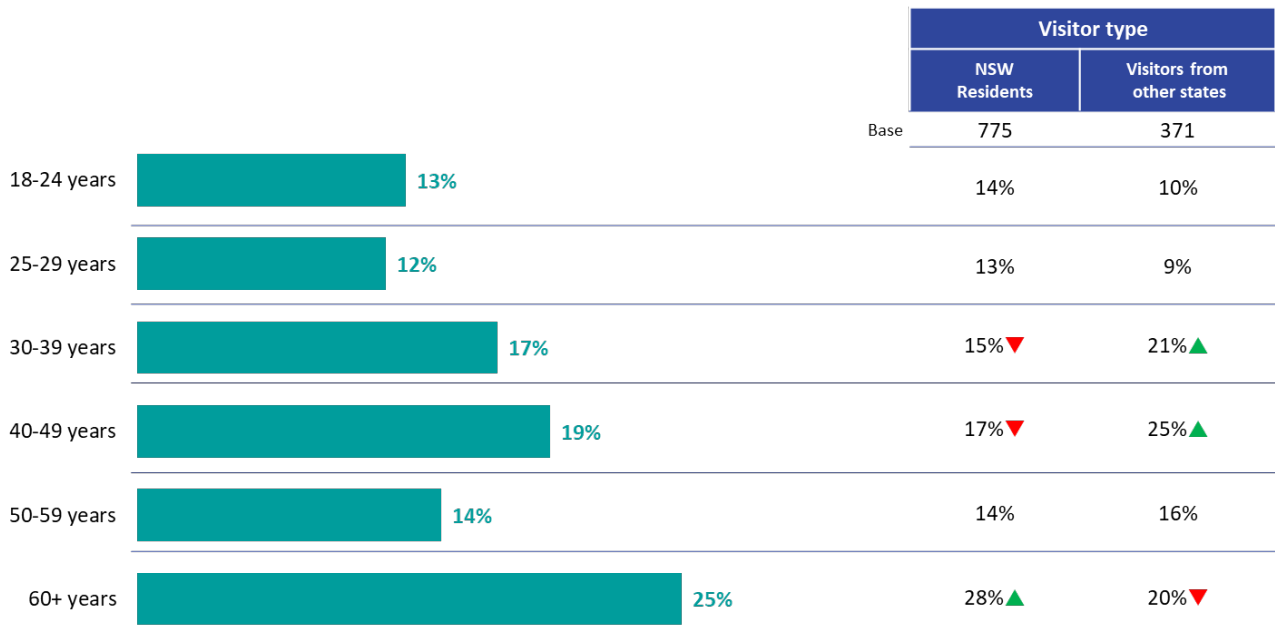
3.1.1 Age

Figure 48 shows the age distribution of the total sample and by Visitor type.

One-quarter (25%) of the total sample is aged 60+, while nearly one in 5 (19%) is aged 40–49 years and around one in 6 are aged 50–59 years. There are fewer in the younger age groups with around one in 8 respondents (13%) aged between 18 and 24 years and a similar proportion aged 25 – 29 years (12%).

Respondents who are classified as Visitors from other states are more likely to be aged 30–39 years (21%) or 40–49 years (25%) while they are less likely to be aged 60+ years (20%). In contrast, respondents who are classified as NSW Residents are more likely to be aged 60+ (28%) and less likely to be aged 30–39 years (15%) or 40–49 years (17%).

Figure 48. Age (Total Visitors and Visitor type)



Base: Total Visitors n = 1,146

SQ1. In which of the following age groups do you fall under?

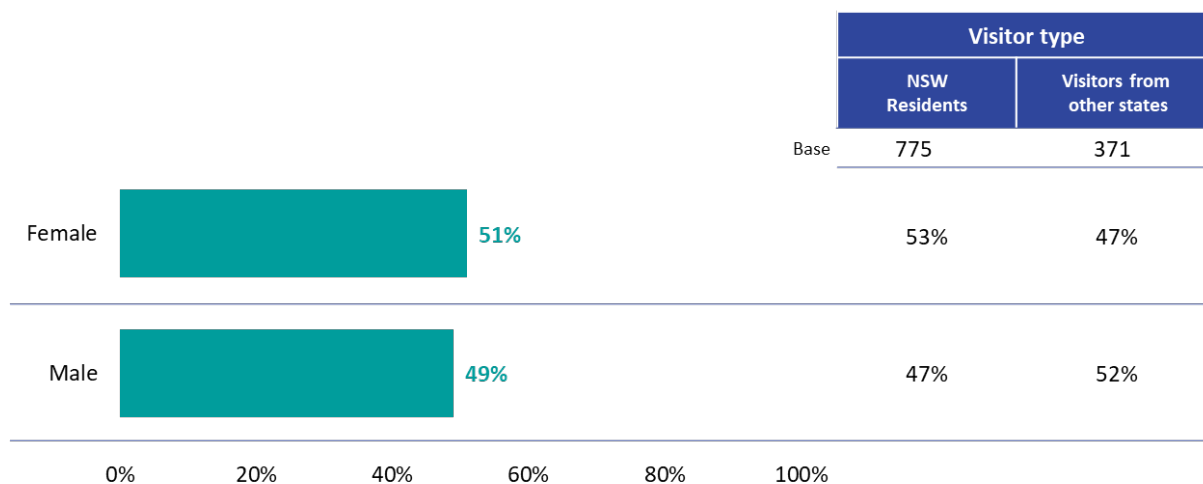
3.1.2 Gender

Figure 49 shows the gender distribution of the total sample and by Visitor type.

At a nationwide level the sample is equally split between male (49%) and female (51%).

This distribution is consistent at a regional level.

Figure 49. Gender (Total Visitors and Visitor type)



Base: Total Visitors n = 1,146

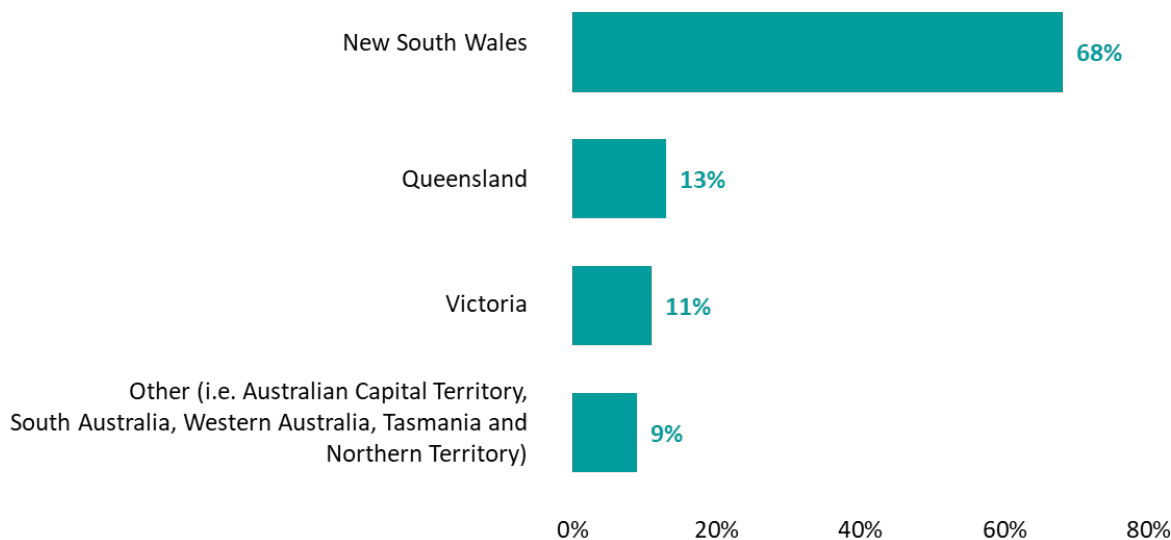
SQ2. What best describes your gender?

3.1.3 Location

Figure 50 shows the state of residency of the total sample.

Around two-thirds (68%) of the Coastal Visitors’ sample reside in NSW. 13% of Coastal Visitor’s reside in Queensland, 11% reside in Victoria while smaller proportions reside in the other states (Australian Capital Territory, South Australia, Western Australia, Tasmania, and the Northern Territory) (9%).

Figure 50. Location



Base: Total Visitors n = 1,146

SQ3. And what is the postcode where you live?

Note: Postcodes re-coded into correct state.

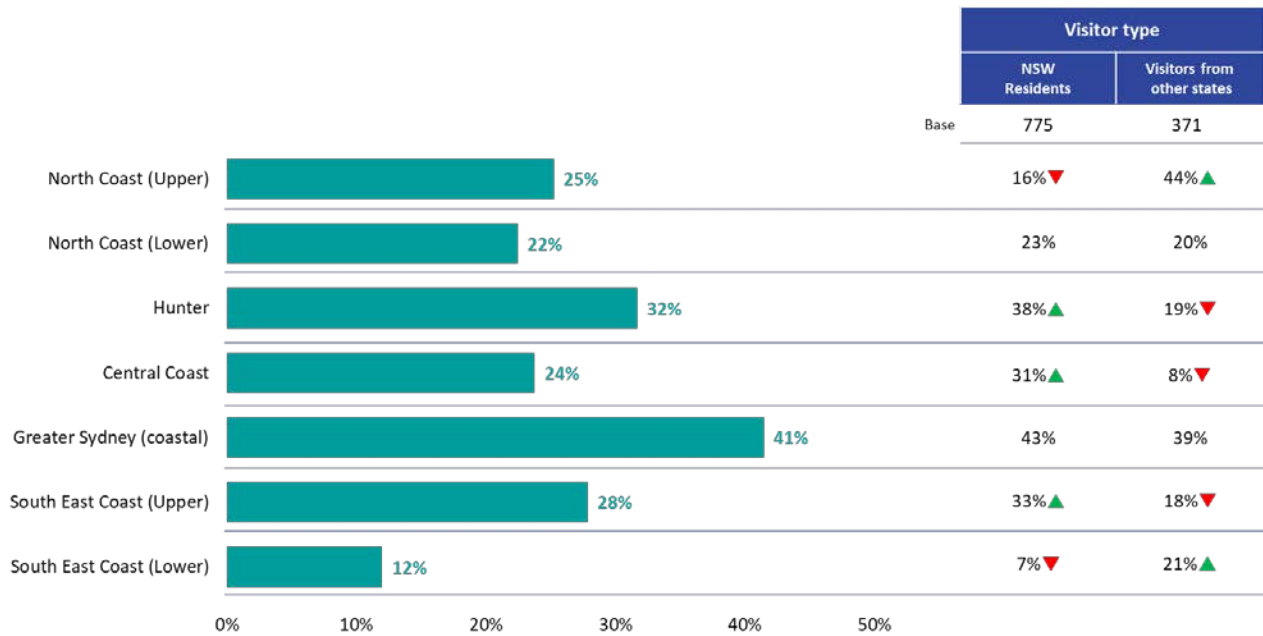
3.1.4 NSW Coastal regions visited in past 12 months

Figure 51 shows the proportion of Visitors who have visited each of the 7 NSW coastal regions in the 12 months prior to completing the survey, by the total sample and by Visitor type.

Around 2 in 4 (41%) respondents had visited the Greater Sydney (coastal) region, around one in 3 (32%) had visited the Hunter region, and a similar amount had visited the South East (Upper) region (28%). Around one in 4 had visited the regions of North Coast (Upper) (25%), Central Coast (24%) and North Coast (Lower) (22%), and the South Coast (Lower) was the least frequently visited, with just one in 9 respondents (12%) having visited.

NSW Residents were more likely to have visited the regions of the Hunter (38%), South East Coast (Upper) (33%) and Central Coast (31%). In contrast, Visitors from other states were more likely to have visited the coastal regions closest to the NSW border, namely North Coast (Upper) (44%) and South Coast (Lower) (21%).

Figure 51. NSW Coastal regions visited (total visitors and visitor type)



Base: Total Visitors n = 1,146

SQ6. In which of the following regions, if any, have you visited coastal locations in the past 12 months?

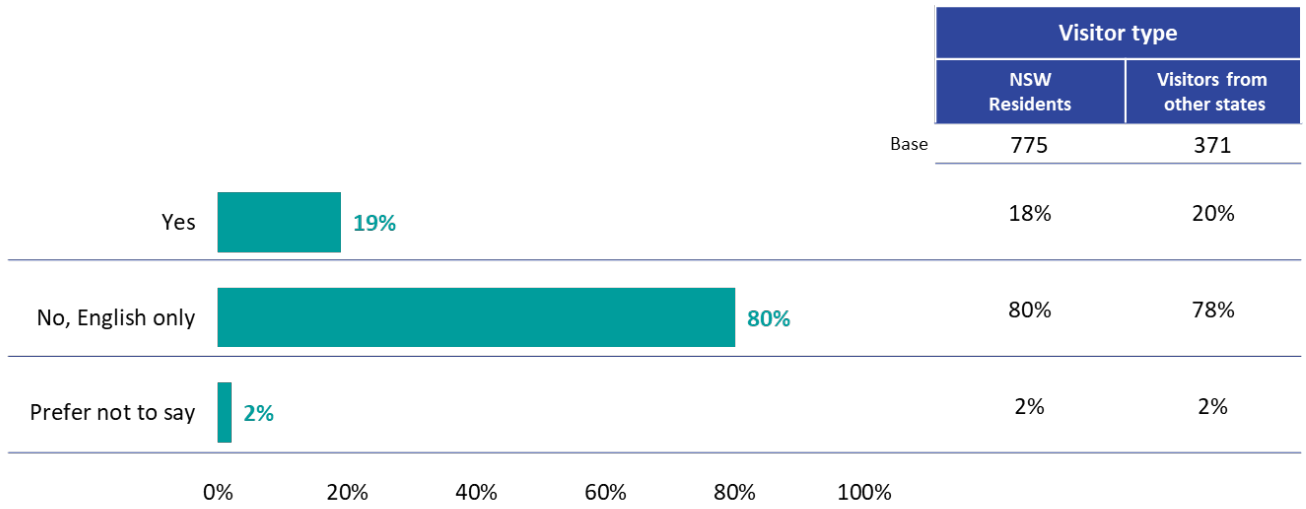
3.1.5 CALD background

Figure 52 shows the proportion of the total sample who speak another language than English at home, and by Visitor type.

Overall, nearly one in 5 respondents (19%) spoke another language than English at home and were therefore considered culturally and linguistically diverse (CALD) for reporting purposes.

This distribution is consistent by visitor type.

Figure 52. CALD background (total visitors and visitor type)



Base: Total Visitors n = 1,146

Q28. Do you or your parents mainly speak a language other than English?

3.2 Appendix B: Questionnaire

SECTION A: SCREENER AND PROFILING QUESTIONS

ASK RESIDENTS, VISITORS

SQ1 In which of the following age groups do you fall under?

{SINGLE}

[RECRUIT TO QUOTA]

HIGH (CONTEXTUAL). INDICATOR 23. DIMENSION 1

17 years or under [DISCONTINUE]	01
18–24 years	02
25–29 years	03
30–39 years	04
40–49 years	05
50–59 years	06
60+ years	07

[RECRUIT TO QUOTA IF FAIL: GO TO TERMINATION SCRIPT]

-----[NEW SCREEN]-----

ASK RESIDENTS, VISITORS

SQ2 What best describes your gender?

{SINGLE}

[RECRUIT TO QUOTA]

HIGH (CONTEXTUAL). INDICATOR 23. DIMENSION 1

Male	01
Female	02
Other [ASSIGN TO GENDER QUOTA AT RANDOM]	97
Prefer not to say [ASSIGN TO GENDER QUOTA AT RANDOM]	98

[RECRUIT TO QUOTA IF FAIL: GO TO TERMINATION SCRIPT]

-----[NEW SCREEN]-----

ASK RESIDENTS AND VISITORS

SQ3 And what is the postcode where you live?

HIGH (CONTEXTUAL). INDICATOR 23. DIMENSION 1

--	--	--	--

HQ1 RES [Hidden recode] RES from location **RECODE FROM SQ3**

Resident [AUTOCODE IF SQ3= QUALIFYING POSTCODE FOR RESIDENT]	01
Non-resident [AUTOCODE IF SQ3≠ QUALIFYING POSTCODE FOR RESIDENT]	02

[RECRUIT TO QUOTA **FOR RESIDENTS** IF FAIL: GO TO TERMINATION SCRIPT]

HQ2 OVLAPPOST OVERLAPPING POSTCODE [Hidden recode] from postcode **RECODE FROM SQ1**

Non-overlapping [AUTOCODE IF SQ3= NON-OVERLAPPING POSTCODE]	01
Overlapping [AUTOCODE IF SQ3= OVERLAPPING POSTCODE]	02

-----[NEW SCREEN]-----

ASK OVERLAPPING POSTCODES (HQ2=02)

SQ4 In which of the following suburbs do you live?

{SINGLE}

[PROMPT RELEVANT LIST OF SUBURBS BASED ON POSTCODE ENTERED AT SQ3]

[DROPDOWN LIST OF RELEVANT SUBURBS]

-----[NEW SCREEN]-----

HQ1 AUSLGAS [Hidden recode] AUSLGAS from postcode RECODE FROM SQ1 IF HQ2=01 AND SQ4 IF HQ2=02

Greater Sydney (coastal)	01
Greater Sydney (inland)	02
North Coast (Upper)	03
North Coast (Lower)	04
Hunter	05
Central Coast	06
South East Coast (Upper)	07
South East Coast (Lower)	08

[RECRUIT TO QUOTA **FOR RESIDENTS** IF FAIL: GO TO TERMINATION SCRIPT]

-----[NEW SCREEN]-----

ASK RESIDENTS

SQ5 Do you live within 5km's of the NSW coast (beach, bay or ocean)?

{SINGLE}

Yes, I live within 5km's of the coast	01
No, I live further than 5km's from the coast	02
Don't know [TERMINATE]	99

HQ2 RESB [Hidden recode] RESB from distance to the coast RECODE FROM SQ3 AND SQ5

Resident [AUTOCODE IF SQ3= QUALIFYING POSTCODE FOR RESIDENT AND SQ5=01]	01
Non-resident [AUTOCODE IF SQ3≠ QUALIFYING POSTCODE FOR RESIDENT OR (SQ3= QUALIFYING POSTCODE FOR RESIDENT AND SQ5=02)]	02

[RECRUIT TO QUOTA **FOR RESIDENTS** IF FAIL: GO TO TERMINATION SCRIPT]

-----[NEW SCREEN]-----

ASK NON-RESIDENTS (HQ4=02)

SQ6 In which of the following regions, if any, have you visited coastal locations in the past 12 months?

Please select all that apply, thinking about any **overnight** and **daytrip visits** you might have taken in the past 12 months prior to the recent travel restrictions imposed as a result of COVID-19 or Bushfires.

Please refer to the NSW map below if needed.



{MULTIPLE RESPONSE}
[RECRUIT TO QUOTA]

HIGH (CONTEXTUAL). INDICATOR 24

North Coast (Upper) (Tweed, Byron, Ballina, Richmond Valley, Clarence Valley Local Government Areas or LGAs)	01
North Coast (Lower) (Coffs Harbour, Bellingen, Nambucca Valley, Kempsey, Port Macquarie-Hastings LGAs)	02
Hunter (Mid-Coast, Port Stephens, Newcastle, and Lake Macquarie LGAs)	03
Central Coast (previously Gosford and Wyong LGAs)	04
Greater Sydney (coastal) (Northern Beaches, Willoughby, North Sydney, Woollahra, Inner West, Bayside, Waverly, Randwick, and Sutherland Shire LGAs)	05
South East Coast (Upper) (Wollongong, Shellharbour, Kiama and Shoalhaven LGAs)	06
South East Coast (Lower) (Eurobodalla and Bega Valley LGAs)	07
None of the above [TERMINATE]	97
Can't remember / not sure [TERMINATE]	98

HQ3 RESVIS [Hidden recode] RESVIS from location [RECODE FROM SQ6](#)

Resident [AUTOCODE IF HQ4=01]	01
Visitor [AUTOCODE IF SQ6=01-07]	02

HQ4 AUSSTATE [Hidden recode] AUSSTATE from postcode [RECODE FROM SQ1](#)

New South Wales	01
Victoria	02
Queensland	03
South Australia	04
Western Australia	05
Tasmania	06
Northern Territory	07
Australian Capital Territory	08

[\[RECRUIT TO QUOTA **FOR VISITORS** IF FAIL: GO TO TERMINATION SCRIPT\]](#)**SECTION B: AWARENESS AND BEHAVIOURS**[ASK RESIDENTS, VISITORS](#)

Q1 How often do you visit the following local coastal area(s)?

{SINGLE RESPONSE PER ROW}

FOR VISITORS PROMPT RESPONSES SELECTED AT SQ6

HIGH (CONTEXTUAL). INDICATOR 25

	Response	Daily	Weekly	Fortnightly	Monthly	3–6 times a year	1–2 times a year	Less often	Never
01	North Coast (Upper) (Tweed, Byron, Ballina, Richmond Valley, Clarence Valley Local Government Areas or LGAs)	01	02	03	04	05	06	07	08
02	North Coast (Lower) (Coffs Harbour, Bellingen, Nambucca Valley, Kempsey, Port Macquarie-Hastings LGAs)	01	02	03	04	05	06	07	08
03	Hunter (Mid-Coast, Port Stephens, Newcastle, and Lake Macquarie LGAs)	01	02	03	04	05	06	07	08
04	Central Coast (previously Gosford and Wyong LGAs)	01	02	03	04	05	06	07	08
05	Greater Sydney (coastal) (Northern Beaches, Willoughby, North Sydney, Woollahra, Inner West, Bayside, Waverly, Randwick, and Sutherland Shire LGAs)	01	02	03	04	05	06	07	08
06	South East Coast (Upper) (Wollongong, Shellharbour, Kiama and Shoalhaven LGAs)	01	02	03	04	05	06	07	08
07	South East Coast (Lower) (Eurobodalla and Bega Valley LGAs)	01	02	03	04	05	06	07	08

[NEW SCREEN]

ASK RESIDENTS, VISITORS

Q2 Before today, had you heard of the following terms?

{SINGLE RESPONSE PER ROW}

RANDOMISE ROWS

MEMS. KPI 13 AND LI 24. INDICATOR 31 AND 32. DIMENSION 2

	Response	Yes	No	Unsure/Don't know
01	<p>Sea country</p> <p>'Sea country' is a term used by Aboriginal people to describe areas associated with the sea or saltwater and includes islands, beaches, headlands, rocky shores, the ocean and estuaries.</p>	01	02	99
02	<p>Marine estate</p> <p>'Marine estate' is a term used by government to describe the coastal waters, estuaries, and coastal land of NSW.</p>	01	02	99

[NEW SCREEN]

INTRO TEXT

In the following questions, you will be asked about different aspects of the NSW coast and its impacts on your experience and personal wellbeing.

For the purpose of this survey, please consider the NSW coast to include the:

- ocean
- estuaries
- coastline (i.e. beaches, dunes and headlands)
- coastal wetlands (i.e. saltmarsh, mangroves and seagrass)
- coastal lakes and lagoons connected to the ocean islands, such as Lord Howe Island.

ASK RESIDENTS, VISITORS

Q3 Which, if any, of the following activities have you done in the past 12 months [SHOW IF RESIDENTS: in your local coastal area] [SHOW IF VISITORS: when you visited the NSW coast]?

{MULTIPLE RESPONSE}

RANDOMISE

HIGH (CONTEXTUAL). INDICATOR 27

Land-based exercise (e.g. walking, jogging, yoga, bike riding)	01
Paddle craft sports (e.g. canoeing, kayaking, SUPing)	02
Water sports (e.g. swimming, surfing, body boarding)	03
Beach going (e.g. going in the water, sun-bathing)	04
Recreational fishing (e.g. line, spear, hand collecting)	06
Snorkelling or SCUBA diving	07
Aboriginal Cultural activities (e.g. taking care of country, cultural fishing)	08
Recreational boating (e.g. motorcruising, sailing, waterskiing, PWC)	09
Wildlife or nature watching	10
Environmental work (e.g. conservation purposes, education, research)	11
Employment (e.g. commercial fishing and boating, tourism industry)	12
Picnicking, sightseeing, visiting coastal cafes	13
Other, please specify	96
None of these [EXCLUSIVE]	99

-----[NEW SCREEN]-----

ASK THOSE WHO HAVE DONE RECREATIONAL BOATING, Q3=09

Q4 What is the main vessel you use?

RANDOMISE

HIGH (CONTEXTUAL). INDICATOR 27

Personal Watercraft (e.g. jet ski)	01
Unpowered dinghy or row boat	02
Smaller powerboat (<4.8m long) [ANCHOR CODES 03 AND 04]	03
Larger powerboat (≥4.8m long) [ANCHOR CODES 03 AND 04]	04
Smaller sail boat (<4.8m long) [ANCHOR CODES 06 AND 07]	06
Larger sail boat (≥4.8m long) [ANCHOR CODES 06 AND 07]	07
Other, please specify	96
Don't know	99

-----[NEW SCREEN]-----

ASK THOSE WHO HAVE DONE RECREATIONAL BOATING, Q3=09

Q5 Which one of the following activities best describes the main reason why you use this vessel?

RANDOMISE

Recreational fishing (e.g. line, spear)	01
Snorkelling or SCUBA diving	02
Towing activities (e.g. waterskiing, wakeboarding)	03
Wildlife or nature watching	04
Cruising, sightseeing	06
Other, please specify	96
Don't know	99

-----[NEW SCREEN]-----

ASK RESIDENTS, VISITORS WHO DO AT LEAST ONE OF THE PROMPTED ACTIVITIES (Q3≠99) OR WHO SELECTED MORE THAN ONE RESPONSE AT Q3

IF SELECTED ONLY ONE RESPONSE, AUTO-CODE Q6 WITH Q3 RESPONSE

Q6 What is your main activity?

{SINGLE}

ONLY PROMPT CODE(S) SELECTED AT Q3

HIGH (CONTEXTUAL). INDICATOR 2

Land-based exercise (e.g. walking, jogging, yoga, bike riding)	01
Paddle craft sports (e.g. canoeing, kayaking, SUPing)	02
Water sports (e.g. swimming, surfing, body boarding)	03
Beach going (e.g. going in the water, sun-bathing)	04
Recreational fishing (e.g. line, spear, hand collecting)	06
Snorkelling or SCUBA diving	07
Aboriginal Cultural activities (e.g. taking care of country, cultural fishing)	08
Recreational boating (e.g. motorcruising, sailing, waterskiing, PWC)	09
Wildlife or nature watching	10
Environmental work (e.g. conservation purposes, education, research)	11
Employment (e.g. commercial fishing and boating, tourism industry)	12
Picnicking, sightseeing, visiting coastal cafes	13
Other, please specify	96

-----[NEW SCREEN]-----

ASK RESIDENTS

Q7 Which, if any, of the following have you done in the past 12 months?

{MULTIPLE RESPONSE}

RANDOMISE. ANCHOR 'UNDERTAKEN ANY OTHER VOLUNTARY ACTIVITY' TO THE BOTTOM

HIGH. INDICATOR 42. DIMENSION 2

Cleaned up litter in a public space	01
Tried to limit your energy use for environmental reasons (e.g. turned off lights, taken public transport or rode a bike instead of driving a car)	02
Been a member of a group or organisation that takes action to improve the health of the NSW coast	03
Encouraged others to change something you thought was harmful to the NSW coastal environment (e.g. emailed a local member, signed a petition, attended a meeting)	04
Tried to get information on an environmental topic relevant to the NSW coast	05
Reported illegal behaviour (i.e. something that breaks the rules for using the NSW coast)	06
Participated in any other voluntary activity that benefits the NSW coastal environment, please specify:	07
None of these [EXCLUSIVE]	99

-----[NEW SCREEN]-----

ASK RESIDENTS, VISITORS

Q8 And how often, if at all, have you done the following in the past 12 months?

{SINGLE RESPONSE PER ROW}

RANDOMISE

KPI15. INDICATOR 40. DIMENSION 2

	Response	Always	Often	Sometimes	Rarely	Never	Don't know	Not applicable
01	Disposed of rubbish appropriately	01	02	03	04	05	98	99
02	Taken care to reduce erosion and minimise use of fertiliser and garden chemicals	01	02	03	04	05	98	99
03	Followed rules and guidelines to minimise disturbance to coastal and marine wildlife (e.g. walking dogs on designated dog beaches, following approach distances for whales).	01	02	03	04	05	98	99
04	Followed rules for recreational fishing (e.g. bag and size limits, safety guidelines)	01	02	03	04	05	98	99
05	Followed rules for recreational boating (e.g. anchoring restrictions, safety guidelines)	01	02	03	04	05	98	99
06	Been mindful not to impact the enjoyment of others when using the NSW coast	01	02	03	04	05	98	99

[NEW SCREEN]

ASK RESIDENTS, VISITORS

Q9 How concerned are you about the following?

{SINGLE RESPONSE PER ROW}

RANDOMISE ROWS

HIGH. INDICATOR 36 AND 37. DIMENSION 2

	Response	Extremely concerned	Moderately concerned	Somewhat concerned	Slightly concerned	Not at all concerned
01	Global environmental problems (e.g. climate change, deforestation, loss of biodiversity, pollution)	05	04	03	02	01
02	Environmental problems that impact the way you value and use the NSW coast (e.g. climate change, pollution, habitat loss)	05	04	03	02	01

-----[NEW SCREEN]-----

SECTION C: ATTITUDES TOWARDS MARINE ESTATE

ASK RESIDENTS, VISITORS

Q10 How important is the NSW coast in contributing to your quality of life?

Please give your answer on a scale from '0' to '10' where '0' means 'not important at all' and '10' means 'very important'.

[SHOW VISITORS ONLY]

Please consider the role visiting the NSW coast plays in contributing to your overall quality of life.

{SINGLE}

MEMS KPI3. INDICATOR 1. DIMENSION 1

0 – Not important at all	00
1	01
2	02
3	03
4	04
5 – Neither important nor important	05
6	06
7	07
8	08
9	09
10 – Very important	10

-----[NEW SCREEN]-----

ASK IF Q10=01–10(EXCLUDE THOSE WHO ANSWERED ‘NOT IMPORTANT AT ALL’)

Q11 Please explain how the NSW coast contributes to your quality of life.

{OPEN RESPONSE}
NON-MANDATORY

-----[NEW SCREEN]-----

ASK RESIDENTS, VISITORS

Q12 How important is the **NSW coast** in contributing to the **following aspects of your life?**

{SINGLE RESPONSE PER ROW}
RANDOMISE ROWS
HIGH. INDICATOR 5 AND 6, 7 & 11. DIMENSION 1

	Response	0 Not important at all	1	2	3	4	5 Neither important nor unimportant	6	7	8	9	10 Very important
01	Physical health	00	01	02	03	04	05	06	07	08	09	10
02	Emotional and mental health	00	01	02	03	04	05	06	07	08	09	10
03	Spending time/socialising with family and friends	00	01	02	03	04	05	06	07	08	09	10
04	Nutritional needs (i.e. eating seafood from NSW waters)	00	01	02	03	04	05	06	07	08	09	10

-----[NEW SCREEN]-----

ASK RESIDENTS, VISITORS

Q13 How much do you agree with the following statements?

{SINGLE RESPONSE PER ROW}
RANDOMISE ROWS

HIGH. INDICATOR 18. DIMENSION 1

HIGH. INDICATOR 38. DIMENSION 2

HIGH. INDICATOR 55, 56, 57, 58. DIMENSION 3

	Response	0 Strongly disagree	1	2	3	4	5 Neither agree nor disagree	6	7	8	9	10 Strongly agree
01	I feel a personal connection to the NSW coast	00	01	02	03	04	05	06	07	08	09	10
02	The NSW coast is part of my identity	00	01	02	03	04	05	06	07	08	09	10
03	[SHOW IF RESIDENTS] I take pride in living on the NSW coast	00	01	02	03	04	05	06	07	08	09	10
04	I feel responsible for helping to maintain a healthy NSW coast	00	01	02	03	04	05	06	07	08	09	10
05	I feel safe when using the NSW coast	00	01	02	03	04	05	06	07	08	09	10

-----[NEW SCREEN]-----

ASK RESIDENTS, VISITORS

Q14 How would you rate the current health of the [SHOW IF VISITORS: natural environment on the NSW coast] [SHOW IF RESIDENTS: natural coastal environment in **your local area**]?

Please think about aspects such as the cleanliness of beaches, water quality, and coastal habitats and wildlife.

{SINGLE}

HIGH. INDICATOR 46. DIMENSION 2

Very good	01
Good	02
Neither good nor poor	03
Poor	04
Very poor	05

Don't know / Not sure	99
-----------------------	----

-----[NEW SCREEN]-----

ASK IF Q14=01–05 (EXCLUDE THOSE WHO ANSWERED 'DON'T KNOW')

Q15 Please explain why you think the health of the natural coastal environment in **your local area** is <INSERT RESPONSE TEXT SELECTED AT Q14>.

{OPEN RESPONSE}

-----[NEW SCREEN]-----

ASK RESIDENTS, VISITORS

Q16 There are many important reasons for managing the NSW coast, some of which are listed below.

Thinking about your personal preference, how would you rate the importance of each aspect?

{SINGLE RESPONSE PER ROW}

RANDOMISE ROWS

HIGH. INDICATOR 8. DIMENSION 1

HIGH. INDICATOR 31 (KPI 13). DIMENSION 2

HIGH. INDICATOR 59. DIMENSION 3

HIGH. INDICATOR 62 AND 63. DIMENSION 4

	Response	0 Not important at all	1	2	3	4	5 Neither important nor unimportant	6	7	8	9	10 Very important
01	To provide a place where people can connect with nature	00	01	02	03	04	05	06	07	08	09	10
02	To support recreation and leisure activities	00	01	02	03	04	05	06	07	08	09	10
03	To sustain businesses (e.g. commercial fisheries, eco-tourism)	00	01	02	03	04	05	06	07	08	09	10
04	To pass on a healthy NSW coast to future generations	00	01	02	03	04	05	06	07	08	09	10
05	To preserve nature - even though it may never be used or seen by humans	00	01	02	03	04	05	06	07	08	09	10
06	To provide a source of local seafood	00	01	02	03	04	05	06	07	08	09	10
07	To preserve maritime heritage (e.g. lighthouses, shipwrecks)	00	01	02	03	04	05	06	07	08	09	10
08	To preserve the cultures and traditions of Aboriginal people	00	01	02	03	04	05	06	07	08	09	10

-----[NEW SCREEN]-----

SECTION D: BENEFITS AND THREATS

ASK RESIDENTS, VISITORS

Q17 How much, if anything, would you say you know about each of the following **benefits** associated with the NSW coast?

{SINGLE RESPONSE PER ROW}

RANDOMISE ROWS

MEMS LI10, LI27, KPI13. INDICATOR 29, 30 AND 31. DIMENSION 2

	Response	Yes, fully aware of it	Yes, aware of it but not in detail	No, not aware of it	Don't know
01	Many types of marine animals and plants in NSW are unique to the southern half of Australia (i.e. aren't found elsewhere in the world)	03	02	01	98
02	Spending time in natural environments has been linked to better health and overall wellbeing in humans	03	02	01	98
03	Nature-based tourism is important for the economy of regional areas of NSW	03	02	01	98
04	Estuaries in NSW (e.g. coastal lakes, harbours) are important nursery areas for many species	03	02	01	98
05	Recreational fishing provides wellbeing benefits (e.g. relaxation, social connection and exercise)	03	02	01	98
06	Commercial fishing and aquaculture in NSW provide the community with a source of seafood that is sustainably managed	03	02	01	98
07	For Aboriginal people, culture, nature, land and water are connected to each other	03	02	01	98
08	Aboriginal cultural fishing is important for passing on cultural knowledge to younger generations	03	02	01	98

[NEW SCREEN]

ASK RESIDENTS, VISITORS

Q18 And how much, if anything, would you say you know about each of the following **threats** associated with the NSW coast?

{SINGLE RESPONSE PER ROW}

RANDOMISE

MEMS LI10. INDICATOR 29. DIMENSION 2

	Response	Yes, fully aware of it	Yes, aware of it but not in detail	Not, not aware of it	Don't know
01	Most marine litter comes from land sources (i.e. is washed or blown into waterways)	03	02	01	98
02	Marine litter can injure and kill wildlife through ingestion or entanglement (e.g. eating plastics, tangled in fishing line)	03	02	01	98
03	Nutrients and sediments that are washed into drains and creeks can end up in waterways	03	02	01	98
04	Stormwater and farmland runoff can affect the health and habitats of marine wildlife (e.g. seagrass)	03	02	01	98
05	Human activities cause estuaries (e.g. coastal lakes, harbours) to be the most impacted environments on the NSW coast	03	02	01	98
06	Climate change is rated as a major threat to the benefits we receive from the NSW coast	03	02	01	98
07	Human presence can impact wildlife (e.g. shore birds, whales) by causing them to move away from feeding, resting and breeding areas	03	02	01	98
08	Harvesting or removing wildlife (e.g. fish, sea snails) can impact the way other people use and value the coast	03	02	01	98

-----[NEW SCREEN]-----

ASK RESIDENTS, VISITORS

Q19 How much of an impact do you think the following aspects **currently** have on **your experience** of [SHOW IF VISITORS: the NSW coast] [SHOW IF RESIDENTS]: your **local coastal areas** in the past 12 months?

When answering, please think about whether you have **personally** been impacted.

Please give your answer on a scale from '0 No impact' to '10 Severe impact' where:

- '0 No impact' means 'You never noticed it'
- '10 Severe impact' means 'It always affects your experience to the point that you had to stop doing the activity'.

{SINGLE RESPONSE PER ROW}

RANDOMISE ROWS. ANCHOR 'OTHER' AT THE BOTTOM

HIGH. IMPACT INDICATOR

	Response	0 No impact	1	2	3	4	5	6	7	8	9	10 Severe impact	Don't know
01	Climate change, including sea level rise, storm surges, heat waves etc.	00	01	02	03	04	05	06	07	08	09	10	99
02	Loss of natural habitats (e.g. coastal bushland, wetlands)	00	01	02	03	04	05	06	07	08	09	10	99
03	Reduced amount of seafood to catch and eat	00	01	02	03	04	05	06	07	08	09	10	99
04	Decline in wildlife (e.g. fish, shorebirds, turtles) to appreciate	00	01	02	03	04	05	06	07	08	09	10	99
05	Poor water quality (e.g. sewage, stormwater and farmland runoff)	00	01	02	03	04	05	06	07	08	09	10	99
06	Litter on shorelines or in the water	00	01	02	03	04	05	06	07	08	09	10	99
07	Illegal behaviour or activities (i.e. other people not following rules)	00	01	02	03	04	05	06	07	08	09	10	99
08	Conflicting activities (e.g. snorkelling, boating, fishing in one area)	00	01	02	03	04	05	06	07	08	09	10	99
09	Lack of access to locations due to management (e.g. no-fishing zones, no-anchoring zones, private development or land ownership) excluding restrictions due to COVID-19	00	01	02	03	04	05	06	07	08	09	10	99
10	Not enough coastal infrastructure (e.g. boat ramps, jetties)	00	01	02	03	04	05	06	07	08	09	10	99
11	Overcrowding	00	01	02	03	04	05	06	07	08	09	10	99

[NEW SCREEN]

ASK RESIDENTS, VISITORS

Q20 Please describe in more detail how the following aspects you selected have impacted your experience.

[SHOW STATEMENTS WHERE RESPONDENT INDICATED SOME LEVEL OF IMPACT, Q19=01–11]

{OPEN RESPONSE}

NON-MANDATORY

-----[NEW SCREEN]-----

ASK RESIDENTS, VISITORS

Q20A Which other aspects or functions, if any, do you think has been having a severe impact on your experience of [SHOW IF VISITORS: the NSW coast] [SHOW IF RESIDENTS]: your **local coastal areas** in the past 12 months?

{OPEN RESPONSE}

NON-MANDATORY

-----[NEW SCREEN]-----

SECTION E: ATTITUDES AND EXPERIENCE WITH GOVERNMENT AGENCIES

ASK RESIDENTS, VISITORS

Q21 Which, if any, of the following NSW Government agencies or authorities that manage the NSW coast are you aware of?

Please select all that apply.

{MULTIPLE RESPONSE}

RANDOMISE

MEMS LI24. INDICATOR 32. DIMENSION 2

DPI Fisheries (Department of Primary Industries)	01
Crown Land	02
Local Land Services	03
EES (Environment, Energy and Science)	04
Planning and Assessment	05
Transport for NSW	06
None of the above [EXCLUSIVE]	98

Don't know / Not sure [EXCLUSIVE]	99
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-----[NEW SCREEN]-----

ASK RESIDENTS, VISITORS

Q22 To the best of your knowledge, what do you think [SHOW IF SELECTED MORE THAN ONE AGENCY: these agencies are] [SHOW IF SELECTED ONE AGENCY: this agency is] responsible for managing?

{MULTIPLE RESPONSE PER ROW}

RANDOMISE ROWS. ONLY PROMPT COLUMN(S) SELECTED AT Q21.

DO NOT ASK IF CODES 98 OR 99 SELECTED AT Q21.

MEMS LI24. INDICATOR 32. DIMENSION 2

	Agency	Fisheries and aquaculture	Water quality and litter	Marine mammals, birds & reptiles	Land-use planning, major developments & infrastructure	Boating, maritime safety and ports, including infrastructure	Marine park and aquatic reserve management	Land management and native title support	Deliver services to farmers to support sustainable land management	Don't know
01	DPI Fisheries (Department of Primary Industries)	01	02	03	04	05	06	07	08	99
02	Crown Land	01	02	03	04	05	06	07	08	99
03	Local Land Services	01	02	03	04	05	06	07	08	99
04	EES (Environment, Energy and Science). This includes the EPA (Environmental Protection Authority) and NPWS (National Parks and Wildlife Service)	01	02	03	04	05	06	07	08	99
05	Planning and Assessment	01	02	03	04	05	06	07	08	99
06	Transport for NSW	01	02	03	04	05	06	07	08	99

[NEW SCREEN]

ASK RESIDENTS, VISITORS

Q23 The Marine Estate Management Authority (MEMA) advises the NSW Government on the management of the NSW coast.

a. Before today, had you heard of the Marine Estate Management Authority (MEMA)?

{SINGLE RESPONSE}

Yes	01
No	02
Don't know	99

[NEW SCREEN]

ASK IF AWARE OF MEMA, Q23=01

Q24 The NSW Government's broad vision for the NSW coast is:

'A healthy coast and sea, managed for the greatest wellbeing of the community, now and into the future'

b. How confident are you that the NSW Government is on track to ensure this vision is achieved?

{SINGLE}

HIGH. DIMEN9. DIMENSION 5

Very confident	04
Fairly confident	03
Not very confident	02
Not at all confident	01
Don't know	99

[NEW SCREEN]

ASK RESIDENTS

Q25 Thinking about the way the NSW coast is managed, how satisfied are you with each of the following aspects?

Please think about the state agencies including their interactions with the public and the way decisions are made and communicated.

Please give your answer on a scale from '0' to '10' when '0' means you are 'not satisfied at all' and '10' means you are 'very satisfied'.

{SINGLE RESPONSE PER ROW}

RANDOMISE ROWS

MEMS KPI12. INDICATOR 71

	Response	0 Not satisfied at all	1	2	3	4	5 Neither satisfied nor dissatisfied	6	7	8	9	10 Very satisfied	Don't know
01	There are opportunities for the community to have their say	00	01	02	03	04	05	06	07	08	09	10	99
02	Information about how and why decisions are made is easy to find	00	01	02	03	04	05	06	07	08	09	10	99
03	Information about how and why decisions are made is easy to understand	00	01	02	03	04	05	06	07	08	09	10	99

-----[NEW SCREEN]-----

ASK RESIDENTS, VISITORS

Q26 How well do you feel you understand the following rules and regulations related to the NSW coast?

{SINGLE RESPONSE PER ROW}

ASK ALL ROWS 01–03

ONLY ASK ROW 04 IF SELECTED CODE 06 AT Q3

ONLY ask row 05 if selected code 09 at q3.

MATCH THE ORDER PROMPTED AT Q3.

MEMS LI21. INDICATOR 33. DIMENSION 2

	Response	Very well	Fairly well	Not very well	Have heard of, but know nothing about them	Never heard about them	Not applicable
01	Disposal of different types of rubbish	05	04	03	02	01	99
02	Stormwater best management (e.g. raingardens, stormwater treatment, erosion control)	05	04	03	02	01	99
03	Approaching marine wildlife (e.g. seals, dolphins, whales) on foot, boat, or in the water	05	04	03	02	01	99
04	Recreational fishing	05	04	03	02	01	99
05	Recreational boating, including use of paddle crafts (e.g. motorcruising, sailing, PWC, kayaking)	05	04	03	02	01	99

-----[NEW SCREEN]-----

SECTION F: PROFILING ATTITUDINAL AND CALD

Now we have a couple of questions to help us analyse the results.

ASK RESIDENTS, VISITORS

Q27 Thinking more broadly about your life in general, how satisfied are you with **your life as a whole**?

{SINGLE}

MEDIUM. INDICATOR 3. DIMENSION 1

0 – Not satisfied at all	00
1	01
2	02
3	03
4	04
5 – Neither satisfied nor dissatisfied	05
6	06
7	07
8	08
9	09
10 – Very satisfied	10

-----[NEW SCREEN]-----

ASK RESIDENTS, VISITORS

Q28 Do you or your parents mainly speak a language other than English?

{SINGLE}

HIGH (CONTEXTUAL). INDICATOR 23. DIMENSION 1

No (only speak English)	01
Yes	02
I'd prefer not to say	99

-----[NEW SCREEN]-----

ASK IF SPEAK OTHER LANGUAGE, Q28=02

Q29 What is the main language spoken at home?

{SINGLE}

Arabic	01
Assyrian	02
Chinese	03
Croatian	04
French	05
German	06
Greek	07
Hindi	08
Indonesian	09
Italian	10
Korean	11
Macedonian	12
Persian	13
Polish	14
Serbian	15
Spanish	16
Tagalog	17
Tamil	18
Turkish	19
Vietnamese	20

Other (please specify)	96
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-----[NEW SCREEN]-----

Termination script:

Thank you for agreeing to take part in the survey. Unfortunately, you are not one of the people we are looking for in this survey.

[REDIRECT TO www.ipsos.com.au]

3.3 Appendix C: Cognitive Interviewing Recruitment Screener

RECRUITMENT SPECS:

General notes

This screener is designed to recruit for telephone cognitive interviews.

1. Please recruit n = 6 participants for the interviews.

Cognitive Interviews will run for approximately 45 mins.

The cognitive interviews will be split into 2 phases – phase one will inform any questionnaire changes, and phase 2 will test this refined version of the questionnaire.

Phase one of cognitive testing will involve n = 3 participants and phase 2 will involve the other n = 3.

Incentives will be \$80 per person. Ipsos will post these to the participant within 24 hours of their interview.

With participants' permission, the groups will be audio and/or video recorded.

The questionnaire will be sent to a designated email address at the time of the interview.

The interview will be about community wellbeing and the environment.

Quotas

We have gender, age and coastal resident/visitor specifications:

- An even mix of gender (n = 3 females, n = 3 males)
- An even mix of age (e.g. n = 2 aged 18–25, n = 2 aged 26–39, n = 2 40 and over)
- An even mix of NSW Coastal Residents (living in NSW) and NSW Coastal Visitors (living in Australia) (n = 3 residents, n = 3 visitors)
- Note: Coastal residents are determined by postal code (list provided) and Coastal Visitors can be anyone living in any Australian postal code that has visited the NSW Coast in the last 12 months, prior to the COVID-19 travel restrictions.

Exclusions:

- Participants must not work in market research or for local, state and Australian Government (nor members of their immediate family), and
- not have completed market research in the last 6 months.
- Must have a device (PC/laptop/tablet/iPad) they can use to read the questionnaire, with internet connection.

Specification:**Cognitive Interviews (n = 6)**

INTERVIEWS	DATE/TIME	SPECIFICATION
Phase 1: N = 3 Cognitive Interviews (Phone)	Monday 13/07- Wednesday 15/07	Mix of ages (18–25, 26–39, 40 and over) Mix of gender (2 x male, 1 x female / 1 x male, 2 x female) Mix of Visitors/Residents (2 x Visitors & 1 x Residents / 1 x Visitors & 2 x Residents) \$80 incentive p.p.
Phase 2: N = 3 Cognitive Interviews (Phone)	Tuesday 21/07- Thursday 23/07	Note: Below quotas need to balance out part one recruits Mix of ages (18–25, 26–39, 40 and over) Mix of gender (2 x male, 1 x female / 1 x male, 2 x female) Mix of Visitors/Residents (2 x Visitors & 1 x Residents / 1 x Visitors & 2 x Residents) \$80 incentive p.p.

[IF QUERIED ABOUT BONA FIDES OF RESEARCH] I can provide the names of people who will verify the legitimate nature of this research project.

The first is the Australian Market and Social Research Society enquiry line on 1300 364 830, who can verify that we are a legitimate market and social research company.

The second is the research project manager, Florence Le Guyader at Ipsos, the organisation managing this research project, who can discuss the specifics of this research. Her phone number is (02) 9900 5193.

2. **[TERMINATION SCRIPT]** Thank you for your interest in participating in this research, unfortunately you are not eligible for this particular study.

3.

[ONLY IF NECESSARY]: This is strictly SOCIAL research for a NSW Government agency. Your responses will remain completely confidential. We are not promoting or selling anything. If you would like to verify the validity of this research you can call the Australian Market and Social Research Society's survey line on 1300 364 830).

[If not available, arrange time to call back to speak with them, or **TERMINATE**]

RECRUITER NOTE: PLEASE REMIND INDIVIDUALS THAT THE INFORMATION THEY PROVIDE IS TOTALLY CONFIDENTIAL AND WILL ONLY BE USED TO DETERMINE THEIR SUITABILITY TO PARTICIPATE.

RECRUITMENT SCRIPT:

We are currently recruiting participants for a series of interviews in relation to community wellbeing and the environment. This research is being conducted on behalf of The NSW Department of Primary Industries and Fisheries. This will involve someone like yourself reading through a questionnaire with a researcher and participating in an informal discussion about the questionnaire. The interview will last for up to 45 minutes.

Interviews will take place over the phone at a time of your convenience over the next 2 weeks. The discussion is confidential, and your responses will remain anonymous. Those You will receive an Eftpos card for \$80 to cover any expenses associated with taking part.

1. Would you be interested in participating?

Yes	1	CONTINUE
No	2	THANK AND TERMINATE

[IF YES, CONTINUE]: I just have some questions for you, to make sure that you qualify, as we need to speak to a good cross-section of people as part of the research.

Thank you very much for agreeing to participate. I need to ask a few questions to ensure that this research would be relevant to you.

2. Have you & when did you last attend a focus group discussion or in-depth interview?

Yes, in the last 3 months	1	THANK & TERMINATE
Yes, in the last 6 months	2	THANK & TERMINATE
Yes, more than 6 months ago but less than 12 months ago	3	CONTINUE
Yes, 12 or more months ago	4	CONTINUE
Currently booked to attend a focus group or in-depth interview	5	THANK & TERMINATE
Never attended a focus group or in-depth interview	6	CONTINUE

3. Do you currently work in any of the following fields?

Market or social research	1	THANK & TERMINATE
For a local, state or federal government	2	THANK & TERMINATE
None of the above	3	CONTINUE

4. Which of the following describes how you think of yourself?

Male	1	CONTINUE
Female	2	CONTINUE
In another way [ASSIGN TO GENDER QUOTA AT RANDOM]	3	CONTINUE
Prefer not to say [ASSIGN TO GENDER QUOTA AT RANDOM]	4	CONTINUE

5. Do you have a device like a PC/laptop/tablet/iPad you can use during the interview with an internet connection?

Yes, I have a device and internet connection	1	CONTINUE
No, I do not have a device/internet	2	THANK & TERMINATE

6. What is your age? [DON'T NEED TO READ OUT AGE RANGES]

17 years old or under	1	THANK & TERMINATE
18 – 24 years old	2	CONTINUE
26 – 39 years old	3	CONTINUE
40 years old or over	4	CONTINUE

7. And what is the postcode and suburb where you live? [POSTCODE LIST TO BE REFERRED TO HERE]
[SUBURB NEEDED AS SOME POSTCODES OVERLAP]

Postcode: ____ ____ ____ ____

Suburb: _____

ASK Q7 IF QUALIFYING POSTCODE FOR POSSIBLE RESIDENT

8. Do you live within 5km of the NSW coast (beach, bay or ocean)?

Yes, I live within 5km's of the coast	1	RECRUIT TO RESIDENT
No, I live further than 5km's from the coast	2	CONTINUE
Don't know	3	THANK & TERMINATE

ASK Q8 IF Q7=2

9. In which of the following regions, if any, have you visited coastal locations in the past 12 months? These could be any overnight and daytrip you might have taken in the past 12 months prior to the recent travel restrictions imposed as a result of the COVID-19 health crisis.

North Coast (Upper) (Tweed, Byron, Ballina, Richmond Valley, Clarence Valley LGAs)	1	RECRUIT TO VISITOR
North Coast (Lower) (Coffs Harbour, Bellingen, Nambucca Valley, Kempsey, Port Macquarie-Hastings LGAs)	2	RECRUIT TO VISITOR
Hunter (Mid-Coast, Port Stephens, Newcastle, and Lake Macquarie LGAs)	3	RECRUIT TO VISITOR
Central Coast	4	RECRUIT TO VISITOR
Greater Sydney (coastal) (Northern Beaches, Willoughby, North Sydney, Woollahra, Inner West, Bayside, Waverly, Randwick, and Sutherland Shire LGAs)	5	RECRUIT TO VISITOR
South East Coast (Upper) (Wollongong, Shellharbour, Kiama and Shoalhaven LGAs)	6	RECRUIT TO VISITOR
South East Coast (Lower) (Eurobodalla and Bega Valley LGAs)	7	RECRUIT TO VISITOR
None [TERMINATE]	8	THANK & TERMINATE
Can't remember / not sure [TERMINATE]	9	THANK & TERMINATE

[IF QUALIFIES, CONTINUE]

To recap:

- This research involves participating in a 45-minute telephone interview with an Ipsos researcher to discuss a questionnaire. The questionnaire will be sent to a designated email address at the time of the interview.
- An incentive of an \$80 EFTPOS card will be provided.
- Are you still happy to participate in this research?
 - **Confirm acceptance of this:** **Yes / No**

Final confirmation

To assist our researchers in their analysis and report the telephone discussion will be audio recorded. All information gathered during the discussion is used for research and training purposes only, unless stated otherwise. Are you still happy to participate in this research?

Confirm agreement: **Yes / No**

[IF YES, CONTINUE AND ARRANGE DATE/TIME/LOCATION SUITABLE FOR PARTICIPANT AND INTERVIEWER. EXPLAIN IT IS VERY IMPORTANT TO CALL IF ANY ISSUES, NEED TO RESCHEDULE OR UNABLE TO PARTICIPATE.]

[IF NO, DISCONTINUE WITH THANKS.]

We would like to send you a confirmation of this appointment to your email. Do you have an email address where we can send it? **[IF YES, WRITE IN EMAIL]**

THANK YOU VERY MUCH FOR YOUR ASSISTANCE WITH THIS PROJECT

Just to remind you, I'm [INSERT NAME], on behalf of Ipsos. In accordance with Privacy Principles, your responses to the questions will remain anonymous. In case I need to check something with you, can I just confirm your name, telephone number, etc.?

Respondent name: _____

Telephone no.: _____

Email: _____

Postal address: _____

Postcode: _____

Date & time of interview: _____

I certify that this is a true, accurate and complete interview, conducted in accordance with IQCA standards and the ICC/ESOMAR International Code of conduct. I will not disclose to any other person the content of this questionnaire or any other information relating to this project. Signed as a true and accurate interview in accordance with all briefing instructions:

Interviewer number: _____

Name: _____

Signed: _____

Date: _____

Confirmation email SCRIPT

Dear XXXXXX,

Thank you for agreeing to take part in the interview to test a questionnaire about community wellbeing and the environment.

The discussion will take 45 minutes and will be conducted over the phone on the [DATE] at [TIME].

The research is part of a study being conducted by the Ipsos Social Research Institute, an independent market and social research company that operates under the market and social research code of professional conduct and the Privacy Act. This research has been commissioned by The NSW Department of Industry (Fisheries).

If, for whatever reason, you can no longer take part or wish to reschedule, please call xxx on xx straight away on so that we can find someone else to fill your spot or find a better time for the interview.

You will be given a \$80 Eftpos card to cover any out-of-pocket expenses you may incur for attending the interview.

If you require reading glasses, please have them on hand.

Thanks again! And please do not hesitate to call if you have any questions or concerns.

Kind Regards,

Xxx