



Victorian Coastal and Marine Environment Community Attitudes and Behaviour Research: Wave 3

- Final Report -

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Executive Summary



Executive Summary

Most Victorians living close the coast visit regularly, largely to escape from the daily pressures to a clean, healthy, natural environment

- The vast majority of Victorians have visited the coast at least once in the last 12 months (87%), with day trips remaining the most popular form of visit.
 - Visits to the coast of more than two hours have increased from an incidence of 80% in 2000 to 83% in 2007. There has been a significant increase in visits across *all* seasons, reflecting people's increased use and reliance on the coast since 2000.
- Qualitatively, people spoke of the coast being of increasing value as they are relying more and more on it as a place to visit. This is not only given the widespread appeal of places with water, but also because many inland waterways are becoming less accessible due to the on-going drought.
- The most enjoyable or valued aspects of people's coastal visits on an *unprompted* basis centres around simply being at the beach, spending time with friends and family, getting away from it all and having a change of scenery – particularly one that is natural and involves water, as well as enjoying the peace and quiet.
 - Specific, *prompted* attributes contributing to people's enjoyment of the coast are quite similar, and somewhat consistent with the previous waves of the research. The key drivers are really about being in a clean, healthy environment, getting away from it all and relaxing with loved ones, more so than engaging in any specific activity.

More Victorians believe that the coast is well managed

- The majority of Victorians continue to agree that the Victorian coast is well managed, which has continued to increase with each wave of the research (from 60% in '96 to 67% in '00 and 74% in '07).



Executive Summary cont'd

- Although a small majority of Victorians could not report anything that specifically concerns or annoys them about the coast or marine environments, a significant proportion did (45%). Females are most likely to express concerns on this (49% vs 40% of males), as well as numerous other survey topics.

The impact of human activities is placing increasing pressure on the coast – pollution remains the key concern, and over-development is of growing concern

- There are two key, stand out issues of concern to Victorians in relation to the coast. Number one by far is rubbish, in terms of litter, plastic bags, cigarettes etc on the beach and in the water (28%). The next key issue is overdevelopment or inappropriate development (at 14%), which was not raised spontaneously as a concern in the 2000 telephone survey – highlighting its growing impact on the community.
 - Other concerns relate to water quality, safety issues, over-fishing and overcrowding, and dredging in Port Phillip Bay.
- The vast majority of respondents who are aware of Victoria's Marine National Parks and Marine Sanctuaries are supportive of them. Many believe that they are working to improve marine populations.
- Linked with this issue is some anecdotal feedback that some people are engaging in illegal fishing activities (notably including people from non-English speaking backgrounds). This is thought to be exacerbated by **a lack of policing of the waters**.
 - Indeed, most respondents agreed that *'Protecting our marine environments requires far better policing of the laws and regulations both on and in our waters'* (86%).
- While efforts to clean up Port Phillip Bay are being recognised, there is a sense much more is needed.
 - Other areas of improvement in recent years that people acknowledged in the qualitative research components include beach cleaning in certain areas; increased community awareness, education and action regarding coastal conservation; improved access in some areas including revegetation and removal of weeds.



Executive Summary cont'd

Coastal developments are thought to be having social and environmental impacts

- Despite perceptions that the coast is well managed, over half of the Victorian population still lack confidence in Government planning and building guidelines to protect the character and feel of towns.
 - There is also a significant rise in the proportion of Victorians who believe the state's coastal towns are increasingly looking like suburbia, with 40% agreeing a lot (up from 29% in 2000).
- People are more likely to agree that '*Local communities generally have enough say in planning decisions*' (to 40%). However, in the Community Engagement Forums with coastal dwellers, this was not the case, with respondents who have proactively sought to influence the outcome of certain decisions expressing a sense of powerlessness against developers.
- Few Victorians believe that coastal developments are *not* having a significant impact on Victoria's native flora and fauna (29%, with just 12% *agreeing a lot*).
- Qualitatively, people spoke of the natural environment being increasingly fragmented and placed under pressure by developments. Importantly, many also sense that there are impacts that they are not aware of, due to a lack of visual and other sensory cues, along with a lack of scientific evidence.
 - Importantly, some people in the community tend to be less aware of the impact of various activities that are harmful to the coast and marine environments, including younger people, males, those from a non-English speaking background and – perhaps surprisingly, those who are fishing enthusiasts.
- When it comes to specific services that people believe would be acceptable on a 10km undeveloped stretch of the coast, there is little shift in preferences since 2000. Support remains highest for lower impact facilities such as a picnic area with one or two tables and toilet facilities with changing rooms.



Executive Summary cont'd

Marine environments remain quite mysterious to Victorians

- Very few respondents felt confident to discuss the health of marine environments, as most had not experienced these. Being shown images of marine life in and around Port Phillip Bay generated a strong sense of the importance of protecting the marine environment, and educating the community not only about what is 'down there', but also about potential impacts of human activity on marine life.
 - There is a sense (and understanding) among some Victorians that there may be 'invisible' problems that they simply do not know about, and many expressed a concern about the likely impacts of increasing coastal development on the marine environment, beyond what they can see themselves. This indicates that there is room to promote the indicators of the health of coastal environments more widely, as a means of engaging the community more closely, addressing concerns and instilling a greater level of confidence about its future management.
- Attitudes to the marine environments remain fairly consistent. An overwhelming majority maintain that *'Marine flora and fauna are important to all Victorians'* (82% agree a lot). Interestingly, more people now agree that *'The seas and oceans are powerful enough to look after themselves'* (24%). However, the majority disagree (72%), and people are now more inclined to agree a lot that *'Our marine environments are under real threat'* (from 41% in 2000, to 45% this year).

Looking ahead, significant efforts are still required to foster greater levels of public confidence

- Public attitudes remain polarised in terms of being confident that there are effective long-term strategies in place to preserve and protect the coast in a state that future generations will be happy with. A slight decline is observed in net confidence, from 48% to 44% this wave.



Executive Summary cont'd

- While the government is most commonly thought to be responsible for managing and protecting the Victorian coast (Local, followed by State), many of the forum respondents *spontaneously* acknowledged the importance of *everyone* doing their bit to help protect the coast.
 - There is a sense that more education is needed to foster higher levels of personal responsibility and ensure that more people clean up after themselves, which also means better understanding the impacts of their actions.
- There is some appeal in contributing to greater levels of coastal protection through further action such as volunteering in conservation activities, although many feel they do not have enough time.
 - The introduction of 'Clean Up the Victorian Coast' days was suggested by forum respondents, mainly because it requires less sacrifice of personal time, but also because it sounded like there would be more fun with more people participating. Indeed, people are far more interested in the idea of a Clean Up day than in joining a volunteering group, with one in two respondents at least *fairly interested*, especially young females.
 - As distinct from offering one's time, a reasonable three in ten respondents said that they would be willing to offer financial support to better protect Victoria's coast, with the average annual amount being a fairly substantial \$213 among those willing to contribute (or \$59 among all respondents).
- In terms of people being engaged on coastal matters, almost a quarter of respondents had actively sought information on the Victorian coast or marine environments in the last 12 months.

A considerable desire exists for better understanding coastal climate change impacts

- There is an emerging issue that the community believes requires attention – namely, climate change. Respondents felt quite strongly that more research is needed into the likely impacts of climate change on the Victorian coast, indicating not only that this is a topic that they know very little about, but also that this is a key area that should be addressed within the updated Victorian Coastal Strategy.



Summary of Recommendations

The following recommendations for the VCC and DSE's consideration are based on feedback from the Victorian community across the qualitative and quantitative components of the research.

- Ensure that the community's concerns about coastal development are seen to be taken very seriously.
 - This means developing stricter planning and building guidelines that place greater value on maintaining, if not restoring, the significant natural capital that the community is increasingly recognising and valuing in the coast.
 - It also means more effective engagement and communication with the community, to instil greater confidence.
- Strive to provide more resources to police and enforce fishing, boating and other controls on activities such as marine pollution and litter, loutish behaviour, removal of dog droppings and keeping dogs on-leash – especially in Marine National Parks and Sanctuaries. This visible presence is important in demonstrating efforts that are being made to protect the coast.
 - Consider developing targeted communications for Victoria's non-English speaking populations about the establishment of the Marine National Parks and Sanctuaries, and the need for strict adherence to fishing laws etc.
- Dedicate a significant level of funding for research into how climate change will affect the Victorian coast and its users, in recognition of strong community concerns about this emerging issue.
- Consider developing a *marketing strategy* and campaign, to instil a greater sense of value in the community as to the natural capital of the coast, and hence how important it is that everyone does their bit to protect this unique and fragile environment for today and future generations alike.
 - This would be an important means of fostering a greater level of engagement with the community, whilst also incorporating the community education that many Victorians believe is required in order to address people's concerns and hence reduce the growing impact of human activities on the Victorian coast.
- Continue to fund community-based coastal conservation efforts, and other coastal restoration activities.
 - Consider developing a 'Clean Up the Victorian Coast Day' to encourage more community involvement. This could be targeted towards younger, female Victorians in particular, who are generally most interested in the idea.



Introduction



Background

- **The Victorian Coastal Strategy provides strategic direction for the planning, management and protection of the Victorian Coast for present and future generations.**
- **The Strategy is reviewed and updated by the Victorian Coastal Council (VCC) and the Department of Sustainability and Environment (DSE) every five years, with new and emerging issues also incorporated.**
- **To inform the Strategy reviews, market research is conducted to examine community awareness, knowledge, attitudes and concerns, as well as behaviours in relation to the Victorian coastal and marine environments.**
- **Ipsos was commissioned to undertake the third wave of community research to inform the current Strategy review.**
 - **Ipsos also conducted the two previous waves in 1996 and 2000, as TQA Research.**
 - **This report provides findings from the two key research phases – namely the seven, intensive Community Engagement Forums, as conducted in the first half of March 2007, and the general community Telephone Survey, conducted in April 2007.**



Research Objectives

- **The key research objectives were to:**
 - **Establish and validate what the community values about the Victorian coast and marine environments, including current uses and behaviours.**
 - As Marine National Parks and Marine Sanctuaries were established in 2002, it was important to explore awareness, perceptions and support for these within the research.
 - **Identify what the community regards as the ‘hot’ issues impacting the Victorian coast and marine environment.**
 - This included both spontaneously expressed issues, as well as a range of specific, prompted issues for exploration. These issues covered coastal and marine environment management, the role of the community, coastal development, funding priorities, information needs, as well as climate change perceptions and knowledge.
 - **Determine how well the community feels the Victorian coast is being managed.**
 - **Determine how community attitudes and behaviours related to the Victorian coast and marine environments have changed since 2000 and 1996.**
- **The outcomes of the market research will input into the formulation of strategies for the long-term management of the Victorian coast.**



Research Methodology



Research Methodology Overview:

A comprehensive multi-phase research program

■ Stage 1:

- **Set-up workshop with Victorian Coastal Council and Department**
- **Conduct of a series of in-depth interviews with stakeholders**
 - Providing important insights and input into the design of community research.
 - Stakeholders nominated by the project team from the Victorian Coastal Council and Department of Sustainability and Environment, comprising representatives from a broad mix of organisations, selected to complement stakeholders that had already been interviewed as part of consultation by the VCC.

■ Stage 2: Series of 7 Community Engagement Forums (March 1 – 14)

- Intensive 3 hours each, to gain significant, robust and in-depth insights.
- Diverse locations: Elwood, Mornington, Geelong, Warrnambool, Lorne, Lakes Entrance, Inverloch.
- Up to 18 participants per forum, with a total sample of n=116 people across all forums.
- Mix of self-completion questionnaires, round table discussions and open forums.
- The key outcomes of this phase of the research were presented to VCC on March 29.

■ Stage 3: Telephone survey of 601 Victorians aged 15+ (March 30 – April 16)

- Random sampling, using the 'next birthday' technique.
- 304 with Melbourne residents, 297 with those in the rest of Victoria.
- 238 with those living within 15kms of the coast.
- Comprehensive 26 minute interview length.
- Tracking core measures, as well as allowing for new/emerging issue coverage and additional questions to enable analysis of economic value of the coast (conducted by URS).

■ Stage 4: Analysis, presentation and reporting



Stakeholder Interviews

- As mentioned, the stakeholder interviews comprised representatives from a broad mix of organisations, selected to complement stakeholders that had already been interviewed as part of consultation by the VCC.
- The list of desired respondents was provided to Ipsos, who in turn contacted the individuals to arrange a suitable time for the interview. An interview guide was prepared for VCC and DSE's approval (see Appendix 1). Each interview was 45 minutes to 1 hour in duration.
 - In total, there were 9 participants, including representatives from Committees of Management, a CMA, media, Coast Action / Coast Care, Local Government, and a tour operator.
- A topline report was completed and provided to the project team in late February. Feedback provided insights into coastal management issues, as well as key considerations for subsequent stages of the research, including recommended lines of enquiry. Broad outcomes were as follows.
 - Respondents each provided some clear examples of improvements made to the coast in recent times. This included re-vegetation, creation of new trails and walkways, establishment of the Marine National Parks and Sanctuaries, pollution controls, and some community education.
 - Most, however, expressed concerns about increased pressure and pollution due to greatly increased visitation and use of coast and marine environments, as well as coastal developments that are increasing fragmentation of native flora and fauna habitats. Other specific, key concerns related to:
 - A perceived lack of integrated management – resulting in inefficiencies and confusion.
 - “Severe funding cutbacks” with a serious lack of adequate funding and human resources to supervise / police waters, invest in infrastructure, better engage the community etc.
 - Insufficient controls on commercial and residential developments; a sense that most proposals are passed; objections are an administrative nightmare, and VCAT is seen to approve all.
 - A sense of over-reliance on community volunteers, and fear of ‘red-tape burn-out’.
 - Potential impacts (known and unknown) of channel deepening on marine life, recreation etc.
 - A need for concerted research into local climate change impacts and adaptation strategies.
 - Plus, impacts of the drought, excessive fishing, pest and weeds, issues with public access and parking.



Community Engagement Forums

- A number of requirements and quotas were applied to the recruitment of the Community Engagement Forums. This included up to 18 participants per forum, with a good mix of the general community, comprising mainly general residents but also some local business operators, as follows:
 - Half males, half females
 - Good mix of age groups, including two teenagers (17/18 year olds)
 - Mix of household types including singles, couples, families, older/retired etc
 - Tend to visit and use the coastal areas, including a good mix of activities such as walking, jogging, swimming, camping/caravanning, diving, boating, fishing, jet skiing, surfing, etc
 - One or two (3 max.) who are actively involved in a coastal community action / volunteering group per forum
 - Four relevant local business operators who would have some perspective on any coastal issues in the area. A minimum of 2 businesses with a water activity related focus.

- All respondents had to live or operate their business within 15kms of the coast. Those in Elwood, Mornington and Geelong had to have visited another part of the Victorian coast at least once or twice in the last 12 months.

- The forums were facilitated by Jasmine Hoye and George Katos, with the support of Jenn Fowler. The forums were conducted from 6:30 – 9:30pm on the following dates:
 - March 1: Elwood
 - March 5: Mornington
 - March 6: Geelong
 - March 7: Warrnambool
 - March 8: Lorne
 - March 13: Lakes Entrance
 - March 14: Inverloch

- A detailed PowerPoint presentation was developed in consultation with DSE and VCC, to guide respondents through the forum components and exercises (see Appendix 2).
 - Respondents were also asked to fill in a self-completion questionnaire (see Appendix 3) at various parts of the evening, to allow for the collection of individual knowledge, perceptions, concerns and behaviours.



Telephone Survey

- A total of 601 interviews was completed, at an average 26 minutes. Target quotas were set by location (as per the table below, with samples sizes achieved shown in brackets). Approximately 40% of respondents live within 15 kilometres of the coast, which was the approach taken in previous waves of the research.
 - This approach has been used not only for consistency, but also because those living closer to the coast tend to be more aware of coastal issues, and hence provide a greater depth of feedback and insight, whilst still also allowing for the survey to represent the views of the broader general Victorian population.

Residential Location	Melbourne (N=)	Rest of Victoria (N=)	Total (N=)
Within 15kms of coast	120 (112 achieved)	120 (145 achieved)	240 (257 achieved)
More than 15kms from the coast	180 (192 achieved)	180 (152 achieved)	360 (344 achieved)
Total	300 (304 achieved)	300 (297 achieved)	600 (601 achieved)

- An additional quota of half of the sample being male and half female was applied, to ensure good representation of males in particular, who can be less inclined to participate in research. Data was adjusted or 'weighted' after the survey to population data from the Australian Bureau of Statistics' Census 2001, by age, gender and location, as shown in the table below.

VICTORIAN POPULATION AGED 15+ YEARS, EXCLUDING OVERSEAS VISITORS (SOURCE: CENSUS 2001)											
VICTORIA TOTAL				MELBOURNE				REST OF VICTORIA			
Age (Yrs)	Males	Females	Persons	Age (Yrs)	Males	Females	Persons	Age (Yrs)	Males	Females	Persons
<30	484,616	479,077	963,693	<30	366,104	364,904	731,008	<30	118,512	114,173	232,685
30-44	521,681	547,714	1,069,395	30-44	389,008	407,542	796,550	30-44	132,673	140,172	272,845
45-54	308,723	318,045	626,768	45-54	219,036	229,545	448,581	45-54	89,687	88,500	178,187
55-64	211,326	211,610	422,936	55-64	148,567	149,932	298,499	55-64	62,759	61,678	124,437
65-74	147,918	163,899	311,817	65-74	101,291	113,835	215,126	65-74	46,627	50,064	96,691
75+	104,978	168,797	273,775	75+	71,830	116,732	188,562	75+	33,148	52,065	85,213
Total	1,779,242	1,889,142	3,668,384	Total	1,295,836	1,382,490	2,678,326	Total	483,406	506,652	990,058

- The telephone survey questionnaire is provided within Appendix 5.



Research Findings





Community Forum Research Findings

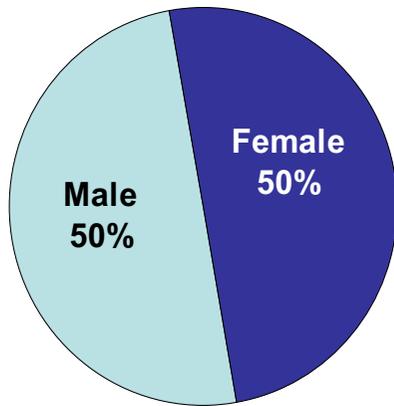


Respondent Profile

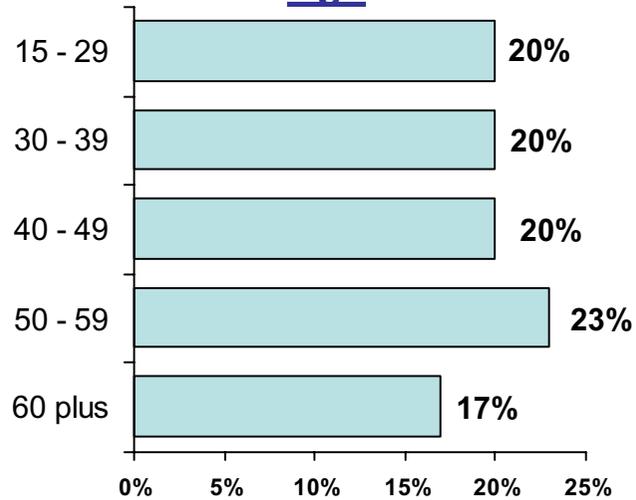


A good mix of the community was represented

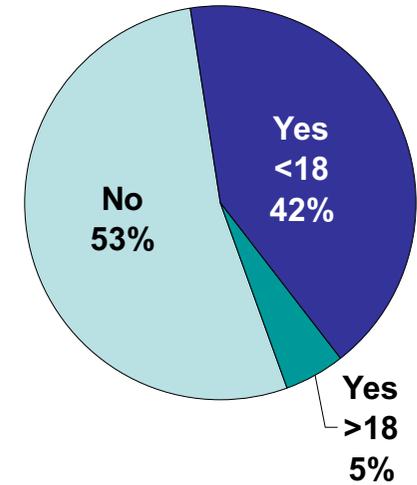
Gender



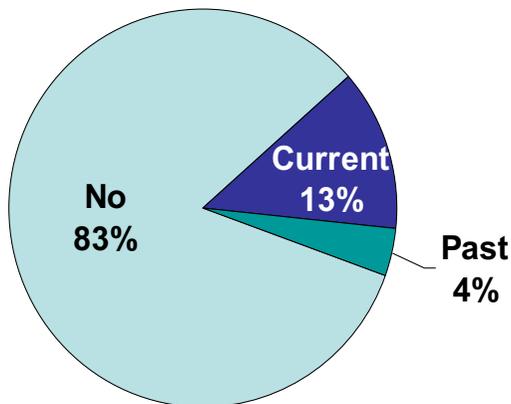
Age



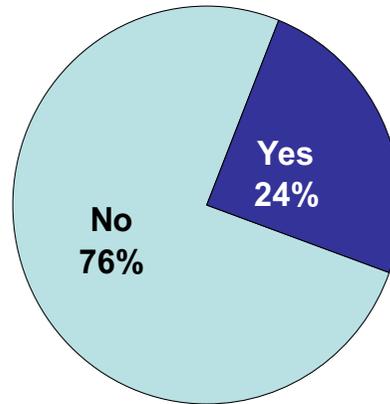
Kids @ Home?



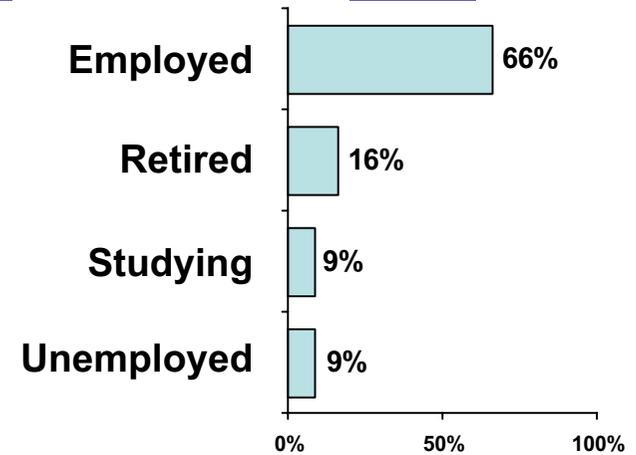
Volunteers



Local Business Operators



Status

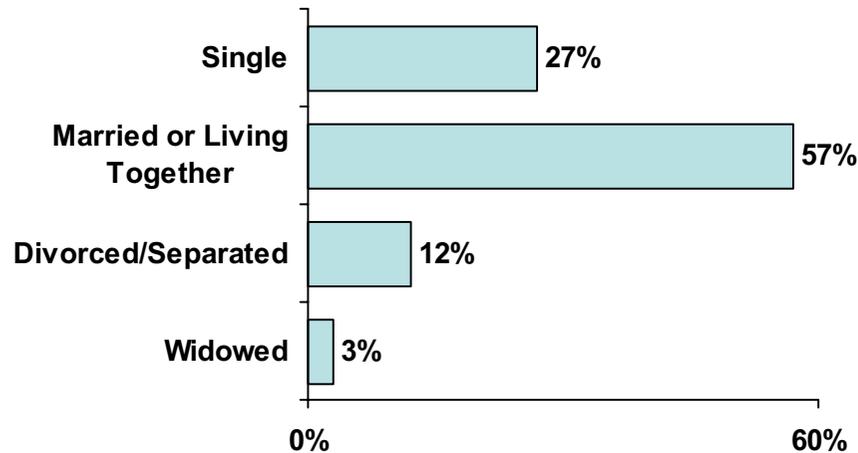


Base: All forum respondents (n=116)

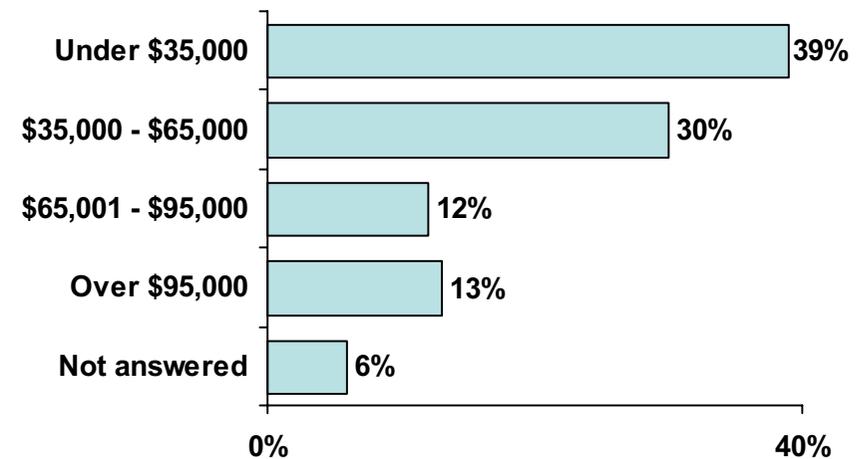


A good mix of the community was represented

Marital Situation



Annual Income



Distance from nearest coastline, bay or ocean

- Respondents lived an average of 4kms from the coast ranging from 1km to 30km.
- Of the 32 local business operators who participated in the forums, their business was an average of 3.8kms from the coast, ranging from 1km to 30kms.

Base: All forum respondents (n=116)



Coast & Marine Environment: Uses & Values



Coast & Marine Environment Uses and Values

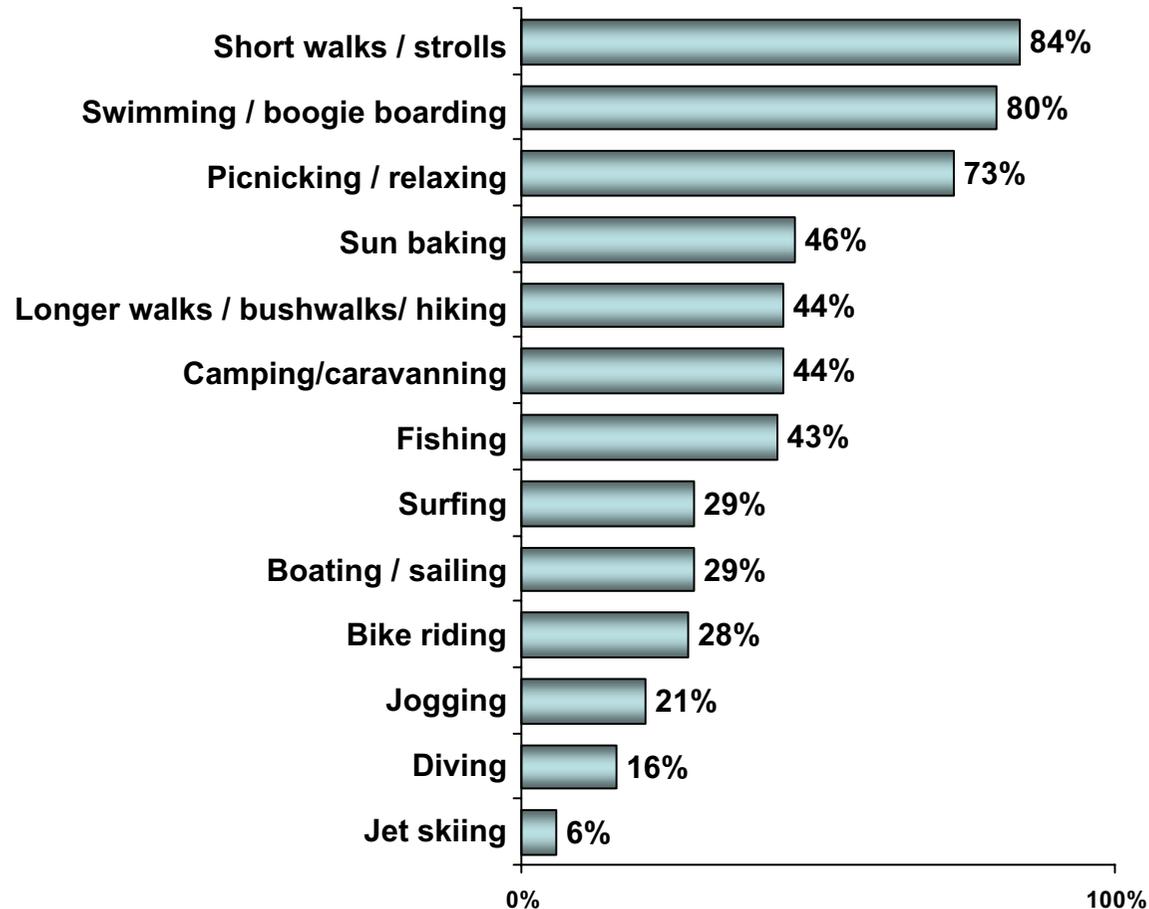
- The Victorian coast is used and valued for many different factors and facets. Perhaps most importantly, coastal dwellers appreciate that it is free and accessible to all.
 - In terms of specific attributes, the natural capital of the coast is very highly valued, with 35% of forum participants stating that the scenery and beauty of the coast is what they really value.
 - The coast is also a place to relax, unwind and contemplate, as well as energise and invigorate.
 - Participants spoke of open spaces and the sea horizon, and the calming sights and sounds providing a sense of freedom from the rush and noise of everyday life (especially among city dwellers).
 - The coast also plays a very important role in parenting, in terms of entertainment, education, calming children down, etc.

- The coast is valued for being a living, dynamic, (mostly) clean, natural and healthy environment that provides a platform for so many different activities, whether out of, on or in the water.
 - It is also an increasingly important setting for exercise and the growing number of health conscious Victorians.

- People described the critical importance of having access to public places with water, and hence the increasing importance of the coast given the impact of the drought on so many inland waterways, combined with the increasingly hot weather.

- The marine environment remains largely an unknown, and mysterious to Victorians.
 - However, it is certainly valued for its wildlife (dolphins and whales are a key feature). It is recognised as an essential part of the web of life, and for its ability to produce food!

Coastal Activities



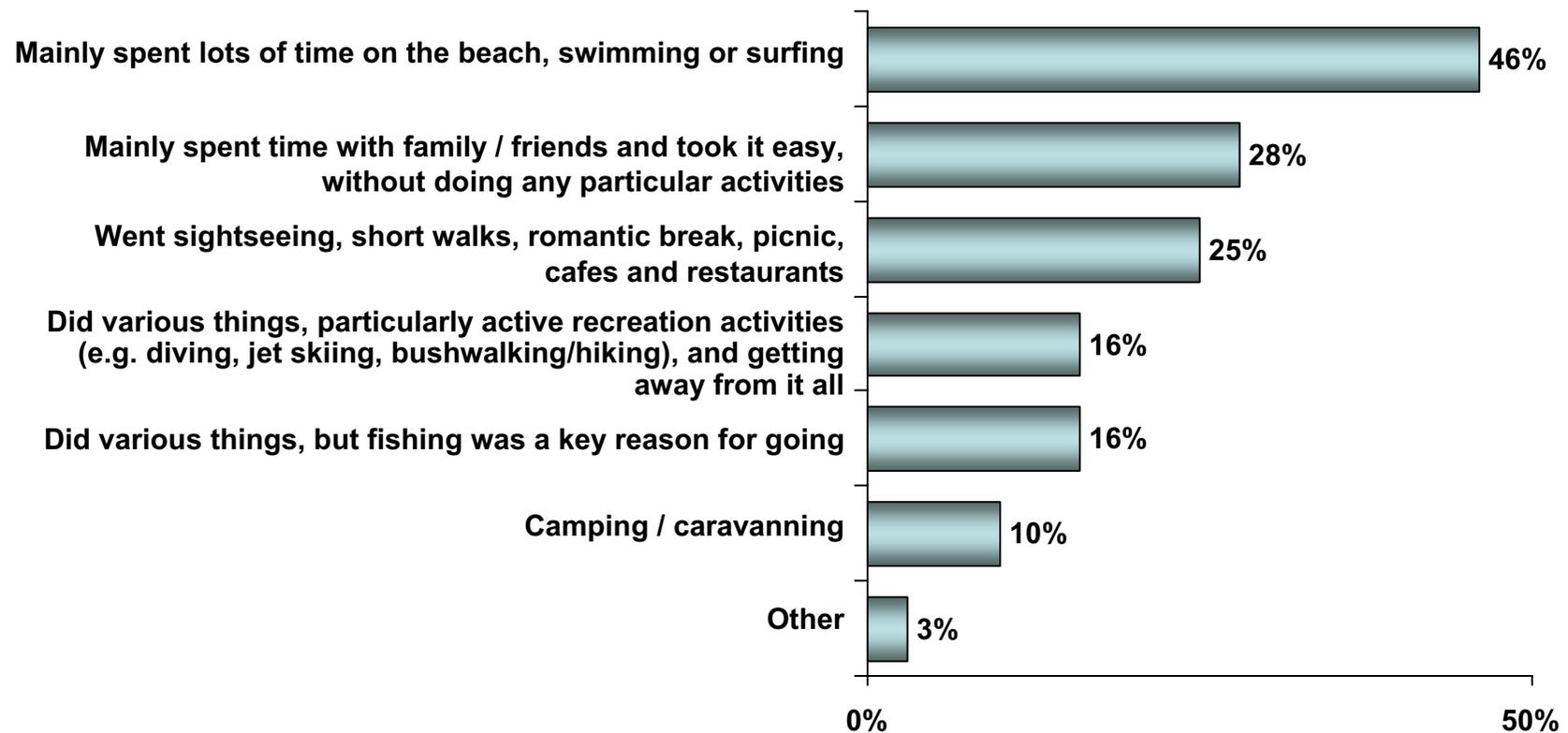
- Coastal dwellers are using the coast and marine environments for many different activities.
 - On average, respondents mentioned 5.6 different activities.
- The most popular uses by far are short walks (84%), swimming or boogie boarding (80%) and picnicking / relaxing (73%).
- More uses were mentioned for:
 - Females at 5.9 vs 5.2 for males
 - East coast 5.9 vs West coast 5.4
 - Younger people – e.g. 6.4 mentions among <29 y.o.s

Base: All forum respondents (n=116). NB: Top mentions only (5%+).

Q.19 Which of the following do you do when using / visiting the coast, either locally or in other Victorian areas?

Last Visit to the Victorian Coast

Activities During Last Visit to the Victorian Coast



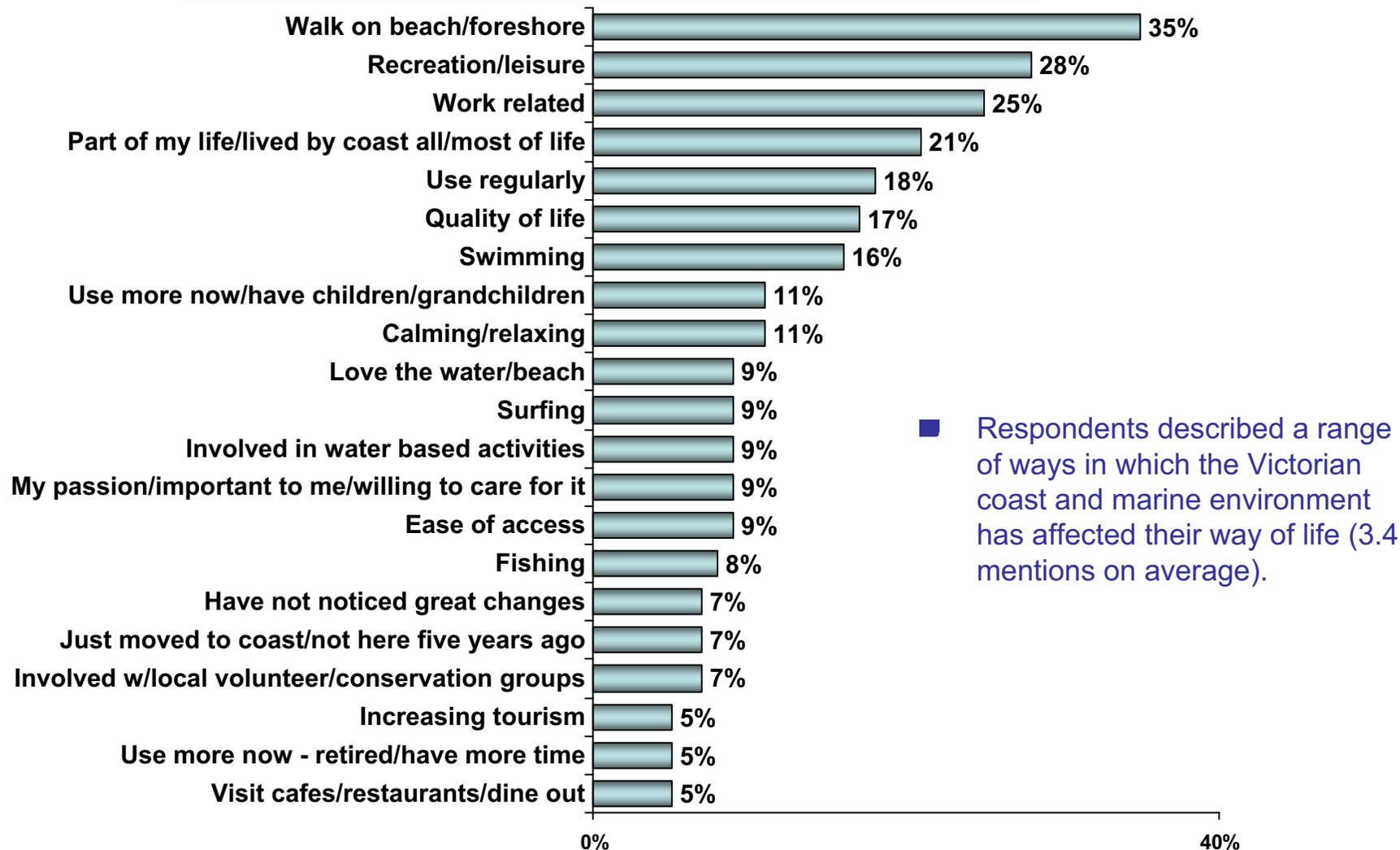
Base: All forum respondents (n=116). Multiple responses provided.

Q.20 Thinking specifically about your last visit to the Victorian coast, which of the following best describes what you did?



The coast plays a range of roles in the lifestyles of those who live on the coast

Role of the Coast and Marine Environment in Lifestyle



Base: All forum respondents (n=116). NB: Top mentions only (5%+).

Q.11 How would you say the Victorian coast and marine environment has affected the way you currently live your life? How are you using or relying on the coast and marine environment? And how is this different to say 5 years ago, if at all? What has changed in your life?



Changes in coastal use mainly reflect a change in life stage and priorities

- Many respondents spoke of the coast as having played a more important role in their day to day lifestyles over the last few years. There are a number of reasons for this:
 - Many spoke of using the coast more as a result of having young children/grandchildren around. The beach is seen as an excellent place to take children, for a range of reasons including family time, beach related and sporting activities, as well as education. In particular, the beach is valued for its use being free, unlike many other activities.
 - Moving away from the city and making the 'sea change', where the attraction of coastal living is the key driver in the coast playing a more important role in their lives.
 - Inland waterways have also become less accessible as a result of the drought, causing more people to turn towards the coast for their 'water fix'. Other research conducted by Ipsos on behalf of the DSE supports the critical importance of waterways in Victorians' enjoyment of public lands.

"It is a big part of life. I have two kids and they love the water. Any chance to visit the beach, we will do it. Every good night we walk on the Strand and past the cafes ... I was born in Lebanon and we lived near the water. Dad decided to settle near water, for sailing, fishing and water based activities. If you are born near the water, you want to be close to it. I feel out of my depth when I'm away from the water." (Elwood)

"Seeing the Red Bluff cliffs and out to sea on the way home is a glorious panorama. It gives me a feeling of freedom. Freedom from inland, especially northern suburbs, where you can feel imprisoned." (Elwood)

"Everything costs money in Melbourne – but here it's free. What you might see in a rock pool is just great." (Inverloch)

"We retired here and can enjoy our retirement. After working, it's just fab. Here it's lovely; you can walk along the beach, it's a great lifestyle." (Inverloch)

"I use it for fitness, that's very important. It's changed a lot at the foreshore in the last 5 years, and people are using it more because of the development down there, the boardwalk, more access and it's nicer to go down there and probably safer now. I go there early in the morning or late at night and there's lots of people there." (Mornington)



A few are using different areas due to concerns or dissatisfaction with aspects of some areas

- The few who are now using the coast *less* generally explained that this is because they are at a different stage of life when they are busy with other priorities.
 - For younger people, this is mainly due to studying or working.
 - For older people, this can be due to reduced mobility, but also a perception that there is less reason to visit the beach as the children in the family grow up – again reinforcing the importance of the beach setting in keeping children entertained and active, as well as educating them.

- However, some respondents spoke of now using different areas of the coast as a result of dissatisfaction with changes that have occurred in areas they have previously used.
 - There were two key reasons for this. Firstly, people prefer to visit less populated and/or quieter areas, whereas some areas are becoming overcrowded. Secondly, some areas are increasingly becoming polluted – especially from syringes (at Melbourne beaches in particular), but also from general litter and debris, as well as outfall (a key issue at Gunnamatta beach), and even from excessive weed growth as a result of the drought (especially at Lakes Entrance).

“It’s become more populated and popular in the last 5 years. Not as easy to get a secluded area.” (Warrnambool)

“The facilities are better, but it’s so much more crowded now – perhaps that’s why.” (Warrnambool)

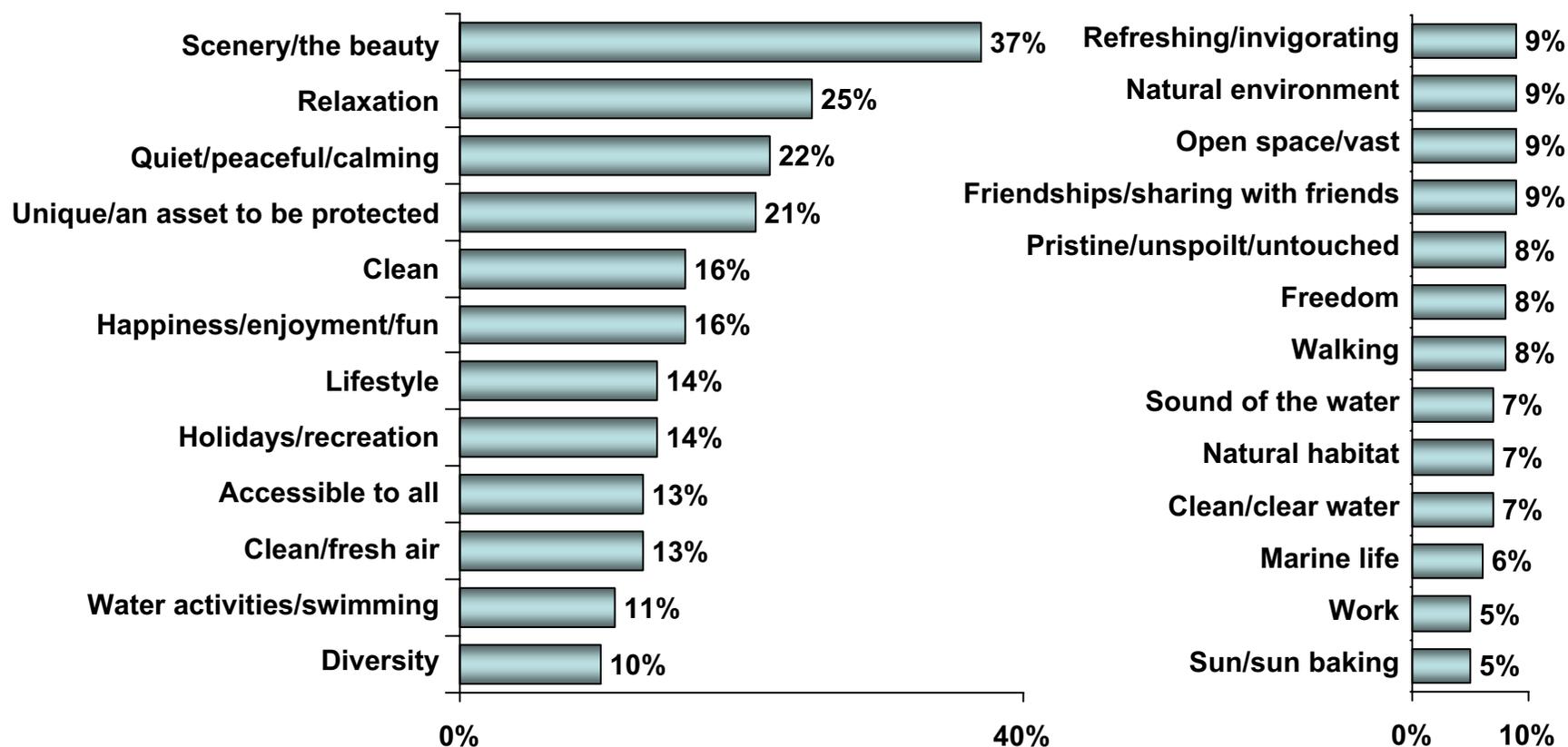
“In 2003 we had a major fire, and there was lots of sediment that ended up in the river systems. We recently had another fire which affects the lake system near the snow fields. I can’t swim in the lake because of the weed, it’s black in some areas. There are places that are just so salty. It’s like the Black Sea - you are just encrusted in salt.” (Lakes Entrance)

- There was a general sense that the coast would play the same or similar roles in the next five years.



Coastal values are predominantly passive and reflect intrinsic value placed in natural capital

The Victorian Coast – Meaning and Values



Base: All forum respondents n=116. NB: Top mentions only (5%+).

Q.13 Please take a few moments to think about and write down all of the words and phrases that describe what the Victorian coast means to you, and what you really value about it.



In the community's own words...

*"Peace. Beauty. Threatened ecosystem. Rich animal and plant life.
Spiritually refreshing."*

"The coast is beautiful, huge. I miss it when I visit relatives inland. The sounds from the ocean are terrific. I could sit there for hours."

"I value the cleanness - hope that is preserved - the space, the air. The weather. It is important for recreation but also for the environment itself."

"Pristine, natural. Value it as it is in its natural condition and needs to be kept that way, with funding to ensure longevity of flora, fauna, wildlife and ocean creatures."

"Opportunity to enjoy water and environment that goes with it. Value it as being readily available to all."

"Enjoyable, amazing, beautiful, resourceful. Value its locality and how I always enjoy it."

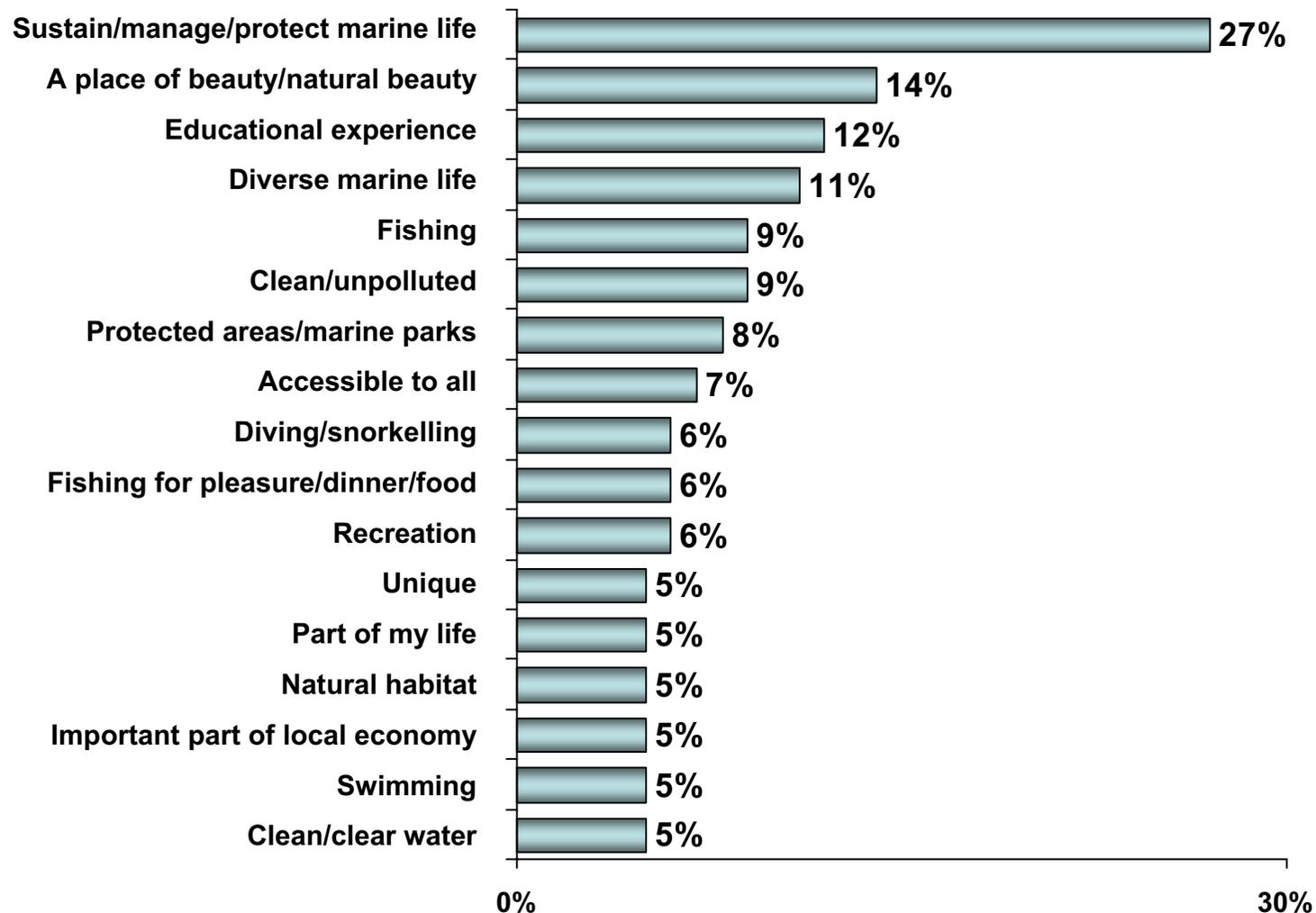
"A place where you can go whenever you want. A place where you can go to think, and have fun."

"Beautiful, wild, pristine, loud, peace. I value all the different things the coast gives and how it always makes me feel alive."



Marine life and its diversity are highly valued – the community seek protection of this

Victorian Marine Environments – Meaning and Values

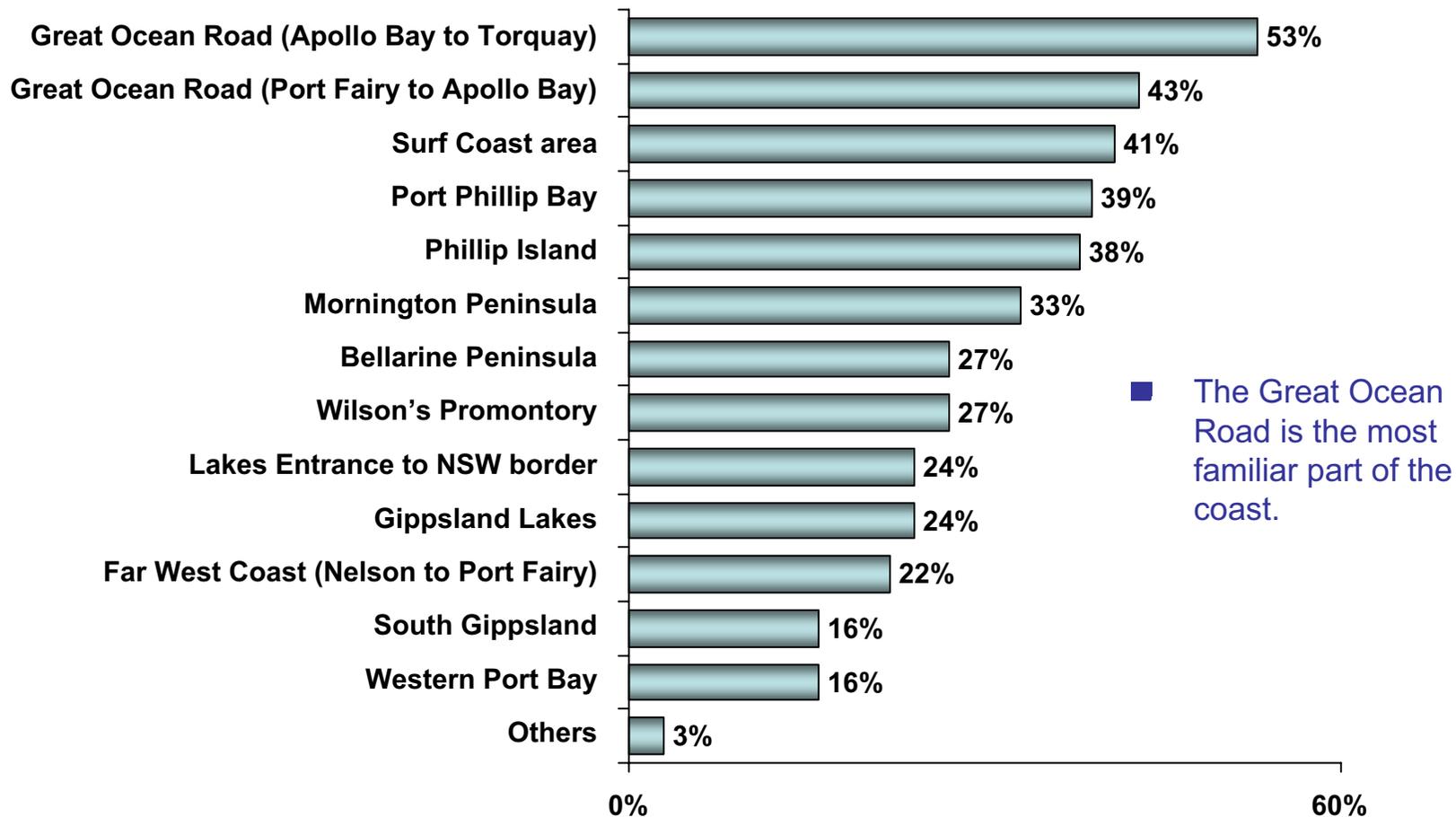


Base: All forum respondents (n=116). NB: Top mentions only (5%+).

Q.14 Please take a few moments to think about and write down all of the words and phrases that describe what the Victorian marine environments mean to you, and what you really value about them.

The Victorian Coast: Familiar Areas

Which parts of Victorian Coast are you familiar with?



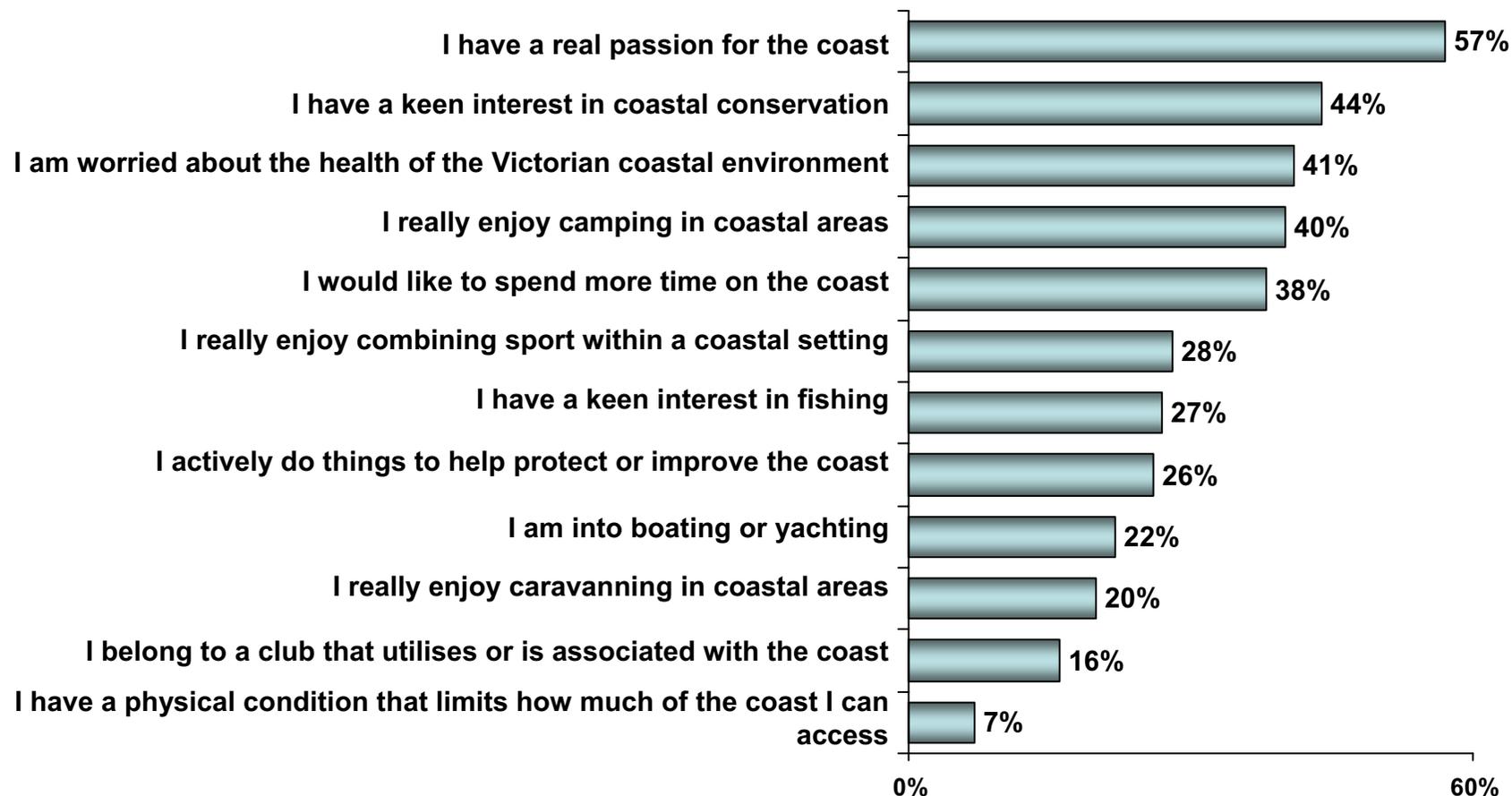
Base: All forum respondents (n=116).

Q.18 Which parts of the Victorian coast would you say you are reasonably familiar with?



General coastal interests reveal passion, commitment and concern

Respondent Interests and Views



Base: All forum respondents (n=116).

Q.21 Do any of the following describe you or your views? (Circle as many as apply)

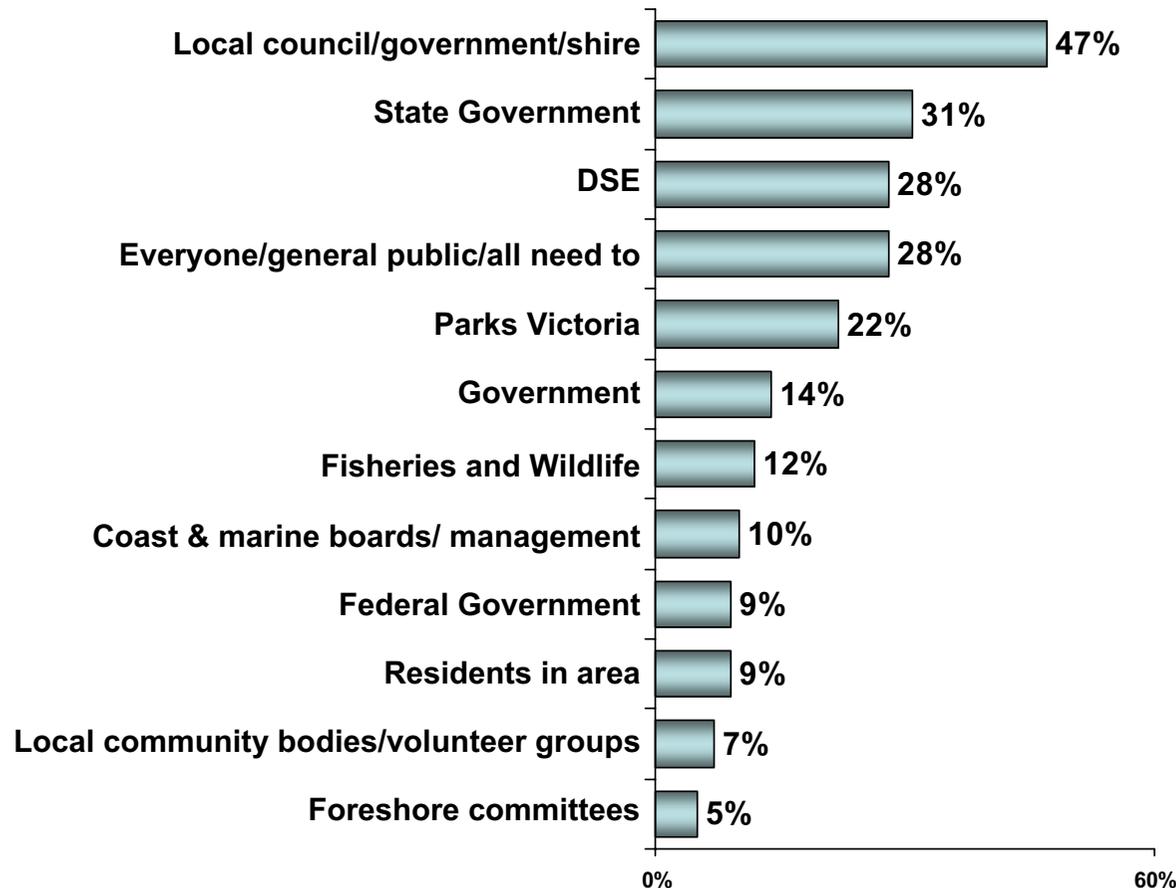


Coastal Management and Information



Local Govt. seen as the most responsible for managing the coast, followed by State Govt. ... and similarly, **EVERYONE**

Who Manages and Protects the Victorian Coast and Marine Environment?



- A fairly large proportion (28%) spontaneously suggested that *everyone* in the community has a role to play in protecting the coast.
- Subsequent open discussion of this topic revealed that virtually all respondents agreed with this sentiment, adding that people need to be more aware and conscious of the impact of their actions on the coast.
- In turn, the discussion turned to the need for more community education to better inform and engage people. Special 'Clean Up the Coast' days were suggested in all forums.
- While there is a degree of interest in volunteering, some people also feel that government may be relying too much on community contributions and in turn not allocating sufficient coastal funding.

Base: All forum respondents (n=116). NB: Top mentions only (5%+).

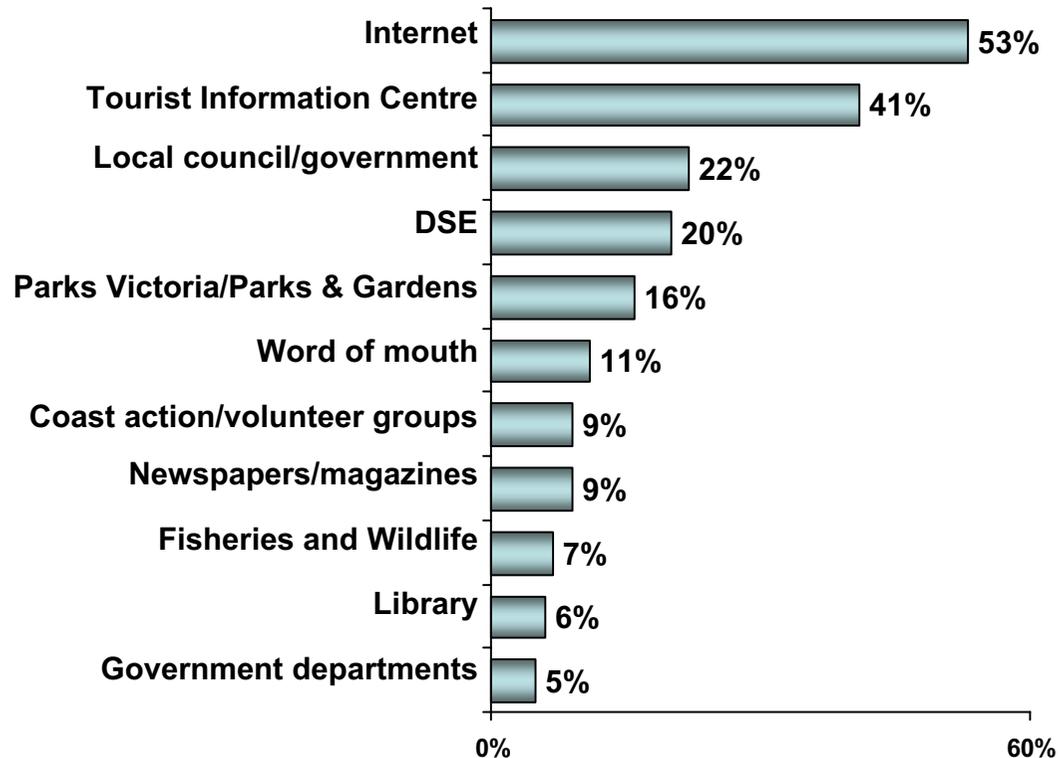
Q.24 Who do you think is responsible for managing and protecting the Victorian coast and marine environments?

(Please list as many as you are aware of, with a '/' after each)



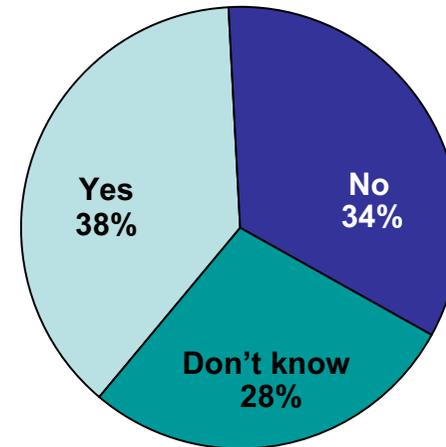
Information Sources & Perceived Availability

Expected Information Sources



- The internet and Tourist Information Centres are by far the most popular information sources.
- Data on specific internet sites is provided within the telephone survey results.

Enough Information Available?



- Opinions are fairly divided among respondents as to whether enough information is available in relation to the Victorian coast or marine environments. Many are unsure, indicating that they have not tried to obtain such information.
- The telephone survey quantifies the proportion of Victorians who have recently sought coastal information (see 'Coastal & Marine Environment Information' section).

Base: All forum respondents (n=116).

Q.22 If you wanted to access information on the Victorian coast and/or marine environments, where or from whom would you expect to find it? *(Please write down as many specific information sources as you are aware of, with a '/' after each)*

Q23 Do you feel that there is enough information available about the Victorian coast and/or marine environments?



Health of the Coast & Marine Environments & Key Issues



Images courtesy of Jeff Weir and Shaun Bourke



Images courtesy of Jeff Weir and Shaun Bourke



Health of the Coast & Marine Environments

- Many are satisfied that the coast and marine environments in Victoria are healthy, and this is especially true in regional coastal areas.
 - However, many were also unsure about how to assess the health of these environments, other than making a visual assessment (see over). In particular, few respondents have been exposed to the underwater and off-shore marine environments, therefore could not comment on their state.
- When shown Victorian marine life images (just a few examples of which are provided on the previous two pages), most were amazed to see the richness and diversity, and instantly felt a heightened sense of the need to protect this unique environment, and hence tell others about it.
- Indeed, many of the participants are quite concerned about increasing impacts of human activity on the coast, especially Port Phillip Bay, which is seen by many as less than pristine, if not fairly polluted.
 - Concerns not only relate to people's ability to access and enjoy the coast, but also the impact on the native flora and fauna, as well as the landscape in general – not only for today, but also for the long-term future health of the coastal environment.
- Specific issues and concerns in relation to human impacts upon the coast that participants expressed in the forums include:
 - The impact of litter and other pollution (including outfall from residential developments and well as agricultural and industrial pollution) on the appearance of the coast, and on wildlife, as well as their ability to safely use the coast without fear of being harmed – e.g. by syringes, broken glass, and potential health impacts of sewage outfall, fertilisers, chemicals and other pollutants.
 - The increasing impact of coastal developments on the look and feel, and health of the coastline.
 - People inappropriately accessing beaches – e.g. trampling over sand dunes and causing erosion.
 - Excessive commercial fishing ... linked with insufficient policing of waters.
 - Potential impacts of channel deepening and dredging, which many people are unsure of.
 - Water and noise pollution from the growing number of motor boats and jet skis, which are present safety concerns.
 - The introduction and impact of pests and weeds.



How People Assess Whether the Coast and Marine Environments are Healthy or Unhealthy

- The community's approach to assessing the health of the coast and marine environments is primarily based on visual factors and evidence. Many *sensed* that there were possibly issues that they were completely unaware of, due to a lack of visible or other sensory evidence, or scientific knowledge or information. This sense is mainly driven by the pressures of a growing population on the coast.

Very Healthy Coast Environment

Clear water
Clean sand
Readily accessible to population
Birds
No erosion
Boardwalks/paths/tracks
Vegetation, bushes, grasses – native species
Eco-sensitive planning and restricted development

Not Very Healthy Coast Environment

Commercial development
Alien animals and plants
Litter – plastic bags, cigarettes
Lack of vegetation on sand dunes
Not many garbage bins
Dog dropping at entry points
Development right on foreshore

Very Healthy Marine Environment

Visibility of marine life e.g. dolphins, penguins
Clean smell
Good fishing
Sea grasses growing freely
Marine protection parks
Abundance of species/Variety of species
Whales coming in

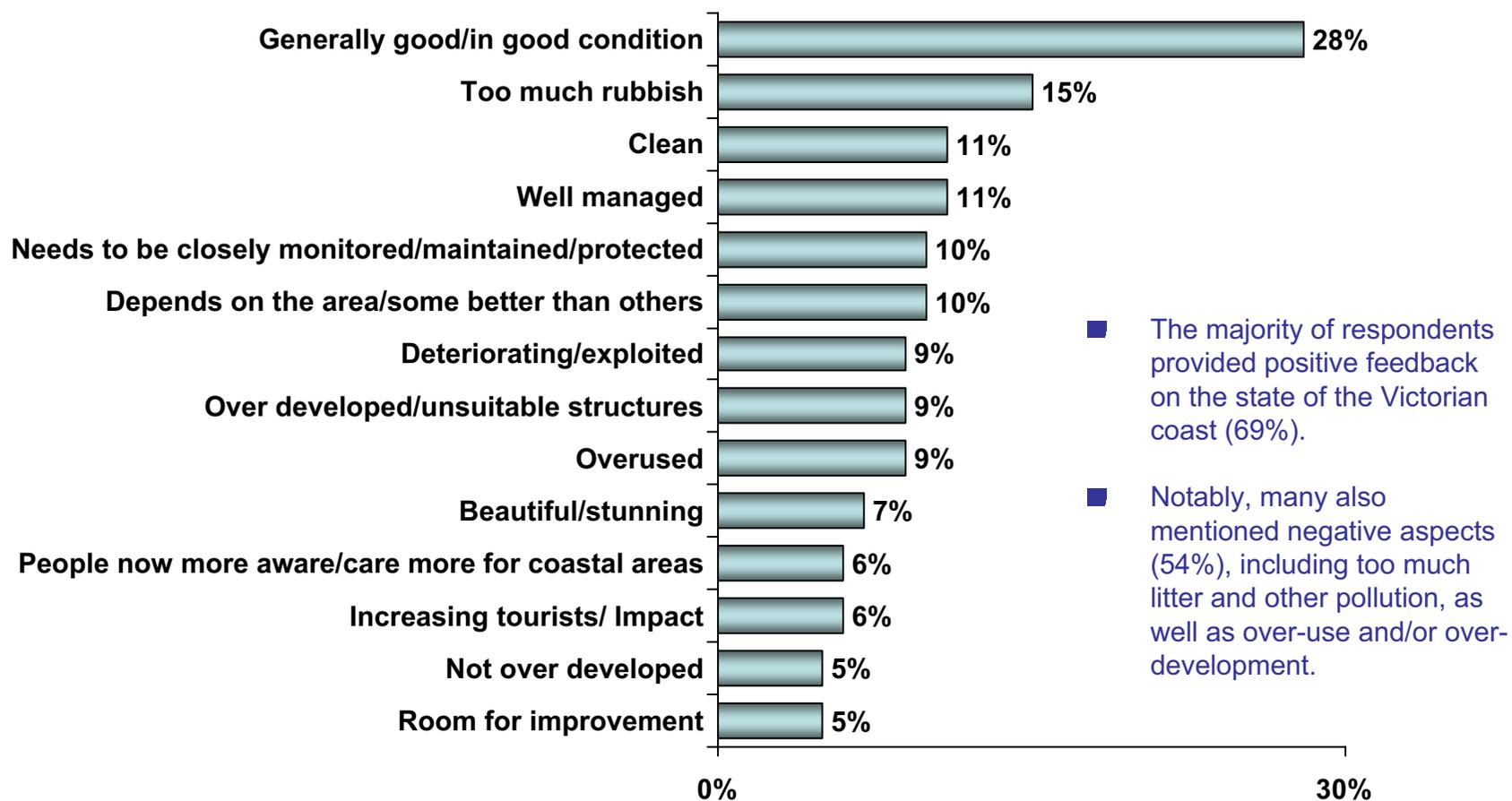
Not Very Healthy Marine Environment

Star fish from dredging boats
Oil slicks – commercial/recreational
Sewage / wastewater outlets into water/bays
Foamy water
Not policing marine rules that exist
Dead fish/dead birds
Virus in abalone
Litter and rubbish on/in water



The Victorian Coast is generally seen to be in good condition, however many also have concerns

Perceived State of the Victorian Coast



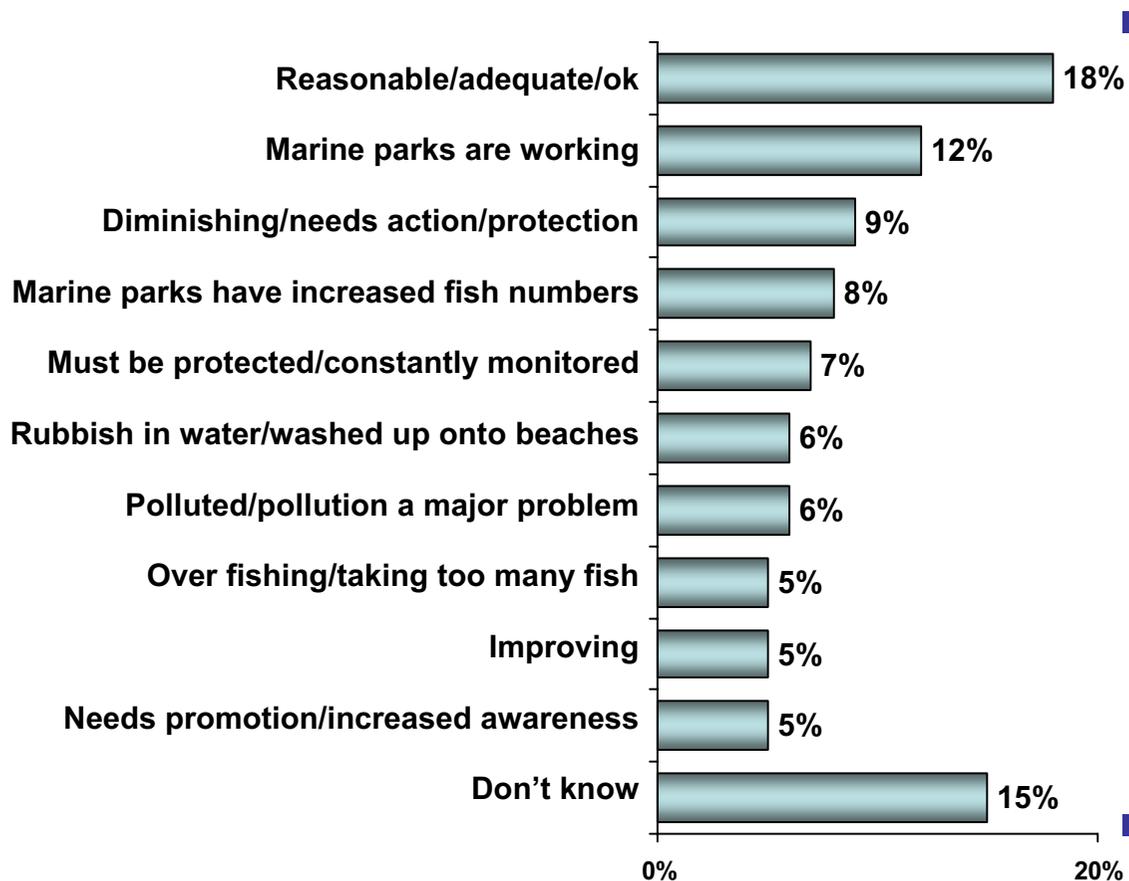
Base: All forum respondents (n=116). NB: Top mentions only (5%+).

Q.25 How would you describe the current state of the Victorian coast? What makes you say that?



Marine Environments are thought to be in reasonable health, although many are unsure

Perceived State of the Victorian Marine Environments



While many respondents provided positive feedback on the state of the marine environments (53%), many also had negative comments (45%).

- Specific concerns included over-fishing, and a need for greater protection and policing, as well as increased awareness / education of the impacts of pollution and over-fishing.
- Some were especially concerned about *potential* impacts of channel deepening/dredging (4%), but most were not aware of possible impacts.
- Qualitative exploration revealed that many respondents did not know how to comment, as they simply did not know enough about the marine environments.

The Marine National Parks and Sanctuaries are seen to be working very well, and are well supported.

Base: All forum respondents (n=116). NB: Top mentions only (5%+).

Q.26 How would you describe the current state of the Victorian marine environments? What makes you say that?



Key Issues for the Coast and Marine Environments

- Pollution remains a key concern in all locations, but especially in Port Phillip Bay.
 - This includes litter and dog droppings ('as is' & in bags), plus engine oil and other water pollutants.
 - Respondents have a heightened sensitivity to this during peak times; it is a highly visual indicator.

"Near Melbourne and regional cities like Geelong - it's fragile and needs to have more evidenced based research to inform improved conservation in future - rather than loving the coast to death." (Elwood)

"Port Phillip Bay is like a giant swimming pool that's not cleaned out very often." (Elwood)

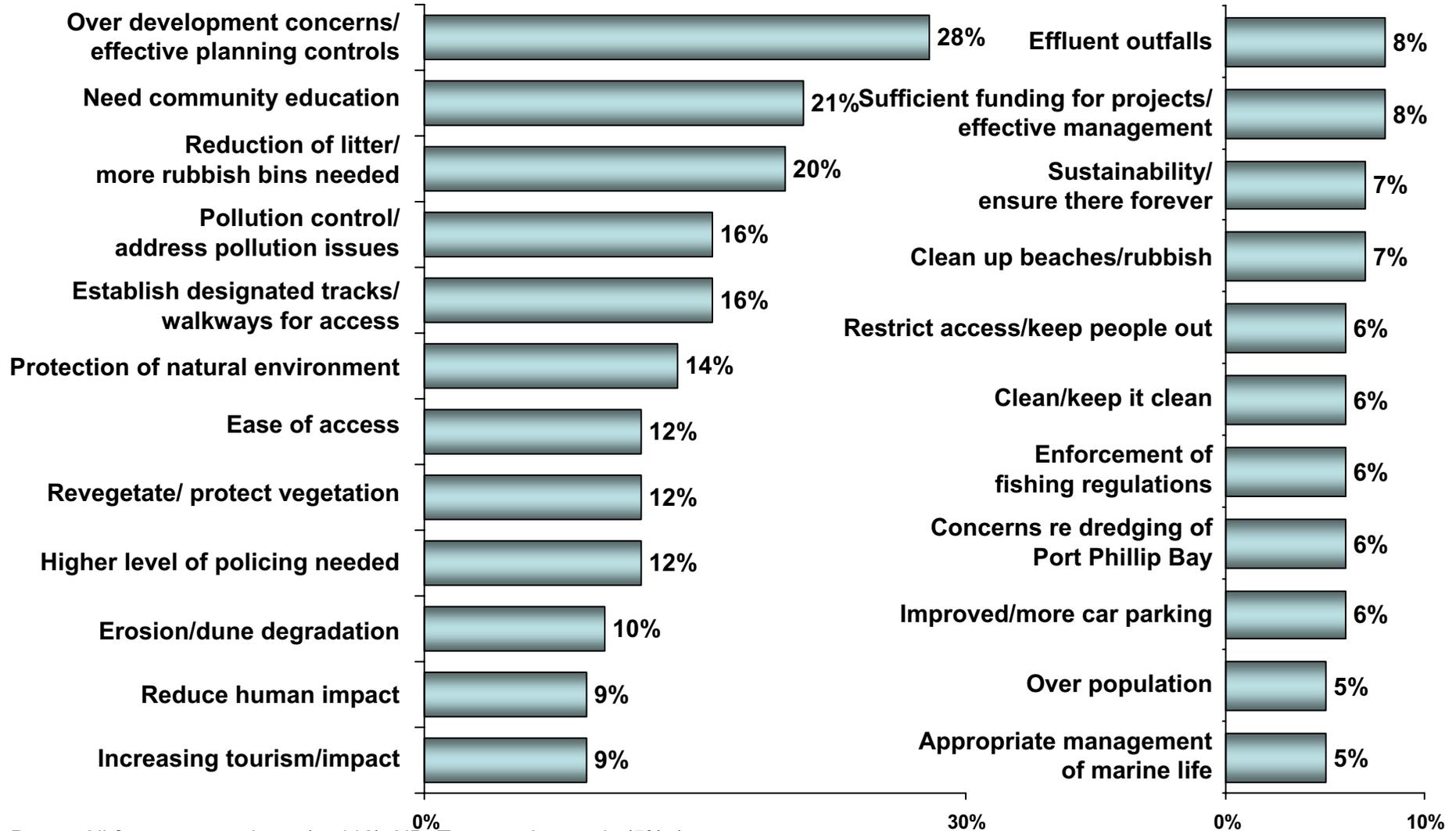
- As covered earlier, the coast is seen to be under pressure from population growth and overcrowding – especially the metropolitan beaches, but also in regional areas during peak times, to the extent that some are looking to move further out (especially in Inverloch). This impacts on people's sense of escapism and peace and quiet.
 - There is, nonetheless, a strong desire for beach access to remain free of charge.
- Coastal development is also related to population growth. People spoke of towns starting to blend together, and not wanting the coast line to end up like Gold Coast, or NSW coast.
 - There is a growing sense of powerlessness against commercial interests, and of the community not being heard or listened to. Some share a sense that VCAT approves all proposals.
- Key issues for the marine environments are over-fishing, coupled with insufficient resources to police the laws and regulations, as well as water pollution.
 - Some also commented on noise pollution created by the growing number of watercraft, along with safety concerns - including waves from large cargo ships (potentially also causing sand loss).

"We were watching a big ship come in, and this huge wave came in and washed all over the kids and everything. It was unbelievable. I've been going there [Dromana] for 30 years and never seen anything like it. Really sends a swell when the ships come in." (Inverloch)



Development, community education and pollution are the key coastal issues affecting Victorians

Important Coastal Issues



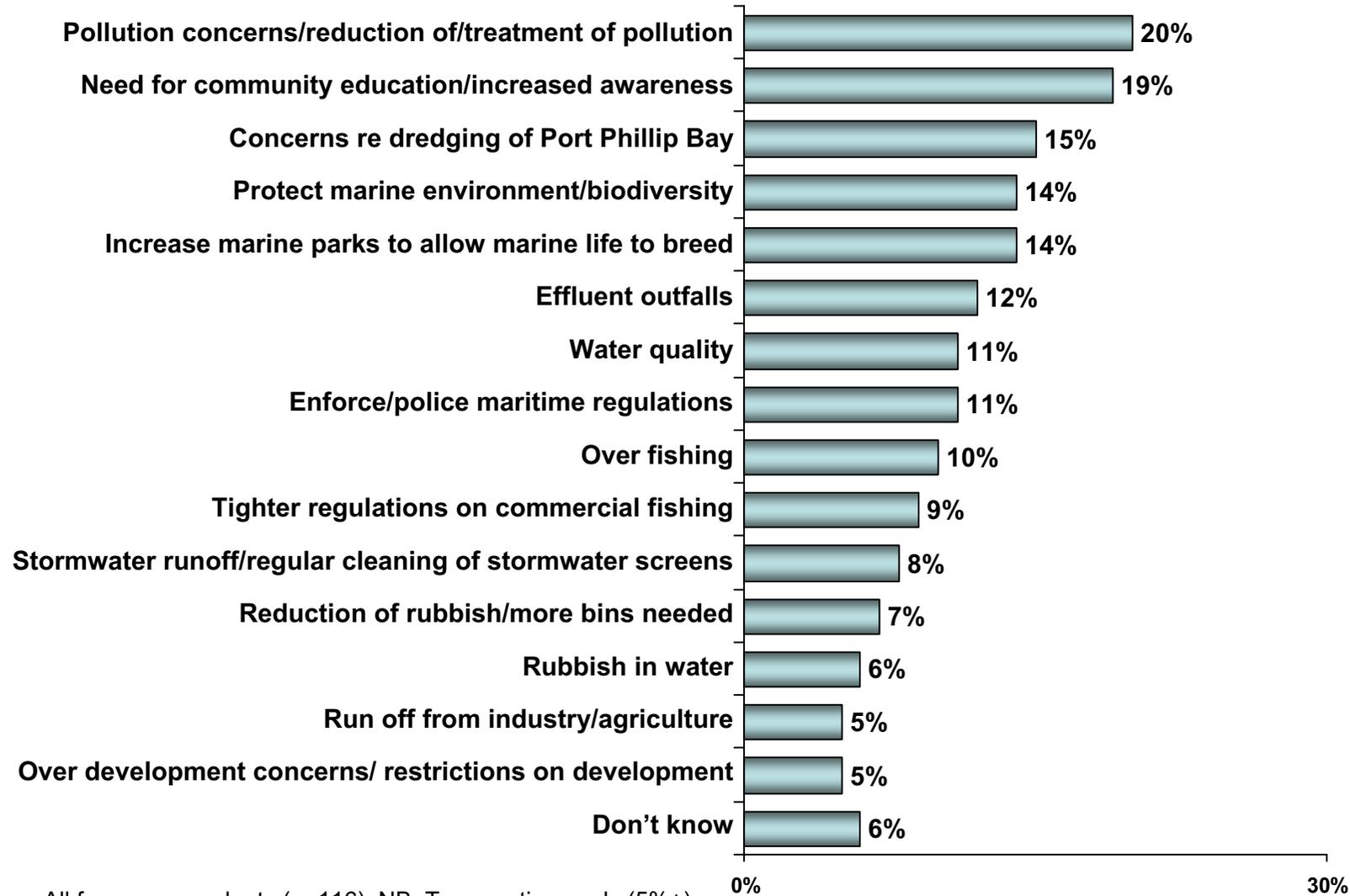
Base: All forum respondents (n=116). NB: Top mentions only (5%+).

Q.27 What do you regard as the important issues affecting you and your use of the coast in Victoria? What are the major or key issues that you feel need to be addressed or warrant some attention?



Pollution and the need for community education are seen as key issues for the marine environment

Important Marine Environment Issues



Base: All forum respondents (n=116). NB: Top mentions only (5%+).

Q.28 What do you regard as the important issues specifically affecting the marine environment in Victoria? What are the major or key issues that you feel need to be addressed or warrant some attention?



Climate change is a big unknown

- Climate change is an *emerging* coastal issue, raised spontaneously only in the last few forums. This appeared to be in response to media activity (e.g. *7:30 Report* on rising seas levels (12/04/07), Channel 10's "Cool Aid" program (04/04/07), plus newspaper coverage).
 - Importantly, people are not comfortable discussing the topic of climate change; there are too many unknowns, and a sense of conflicting opinions – due to a perception that there is still debate over the realities of climate change. The Federal Government is seen to have contributed greatly to this sense of debate.

- Drought is seen as the only possible current symptom of climate change, and respondents had no real understanding of potential future impacts.
 - Quite a few respondents were sensitive to some of the effects of the drought, in terms of vegetation dying, an increase in sediment, weeds and salt levels in the waterways, and increasing human pressure or reliance on the coast as inland waterways that are normally used are drying up.

- Respondents also had a sense that there is not much that they can do about rising sea levels. This confirms other research that many people are unsure about what to do about climate change in general.
 - Some also expressed the view that if they change their own behaviour this will not have a positive or significant impact because Australia's carbon emissions represent only a very small proportion of global emissions.

- These findings point to another key issue in that many respondents felt quite strongly that the community needs a far greater level of education about the importance of protecting the coast and marine environments and the impacts of their own actions, in order to minimise these impacts in future. While education is an on-going requirement, this sentiment appears to indicate a need for a mainstream *marketing* campaign – especially given the 'protective' response people had to seeing a series of marine life images.

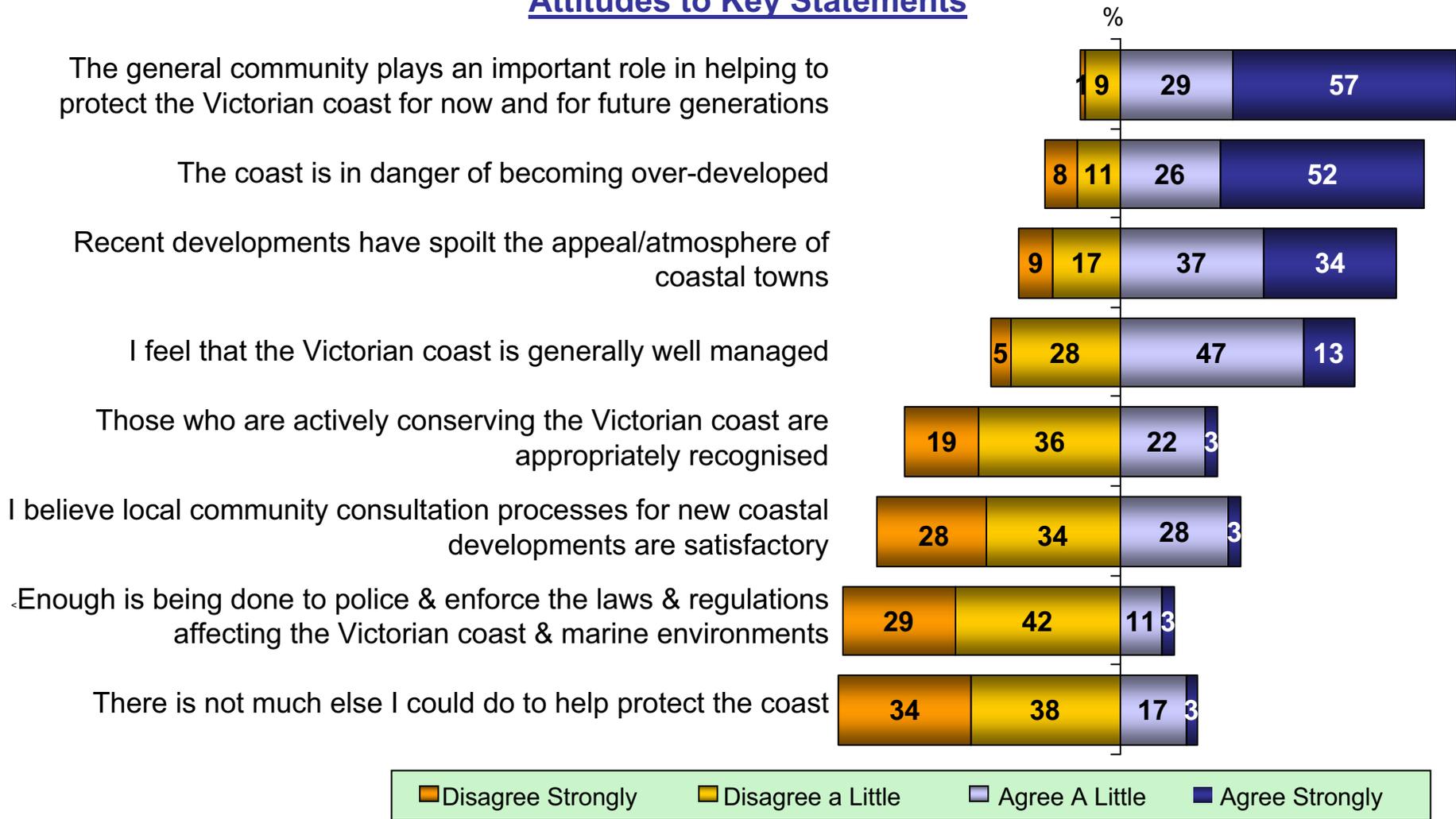


Attitudes & Perceptions



Key attitudinal statements highlight concerns; people certainly recognise there is more they themselves could do ... the question is: how do we want to engage people? What is the cause / call to action?

Attitudes to Key Statements



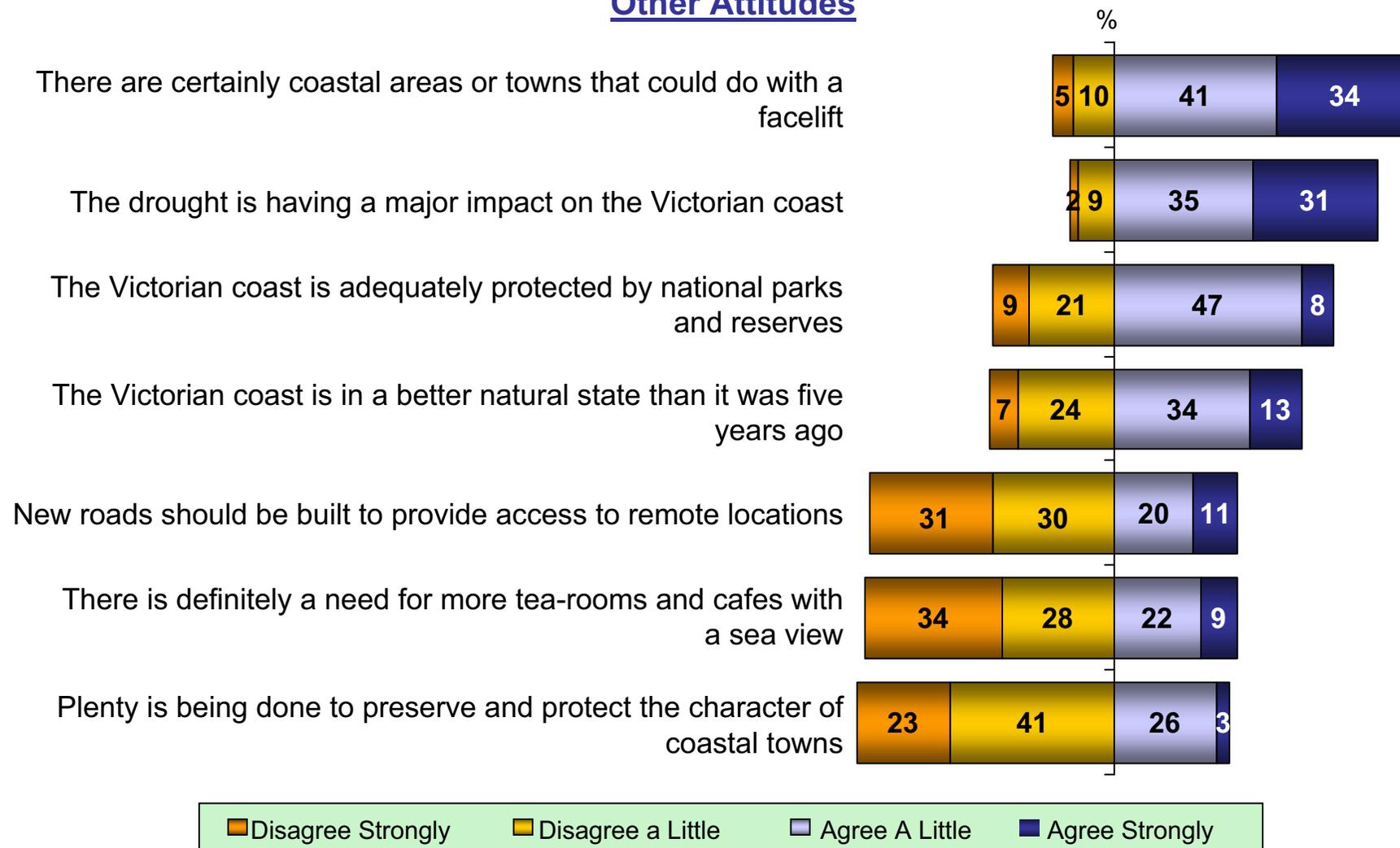
Base: All forum respondents (n=116). NB: Top mentions only (5%+).

Q.29 Please tell us the extent to which you agree or disagree with each of the statements below.
 (Simply circle the most appropriate answer for each statement)



Attitudes to other statements confirm concerns about developments – e.g. roads, cafes, protecting character of towns

Other Attitudes



Base: All forum respondents (n=116). NB: Top mentions only (5%+).

Q.29 Please tell us the extent to which you agree or disagree with each of the statements below.

(Simply circle the most appropriate answer for each statement)



Funding Priorities



Perceived funding priorities further confirm concerns about pollution

FUNDING OPTIONS	Unit Cost	% Included
Reducing Pollution (incl. litter traps)	\$3,000,000	93%
Supporting Community Groups Working on the Coast	\$60,000	73%
Vegetation Management and Improvements (incl. weed control)	\$30,000	72%
Toilet Blocks	\$150,000	68%
Foreshore Improvements (incl. picnic area, BBQ)	\$250,000	56%
Patrol illegal fishing activity	\$100,000	56%
Marine Pest Management	\$500,000	54%
Car Parks (incl. drainage and landscaping)	\$200,000	44%
Information source for coastal/marine environments	\$150,000	44%
Develop Long Walking Trails	\$500,000	43%
Shared Pathways (Paved)	\$250,000	40%
Upgrade Boat Ramp facilities	\$200,000	34%
Camping Area Improvements	\$250,000	34%
Research & monitoring of Climate Change	\$500,000	31%
Buyback land for conservation purposes	\$800,000	30%
Streetscape Improvements	\$750,000	22%
Sand replenishment on beaches (incl. groynes - rock walls extending into the water to stop sand moving)	\$3,000,000	15%
Upgrade Pier	\$2,000,000	13%

■ The fact that pollution controls represented such a large proportion of the total funding budget respondents had to work within (i.e. \$3M of the \$5M), and yet 93% still included this in their mix of recommended priorities confirms its importance.

■ Importantly, there is also a strong desire for funding allocation to support community groups and community education (73%), confirming that the community wants to be engaged more on coastal matters.

- Notably, in all seven community engagement forums, respondents suggested and supported holding 'Clean Up the Coast' days as a relevant form of engagement.

Base: All forum respondents (n=116).

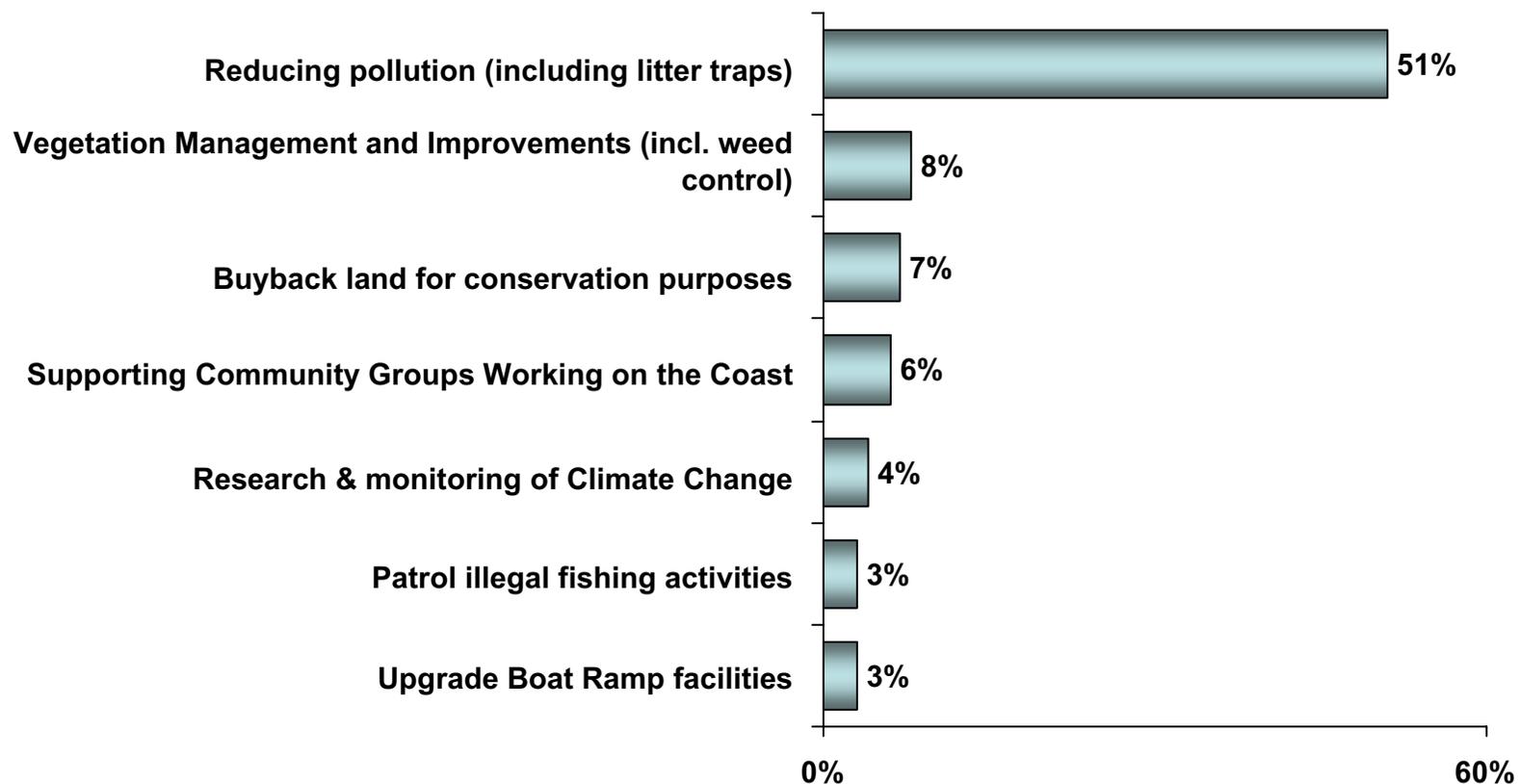
Q.30 Imagine you were put in charge of managing one of the following three regions of Victoria's coast and you had \$5 million to spend on the region over the next 12 months. On which of the following would you spend this sum of money? In what areas, do you feel the money is needed?



Clearly, reducing pollution is the standout priority

Top Funding Priority

(Single Response)



Base: All forum respondents (n=116).

Q.31 If you could only spend this \$5 million on just one item, what would it be? What do you see as the top priority?

(PLEASE CIRCLE JUST ONE NUMBER)



Coastal Development



The community is growing more sensitive to coastal development and feels a sense of powerlessness

- The general feeling among coastal dwellers in relation to coastal development is that there are insufficient controls, such that there is either already enough, or *too much* development – especially given the growth of the population and the attraction of seaside living.
 - This is seen to be not only impacting upon the natural environment and its ability to function and stay healthy, but it is also affecting people’s ability to enjoy the coast in the same way – e.g. the open spaces, peace and quiet, the feeling of ‘getting away from it all’ etc. There was a general sense that the amount of public land fronting the coast (96% of the coast) be maintained, if not increased.
 - Some developments are seen to have improved the look and feel, and accessibility of parts of the coast, particularly through the development of designated walking trails and car parks. However, many suspect that new residential developments in particular will place too much strain on the coast and the sea (i.e. from outflows). Housing developments are also thought to be changing the character of a number of towns, making them look more like suburbs of Melbourne.
 - Very few were aware of the 2006 Coastal Spaces report. In general, while they were reasonably supportive of the spatial growth recommendations for their local area, most were unsure about how such growth would occur or what the impacts would be. As already mentioned, respondents expressed a real sense of powerlessness to influence the outcomes of developments they oppose.

“I have a holiday house in Torquay – and it’s now like a suburb of Melbourne. People used to think beach-side was yucky – now in the last 25 years everyone wants a piece of it.” (Elwood)

“We need it to be monitored, they’re going to allow multi-storey development. That’s not what people came to live here for. They’re not listening to us. It’s just going to end up another suburb of Melbourne, which it ISN’T.” (Mornington)

“They have a chance to do something really good here and look at what they did to Frankston, it’s horrible, all those high rise buildings, and they can’t turn it back.” (Mornington)

“Slowly there won’t be many country towns anymore and it will all be overtaken by buildings. They’re less appealing, aesthetically, but I guess the beach will always be there.” (Mornington)



In the community's own words...

"Over development is an issue. I live in Port Melbourne and the amount of changes over the last 5 years is amazing. The big developers have come in. I see it as more of an environmental issue. It used to be just a beach. Now there is restaurants and condominiums." (Elwood)

"I think it's gorgeous, the [Port Melbourne] development is fantastic. It's designed to bring people to the beach. I bring my kids to experience it. It's not the same as living in Torquay, it's a city beach. I think it's great." (Elwood)

"We've got enough here. We have everything we need. We don't want any more development. Not on the beach, maybe elsewhere." (Lorne)

"There is more weed in the lake, maybe because of the grey water. Or maybe it's caused by the population explosion and a lot more buildings; that could be causing this. With the sea and tree change it's just bringing more people here. It's [the wastewater] gotta go somewhere and it's going into the Lakes. There's lots more people here... but you couldn't fill 90 mile beach up with homes and buildings even if you tried to. It doesn't detract, it's just the way it is." (Lakes Entrance)

"I worry that the shire call for people's input. I don't want our coastline to be like Queensland, the Gold Coast, and fortunately it hasn't happened yet. They call on the people and it goes to Council and then council just rolls over and tells DSE or VCAT what they are expecting to hear." (Inverloch)

"I think they just think develop anything on the coast that they can, the developers. There's got to be some limits on that development on the coast." (Mornington)

■ In relation to the Broadbeach development at Inverloch:

"There was huge objections. It gets rejected, then they go to VCAT who overrides it, and then it just goes ahead with a few modifications."

"We are against it and then it goes through. Not many people I know are for it. If we do have a say we are ignored. They do what they want to do. It's development by stealth and I think there's even been some things they've just gone ahead with before they've even had approval. So, there's been illegal activity."



Some specific hypothetical developments held appeal although strict controls are called for

- Respondents were asked to indicate whether a range of different hypothetical developments for their local area would be acceptable or unacceptable.
- The developments that were least acceptable included golf courses, shopping centres, beachside apartments, residential developments, swimming pools, restaurants and kiosks.
 - Those in Lorne expressed the strongest opposition to any additional developments (Erskine House was seen as inappropriate). By contrast, respondents in Lakes Entrance were quite supportive of a whole range of developments. Key restrictions included height limits on any new buildings, while there was a general sense that more development would contribute to the town's economy.
 - There was also a general sense that developers doing extra things for the community is mere bribery.

"We've got enough here. We have everything we need. We don't want any more development. Certainly not on the beach, maybe elsewhere." (Lorne)

"Gold Coast looks quite nice. Doesn't look bad with all the hotels. But put one of those in Torquay and it would look terrible." (Geelong)

- There were some specific developments that appealed to respondents, or that they felt the community would benefit from. There was, however, a general sense that any new developments would need to be designed and built with environmentally sensitive principles in mind, and height limits were a key concern.
 - The developments that held more appeal included toilet blocks, picnic facilities, a Life Saving Club, a marina, camping grounds, an eco-lodge, and a playground.

"Even though we enjoy tourism, let's keep it as natural as we can. We should be limiting development. If we care about tourism then we need to look after the environment too." (Elwood)



Key Forum Take-Outs



Key Forum Take-Outs

- A strong desire exists in the community for greater **engagement** in relation to the coast and marine environments, and greater **reassurance** that they are being appropriately cared for.
- Rather than a specific education program, this indicates a need for a strategic **marketing** program and **call to action**.
- This means marketing the many values and *natural* capital contained within these environments that are increasingly important to the Victorian community. Intrinsic to this is a need to communicate how **unique** and **fragile** the coast and marine environments are, how susceptible they are to human activity, and hence how important it is for **everyone** to do all they can to protect them for all generations to come.
- Essentially, the research points to a growing desire, if not *need* for **increased Government funding** to ensure sustainable coastal development.
 - It is worthwhile exploring opportunities to call for increased financial support from the general community, although the response is likely to be somewhat limited (see 'Willingness to Contribute Financially' section within the telephone survey results).



Community Telephone Survey

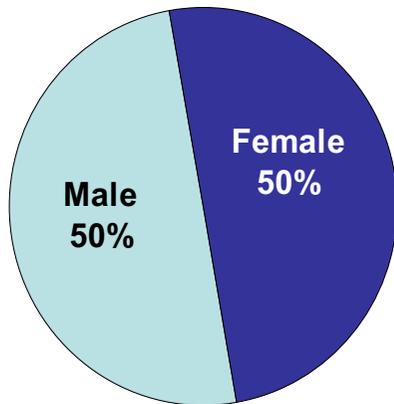


Respondent Profile

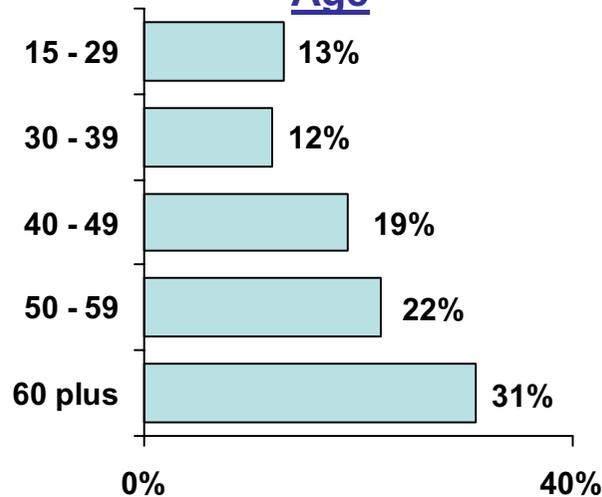


A good mix of the community was represented

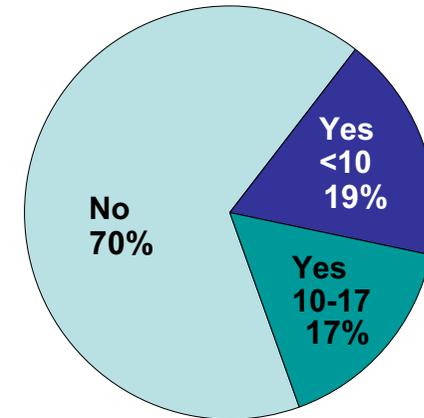
Gender



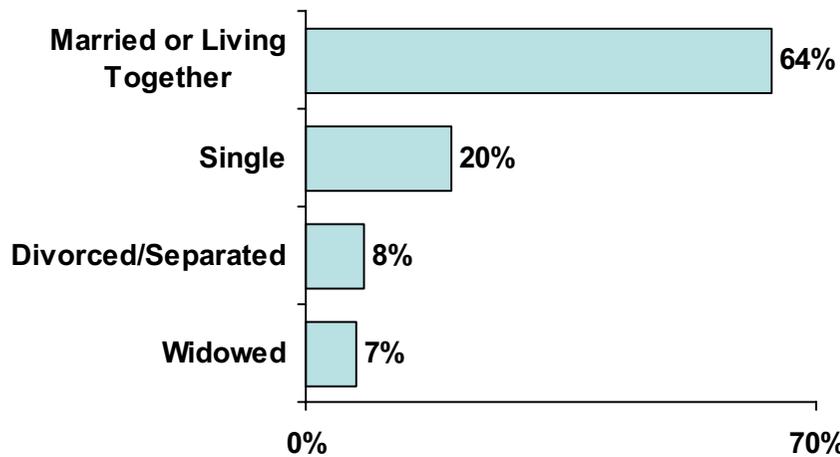
Age



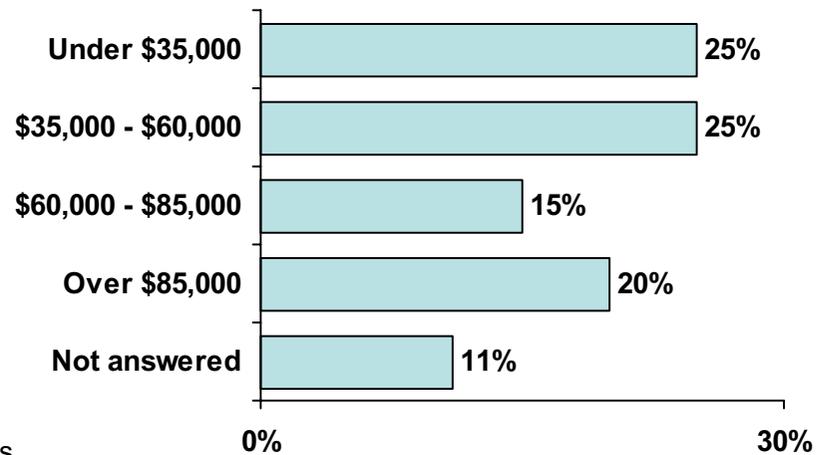
Kids @ Home?



Marital Situation



Annual Income

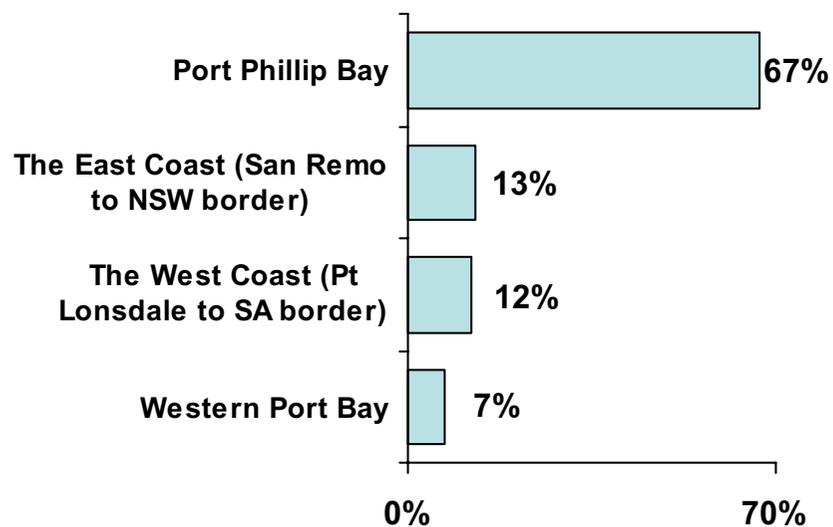


Base: All telephone respondents (n=601). Various demographic questions.

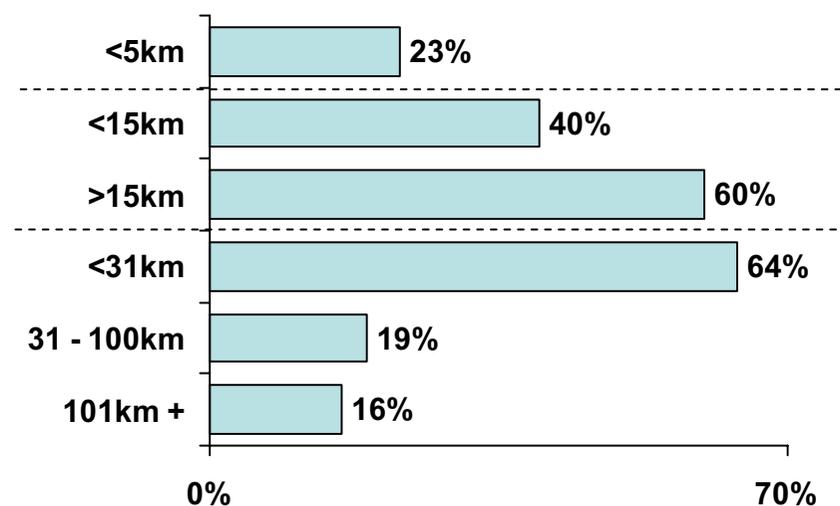


Respondent Profile cont'd

Location



Distance of Residence from the Coast



Base: All telephone respondents (n=601).

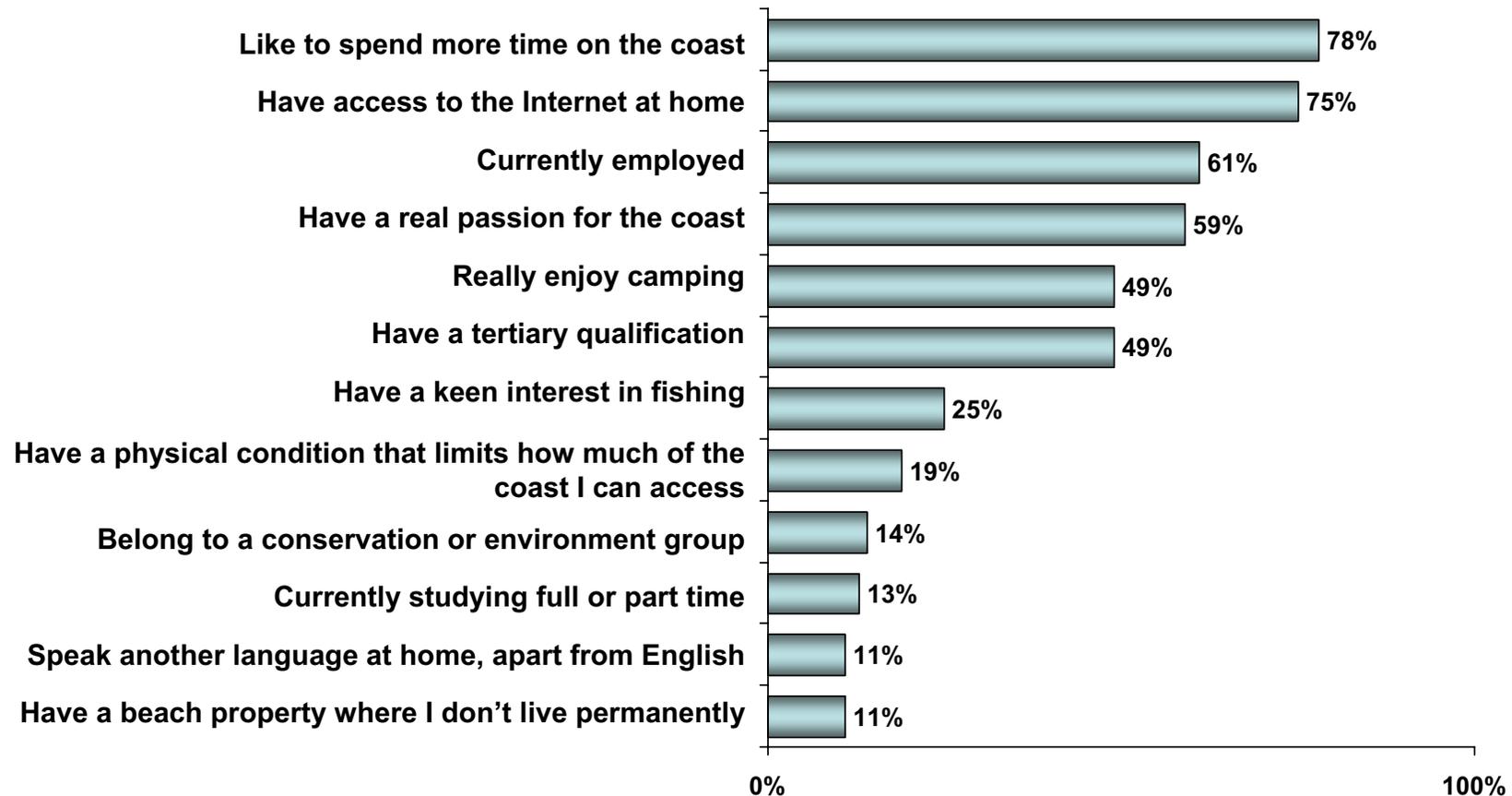
Q2. Firstly, approximately how many kilometres do you live from the nearest coastline, bay or ocean?

Q3. And can I just check whether that is along Port Phillip Bay, Western Port Bay, the West Coast (Pt. Lonsdale to SA Border), or the East Coast (San Remo to NSW Border)?



Respondent Profile – Various Characteristics

Various Respondent Characteristics



Base: All telephone respondents (n=601).

Q48. Do any of the following describe you or your views? (READ ALL)



Coastal Visitation



Coastal Visitation

- A key component of the telephone survey involved asking respondents about their visits to the Victorian coast over the last twelve months, and comparing this to previous waves of the research to understand changes over time, and any emerging trends or issues. Specific lines of enquiry included:
 - The number of various types of visits made (i.e. day trips, trips involving overnight stays, short trips of less than two hours), and which months people had visited the coast, as well as activities undertaken in the last year.
 - Details of the last trip made, which included a series of questions specifically for URS' analysis of the economic value of the Victorian coast. The reader should refer to the URS report for detailed findings for these questions.
 - A series of questions about the respondent's most significant or enjoyable trip to the coast in the last 12 months, including time and length of visit, location, accommodation used, activities, quality perceptions, factors that contributed to their enjoyment of the visit.

Key Results

- More people are visiting the coast than in 2000, which is supported by the qualitative findings, where people spoke of the coast being more important to them now that inland waterways are less accessible as a result of the drought.
 - The vast majority of Victorians have visited the coast at least once in the last 12 months (87%), with day trips remaining the most popular form of visit; 74% of respondents had visited an area of the coast away from their local area, for at least 2 hours (compared with 80% in 2000).
 - When just considering the two trip types measured in 2000 – namely trips of at least 2 hours and overnight stays, this has increased from 80% to 83%.
- The next most popular form of visit is an overnight stay, which 54% had enjoyed at least once (and 3 times on average over the last year).
- Many had also made a short visit of less than two hours (47%), and this form of visit tends to be more regular (an average of 14 times in the last 12 months).



Coastal Visitation cont'd

- A significant increase in visits across all seasons is observed, reflecting Victorians' increased use and reliance on the coast since 2000, which respondents described qualitatively within the forums.
 - Understandably, the closer one lives to the coast, the more likely they are to visit. Notably, there is a significant increase in people claiming that their most enjoyable trip in the last 12 months was within the Central Coast area.
 - The warmer months remain the most popular – especially December and January. This represents a slight shift from the 2000 study, when January and February were the standout months.

- Specific, prompted attributes contributing to people's enjoyment of the coast are quite similar, and fairly consistent with the previous waves of the research. The key drivers are really about being in a clean, healthy environment, getting away from it all and relaxing with loved ones, more so than engaging in any specific activity.
 - Notably, enjoying wildlife and nature has become a far more important factor in contributing to people's enjoyment of Victoria's coast and marine environments, with 34% rating this as a crucial factor in 2007 (vs 13% in 2000).
 - Furthermore, a regression or 'driver' analysis was undertaken to determine the relative impacts of the natural environment and the man-made facets of the coast on people's overall enjoyment of their coastal experience. Not only is the natural environment seen to be of far better quality than man-made attractions in contributing to people's overall enjoyment of the coastal experience, but it also plays a far more important role in driving overall perceptions.



Coastal Visitation cont'd

Conclusions and Implications

- With more Victorians now using the coast, people are becoming more sensitive to the impacts of human activities on the coast.
- As a result, people seem to be valuing the significant natural capital offered by the coast more than ever.
- It will be important to acknowledge these values within the Victorian Coastal Strategy, as they represent implications particularly in terms of communicating with people in relation to the coast.
- Communications should reinforce the importance of the natural features – not only showcasing these, but also what is being done to protect them, and how the man-made facilities complement the natural ones.



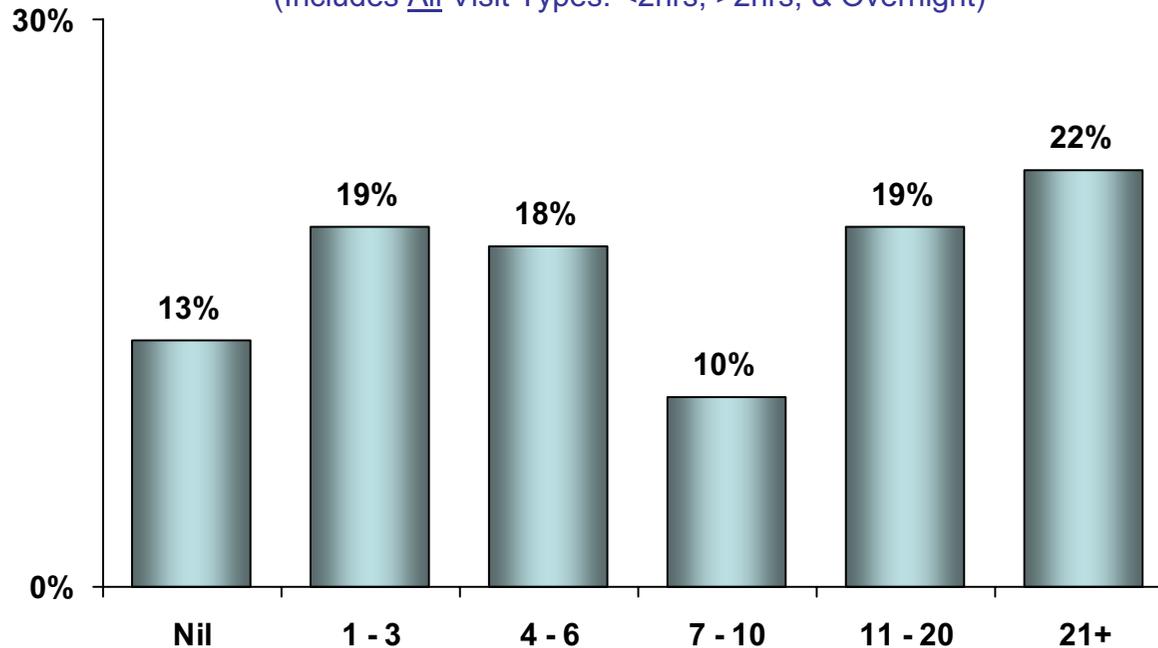
Number & Time of Visits: Last 12 Months



Total Visits to Victorian Coast in Last 12 Months

Total Number of Visits, Last 12 Months

(Includes All Visit Types: <2hrs, >2hrs, & Overnight)



- The vast majority of Victorians have visited the coast at least once in the last 12 months (87%).
- The number of visits people made to the coast ranged greatly, with the average number of trips being 26.
- Those who tend to visit the coast more include:
 - Those living within 5km (78 trips)
 - West coast residents (53 trips)
 - Regional males (37 trips)
 - People over 65 (35 trips)
 - Those earning more than \$85k (32 trips on average).

Base: All telephone respondents (n=601). Weighted data.

Q.4 Thinking carefully now about all the visits you have made to the Victorian Coast or coastal areas for recreation or leisure purposes in the last 12 months. A visit may have been a holiday, fishing trip, day trip or even just a coffee at a seaside café, but excludes a visit for household duties or just going to work, home or school, and it assumes a stay of at least two hours (excluding travel time).

Q.4a How many visits or day trips did you make in the last 12 months to areas of the Victorian Coast, away from your local area where you didn't stay overnight?

Q.4b And how many trips or visits did you make to areas of the Victorian Coast in the last 12 months where you stayed away overnight?

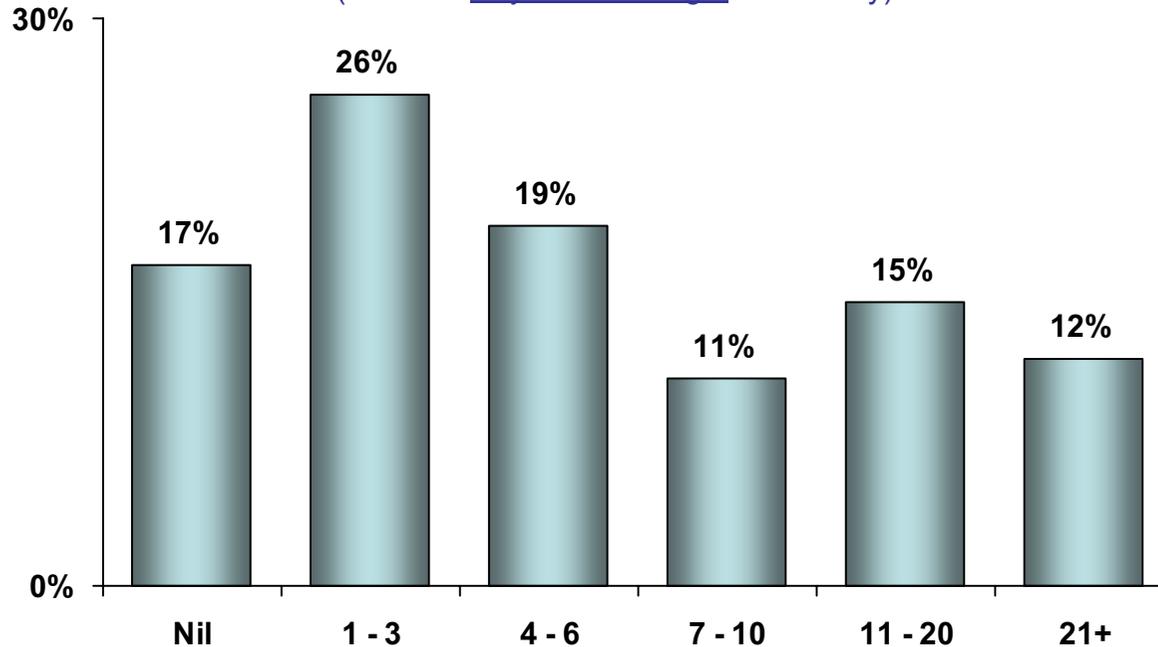
Q.4c And roughly how many visits did you make to Victorian coastal areas in the last 12 months where you stayed for less than two hours? This may include visits to your local coastal or foreshore area.



Total Visits to Victorian Coast in Last 12 Months

Total Visits, Last 12 Months

(Includes Day and Overnight Visits Only)



- More people are now making trips of more than two hours to the Victorian coast than in 2000 – up from 80% to 83%, or non-visitors down from 20% in 2000, to 17% this wave.
- However, more people have only made one to three trips of this type than in 2000 (from 20% to 26%), while fewer people have made more than 20 trips (down 8 percentage points from the last wave to 12%).
- As such, the average number of trips of at least two hours in the last 12 months has fallen from 15 in 2000 to 12 this year.

Base: All telephone respondents (n=601). Weighted data.

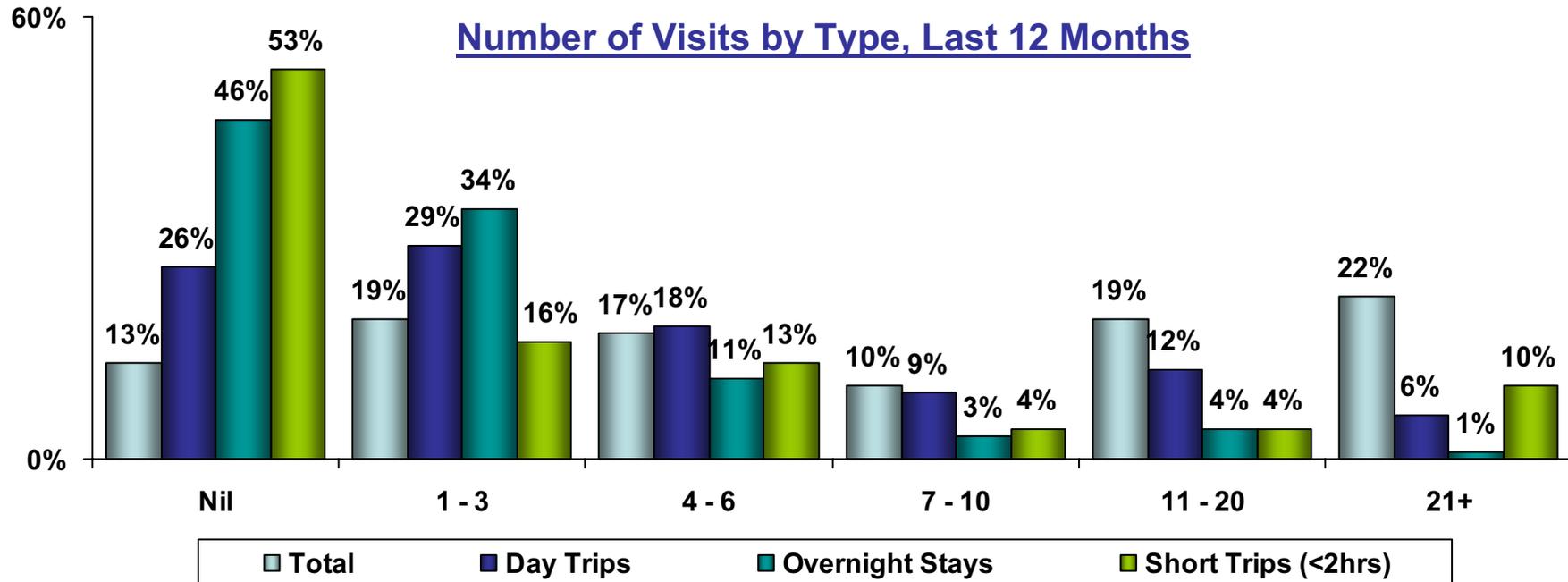
Q.4 Thinking carefully now about all the visits you have made to the Victorian Coast or coastal areas for recreation or leisure purposes in the last 12 months. A visit may have been a holiday, fishing trip, day trip or even just a coffee at a seaside café, but excludes a visit for household duties or just going to work, home or school, and it assumes a stay of at least two hours (excluding travel time).

Q.4a How many visits or day trips did you make in the last 12 months to areas of the Victorian Coast, away from your local area where you didn't stay overnight?

Q.4b And how many trips or visits did you make to areas of the Victorian Coast in the last 12 months where you stayed away overnight? 73



Total Visits to Victorian Coast in Last 12 Months



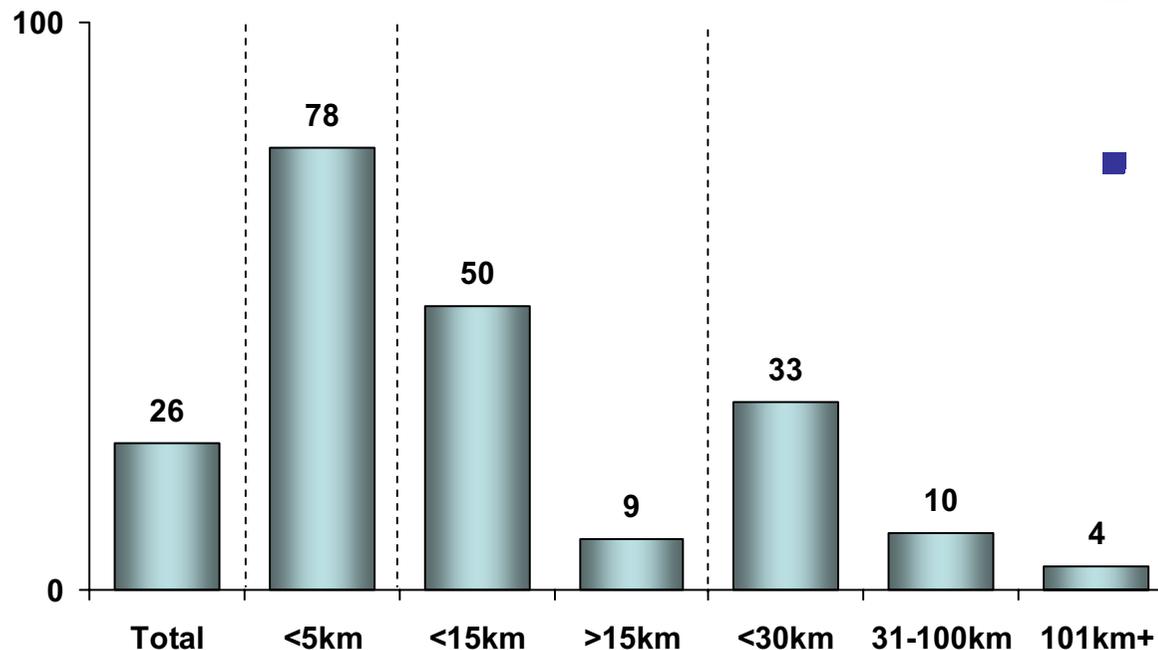
Day trips remain the most popular form of visit; 74% of respondents had visited an area of the coast away from their local area, for at least 2 hours (compared with 80% in 2000). On average, these Victorians had done so 9 times over the previous year. The next most popular form of visit is an overnight stay, which 54% had enjoyed at least once (and 3 times on average over the last year). Many had also made a short visit of less than two hours (47%), and this form of visit tends to be more regular (an average of 14 times in the last 12 months).

Base: All telephone respondents (n=601). Weighted data.

Q.4 Thinking carefully now about all the visits you have made to the Victorian Coast or coastal areas for recreation or leisure purposes in the last 12 months. A visit may have been a holiday, fishing trip, day trip or even just a coffee at a seaside café, but excludes a visit for household duties or just going to work, home or school, and it assumes a stay of at least two hours (excluding travel time).

Q.4a How many visits or day trips did you make in the last 12 months to areas of the Victorian Coast, away from your local area where you didn't stay overnight? / Q.4b And how many trips or visits did you make to areas of the Victorian Coast in the last 12 months where you stayed away overnight? / Q.4c And roughly how many visits did you make to Victorian coastal areas in the last 12 months where you stayed for less than two hours? This may include visits to your local coastal or foreshore area.

Average Number of Visits by Distance Reside From Coast (Last 12 Months)



- Understandably, the closer one lives to the coast, the more likely they are to visit.
- Specifically, those who live within 5kms of the coast visited an average of 78 times.
 - within 15kms, 50 times compared to 9 times among those who live more than 15kms from the coast.

Base: All telephone respondents (n=601). Weighted data.

Q.4 Thinking carefully now about all the visits you have made to the Victorian Coast or coastal areas for recreation or leisure purposes in the last 12 months. A visit may have been a holiday, fishing trip, day trip or even just a coffee at a seaside café, but excludes a visit for household duties or just going to work, home or school, and it assumes a stay of at least two hours (excluding travel time).

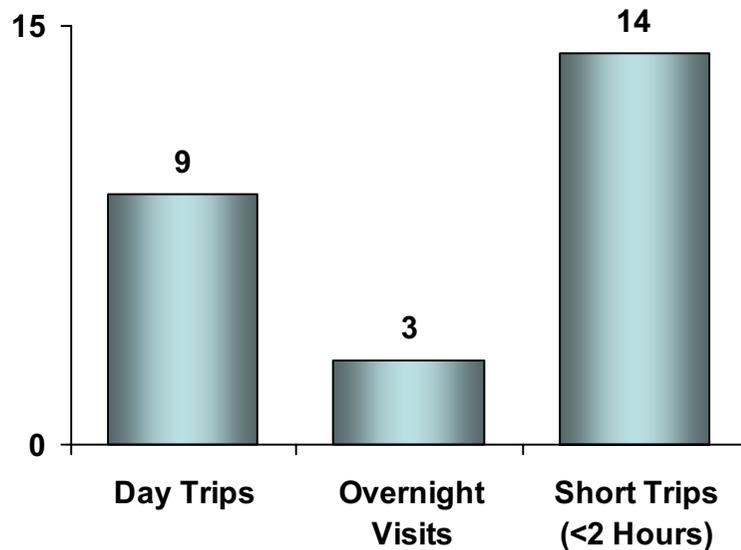
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Q.4c And roughly how many visits did you make to Victorian coastal areas in the last 12 months where you stayed for less than two hours? This may include visits to your local coastal or foreshore area.

Number of Different Visit Types

**Average Number of Visits,
Last 12 Months**



- Short trips of less than two hours are not surprisingly the most regular form of visit, with an average of 14 visits taken within the last 12 months.
- Since 2000, the average number of day trips has decreased from 12 to 9 visits but the number of overnight visits has remained the same at 3.
- Those who did not take a day trip to the coast in the last 12 months remained steady at 26% compared to 30% in 2000.
- Similarly, those who did not stay overnight on the coast varied only slightly from the last study with 46% in 2007 vs 51% in 2000.

Base: All telephone respondents (n=601). Weighted data.

Q.4 Thinking carefully now about all the visits you have made to the Victorian Coast or coastal areas for recreation or leisure purposes in the last 12 months. A visit may have been a holiday, fishing trip, day trip or even just a coffee at a seaside café, but excludes a visit for household duties or just going to work, home or school, and it assumes a stay of at least two hours (excluding travel time).

Q.4a How many visits or day trips did you make in the last 12 months to areas of the Victorian Coast, away from your local area where you didn't stay overnight?

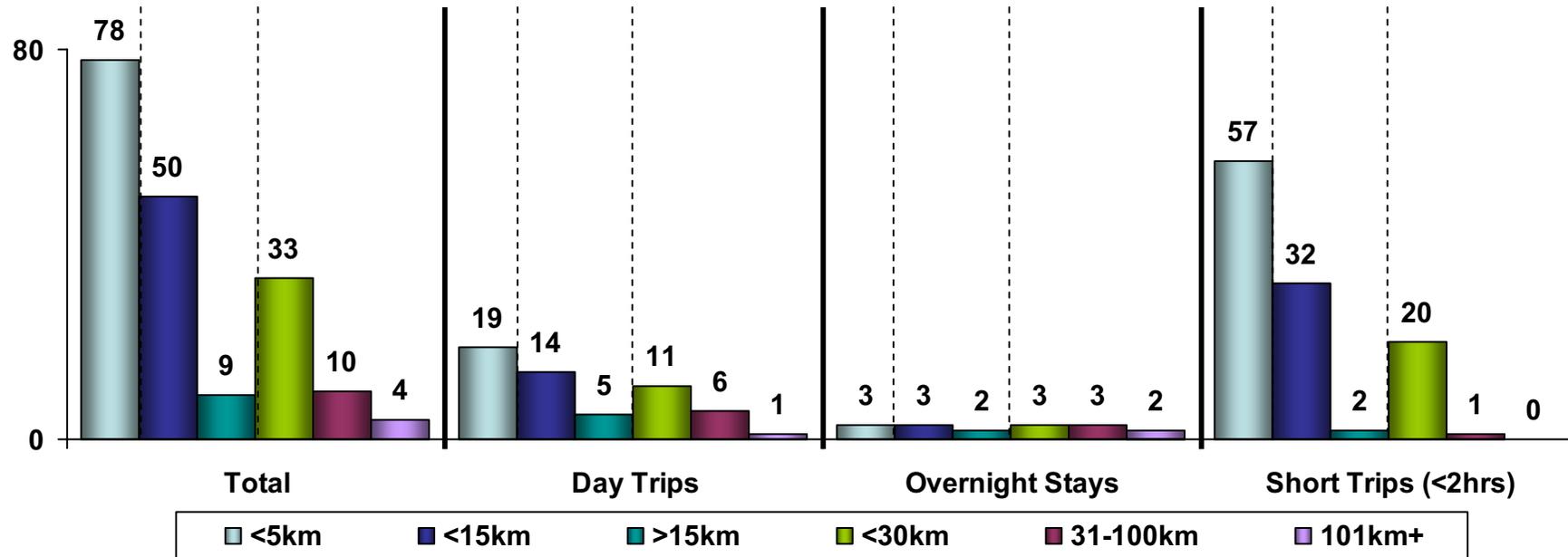
Q.4b And how many trips or visits did you make to areas of the Victorian Coast in the last 12 months where you stayed away overnight?

Q.4c And roughly how many visits did you make to Victorian coastal areas in the last 12 months where you stayed for less than two hours? This may include visits to your local coastal or foreshore area.



Trip Types by Distance from the Coast

Average Number of Trips by Type by Distance from The Coast



Those living within 15kms of the coast take more day trips and significantly more short trips to coastal areas than those living more than 15kms (14 visits vs 5 visits, and 32 vs 2 respectively).

Base: All telephone respondents (n=601). Weighted data.

Q.4 Thinking carefully now about all the visits you have made to the Victorian Coast or coastal areas for recreation or leisure purposes in the last 12 months. A visit may have been a holiday, fishing trip, day trip or even just a coffee at a seaside café, but excludes a visit for household duties or just going to work, home or school, and it assumes a stay of at least two hours (excluding travel time).

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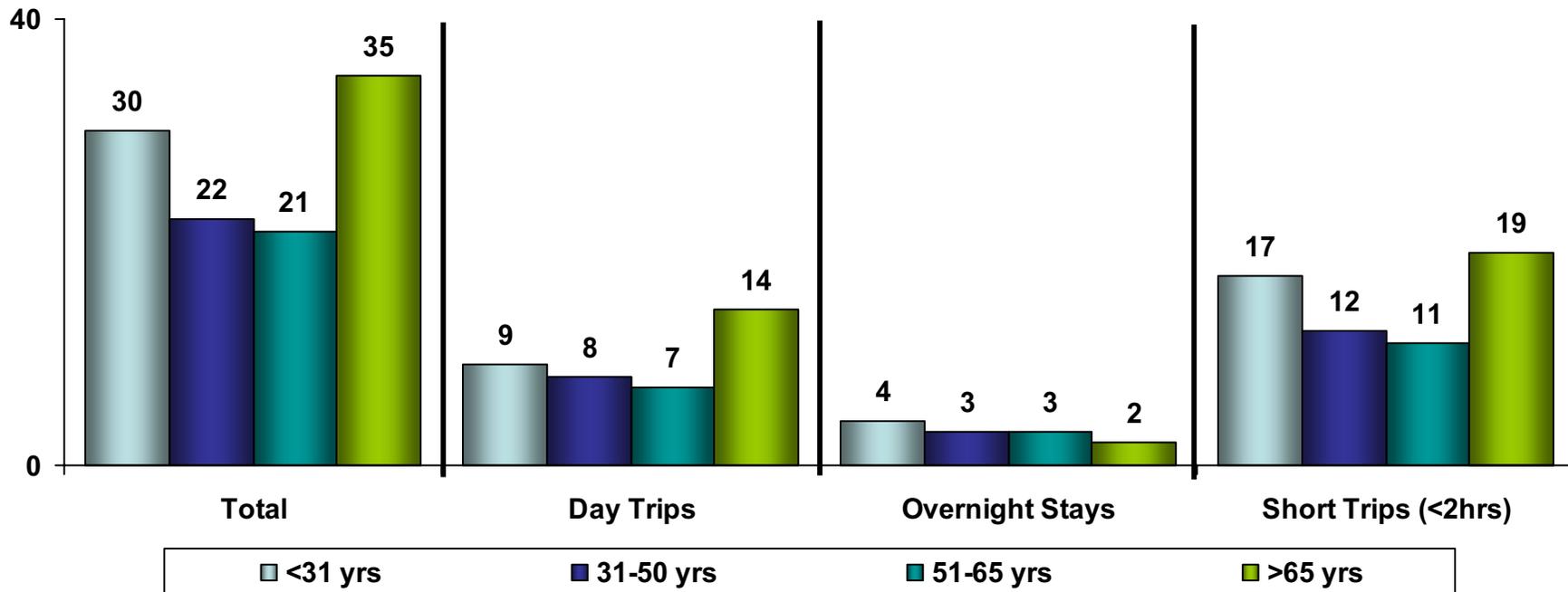
Q.4b And how many trips or visits did you make to areas of the Victorian Coast in the last 12 months where you stayed away overnight?

Q.4c And roughly how many visits did you make to Victorian coastal areas in the last 12 months where you stayed for less than two hours? This may include visits to your local coastal or foreshore area.



Number and Type of Visit by Age Group

Average Number and Type of Visit by Age Group



■ Notably, younger Victorians are more likely to have visited the coast in the last 12 months, with only 6% of those aged under 31 not having visited the coast at all, compared with 11% of those aged 31-50 years, 18% of 51-65 years olds and 24% of those aged over 65 years. Among those who have visited the coast, though, younger Victorians tend to enjoy more overnight trips whilst older Victorians tend to make more day or short trips.

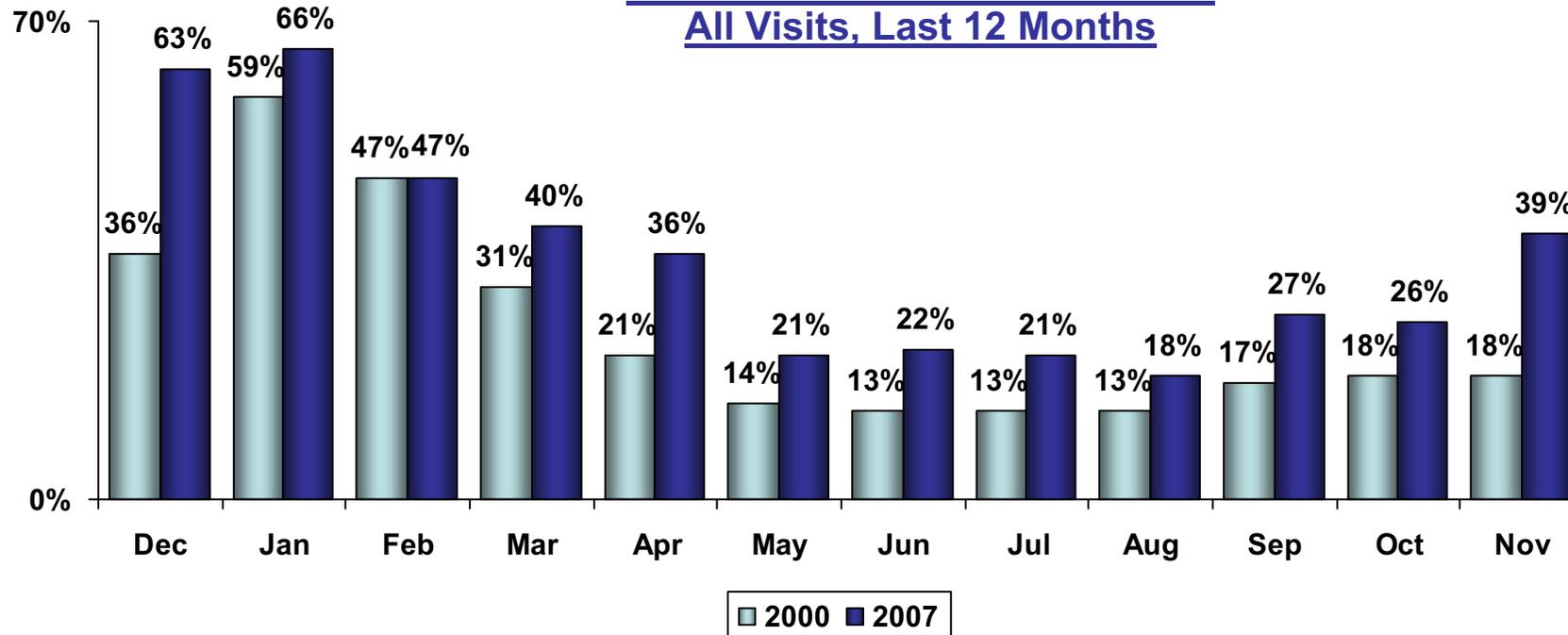
Base: All telephone respondents (n=601). Weighted data.

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Months of Visits in Last 12 Months

**Months Visited Victorian Coast:
All Visits, Last 12 Months**



- The warmer months remain the most popular – especially December and January (with 63% and 66% of visitors having done so during these months, respectively).
- This represents a slight shift from the 2000 study, when January and February were the standout months (at 59% and 47% respectively).

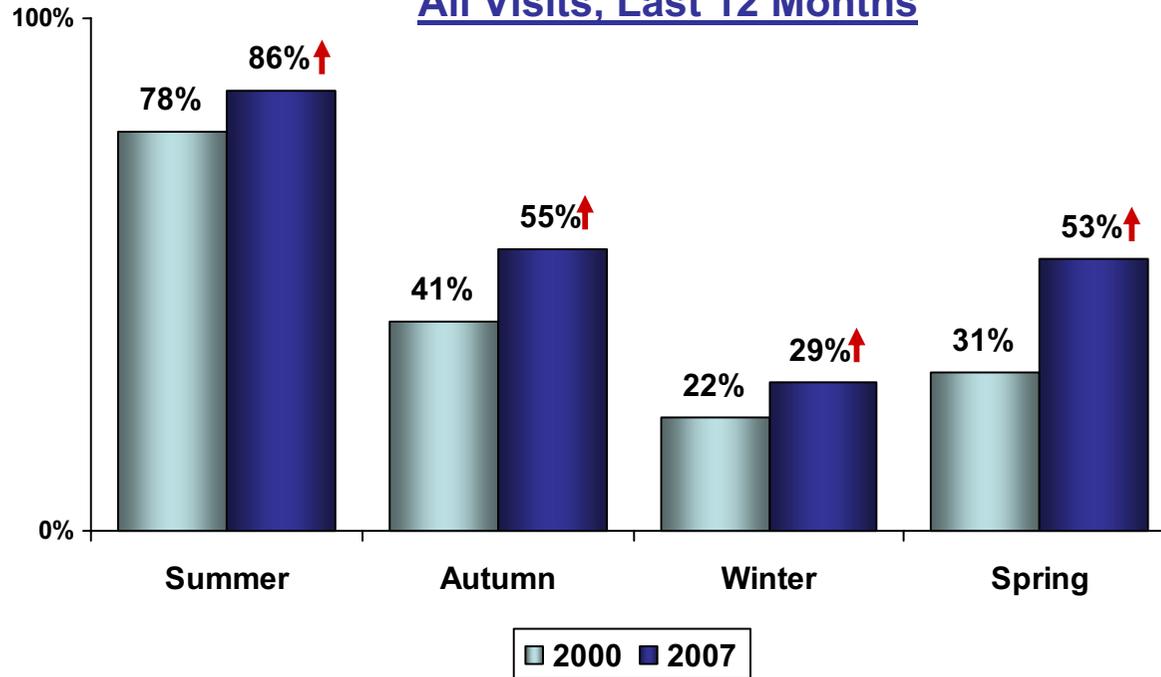
Base: All telephone respondents who had visited the coast, last 12 months (n=495). Weighted data.

Q.5 Thinking of all your visits or trips away to areas of the Victorian coast in the last 12 months (both day trips and overnight stays of 2 or more hours), in which month or months did you go? (**Do not read out, multiple answers ok**)

Q.18 I would like you to specifically think about your most significant or enjoyable visit or trip to an area of the Victorian coast over the last twelve months... OK, in which month was this visit?

Summer remains the peak season for visitors

Season Visited Victorian Coast: All Visits, Last 12 Months



↑ ↓ = Statistically significant difference at 95% confidence

- While summer is the peak season, especially for people's most significant visits to the coast, there is certainly considerable year round visitation.
- Significant increases in visitation are also observed for all seasons, reflecting Victorians' increased use and reliance on the coast since 2000, which respondents described qualitatively within the forums.
- Those under 30 showed the highest visitation in summer out of all age groups at 96%, followed closely by 31-50 year olds at 91%.

Base: All telephone respondents who had visited the coast, last 12 months (n=495). Weighted data.

Q.5 Thinking of all your visits or trips away to areas of the Victorian coast in the last 12 months (both day trips and overnight stays of 2 or more hours), in which month or months did you go? (**Do not read out, multiple answers ok**)

Q.18 I would like you to specifically think about your most significant or enjoyable visit or trip to an area of the Victorian coast over the last twelve months... OK, in which month was this visit?



Use of Coast and Marine Environments: Last 12 Months



Uses of Victorian Coast and Marine Environment, Last 12 Months

Uses of Victorian Coast and Marine Environment	2007 %
Short walks and strolls along the coast, trails, piers or jetties	93
Lying, sitting or just relaxing on the beach	86
Spending time with the family	85
Visiting seaside cafés or restaurants	80
Viewing nature and wildlife	78
Spending time with friends outside the family	77
Swimming	70
Picnicking	68
Scenic driving or motor bike riding	62
Surfing, body-boarding or boogie-boarding	37
A paid ferry or boat ride or excursion (excluding fishing)	30
Bicycle riding	30
Longer walks or hikes of 2 hours or more	30
Camping or caravanning near the beach	28
Walking the dog	28

- Participants were asked if they had taken part in a range of listed activities. ‘Short walks and strolls along the coast, trails and piers or jetties’ was the top response, followed by ‘lying, sitting or just relaxing on the beach’ (93% and 86%). These were also the top, *unprompted* activities listed in 2000 results where respondents were asked what the main activity they took part in during their most enjoyable trip (at 37% and 22% respectively).
- Other highly popular coastal past-times have included spending time with the family and/or friends, seaside dining, and enjoying nature and wildlife.
- Not surprisingly, visitors aged 65 and over were less inclined to take part in more vigorous activities including ‘surf, body boarding or boogie boarding’ (3%), ‘bicycle riding’ (6%) and ‘land-based fishing’ (9%), while they were more inclined than other age groups to take part in ‘conservation activities’ (11%).

Base: All telephone respondents who had visited the coast, last 12 months (n=495). Weighted data.

Q.27 Please answer yes or no as to whether you have used the Victorian coast or marine environments for each the following things or activities in the last 12 months.



Uses of Victorian Coast and Marine Environment, Last 12 Months cont'd

Uses of Victorian Coast and Marine Environment	2007 %
Land-based fishing (including off piers and jetties)	23
Boat-based fishing	17
Snorkelling	14
Power boating	13
Playing golf	11
Private yachting or sailing	10
Involvement in conservation, Friends of the Foreshore or Coast Action Groups	8
Scuba diving	5
Jet-skiing or power-skiing	5

- People with children participated in certain activities more so than those without children:
 - Spending time with the family (97% vs 78%)
 - Swimming (85% vs 63%)
 - Picnicking (84% vs 60%)
 - Bicycle riding (44% vs 23%)
- Respondents with no children tended to visit seaside cafes or restaurants, more than families or people with children (84% vs 72% respectively).

"We had a picnic lunch and went for walks and swimming. Throwing frisbee on the beach."

"Went to see the penguin colony. We walked around the market, craft markets, and visited the restaurants."

"Went to the hot springs, went out for dinner, went to the beach. We walked to see a kite competition."

"Played on playground with the kids, had a meal in restaurant there, rode bikes on bike tracks."

Base: All telephone respondents who had visited the coast, last 12 months (n=495). Weighted data.

Q.27 Please answer yes or no as to whether you have used the Victorian coast or marine environments for each the following things or activities in the last 12 months.



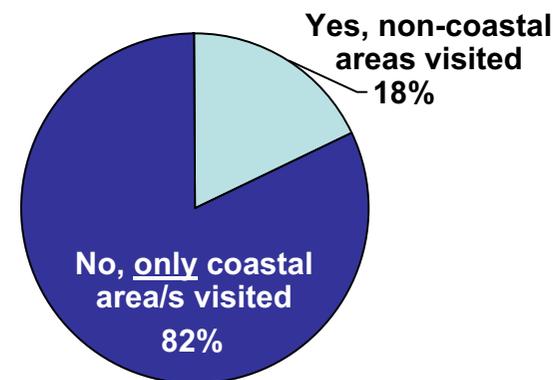
Last Trip



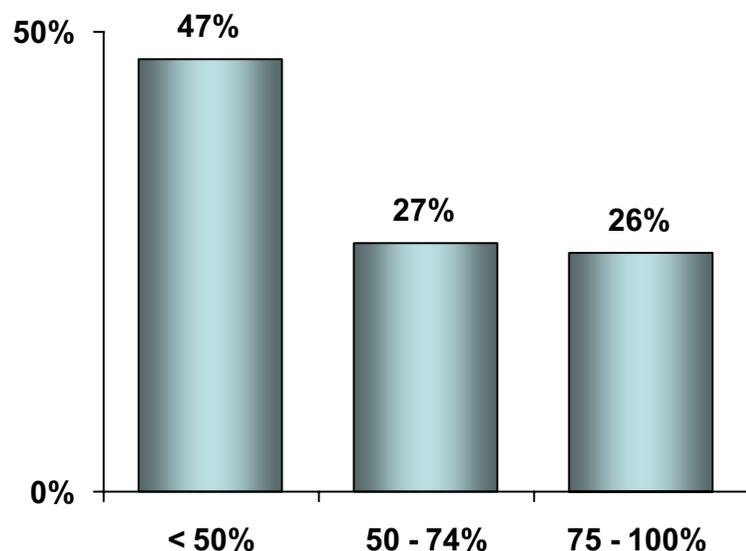
Last Trip: Getting There

- For detailed analysis of this section please refer to URS report 'Assessing the Value of the Coast to Victoria'.

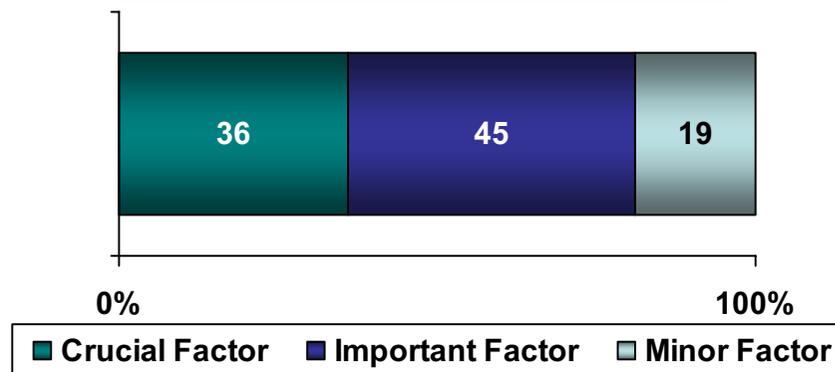
Did Trip Involve Non-Coastal Area?



Time Spent Travelling to & Visiting the Coast



Was the Visit to the Coast a...?



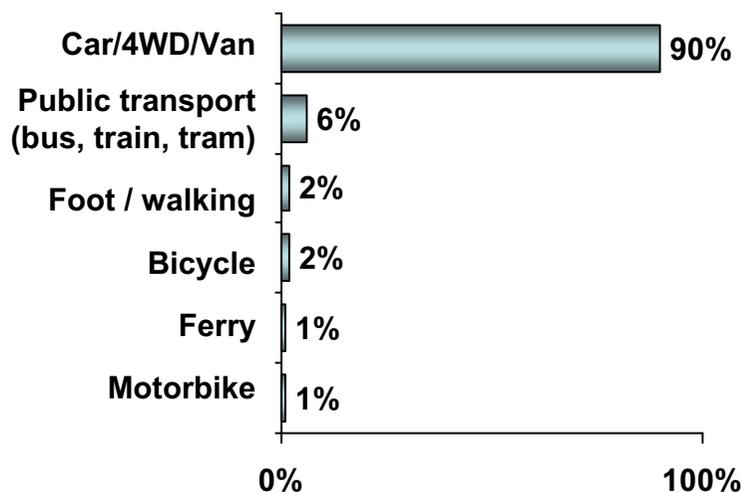
Base: All telephone respondents who had visited the coast, last 12 months (n=495). Weighted data.

Q.6 Did that trip include also visiting any non-coastal areas, or was it just a trip to a coastal location?

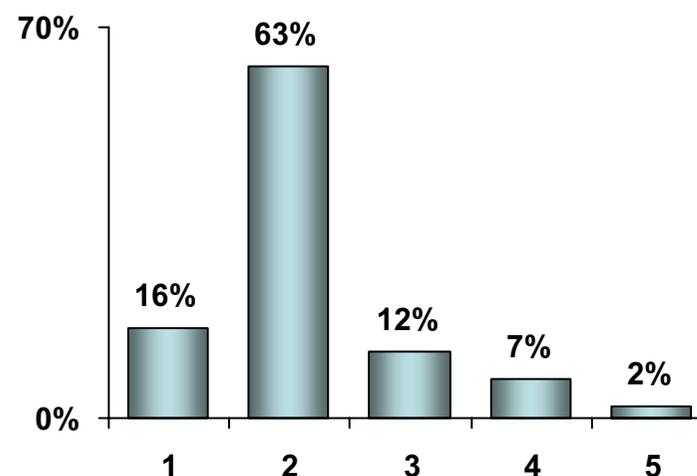
Base: All Respondents who answered 'yes' to Q6 (n=89). Weighted data.

Q.6a As part of the overall trip, was the visit to the coast a ...? / Q.6b As part of the overall trip, how much time did you spend on travelling to and visiting the coast? Was it...?

Transport To and From Location



How Many Adults in the Car With You?



- Of the 6% that took public transport to the coastal location, the average cost was \$20, from a range of \$1 to \$120.

Base: All telephone respondents who had visited the coast, last 12 months (n=495). Weighted data.

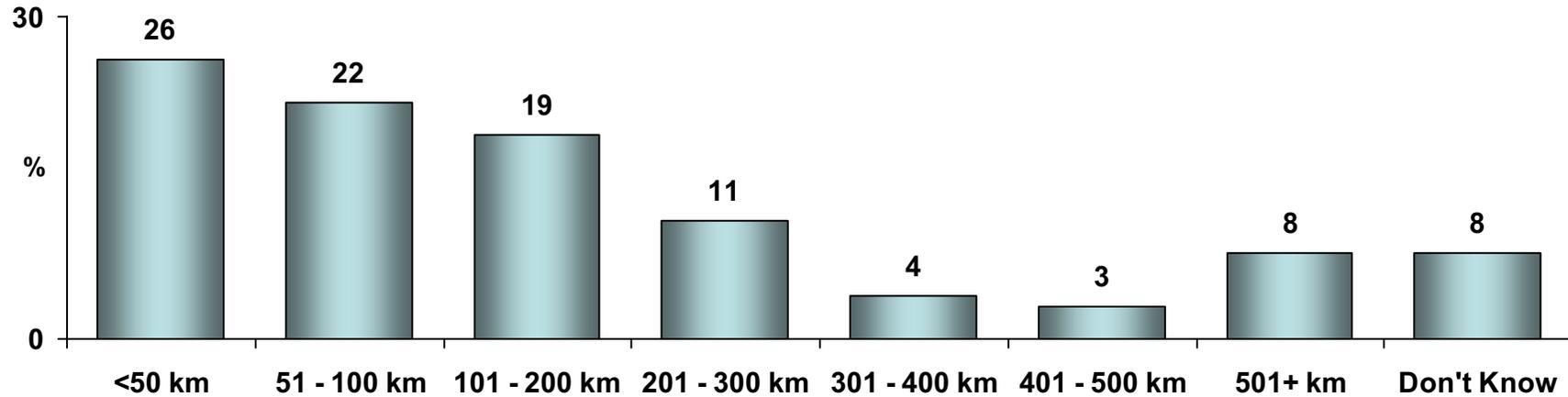
Q.11 How did you get to and from the location. **ACCEPT MULTIPLE RESPONSE.**

Base: All telephone respondents that travelled via car (n=459).

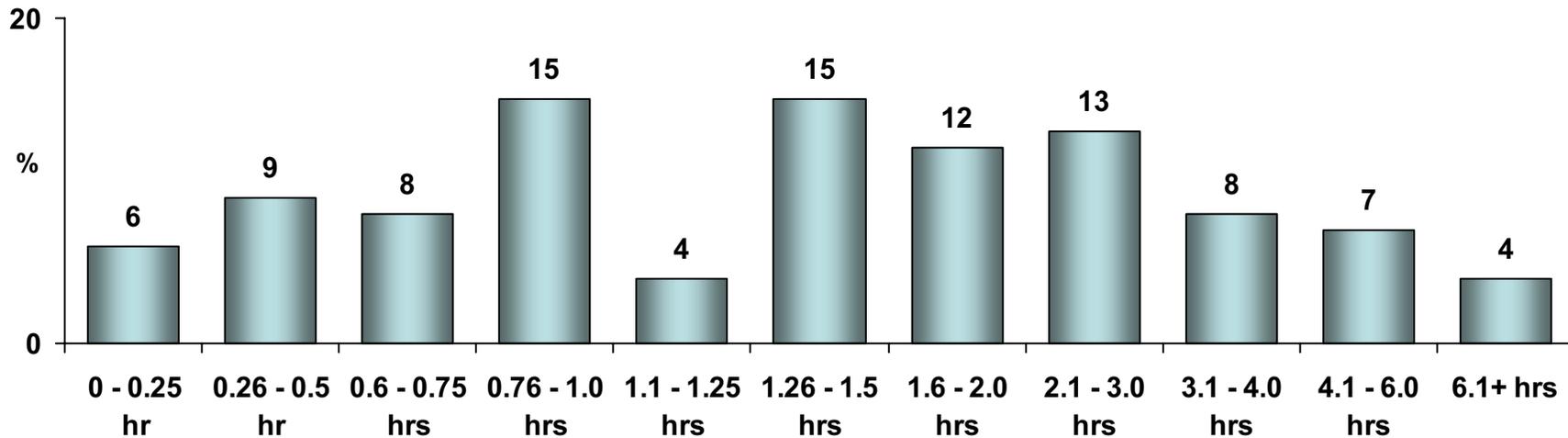
Q.13 How many adults were in the car with you?

Last Trip: Getting There cont'd

Distance Travelled To and From Location



Time Taken to Travel To Location



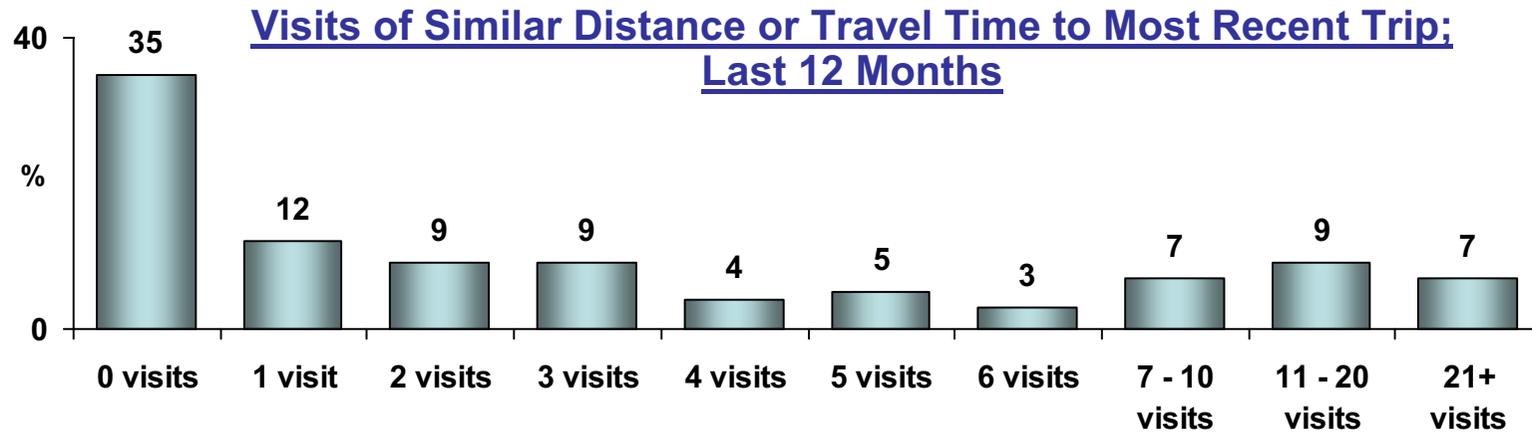
Base: All telephone respondents who had visited the coast, last 12 months (n=495). Weighted data.

Q.8 How far did you have to travel to get there and back home again, in total (in kilometres)?

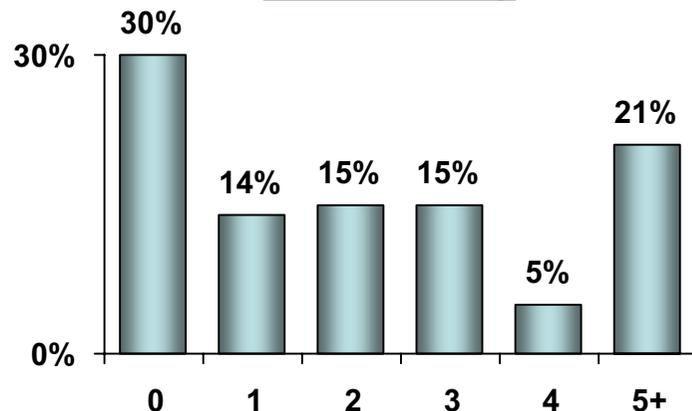
Base: All telephone respondents who had visited the coast, last 12 months (n=495). Weighted data.

Q.9 And how long did it take you to travel there, in total (in hours and minutes)?

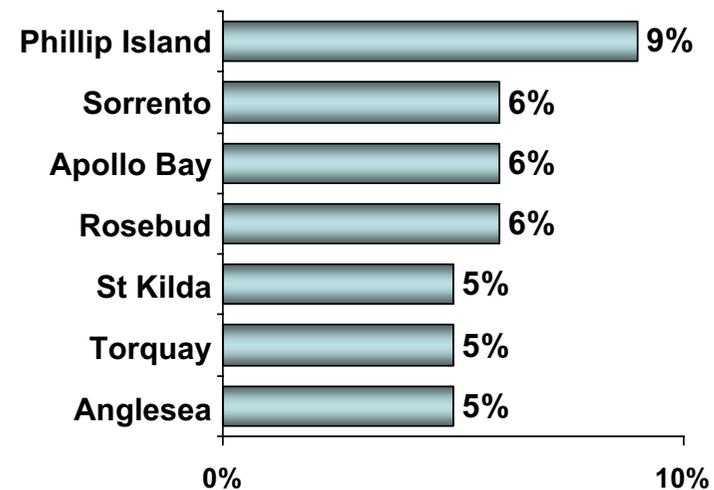
Last Trip cont'd



Number of Nights at Coastal Location; Most Recent Trip



Area/s Visited During Last Trip



Base: All telephone respondents who had visited the coast, last 12 months (n=495). Top responses shown (5%+). Weighted data.

Q.7 What coastal area or town was it that you visited? ACCEPT MULTIPLE RESPONSES.

Q.10 How many trips have you made like this to the Victorian coast over the last 12 months, that is, of a similar distance or travel time?

Base: Telephone respondents that stayed overnight at a coastal location (n=315)

Q.14 How many nights, if any, did you stay at that coastal location?

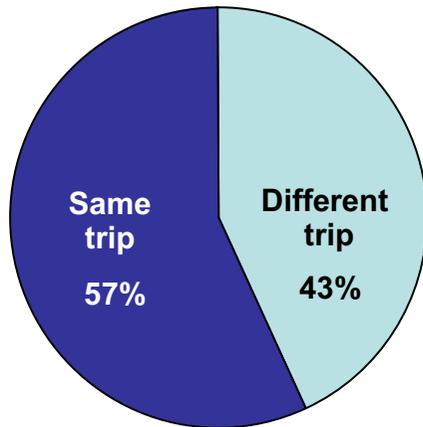


Most Enjoyable Trip: Last 12 Months



Most Enjoyable Trip: Last 12 Months – Location

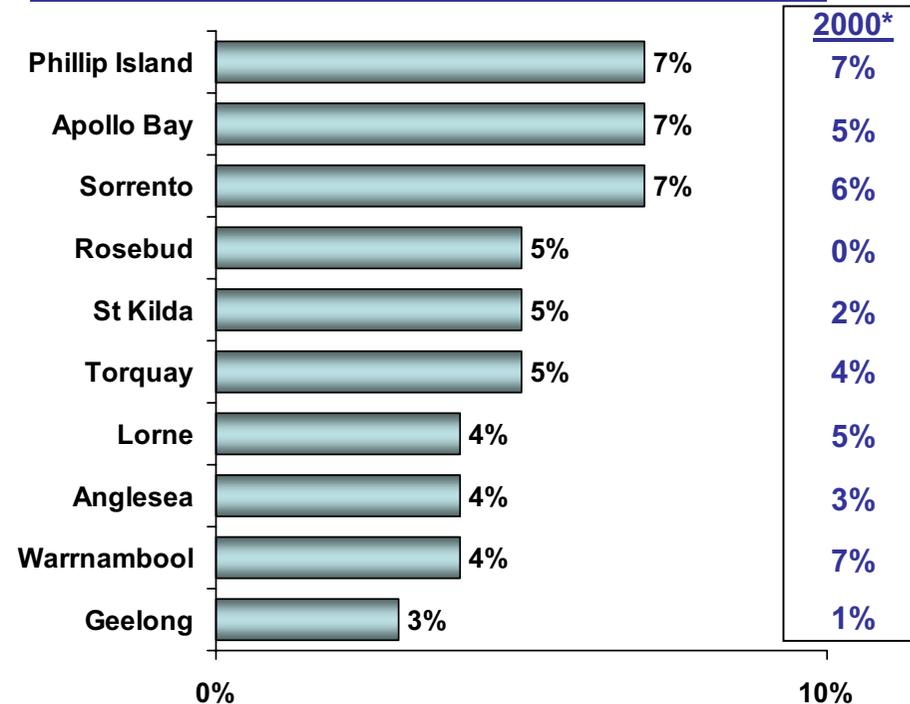
Was Most Enjoyable Visit Your Last Trip?



- For the majority of respondents (57%), their last trip to the coast was also their most enjoyable within the last 12 months.

- In terms of locations, Phillip Island, Apollo Bay and Sorrento are equal first for the most popular (each at 7%), followed by Rosebud, St Kilda beach and Torquay on par for second (each at 5%), then Lorne, Anglesea, Warrnambool and Geelong.
 - This represents a slightly different mix of locations from 2000, although it is important to note that this year includes a new category of short trips of less than 2 hours.
 - St Kilda beach stands out in terms of appealing to younger Victorians, where 11% of those aged under 31 years nominated this as the location of their most enjoyable coastal experience. Older Victorians were more inclined to have visited locations such as Warrnambool, Queenscliff, Port Fairy and Lakes Entrance.

Location of Most Enjoyable Visit: Top 10



Base: All telephone respondents who had visited the coast, last 12 months (n=495). Weighted data. * NB: does not include short trips <2hrs.

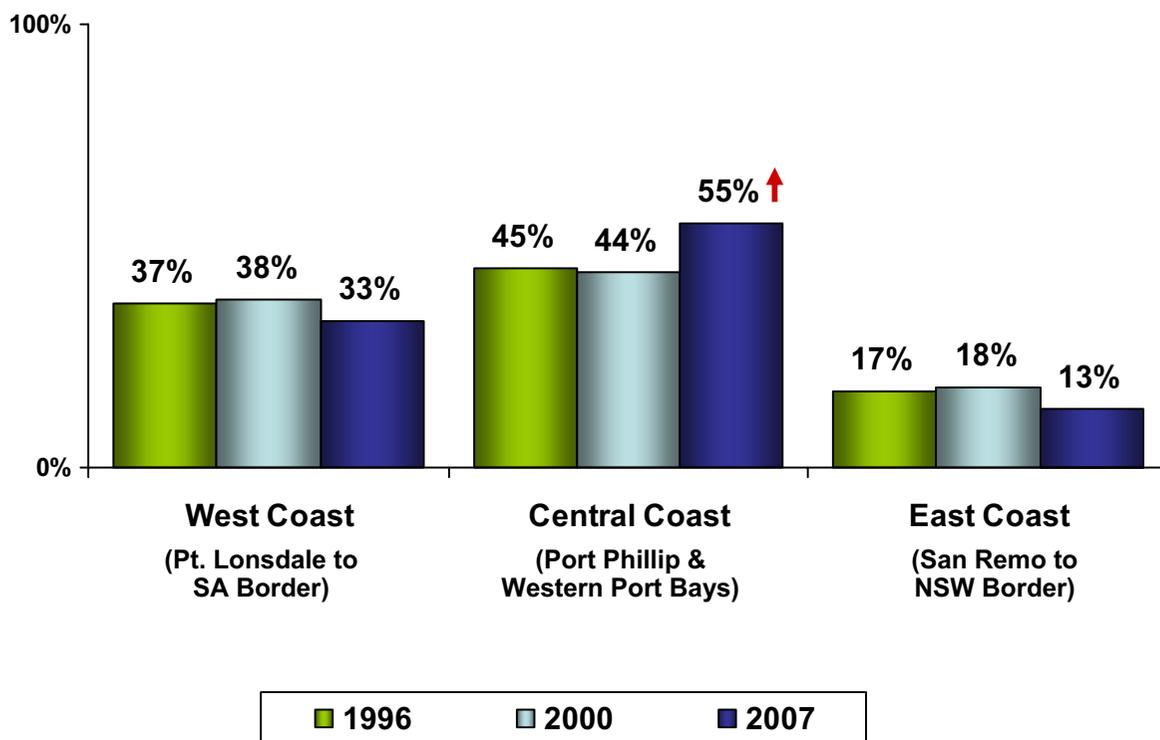
Q.16 Firstly, can I just check whether this was a different trip from your most recent trip, which we have just discussed?

Q.17 What area or town was it that you visited? **ACCEPT MULTIPLE RESPONSES.** NB: Top ten mentions only.



More of people's significant visits are occurring in the Central Coast area

Coastal Region of Most Significant Visit



- In 2007, the proportion of people who enjoyed their most significant trip on the West and East Coast areas remains fairly stable. At 33% and 13% respectively these results are slightly lower than in 2000, but not significantly.
- Meanwhile, there is a significant increase in people stating that their most significant visit to the coast in the last 12 months was within the Central Coast.
- Notably, those who live along each respective part of the coast are far more likely to claim that their section of the coast is where they had their most enjoyable visit. That is, 48% of East Coast residents nominated an area of the East Coast, 73% of West Coast residents the West Coast, and 59% of Central Coast residents nominated an area in the Bays.

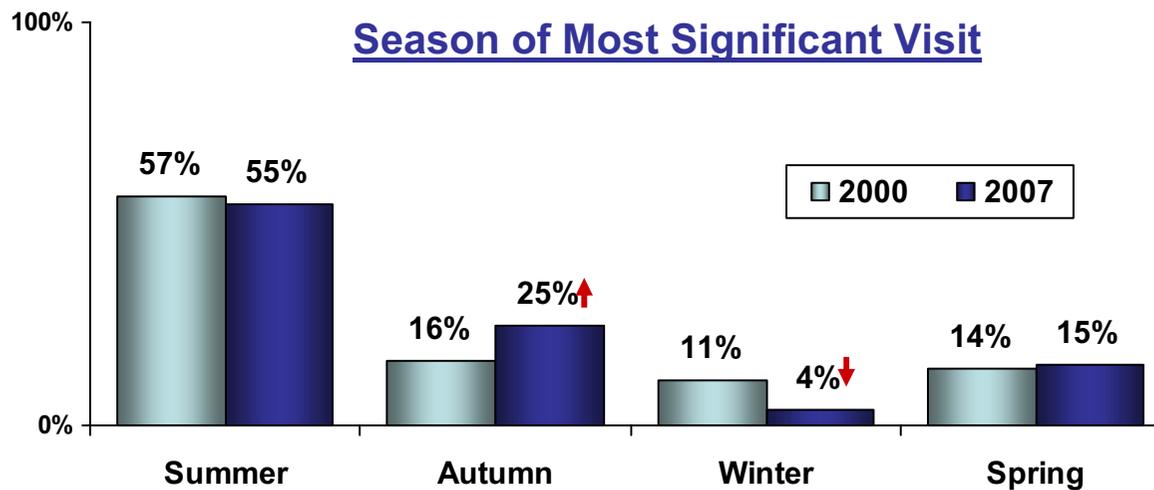
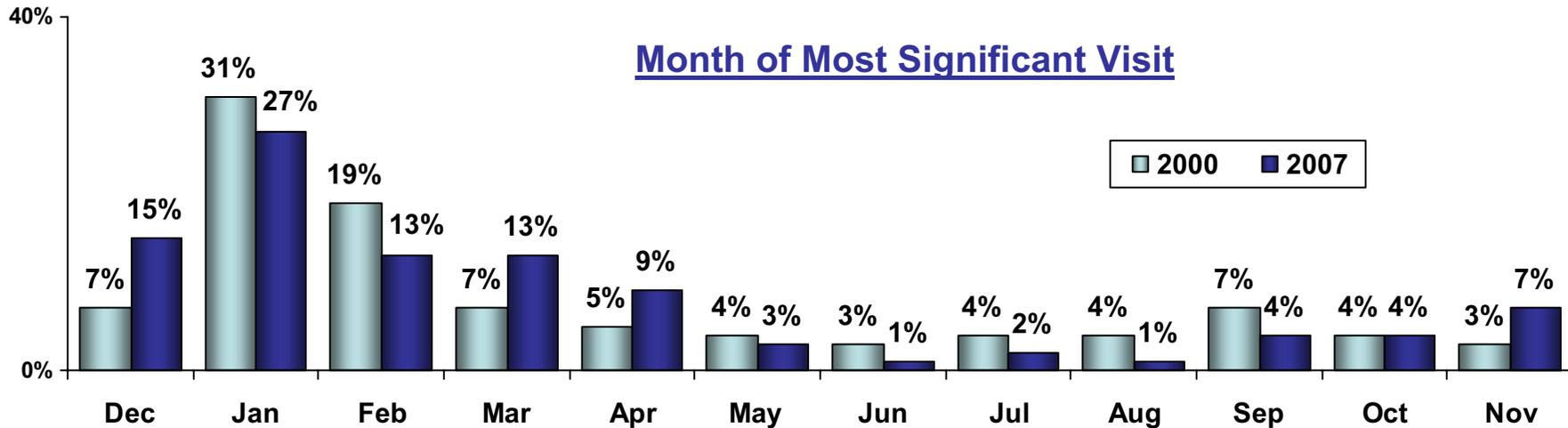
↑ ↓ = Statistically significant difference at 95% confidence

Base: All telephone respondents who had visited the coast, last 12 months (n=495). Weighted data.

Q.17 What area or town was it that you visited? ACCEPT MULTIPLE RESPONSES. NB: Top ten mentions only.



Summer remains the key time for people's most significant coastal visits



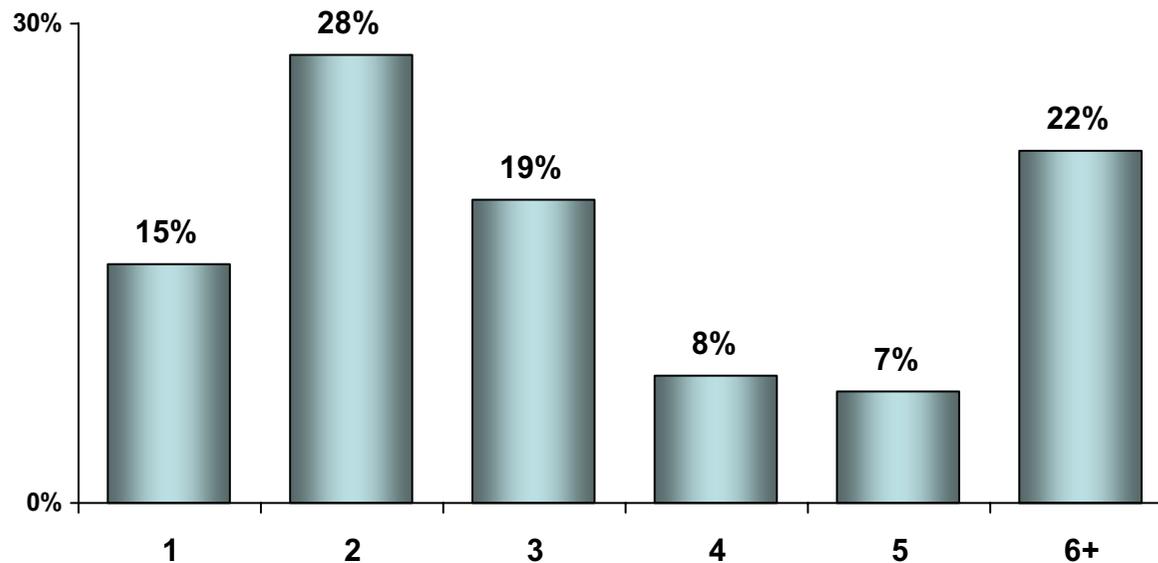
- There is a shift in results here, with more people now having their most enjoyable coastal experience over a longer period from early summer through to mid-autumn. This may be due to warmer weather in general. Indeed, there is a significant increase in people having their most significant trip in autumn, with a corresponding decline for winter.
- Summer is more popular for younger Victorians (especially those aged under 31), while the autumn and winter months are more popular among older Victorians – especially those aged over 65 years. This is important in terms of coastal marketing programs.

Base: All telephone respondents who had visited the coast, last 12 months (n=495). Weighted data.

Q.18 I would like you to specifically think about your most significant or enjoyable visit or trip to an area of the Victorian coast over the last twelve months... OK, in which month was this visit?

Two or three night stays are most popular

Number of Nights

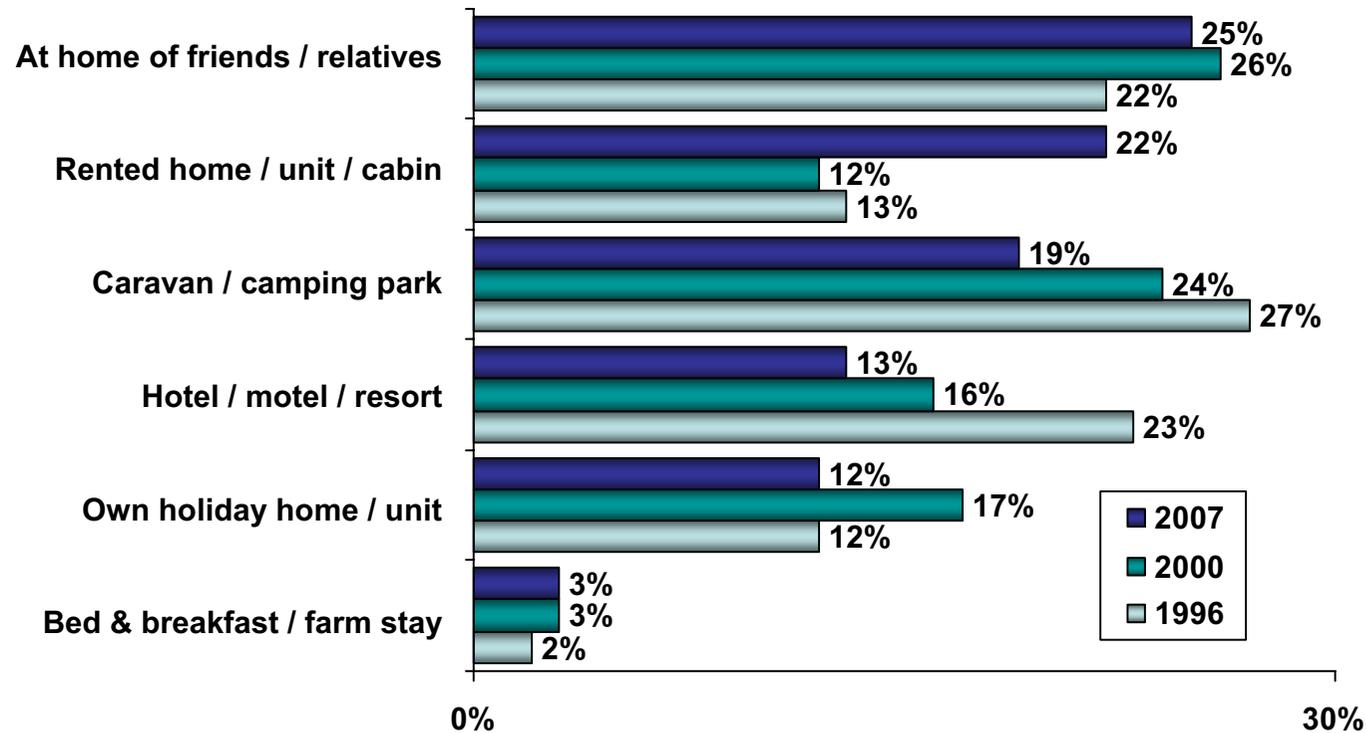


- The number of nights stayed on the coast ranged up to 93 nights (1 respondent), although 2 or 3 nights is the most popular length of stay (28% and 19% respectively).
- Those inclined to have longer trips are people aged over 65 years (6 nights on average), those who are into fishing (5 nights on average), and those with a beach house (5 nights on average).

Base: All telephone respondents who stayed overnight at a coastal location during the trip (n=259). Weighted data.
 Q.19 How many nights, if any, did you stay at that coastal location?

Some changes evident in accommodation types

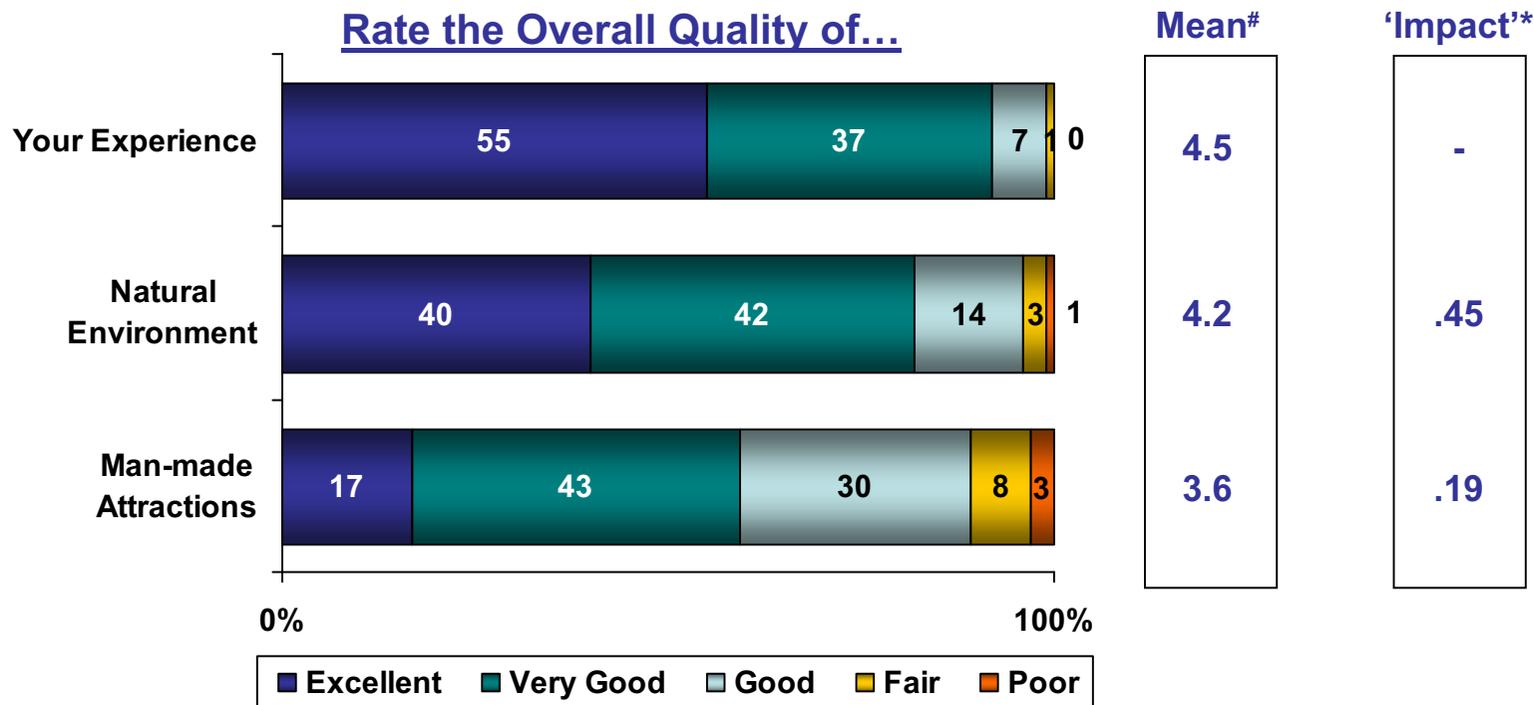
Overnight Accommodation



- For those who had an overnight stay on the coast during their most enjoyable trip, staying at a friend's or family's place remains the most popular form of accommodation. This is especially true of those aged under 31 (36%) and over 65 (34%).
- Meanwhile, there has been a marked increase in use of rented homes, units or cabins (from 12% in 2000 to 22%).
- While there was an increase in people staying at their own holiday home from 1996 to 2000, this has now returned to 1996 levels. There has also been a continued decline in people staying caravan/camping parks (from 27% in 1996 to 24% in 2000 and 19% in 2007), as well as hotel/motel resorts (from 23%, to 16% and now 13% respectively).



Natural environment contributes far more to people's enjoyment than man-made attractions or facilities



■ A regression or 'driver' analysis was undertaken to determine the relative impacts of the natural environment and the man-made facets of the coast on people's overall enjoyment of their coastal experience. Not only is the natural environment seen to be of far better quality than man-made attractions in contributing to overall enjoyment of the coastal experience, but it also plays a far more important role – it has more than twice the impact in driving overall perceptions (with 'impact scores' of .45 vs .19 respectively). These findings highlight the important natural capital that the Victorian coast offers, which is something that participants in the Community Engagement Forums described being increasingly conscious of.

Base: All telephone respondents who had visited the coast, last 12 months (n=495). Weighted data. * Regression score, out of a possible 1.0. Q.23 How would you rate the overall quality of your experience of this most significant or enjoyable visit to the Victorian coast? Would you say that it was [READ OUT]? / Q.24 How would you specifically rate the overall quality of the natural environment in contributing to your enjoyment of this trip? Would you say that it was [READ OUT]? / Q.25 And how would you rate the overall quality of the man-made attractions, buildings, facilities, services or amenities in contributing to your enjoyment of this trip? [READ OUT]?

Of a possible 5.0, based on weights given to each rating point, as follows: Excellent (5), Very Good (4), Good (3), Fair (2), Poor (1). 95



Most Enjoyable Aspect of Trip: Spontaneous Mentions

Enjoyable Aspects of Most Significant Trip	2007 %	Enjoyable Aspects of Most Significant Trip	2007 %
The beach / going to / time spent on the beach	19	Coastal views / views of the coastline	4
Time / meeting up / socialising with friends	14	On the water / kayaking / boating / jet skiing / surfing etc	4
Getting away / change of surroundings	11	The beauty / spectacular / stunning / how beautiful it is	3
Relaxing	10	Watching / observing marine life / penguins / seals etc	3
Time spent with family	9	Restaurants / good / special restaurants	3
The scenery / the views / enjoyed the views	7	Eating out / dining / the meals / food	3
The weather / enjoy the weather	7	Walking / the walks	3
Swimming	6	Lack of development / not built-up / unspoilt	3
The water / sea / ocean / being near the water	6	Not crowded	3
Peaceful / calm / quiet	6	Attending / taking part in an event (various)	3
Natural environment / enjoying nature	6	Shopping / local shops / looking around town / markets	3
Walking on the beach / sand / beach walks	6	Sightseeing / visiting tourist spots	3
Fishing	5		

- The most enjoyable or valued aspects of people's coastal visits on an *unprompted* basis centres around simply being at the beach, spending time with friends and family, getting away from it all and having a change of scenery – particularly one that is natural and involves water, as well as enjoying the peace and quiet. Qualitatively, people spoke of the coast being an increasingly important place to visit, given the widespread appeal of places with water, especially as many inland waterways are suffering and becoming less accessible due to the on-going drought. Meanwhile, specific activities such as walking, swimming, eating, sightseeing and shopping etc, are considered important secondary factors (as shown overleaf).
- Apart from those aged under 31 being more likely to mention the beach than others (30%), sub-group results are consistent.

Other Activities During Most Enjoyable Trip

Other Activities During Most Enjoyable Trip	2007 %
Walking / the walks	21
Swimming	20
Eating / dining out / the meals / food	18
Sightseeing / visiting / tourist spots	15
Shopping / local shops/ looking around town / markets	13
Walking on the beach / sand / beach walks	12
Cafes / coffee shops / went to cafes	12
Relaxing	11
Fishing	9
The beach / going to / time spent on the beach	9
Beach games / activities	8
Time / meeting up / socialising with friends	7
Restaurants / good / special restaurants	6
On the water / kayaking / boating / jet skiing / surfing etc	6
Picnics / having picnics	5
Bushwalking	5
Surfing / boarding	5

Other Activities During Most Enjoyable Trip	2007 %
The pubs / went to the pubs	3
Bike riding / cycling / used bike tracks	3
Time spent with family	3
Sporting activities (various)	3

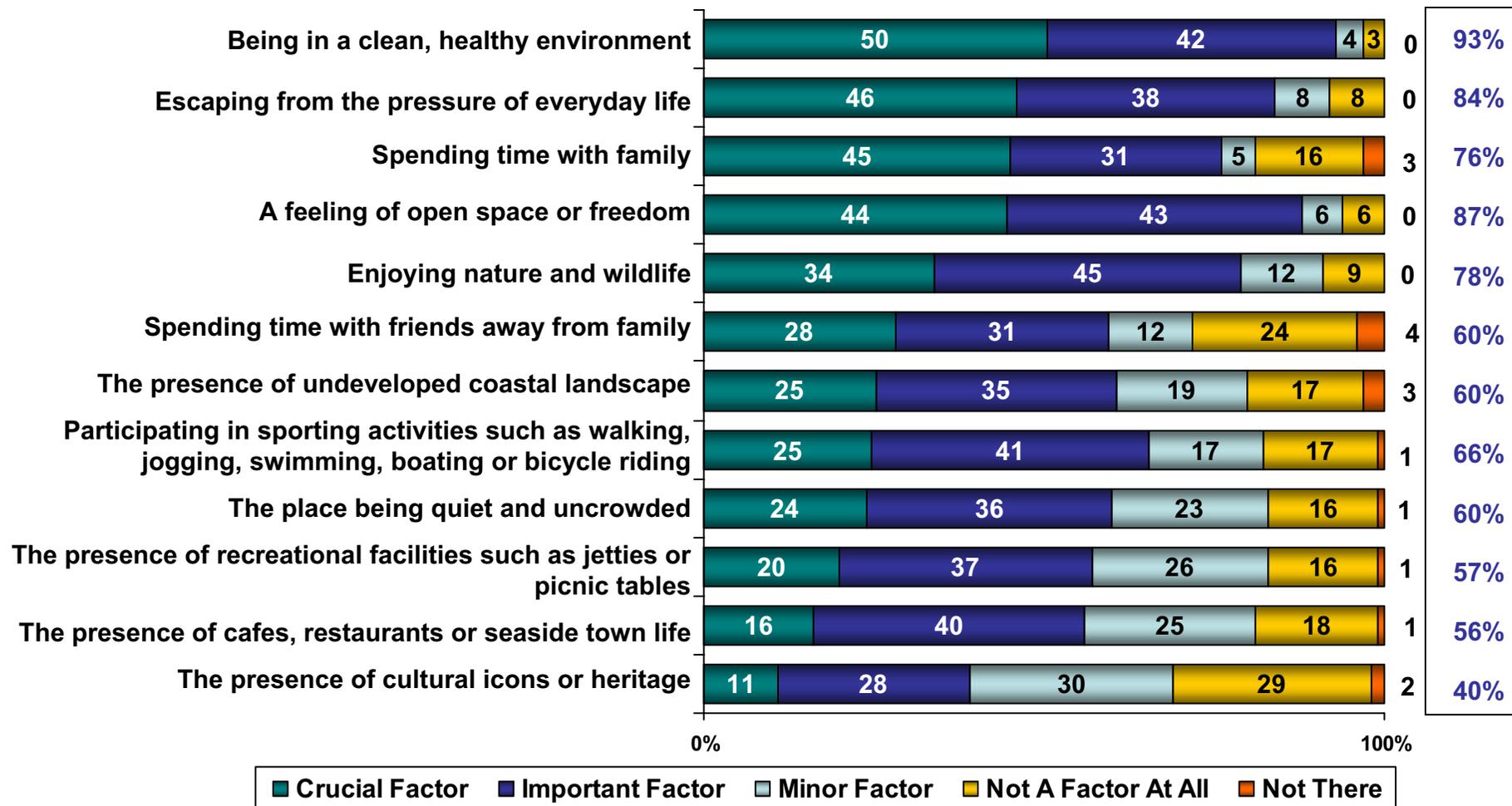
- The incidence of people engaging in other various activities on their most significant trip was fairly consistent at the sample sub-group level. A couple of exceptions were as follows.
- Younger Victorians are more likely to engage in swimming:
 - Under 31 years: 28%
 - 31 – 50 years: 22%
 - 51 – 65 years: 10%
 - 65+ years: 4%
- Dining out was more popular among those aged 31-50 years (25%).



Key drivers are really about being in a clean healthy environment, getting away from it all and relaxing with loved ones, more so than engaging in specific activities

Importance of Factors in Contributing to Enjoyment of the Visit

Crucial / Important



Base: All telephone respondents who had visited the coast, last 12 months (n=495). Weighted data.

Q.26 Still thinking about that same trip, please tell me the extent to which each of the following factors contributed to your enjoyment of the visit.

Firstly, [READ OUT FIRST FACTOR – ROTATE FACTORS], would you say that this was a crucial factor, an important factor, a minor factor, or not a factor at all in your enjoyment of that visit to the coast? REPEAT FOR REMAINING FACTORS



Families living and working in the city are most likely to visit the coast to escape the daily grind

- The following analysis looks at the sub-groups in the sample for whom the top five factors were more important.

Factor	Those more inclined to rate the factor as <i>crucial</i> / <i>important</i> are...
Being in a clean, healthy environment	<ul style="list-style-type: none"> ■ Female: 96% vs 89% of males ■ Under 31 years of age: 58% <i>crucial</i>, vs 48% of those aged 31-65 and 43% of those aged 65+
Escaping from the pressure of everyday life	<ul style="list-style-type: none"> ■ Living in Melbourne: 87% vs 75% of those living in non-metropolitan areas ■ Aged 31-50 years (91%) ■ Working: 89% vs 74% of unemployed people ■ Parents with kids under 18 years: 57% <i>crucial</i> vs 40% those without kids
Spending time with family	<ul style="list-style-type: none"> ■ Female: 80% vs males at 71% ■ Aged 31-50 years: 57% <i>crucial</i> vs less than 40% for all other age groups ■ Parents with kids under 18 years: 68% <i>crucial</i> vs 34% of those without kids ■ Employed: 51% <i>crucial</i> vs 33% of those who are unemployed ■ Notably, time away from the family is most important for those aged under 31 (45% <i>crucial</i> vs 26% or less among other age groups). Also, the younger the person, the more important sporting activities are.
A feeling of open space or freedom	<ul style="list-style-type: none"> ■ Living in Melbourne: 90% vs 81% of those living in non-metropolitan areas ■ Female: 91% vs 83% of males ■ Into fishing: 94% vs 86% of those not into fishing
Enjoying nature and wildlife	<ul style="list-style-type: none"> ■ No major differences – general appeal!



Visiting the coast is still about being in a clean healthy environment and getting away from daily pressures

Crucial Reasons for Visiting the Coast	1996 %	2000 %	2007 %
Being in a clean, healthy environment	53	52	50
Escaping from the pressure of everyday life	52	61	46 ↓
Spending time with family	44	51	45
A feeling of open space or freedom	44	47	44
Enjoying nature and wildlife (Previously 'Viewing nature and wildlife'.)	N/A	13	34 ↑
Spending time with friends away from family	25	27	28
The presence of undeveloped coastal landscape	N/A	N/A	25
Sporting activities such as walking, jogging, boating or bicycle riding	N/A	N/A	25
The place being quiet and uncrowded (Previously 'Being away from crowds and other people'.)	36	38	24 ↓
The presence of recreational facilities such as jetties or picnic tables	N/A	N/A	20
The presence of cafes, restaurants or seaside town life	N/A	N/A	16
The presence of cultural icons or heritage	N/A	N/A	11

- Despite a change in priority, the top three most crucial factors in people's enjoyment of their trip. Being in a clean, healthy environment is consistently a key factor – with 50% of visitors rating this as *crucial*, this is currently number one. Escaping the pressure of everyday life is now the second most important factor overall, having declined significantly from 2000 levels (from 61% to 46% *crucial*). Notably, nature and wildlife have become far more important, with 34% now rating this as a crucial factor in their enjoyment of the trip (up from 13% in 2000).
- Perhaps reflecting qualitative feedback that many coastal locations are becoming increasingly crowded, there has been a decline in people claiming that an 'uncrowded environment' was a crucial reason for visiting the coast (from 38% to 24%).

Base: All telephone respondents who had visited the coast, last 12 months (n=495). Weighted data. NB: Red arrow indicates significant shift.

Q.26 Still thinking about that same trip, please tell me the extent to which each of the following factors contributed to your enjoyment of the visit. Firstly, [READ OUT FIRST FACTOR – ROTATE FACTORS], would you say that this was a crucial factor, an important factor, a minor factor, or not a factor at all in your enjoyment of that visit to the coast? REPEAT FOR REMAINING FACTORS



Coastal Management



Coastal Management

- This section looks at community attitudes and perceptions towards the management of the Victorian coast. The section begins by looking at specific issues and concerns, and concludes with a measure of attitudes regarding the need for more research in relation to coastal impacts of climate change.
 - Within the Community Engagement Forums, respondents were asked whom they believe to be responsible for managing the coast (see 'Coastal Management and Information' section). Similar to 2000, many respondents think that this is their local council's responsibility (47%), followed by 'State Government' (31%), or DSE (28%). Notably, many also recognise the important role that all individuals play in helping to manage and protect the coast (28% spontaneously suggested this, and upon being prompted, virtually all forum participants agreed).

Key Results

- In 2007, a significant increase is observed in the proportion of Victorians who agree that the coast is well managed (74%, up from 67% in 2000). Despite this positive trend, many Victorians (45%) have concerns about the coast and/or marine environments. In general, females remain more sensitive to various issues than males.
 - Key concerns relate to rubbish and pollution (28%), over-development of the coast (14%). At the next level down are water quality concerns, over-crowding, and a new issue to have emerged is the dredging of Port Phillip Bay (8%).
- The majority of respondents again agree that *'Most of the Victorian coast has been preserved in a very natural state'* (73%), with two in five *agreeing a lot* (39%).
- Significant gains are observed for two key areas, where more people *agree a lot* that:
 - *'Victoria can take pride in the way it has managed its coast'* – at 43%, up from 34%.
 - *'Port Phillip Bay is a clean, natural marine environment'* – from 12% up to 21%.
 - This may be a reflection of efforts to clean up beaches in certain areas; particularly metropolitan ones.



Coastal Management

- Around half of those interviewed are still not confident that there are long-term strategies in place to protect the coast (48%), and twice as many people are unsure either way (at 8%).
- For many, climate change is an unknown, emerging, and important issue. Sentiment is very clear that *'More research is needed about how climate change will impact upon the Victorian coastal and marine environments, and what this means for Victorians'*, with the great majority agreeing a lot (69%).

Conclusions and Implications

- Given the extent of Victorians who have expressed concerns about the coast and/or marine environments, and that just one in three firmly agree that the coast is well managed, a strategy of continuous improvement is required in order to address concerns and enhance perceptions going forward. Likewise, efforts and successes of initiatives aimed at addressing concerns regarding pollution etc, should be communicated to the community to enhance perceptions and reduce concerns.
 - Key areas for improvement include efforts to reduce litter and pollution, and over-development of coastal areas (which are seen to be closely related issues). The latter is addressed further in the 'Coastal Development' section.
- Given the firm desire for more research into how climate change will affect the Victorian coast and its users, as well as the lack of information in this regard, significant funding should be considered for this emerging issue. This is a key topic that should be addressed within the Victorian Coastal Strategy.
- With a large proportion of the community still not confident that there are long-term strategies in place to protect the coast, it would be prudent for Government to communicate its strategies, particularly those that address people's concerns as expressed within this survey and via other community feedback.

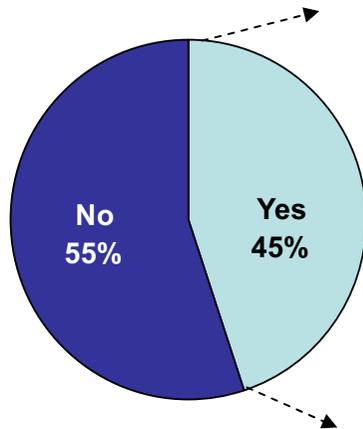


Issues & Concerns



Many Victorians are concerned or annoyed about aspects of the coast or marine environments

Current Concerns?



- Many respondents expressed concerns or annoyances about the coast (45%).
- The top two concerns – by far – are rubbish and litter (at 28%), followed by over-development (at 14%).
- Although some people are more likely to be concerned than others (see over), specific concerns are generally consistent among sub-groups. This is also consistent with findings from the Community Engagement Forums.

Top Concerns	Total %	Age Group			
		<30 % (n=35)	31-50 % (n=84)	51-65 % (n=94)	>65 % (n=50)
Rubbish/litter/plastic bags/broken glass/cigarette butts/rubbish dumped	28	40	23	25	26
Over development / inappropriate/ too commercialised	14	9	17	17	8
Poor water quality/water not clean/effect on marine life	8	11	9	6	1
Pollution (in general)	8	11	9	6	1
Dredging of Port Phillip Bay/dredging activities	8	5	11	10	5
Over crowded/over populated	7	5	8	9	4
Decreasing natural habitat/environment / lack of conservation	7	5	8	9	4
Damage/destruction of eco-system/ marine life from dredging	6	3	6	10	7
Drunks/hoons/undesirables around	6	3	9	2	6
Erosion/erosion of dunes/cliffs	5	13	0	3	4

Base: All telephone respondents (n=601). Weighted data.

Q.29 Are there any things that currently concern or annoy you about the Victorian coastal or marine environments?

Base: All telephone respondents who answered 'yes' to Q.29 (n=269). Weighted data. NB: Top 10 mentions only.

Q.30 Could you please describe these concerns to me? What other issues or concerns do you have about the Victorian coast or marine environments? (PROBE FULLY AND CLARIFY ANY VAGUE RESPONSES.)



Human activities are placing more and more pressure on the coast – pollution remains the key concern, and increasingly, over-development

- Although a small majority of Victorians could not report anything that specifically concerns or annoys them about the coast or marine environments (55%), a significant proportion did (45%). Those most likely to express concerns are:
 - females (49% vs 40% of males);
 - people living within 5kms of the coast (48%);
 - those who visited the coast 6 or more times in the last year (52% vs 39% those who had visited less often);
 - those who had sought information about the coast or marine environments in the last 12 months – who represent 24% of respondents (at 62% vs 39% among those who had not sought information);
 - those who belong to an environment or conservation group – who represent 14% of the respondents (at 60% vs 42% of others);
 - those who are tertiary educated (49% vs 39% of those without tertiary qualifications); and
 - those with children – who represented 29% of respondents (at 51% vs 41% of those without children).

- There are two key, stand out issues of concern to Victorians in relation to the coast – namely rubbish, in terms of litter, plastic bags, cigarettes etc on the beach and in the water (28%), followed by overdevelopment or inappropriate development (14%), which was not raised spontaneously as a concern in the 2000 telephone survey – highlighting its impact on the community. These were also the top two issues expressed by coastal dwellers in the Community Engagement Forums, where reducing pollution was the standout funding priority.
 - At the next level down are over-crowding / overpopulating areas (7%, similar to the 6% level in 2000), decreasing natural habitat / lack of conservation (a new issue at 7%), poor water quality (a fairly consistent 8%), pollution in general (8%), and concerns about dredging of Port Phillip Bay (a new issue at 8%).
 - A host of other issues were also cited, from too many jet skis and motor boats impacting on the sense of peace and quiet, polluting the water and coming too close to swimmers, a lack of bins, drunks / hoons, over-fishing and poaching (both commercial and leisure fishers), insufficient beach access in terms of both parking and walking trails, need for greater control of dogs on beaches, effluent outfalls, developments too close to the beach, too many large commercial ships in the bays, need for more revegetation, and a general lack of policing controls in coastal and marine environments.



Voicing their concerns...

"The chance we will lose the natural beauty of the Victorian coastline by over-development. I think it is people who will have a negative impact on the coastline by overdeveloping and not leaving it to its natural beauty."

"Things being built right on the beach, houses, high density housing right on the beach. I don't like Inverloch for that reason, can't walk anywhere because of the houses."

"Overdevelopment. Torquay, it has too many buildings around the edges. It's reducing the types of animals that can live there. More population is being disruptive to the natural environment."

"Over development, for example the 12 Apostles. Now they have too much space taken up from the car park. It has lost its attraction. The whole coastline is getting way too over-developed, looking too much like the city."

"Overdevelopment. There's a lot of residential estates going up which contributes to pollution, and there's noise pollution too."

"When I visited the areas of Torquay, Barwon Heads, Ocean Grove. I was very shocked at the way it had been developed, it's so over crowded and they have destroyed the natural feel of the place by building over too much of the natural environment. This has also happened around the Port Phillip Bay area."

"Developments that is happening. In one way it's good and the other way it's bad. I suppose it's good to get more people down there but then again I feel they are over developing man made things and destroying natural surroundings and will put more pressure on the marine environment. Also, the sewerage outfall is terrible, it's not nice to swim in the ocean with that kind of stuff pouring into it."

"Crowds are a major problem, and the fact I feel people are not necessarily respecting the environment, so it requires a cooperation between people on the beach which is a shared space."

"The water quality; what us as a society are doing to change the water quality, we're changing it for the worse."

"The fish that comes out of Port Phillip Bay is not of a good quality. You can taste the difference between coastal and bay fish. This could be due to the amount of people who are living around the bay contributing to the pollution that is going into the bay."



Voicing their concerns...

“Some of the rubbish that is lying around like smoke butts, beer bottles and plastic bags and lemonade bottles. If you go there late at night there are a lot of young drunks and it gets a bit scary with them there. You are wondering are they there for a bit of fun or are they going to come over and cause trouble. Also, spillages from ships, oily stuff out of the ships out at sea that comes into the shore eventually.”

“Pollution, sewage outlets at Wye River, it causes contamination of the water going into the sea, meaning that the river is unusable. We haven’t been able to use it for swimming at all times for the last two years.”

“The dredging in the bay, because its going to seriously impact on the beaches and marine life, diving and snorkelling.”

“I have concern for the future and the management of the state. I am concerned about the dredging of Port Phillip Bay and Western Port and Hastings. I would like to be assured that they are not going to destroy marine life and marine habitats for fish and bird life in Hastings. There are pelicans and I wouldn’t want activities to take place that would destroy these habitats. Just that it’s respected and taken care of by those who are paid to take care of it.”

“The Gunnamatta sewerage outfall. And the smell when you walk along the beach down there it pong. And the enviromental factors like it’s just not good for the place. I’m not a scientist but there is fish and birds and we are just dumping the stuff out there. Well locally, Kananook Creek in Frankston is a filthy silt mess, I think the bay forms part of the coast and too it’s built up. Well it’s just like this sludging black mess with pipes in it, storm water pipes and they flow straight into the creek and into the bay.”

“The Government is not looking after Port Phillip Bay enough. They are more concerned with making money.”

“Too many people and too much rubbish left behind.”

“Poachers – the taking of undersized or protected fish and shellfish.”

“Lack of adequate sign posting, about natural features, and information about illegal fishing activities. People don’t even know they are in a marine park because there is no signs.”



Voicing their concerns...

“There is too many jet skis going around unpatrolled, like speeding, too close to the coastline and I don't think it is being patrolled enough for licences. I have noticed a lot of Chinese fisherman who don't respect the legal size of the fish, they seem to take any fish and mush it up regardless of size.”

“Jet skis; they are always there and creating havoc along the estuaries. I kayak a lot there, and the noise of the motors and the erosion caused by the wakes along the river banks. There is also a lot of undersized fish being taken by visitors. I don't think that the fishing is being policed.”

“Jet skis being allowed to operate in swimming areas. It just needs to be banned from coming in too close to people who are snorkelling or swimming.”

“They shouldn't put parking meters on the beach. They get enough in council rates and the places where are the best to look at the views and things, they are going to put parking meters there, so it will stop people from coming.”

“Pollution; people leaving things laying around on the shore. Oil leaks from big oil tankers. Degradation of sand dunes, erosion.”

“Port of Hastings proposed development. The Bracks government is planning on opening another port in Hastings, too much industrialisation.”

“I get worried about our seafood life, and worried about our wild life, I want to keep them alive, not in danger.”

“They might ruin it with too much development along the coast, too many ghastly houses. Also, the drought, it's depressing to see the landscape all brown along the coast.”

“Over fishing, and pollution, in Port Phillip Bay - the by-products from industry like Alcoa, just pollution in general.”

“Interference with the natural environment like construction and litter, and a lack of effort to restore these environments, and appropriation of the shoreline by yacht clubs or commercial groups. Also, personal safety, that it doesn't attract groups of misbehaving, which threatens the enjoyment of people. So, I can't wander along a beach because youths might harass.”

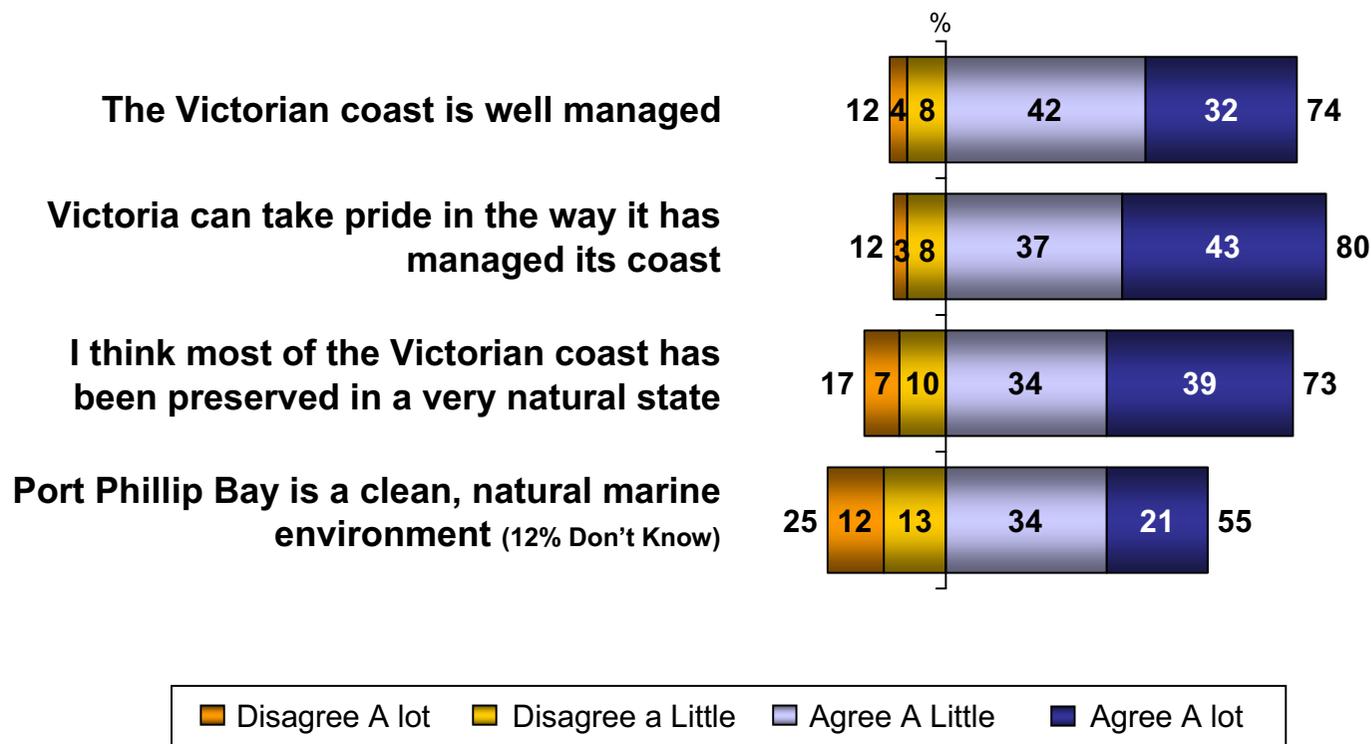


General Attitudes & Perceptions



Overview of Coastal Management Attitudes & Perceptions

Attitudes Towards Coastal Management



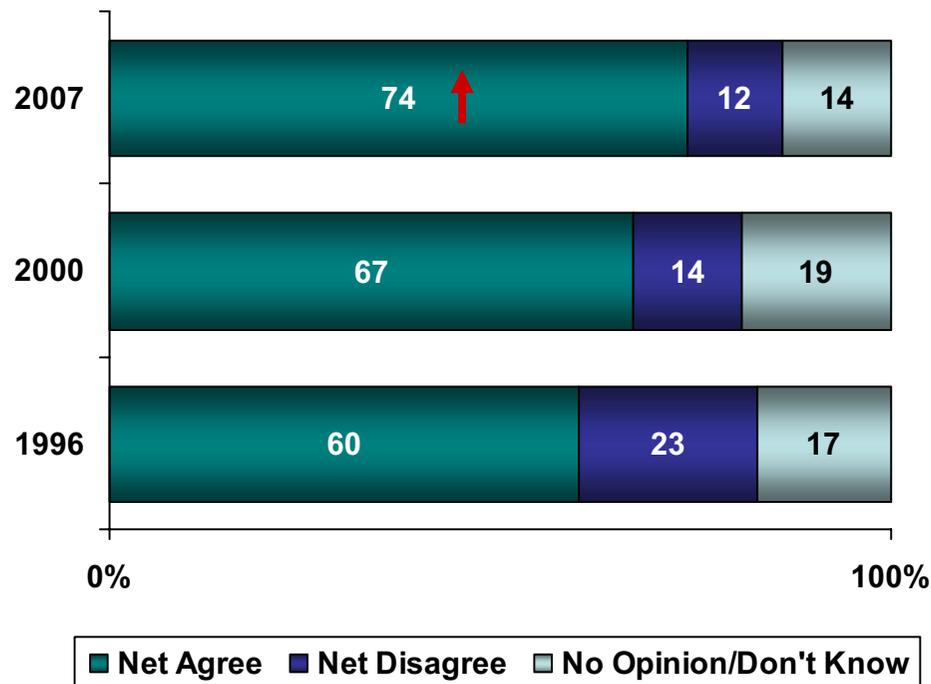
Base: All telephone respondents (n=601). Weighted data.

Q.31 I am going to read out a few statements that some people have made about the Victorian coast – please tell me whether you agree or disagree with each, and whether that is a lot or a little. Firstly... ?



An improvement in perceived management of the Victorian coast is evident

Whether Feel Victorian Coast is Well Managed



↑ ↓ = Statistically significant difference at 95% confidence

- The majority of Victorians still agree that the Victorian coast is well managed.
- Indeed, perceptions have continued to improve with each wave of the research.
- Furthermore, with 74% *agreeing a lot / a little* this wave, this is a significant improvement since the 2000 survey.
- As in 2000, those aged 15 – 30 years are more likely to agree with this statement (82%) than older Victorians:
 - 31 – 50 year olds: 73%
 - 51 – 65 years olds: 67%
 - 65+ years olds: 70%
 - It is important to bear in mind that in the Community Engagement Forums, younger respondents were generally less aware of coastal management issues.

Base: All telephone respondents (n=601). Weighted data.

Q.31.04 I am going to read out a few statements that some people have made about the Victorian coast – please tell me whether you *agree* or *disagree* with each, and whether that is a lot or a little...The Victorian coast is well managed.



Coastal Management: Detailed Comparison

The Victorian Coast is Well Managed	2000 %	2007 %
Agree A Lot	27	32 ↑
Agree A Little	41	42
Neither Agree Nor Disagree	11	6
Disagree A Little	9	8
Disagree A Lot	5	4
NET AGREE	67	74 ↑
NET DISAGREE	14	12
Don't know	8	8

- In 2000 the increase in agreement with this statement was due to a significant decline in those disagreeing, and appeared to more clearly reflect efforts to improve management of the coast.
- In 2007, this is partly due to a drop in the number of respondents without an opinion (from 19% to 14%). What this means is that more Victorians are now engaged on the topic of coastal management. This is supported by the qualitative research, where respondents described a higher level of coastal usage, as well as community education and awareness of coastal issues, which is also a reflection of the coast now being more important to more Victorians.
- Notably, the proportion who agreed *a lot* that the Victorian coast is well managed has also increased significantly to 32% (from 27% in 2000).
 - Whilst this is a positive trend, there still remains plenty of room to improve. With 45% of Victorians expressing some level of concern, continual efforts will need to be made to enhance perceptions of the way in which the coast is managed, and reduce the level of concern.

↑ ↓ = Statistically significant difference at 95% confidence

Base: All telephone respondents (n=601). Weighted data.

Q.31.04 I am going to read out a few statements that some people have made about the Victorian coast – please tell me whether you agree or disagree with each, and whether that is a lot or a little. The Victorian coast is well managed...?



Victorians maintain a high level of pride in how the coast has been managed

Victoria Can Take Pride in the Way it has Managed its Coast	2000 %	2007 %
Agree A Lot	34	43 ↑
Agree A Little	43	37
Neither Agree Nor Disagree	7	4
Disagree A Little	8	8
Disagree A Lot	3	3
NET AGREE	77	80
NET DISAGREE	11	11
Don't know	5	5

- There has been a significant increase in the proportion of respondents *agreeing a lot* that 'Victoria can take pride in the way it has managed its coast' – from 34% in 2000 to 43% this wave.
- Some respondents were significantly more likely to *agree a lot* with this statement, including:
 - Those living in Melbourne: 43% vs 35% of other Victorians
 - Those in Western Port Bay: 62%
 - Those from a non-English speaking background: 58% vs 41% of other Victorians
- As in 2000, those aged 15 – 30 years were also more likely to agree with this statement (91%) than older Victorians:
 - 31 – 50 year olds: 79%
 - 51 – 65 years olds: 74%
 - 65+ years olds: 73%

↑ ↓ = Statistically significant difference at 95% confidence

Base: All telephone respondents (n=601). Weighted data.

Q.31.05 I am going to read out a few statements that some people have made about the Victorian coast – please tell me whether you agree or disagree with each, and whether that is a lot or a little. Victoria can take pride in the way it has managed its coast...?



Many maintain that the coast has been preserved in a very natural state, despite concerns

Most of Victorian Coast Preserved in a Very Natural State	2000 %	2007 %
Agree A Lot	39	39
Agree A Little	39	34
Neither Agree Nor Disagree	5	5
Disagree A Little	9	10
Disagree A Lot	6	7
NET AGREE	77	73
NET DISAGREE	15	17
Don't know	3	5

- The majority of respondents agree that ‘*Most of the Victorian coast has been preserved in a very natural state*’ (73%). Although fewer people agree than in 2000 (77%), this is not a significant decline.
 - This perception is somewhat supported by the fact that 96% of land fronting the coast in Victoria is public land. However, this is not widely known, with very few participants in the Community Engagement Forums being aware of the extent of publicly owned coastal land.
- Those aged over 65 years are significantly more likely than others to *agree a lot* with the statement (51%) – a positive finding, as these respondents tend to have a longer frame of reference by which to assess this.
- While these results appear to be somewhat in contradiction with concerns about over-development and pollution, respondents tend to think about the *whole* coastline in responding to this question, including undeveloped areas outside of coastal town boundaries.

Base: All telephone respondents (n=601). Weighted data.

Q.31.01 I am going to read out a few statements that some people have made about the Victorian coast – please tell me whether you *agree* or *disagree* with each, and whether that is a lot or a little. I think most of the Victorian coast has been preserved in a very natural state...?



Improved perceptions that Port Phillip Bay is a clean, natural marine environment

Port Phillip Bay is a Clean, Natural Marine Environment	2000 %	2007 %
Agree A Lot	12	21 ↑
Agree A Little	32	34
Neither Agree Nor Disagree	10	8
Disagree A Little	19	13
Disagree A Lot	16	12
NET AGREE	44	55 ↑
NET DISAGREE	35	25 ↓
Don't know	11	12

↑ ↓ = Statistically significant difference at 95% confidence

Base: All telephone respondents (n=601). Weighted data.

Q.31.02 I am going to read out a few statements that some people have made about the Victorian coast – please tell me whether you agree or disagree with each, and whether that is a lot or a little. Port Phillip Bay is a clean, natural marine environment...?

- A positive finding is that Victorians are significantly more likely to agree that *'Port Phillip Bay is a clean, natural marine environment'* than they were in 2000 (55%, up from 44%). Indeed, they are almost twice as likely to *agree a lot* with this statement (from 12% up to 21%).
 - Younger Victorians are the most positive, with two thirds of those aged 15–30 years agreeing with the statement (67%) compared with 31–50 year olds (54%) and those aged 65+ (52%).
- This may be a reflection of efforts to clean up beaches in certain areas; particularly metropolitan ones.
 - Those living in Melbourne were far more likely to agree with the statement (61% vs 39% of those living in other areas).
 - West Coast residents were less likely to agree (35%), and those on the East Coast were the least likely to agree (33%).
 - Notably, efforts to remove syringes from certain beaches have been recognised, with just 3% nominating this as a concern in the telephone survey, compared to 7% in 2000.
- Some respondents were far more likely to *disagree a lot* with the statement:
 - Those who have sought coastal information in the last 12 months (17% vs 9% of others), those who belong to an environment or conservation group (24% vs 10%), and those from a non-English speaking background (23% vs 10%).



A slight drop in confidence in long term planning

Confidence in Long Term Strategies to Preserve and Protect Victorian Coast	2000 %	2007 %
Very confident	7	6
Fairly confident	41	38
Not too confident	33	33
Not at all confident	15	15
NET CONFIDENT	48	44
NET NOT CONFIDENT	49	48
Don't know	4	8

- Public attitudes remain polarised in terms of being confident that there are effective long-term strategies in place to preserve and protect the coast in a state that future generations will be happy with (with a slight decline in net confidence from 48% to 44%, and only 6% being *very confident*).
- With a significant increase in people saying that they do not know (from 4% to 8%), this indicates that it would be prudent for government to communicate its long-term strategies to help arrest this trend.
- While the government is most commonly thought to be responsible for managing and protecting the Victorian coast (Local, followed by State), many of the Community Engagement Forum respondents spontaneously acknowledged the importance of everyone doing their bit to help protect the coast (see 'Coastal Management and Information' section).
 - There is a sense that more education is needed to foster higher levels of *personal* responsibility and ensure that more people clean up after themselves, which entail information about the impacts of specific actions.

Base: All telephone respondents (n=601). Weighted data.

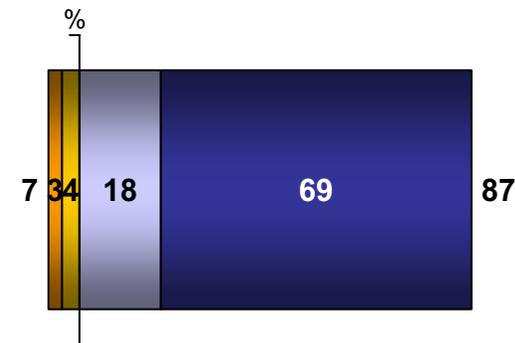
Q.32 How confident are you that there are strategies in place to ensure the Victorian Coast will be preserved and protected in a state that our grandchildren's grandchildren will be happy with? Would you say you are...



There is little question that the community believes more research is needed into climate change

Attitudes Towards Climate Change Research

More research is needed about how climate change will impact upon the Victorian coastal and marine environments, and what this means for Victorians



Disagree A lot Disagree a Little Agree A Little Agree A lot

- Based on feedback from the Community Engagement Forums and the open-response question in the telephone survey about people's concerns, it is clear that Victorians are not currently linking climate change with the coast, in terms of what the physical impacts will be, as well as how this will affect users of the coast.
- For many, this is an unknown, scary, and emerging issue. As such, a very high level of agreement is observed that *'More research is needed about how climate change will impact upon the Victorian coastal and marine environments, and what this means for Victorians'* – at 69% agree a lot. Hence this is a key area that should be addressed within the updated Victorian Coastal Strategy.
 - As with many other issues, females were more likely to agree with this statement (92% vs 82% of males). Otherwise, responses were highly consistent between sub-groups, indicating that this is an issue of general concern and importance for most Victorians.

Base: All telephone respondents (n=601). Weighted data. NB: Don't know (4%) and Neither (2%) not shown.

Q31. I am going to read out a few statements that some people have made about the Victorian coast – please tell me whether you agree or disagree with each, and whether that is a lot or a little. Firstly... ?



Marine Environment Management



Marine Environment Management

- Specific questions were asked about the marine environment, including a series of attitudinal and knowledge based questions that have been posed in previous waves of the research. Victoria's 13 Marine National Parks and 11 Marine Sanctuaries were established in 2002, so it was also important to measure the awareness and level of support for these Parks within the telephone survey.

Key Results

- The attitudes and knowledge of Victorians in relation to the marine environment remain largely consistent with those of the 2000 survey, and also tend to be consistent among various segments of the community.
- There is no doubt that the flora and fauna of Victoria's marine environments are important to all Victorians, with a very high 83% *agreeing a lot* with this.
- Most respondents (86%) agree that '*Protecting our marine environments requires far better policing of the laws and regulations both on and in our waters*', with 61% *agreeing a lot*.
- Most respondents also agree that '*Victoria's marine environments are under real threat*' (75% net *agree a lot / a little*). Indeed, sentiment is somewhat stronger than in 2000, with 45% now *agreeing a lot* compared with 41% in the previous wave. Pollution is a key threat, along with over-fishing and other pressures placed on the marine environment by human activities.
- Similar to results in 2000, the majority of Victorians feel that they don't know all that much about the marine environments, which was also found in the qualitative phase of the research.



Marine Environment Management

- The majority of Victorians still *disagree* that ‘*The seas and oceans are powerful enough to look after themselves*’, although this has declined significantly from 82% in 2000 to 72%.
- Most respondents claim to be aware of Victoria’s Marine National Parks and Marine Sanctuaries (71%), and are supportive of these (92%, with 70% *strongly* supporting them and just 3% unsupportive).
 - It should be noted that significantly fewer people from a non-English speaking background are aware of the Marine National Parks and Sanctuaries (51% compared with 75% of other Victorians).
 - Linked with this issue is some anecdotal feedback from fishing enthusiasts in the Community Forums that people from non-English speaking backgrounds have been seen to be more likely to be engaging in inappropriate if not illegal fishing activities, which is thought to be exacerbated by a lack of policing of the waters.

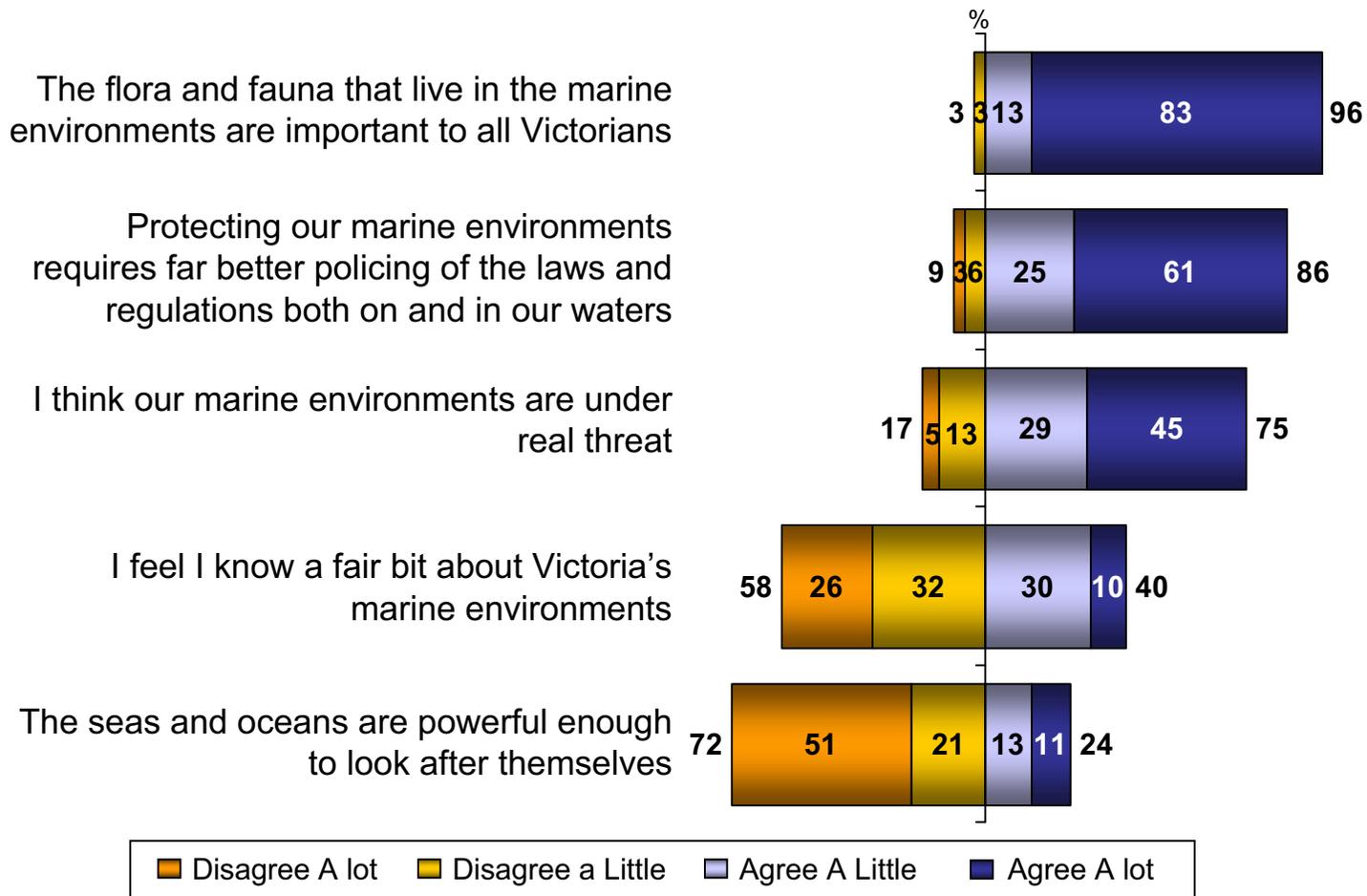
Conclusions and Implications

- Victorians place significant value on the marine environment and its inhabitants, and hence maintain that these are values that need to be protected from the significant threats of increased human pressure. Education is also required to raise awareness of the impacts and consequences of certain activities.
- Going forward, to address concerns about the lack of sufficient policing and supervision of marine activities, it will be important to deploy more resources to police the laws and regulations on and in Victorian waters, and to communicate the success of such action (e.g. number of people caught, nature of penalties, species protected etc). Similarly, the successes of the Marine National Parks and Sanctuaries should be promoted to help strengthen understanding of these, and maintain support.
- With lower awareness of the Marine Parks and Sanctuaries among those from a non-English speaking background, targeted communications are required to raise awareness among this significant segment of the community (i.e. around 20% of Victorians as per Census 2001).



Overview of Marine Environment Attitudes and Perceptions

Attitudes & Knowledge Regarding Victoria's Marine Environments



Base: All telephone respondents (n=601). Weighted data.

Q.45 Please tell me the extent to which you *agree* or *disagree* with each of the following statements relating to the marine environments in Victoria... NB: 'Don't know' and 'Neither agree nor disagree' not shown.



Marine flora and fauna remains highly important to Victorians

The Flora and Fauna that Live in the Marine Environments are Important to All Victorians	2000 %	2007 %
Agree A Lot	80	83
Agree A Little	15	13
Disagree A Little	3	3
Disagree A Lot	1	0
NET AGREE	95	96
NET DISAGREE	4	3
Can't Say	1	1

- There is no doubt that the flora and fauna of Victoria's marine environments are important to all Victorians, with a very high 83% *agreeing a lot* with this statement.
- This result is consistent with that of the 2000 survey.
- The only sub-group difference in this result is observed among those who have sought information about the coast or marine environments in the last 12 months – 94% of these respondents (who represent 23% of the total sample) *agreed a lot* with the statement, compared with 79% of those who had not sought any information.

“Unique, beautiful, cleansing, incredible. I value the marine environment just as much the coastal environment. Even though I don't know a lot about what's out there I appreciate that it's an important part of our planet.”

“Unknown - a mystery undervalued, when revealed – fascinating.”

“Lots of fish and other sea creatures, particularly them living in protected areas, to ensure their ongoing existence. I value the action to ensure protection of species, to have it for future generation. “

Base: All telephone respondents (n=601). Weighted data.

Q.45.02 Please tell me the extent to which you *agree* or *disagree* with each of the following statements relating to the marine environments in Victoria. (ROTATE ALL STATEMENTS). IF AGREE/DISAGREE, ASK: Is that a little or a lot? The flora and fauna that live in the marine environments are important to all Victorians...?



Far better policing of our marine environments remains a key issue for Victorian waters

<i>Protecting our Marine Environments Requires Far Better Policing of the Laws and Regulations Both On and In Our Waters</i>	2000 %	2007 %
Agree A Lot	64	61
Agree A Little	25	25
Disagree A Little	4	6
Disagree A Lot	3	3
NET AGREE	90	86
NET DISAGREE	7	9
Can't Say	3	5

“There is a lot of undersized fish being taken by visitors. I don’t think that the fishing is being policed.”

“We are being too policed. We are scared about breaking the rules, for example we want to go out in the boat and next thing we have to watch where the marine parks are because they have taken up the fishing spots ... The coast has been so policed out by rules and regulations in the way of where we can go and where we can’t go, but on the other hand, they don’t have enough policing of bad behaviour.”

- Most respondents (86%) agreed that ‘*Protecting our marine environments requires far better policing of the laws and regulations both on and in our waters*’, with 61% agreeing a lot.
 - These results are fairly consistent with those of the 2000 survey.
 - Those who are more inclined to agree a lot include females (66% vs 55% of males) and those who expressed specific concerns about Victoria’s coast (68% vs 55% of those without specific concerns).

- This was certainly supported qualitatively, with respondents in each the Community Engagement Forums expressing concerns that there is insufficient policing of Victorian waters, such that laws and regulations are not only being breached, but also not taken very seriously by some members of the community.
 - There is a sense that if the regulations are seen to be policed, they will be taken more seriously.
 - Even some of those in the small minority who feel that there are too many regulations acknowledge that there is a lack of policing (as evidence by the feedback shown opposite).

Base: All telephone respondents (n=601). Weighted data.

Q.45.04 Please tell me the extent to which you agree or disagree with each of the following statements relating to the marine environments in Victoria. (ROTATE ALL STATEMENTS). IF AGREE/DISAGREE, ASK: Is that a little or a lot? Protecting our marine environments requires far better policing of the laws and regulations both on and in our waters...?



Many agree our marine environments are threatened

<i>Our Marine Environments are Under Real Threat</i>	2000 %	2007 %
Agree A Lot	41	45
Agree A Little	34	29
Disagree A Little	14	13
Disagree A Lot	4	5
NET AGREE	76	75
NET DISAGREE	18	17
Can't Say	7	8

“Poorly treated sewage outlets. Discharge of water by foreign shipping. In the future possible bay dredging. Invasion of bay by alien sea creatures. Poor control of stormwater outlets. Education programs regarding the marine environment.”

“More education about how we can protect the coastline when we use it. Less development on the bay (marinas) to keep the boats from polluting water. Ban the use of jet skis.”

- Most respondents agree that Victoria’s marine environments are under real threat (75% net agree a lot / a little).
- Indeed, sentiment is somewhat stronger than in 2000, with 45% now *agreeing a lot* compared with 41% in the previous wave.
- Those who are significantly more likely to believe that the marine environments are threatened are:
 - Females: 81% net agree vs 68% of males
 - Aged under 31 years: 84% net agree
- Qualitatively, perceived threats include pollution from rubbish, sewage outfalls, fertilisers and other chemicals, as well as dredging and channel deepening, over-fishing and increased pressure from larger and more water craft – particularly including large shipping vessels.
 - As a result of these issues, many forum participants spoke of the need for greater levels of community education not only about the impacts of inappropriate activities, but also about the consequences – including fines and penalties, as well as other social impacts such as potentially harming people (and/or wildlife).

Base: All telephone respondents (n=601). Weighted data.

Q.45.01 Please tell me the extent to which you *agree* or *disagree* with each of the following statements relating to the marine environments in Victoria. (ROTATE ALL STATEMENTS). IF AGREE/DISAGREE, ASK: Is that a little or a lot? I think our marine environments are under real threat...?



Few Victorians feel knowledgeable about the marine environments

<i>I Know a Fair Bit About Victoria's Marine Environments</i>	2000 %	2007 %
Agree A Lot	13	10
Agree A Little	33	30
Disagree A Little	35	32
Disagree A Lot	19	26
NET AGREE	46	40
NET DISAGREE	54	58
Can't Say	0	2

"The marine environment doesn't really affect me much. It would be nice to be aware of what and where the marine parks are."

"It's there, as in I can see and smell and hear the ocean, but I don't think much more about it."

- Similar to results in 2000, the majority of Victorians feel that they don't know all that much about the marine environments – 58% disagree that *'I know a fair bit about Victoria's marine environments'*.
 - However, there appears to be a slight decline in the overall level of knowledge, with 26% *disagreeing a lot*, which is significantly higher than the 19% recorded in 2000.
- These results were supported qualitatively, with many participants in the Community Engagement Forums explaining that they have very limited understanding or knowledge of the marine environments. Those inclined to have higher levels of knowledge are those who regularly use the waters for activities such as diving and fishing.
- Understandably, those who live closer to the coast tend to be more confident in their knowledge of the marine environment.
 - Those aged over 65 years are also more inclined to feel that they know a fair bit (19% *agree a lot*). Others with higher levels of knowledge include those who have sought information on the coast in the last 12 months (19%) and those who belong to a conservation or environment group (19%), and those who expressed concerns about the coast or marine environments (15%).

Base: All telephone respondents (n=601). Weighted data.

Q.45.05 Please tell me the extent to which you *agree* or *disagree* with each of the following statements relating to the marine environments in Victoria. (ROTATE ALL STATEMENTS). IF AGREE/DISAGREE, ASK: Is that a little or a lot? I feel I know a fair bit about Victoria's marine environments...?



The marine environment is thought to need our help

<i>The Seas and Oceans are Powerful Enough to Look After Themselves</i>	2000 %	2007 %
Agree A Lot	4	11 ↑
Agree A Little	11	13
Disagree A Little	20	21
Disagree A Lot	62	51 ↓
NET AGREE	15	24 ↑
NET DISAGREE	82	72 ↓
Can't Say	2	4

“I feel around this area, the public need to make a conscious effort to look after the sand of St Kilda. Because of tide change, everything eventually on the sands will affect the marine life. This year there was a high influx of flies, especially on the beach. There has to be a reason for this on our behalf.”

↑ ↓ = Statistically significant difference at 95% confidence

- There is a shift in perceptions that ‘*The seas and oceans are powerful enough to look after themselves*’, with a significantly larger proportion of respondents agreeing with this statement than in 2000 (24% compared with 15%).
- However, overall, the large majority of respondents still disagree with this sentiment (72%), indicating that people clearly recognise the role that humans have in helping to protect the marine environment.
- The shift in results may be linked with the slight overall decline in claimed knowledge of the marine environment among Victorians.
- Those who are significantly more inclined to *agree a lot* with the statement include:
 - Males: 17% vs 6% of females
 - People aged 65+ years: 23%
 - Low income earners and the unemployed: 19% and 16% respectively
 - Those without tertiary education: 15% vs 8% of others
 - Those who are into fishing: 22%

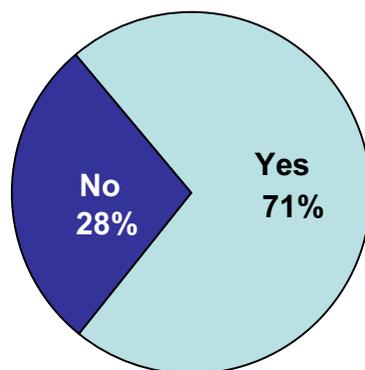
Base: All telephone respondents (n=601). Weighted data.

Q.45.03 Please tell me the extent to which you *agree* or *disagree* with each of the following statements relating to the marine environments in Victoria. (ROTATE ALL STATEMENTS). IF AGREE/DISAGREE, ASK: Is that a little or a lot? The seas and oceans are powerful enough to look after themselves ...?

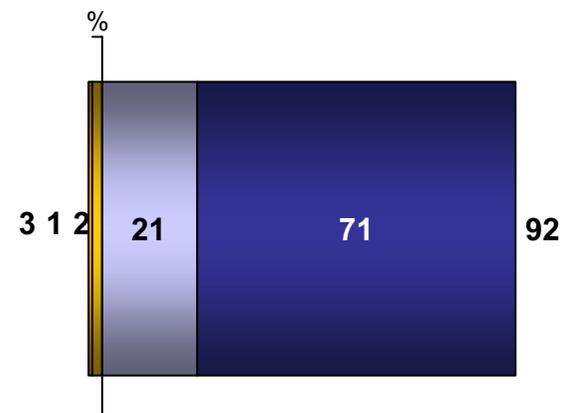


High awareness of, and support for, Marine National Parks and Marine Sanctuaries

Heard of Marine National Parks & Marine Sanctuaries?



Support or Oppose Marine National Parks & Marine Sanctuaries



- Almost three quarters of respondents claim to have heard of Victoria's Marine National Parks and Marine Sanctuaries (72%), which is a good benchmark figure against which to track future awareness. However, it should also be noted that in the forums, most respondents had only a vague awareness or understanding of these Parks and Sanctuaries, with very few aware of where they are or when they were established.
- Some of those who describe themselves as being 'into fishing' feel that there are too many Marine Parks. However, the vast majority of respondents who are aware of these Parks and Sanctuaries (71% of the population), are supportive of these (92%, with 70% *strongly* supporting them and just 3% unsupportive). It should be noted that significantly fewer people from a non-English speaking background are aware of these Parks and Sanctuaries (51% compared with 75% of other Victorians), indicating that targeted communications are required to raise awareness among this significant segment of the community (i.e. around 20% of Victorians as per Census 2001).

Base: All telephone respondents (n=601). Weighted data. NB: Does not total 100% due to rounding.

Q.46 Have you heard of Victoria's Marine National Parks and Marine Sanctuaries?

Base: All respondents who answered 'yes' to Q.46 (n=462). Weighted data.

Q.47 Do you support or oppose the Marine National Parks and Marine Sanctuaries? Is that strongly or mildly?



Coastal Development



Coastal Development

- Key issues considered within the telephone survey centered around coastal development, in terms of people's attitudes towards developments and their impacts, and the level of confidence people have in Government planning to protect the character of coastal towns. Respondents were also asked about specific facilities and amenities that they would find acceptable on an otherwise undeveloped 10 kilometre stretch of the Victorian coast. Where possible, results are compared against 2000.

Key Results

- It is important to bear in mind that over-development of Victorian coastal areas was mentioned *spontaneously* by 14% of respondents as a key concern (this being the second highest issue raised.)
- In turn, almost two thirds of Victorians are concerned that *'Our Victorian coastal towns are increasingly looking more like ordinary Australian suburbs or parts of the city'* – a significant increase compared to 2000 (64% up from 54%). This has been driven by people aged 31-65 in particular.
- There has been a significant increase in the proportion of Victorians who agree that *'Local communities generally have enough say in Government planning decisions affecting their own area'* – from 32% to 40%. However, the same proportion disagree, and the majority disagree a lot (23%), and feedback from participants in the Community Engagement Forums indicated that many people who had given their views had not had their feedback or concerns taken on board.
- Half of those interviewed disagreed that *'Coastal developments do not seem to be having a significant impact on Victoria's native flora and fauna'* (50%, with a sizeable 24% *disagreeing a lot*).
 - This supports concerns raised spontaneously, both in the forums and in the telephone survey.



Coastal Development

- Over half of the Victorian population still lack confidence in Government planning and building guidelines to protect the character and feel of towns along the coast (52%).
 - The types of developments people tend to find acceptable are basic amenities such as picnic tables and toilets or changing rooms, while few see commercial developments such as cafes and kiosks as acceptable.
- While the majority of Victorians continue to disagree that camping and caravan parks should not be allowed on foreshore areas (57%), it is important that a considerable one in three *agree* with this suggestion (34% - including almost one in five who *agree a lot*, at 19%). In the Community Engagement Forums, there was a general feeling that there should not be any *new* camping grounds or caravan parks.

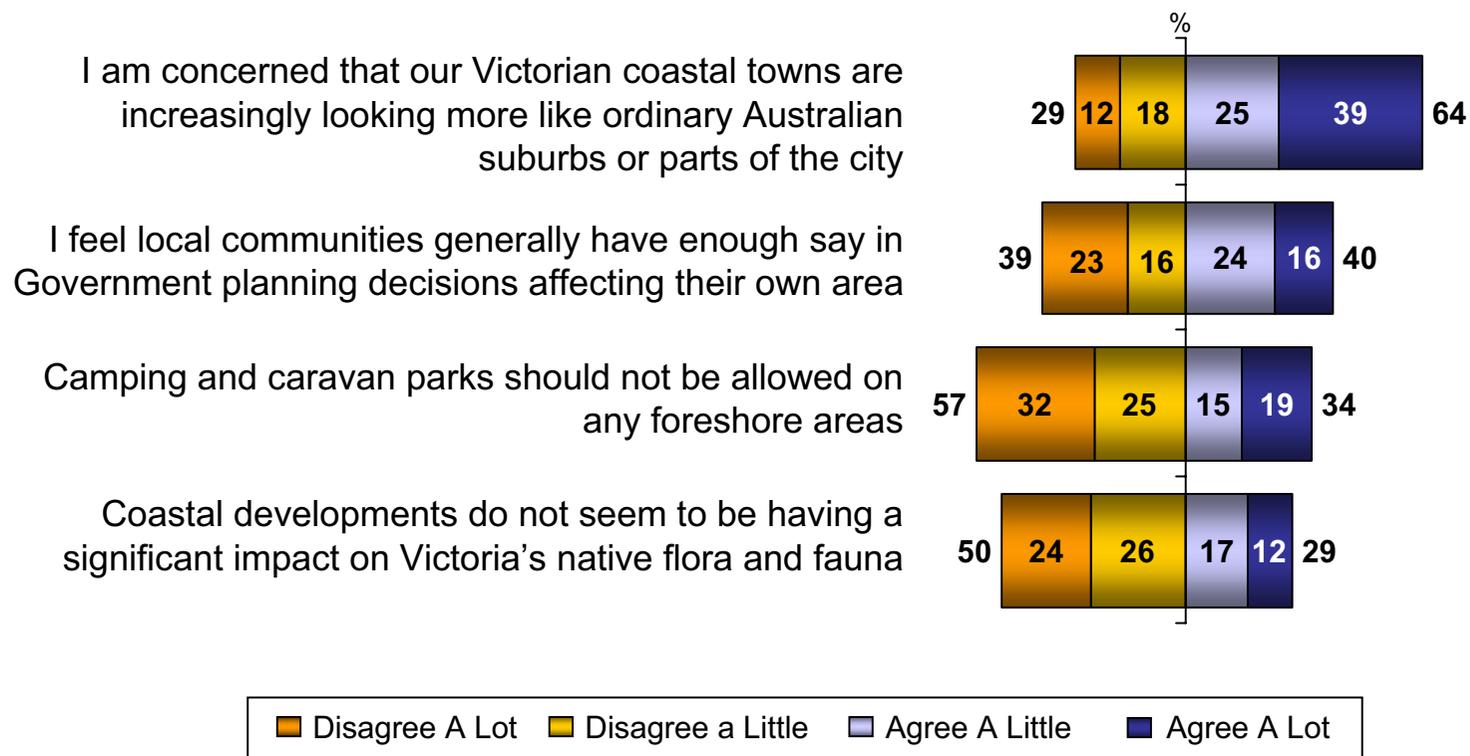
Conclusions and Implications

- It will be important to ensure that the community's concerns about coastal development are seen to be taken very seriously. This means developing stricter planning and building guidelines that place greater value on maintaining, if not restoring, the significant natural capital that the community is increasingly recognising and valuing in the coast.
 - This also requires more effective engagement and communication with the broader community on planning decisions and how and why these are made, to ensure that their concerns are better addressed, and to instil greater public confidence.
 - Building height limits and other controls, including ecologically sustainable designs, should be considered to address concerns that coastal towns are looking increasingly like suburbia and having detrimental environmental impacts.



Overview of Coastal Development Attitudes and Perceptions

Attitudes Towards Coastal Development



Base: All telephone respondents (n=601). Weighted data. NB: Does not add to 100% - Neither and Don't know not shown. See detailed results.

Q.31 I am going to read out a few statements that some people have made about the Victorian coast – please tell me whether you agree or disagree with each, and whether that is a lot or a little. Firstly... ?



Growing concerns that coastal towns are increasingly looking like suburbia, losing their character

Concerned Coastal Towns are Increasingly Looking Like Ordinary Australian Suburbs or Parts of the City	2000 %	2007 %
Agree A Lot	29	39↑
Agree A Little	27	25
Neither Agree Nor Disagree	6	3
Disagree A Little	21	18
Disagree A Lot	13	12
NET AGREE	56	64↑
NET DISAGREE	34	29
Don't know	3	4

↑ = Statistically significant difference at 95% confidence

- Almost two thirds of Victorians agree that ‘I am concerned that our Victorian coastal towns are increasingly looking more like ordinary Australian suburbs or parts of the city’ – a significant increase compared to 2000 (64% up from 54%).
 - Indeed, the majority (39%) agree a lot with this statement, which is also significantly higher than in 2000. These results reflect concerns expressed in the qualitative components of the research.
 - Differences are again observed by age group, as shown in the chart overleaf.

- Interestingly, the higher the household income, the less likely respondents are to agree a lot:
 - Less than \$35K/annum: 49%
 - \$35 - \$60K: 41%
 - \$60 - \$85K: 37%
 - More than \$85K: 34%

- Those who have a keen interest in fishing are also more likely to agree a lot (49% vs 36% of others). Being out on the water is likely to give these people a different visual perspective of coastal towns that is worth taking into consideration.

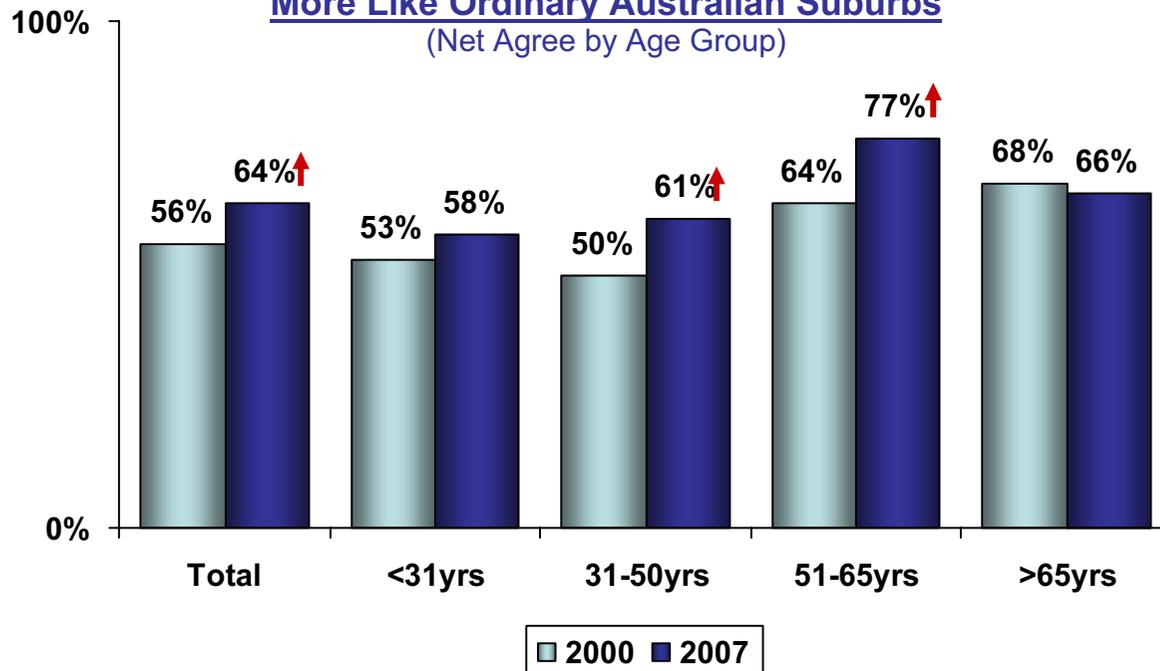
Base: All telephone respondents (n=601). Weighted data.

Q.31.09 I am going to read out a few statements that some people have made about the Victorian coast – please tell me whether you agree or disagree with each, and whether that is a lot or a little. I am concerned that our Victorian coastal towns are increasingly looking more like ordinary Australian suburbs or parts of the city...?



Baby boomers most concerned about developments impacting upon the look and feel of the coast

Concerned Coastal Towns Increasingly Looking More Like Ordinary Australian Suburbs
(Net Agree by Age Group)



Agree a lot x Age	%
15 – 30 yrs	33
31 – 50 yrs	34
51 – 65 yrs	53
65+ yrs	44

↑ = Statistically significant difference at 95% confidence

- As per the 2000 survey, older respondents are more likely to agree that coastal towns are looking more like suburbia. They have a greater frame of reference with which to assess the ways in which coastal towns have changed over time, which adds a certain level of credence to their opinions.
 - Notably, baby boomers are now the most concerned age group (51-65 years), whereas those aged 65+ were most concerned in the 2000 survey. This is also the least likely age group to have a beach property where they don't live permanently (at 6% compared with 17% of those aged 15-30, 14% of those aged 31-50, and 8% of those aged 65+).
 - As well as baby boomers, those aged 31-50 are also significantly more likely to agree with this statement than in 2000.

Base: All telephone respondents (n=601). Weighted data.

Q.31.09 I am going to read out a few statements that some people have made about the Victorian coast – please tell me whether you agree or disagree with each, and whether that is a lot or a little. I am concerned that our Victorian coastal towns are increasingly looking more like ordinary Australian suburbs or parts of the city...?



People more likely to feel that local communities have enough say in government planning decisions

Local Communities Generally Have Enough Say in Government Planning Decisions affecting Their Own Area	2000 %	2007 %
Agree A Lot	13	16
Agree A Little	18	24 ↑
Neither Agree Nor Disagree	10	9
Disagree A Little	20	16
Disagree A Lot	27	23
NET AGREE	32	40 ↑
NET DISAGREE	47	39 ↓
Don't know	11	13

■ There has been a significant increase in the proportion of Victorians who agree that ‘Local communities generally have enough say in Government planning decisions affecting their own area’ – from 32% to 40%.

■ As per the 2000 survey, females are significantly more inclined to *disagree* with this statement than males (44% vs 33% respectively).

- Those who expressed concerns about the Victorian coast are more likely to *disagree a lot* (30% vs 17% of others who did not have concerns).
- Those aged 30+ are also more likely to *disagree* (see over). It is important to bear in mind that older respondents are more likely to have actively sought to have their say in government planning decisions.

■ It is also important to note, however, that in the Community Engagement Forums with coastal dwellers, this was not the case, with respondents who have proactively sought to influence the outcome of certain decisions expressing a sense of powerlessness.

- Indeed, those who belong to an environment or conservation group were more likely to disagree with this statement (50%).

↑ ↓ = Statistically significant difference at 95% confidence

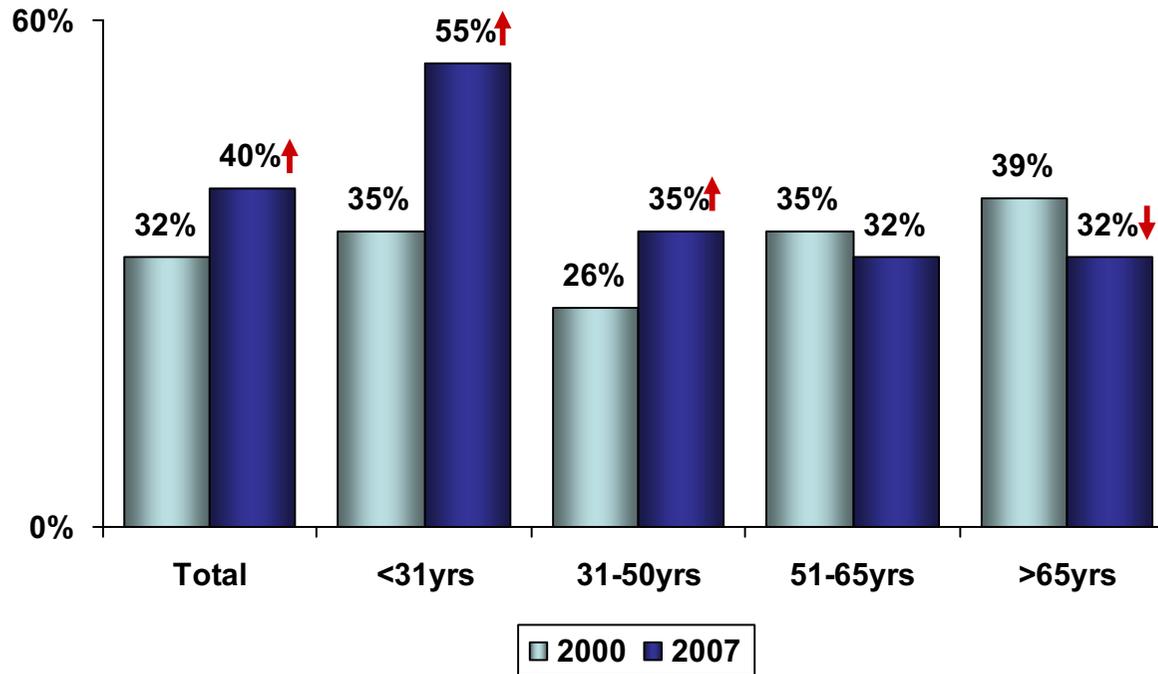
Base: All telephone respondents (n=601). Weighted data.

Q.31.07 I am going to read out a few statements that some people have made about the Victorian coast – please tell me whether you agree or disagree with each, and whether that is a lot or a little. I feel local communities generally have enough say in Government planning decisions affecting their own area ... ?



Victorians aged over 30 are most concerned about insufficient community consultation

Local Communities Generally Have Enough Say in Government Planning Decisions Affecting Their Own Area... (Net Agree by Age Group)



Disagree x Age	%
15 – 30 yrs	27↓
31 – 50 yrs	41
51 – 65 yrs	46
65+ yrs	43

- There are some significant shifts among the different age groups in relation to perceptions that people have enough say about Government planning decisions in their area. The overall increase in agreement levels are driven mostly by those aged up to 50.

↑ ↓ = Statistically significant difference at 95% confidence

Base: All telephone respondents (n=601). Weighted data.

Q.30.07 I am going to read out a few statements that some people have made about the Victorian coast – please tell me whether you agree or disagree with each, and whether that is a lot or a little. I feel local communities generally have enough say in Government planning decisions affecting their own area...?



The majority remain happy to allow camping and caravan parks on foreshore areas

Camping and Caravan Parks Should Not be Allowed on Any Foreshore Areas	2000 %	2007 %
Agree A Lot	18	19
Agree A Little	15	15
Neither Agree Nor Disagree	6	7
Disagree A Little	32	25
Disagree A Lot	28	32
NET AGREE	33	34
NET DISAGREE	60	57
Don't know	1	2

- While the majority of Victorians continue to disagree that camping and caravan parks should not be allowed on foreshore areas (57%), it is important that a considerable one in three *agree* with this suggestion (34% - including almost one in five who *agree a lot*, at 19%).
 - Females are more likely to oppose camping and caravan parks on the foreshore (39% vs 29% of males).
- In the Community Engagement Forums, there was a general feeling that there should not be any *new* camping grounds or caravan parks.
 - Some feedback was also provided that existing facilities have insufficient amenities, and that in some cases, this is having an impact on peoples' ability to enjoy their coastal experience. For example, some people reported odours and/or leakage problems from toilet facilities that are too close to the water.
- Residents of the East Coast are most likely to oppose such a ban – 44% *disagree a lot*, compared with 35% of West Coast dwellers and 30% of those who live in Port Phillip or Western Port Nays.

Base: All telephone respondents (n=601). Weighted data.

Q.31.03 I am going to read out a few statements that some people have made about the Victorian coast – please tell me whether you *agree* or *disagree* with each, and whether that is a lot or a little. Camping and caravan parks should not be allowed on any foreshore areas...?



Many sense that developments are having a significant impact on native flora and fauna

Coastal Developments Do Not Seem to be Having a Significant Impact on Victoria's Native Flora and Fauna	2007 % (New)
Agree A Lot	12
Agree A Little	17
Neither Agree Nor Disagree	8
Disagree A Little	26
Disagree A Lot	24
NET AGREE	29
NET DISAGREE	50
Don't know	13

- Half of those interviewed disagreed that 'Coastal developments do not seem to be having a significant impact on Victoria's native flora and fauna' (50%, with a sizeable 24% disagreeing a lot).
 - Again, females are more likely to disagree than males (55% vs 44%).
- In the stakeholder interviews as well as the Community Engagement Forums, many respondents spoke of the impacts of coastal developments on native flora and fauna, particularly in terms of increasingly impinging upon and fragmenting their habitats, but also the effects of increased pollution from a growth in usage and visitation and of the coast, along with increased outfalls from residential developments.
 - Many, however, were unsure of what the *specific* impacts were, especially from a long-term perspective, indicating that without scientific evidence, they can only make a visual assessment, and have a *sense* that the impacts are significant.
- Those living on the West Coast are most likely to disagree (61%), followed by Central Coast residents (51%), whereas those on the East Coast were least likely to disagree (38%).
 - This matches observations from the qualitative stages of the research, where those on the Western Coast were far more sensitive to developments – particularly in towns such as Lorne, Torquay and increasingly, Warrnambool.

Base: All telephone respondents (n=601). Weighted data.

Q.31.08 I am going to read out a few statements that some people have made about the Victorian coast – please tell me whether you *agree* or *disagree* with each, and whether that is a lot or a little. Coastal developments do not seem to be having a significant impact on Victoria's native flora and fauna...?



The majority still lack confidence in Government planning to protect the character of coastal towns

Confidence in Current Government Planning to Protect Character of Towns	2000 %	2007 %
Very confident	3	4
Fairly confident	34	31
Not too confident	35	34
Not at all confident	18	18
NET CONFIDENT	37	35
NET NOT CONFIDENT	53	52
Don't know	10	13

- Despite perceptions that the coast is well managed, over half of the Victorian population still lack confidence in Government planning and building guidelines to protect the character and feel of towns along the coast (52% net not confident).
- Younger Victorians (aged up to 30) are more likely to believe there are appropriate guidelines in place (49% net confident). However, qualitatively it was found that younger respondents are less aware of controls in place and are less affected by, and sensitive to, recent developments because they have a shorter frame of reference in terms of not having seen the same extent of changes as older Victorians.
- With almost one in five Victorians (18%) *not confident at all*, and just 4% *very confident* in current government planning in this regard, this remains a significant area upon which perceptions could be improved.
- Furthermore, a fairly large 13% are not sure, indicating that it may be worthwhile to communicate general planning and building guidelines to the community, in basic, layman's terms.

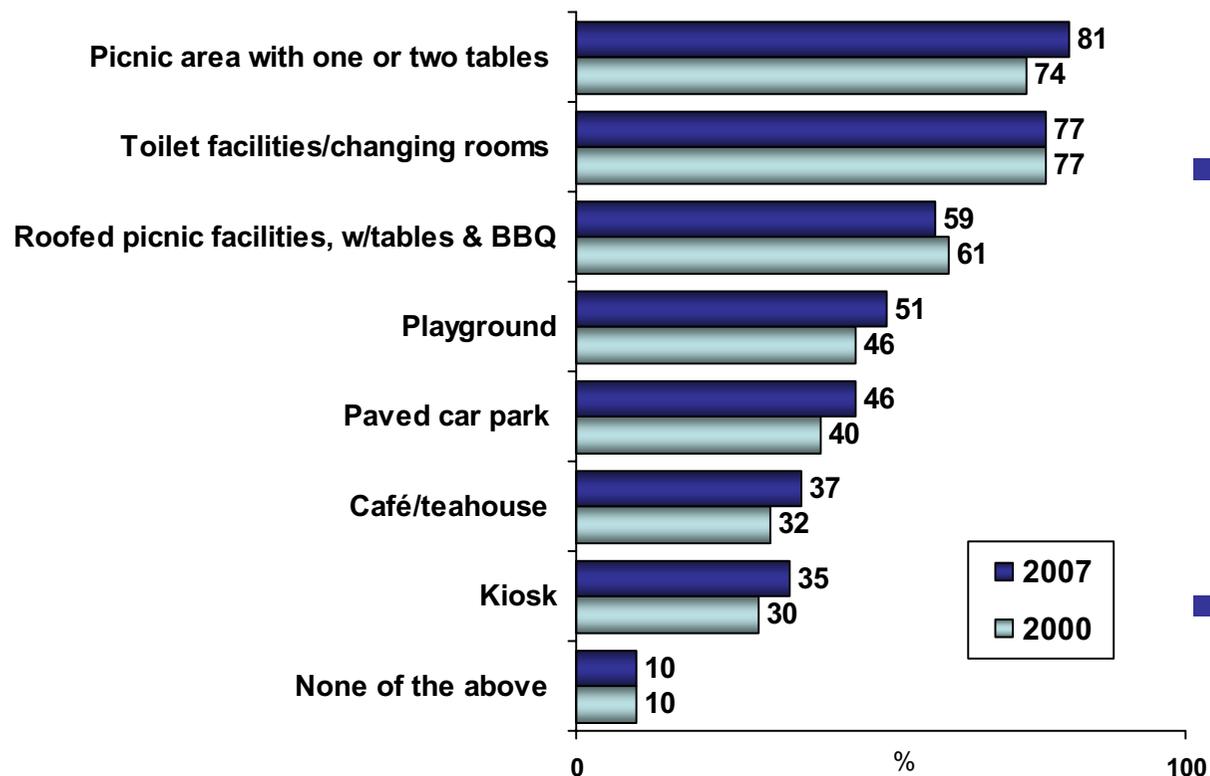
Base: All telephone respondents (n=601). Weighted data.

Q.33 How confident are you in current Government planning and building guidelines in protecting the character and feel of towns along the Victorian coast? Would you say you are...



Consistent preference for lower impact and lower maintenance development options

Appropriate Facilities in An Undeveloped Coastal Area



- When it comes to specific services that people believe would be acceptable on a 10km undeveloped stretch of the coast, there is little shift in preferences since 2000.
- Support remains highest for basic, lower impact facilities such as a picnic area with one or two tables and toilet facilities with changing rooms. A consistent 10% feel that no facilities should be introduced to such an environment. Commercial facilities have limited appeal.
- Readers should refer to the Development section from the Community Engagement Forums for further insights as to the types of facilities and developments that coastal dwellers find acceptable.

Base: All telephone respondents (n=601). Weighted data.

Q.34 I want you to imagine an undeveloped stretch of land along the Victorian coast, with just the beach on one side and a road on the other. There are no developments or structures for 10kms. Which of the following services or facilities would you find appropriate on this undeveloped piece of land? (READ OUT ALL, ROTATE (CODE 8 ALWAYS LAST), ACCEPT MULTIPLE RESPONSES) 140



Community Participation and Engagement



Community Participation and Engagement

- This section looks at community participation and engagement in relation to Victoria's coast and marine environments. A series of questions were asked of respondents to gauge the degree and extent of their participation and engagement, ranging from how the community sources information in relation to the Victorian coast, to determining the likelihood of respondents actively participating in organisations that look after the Coast, and potential financial contributions to the preservation of the Victorian coast and marine environments.
 - The questions on what sources of information the community uses, and their potential financial contributions are new to the questionnaire in 2007, negating comparison with the earlier studies in 2000 and 1996.

Key Results

- There has been a relatively small decline since the 2000 study in the number of respondents who have heard of Coast Action Groups (from 59% to 53%).
- Awareness of the Victorian Coastal Council is relatively low among Victorians, with 75% stating that they had not heard of the organisation.
- In terms of people volunteering their time to help protect the coast, interest levels remain fairly limited and consistent with previous waves. Around three in ten claim to be either *fairly or very interested* in joining a volunteer group. However, the idea of being involved in a 'Clean Up' day is something that people are far more interested in (49% *fairly / very*).
 - Females and younger Victorians (aged 15 – 30 years) are the most inclined to be interested in such an event, along with those who tend to use the coast more frequently.



Community Participation and Engagement

- Three in ten Victorians would be prepared to contribute financially with amounts ranging from \$5 to \$5,000, and the average amount being \$213 (or \$59 among all respondents).
 - An unwillingness to contribute financially is highest among families with children in the age group of 10 to 17 years (71%). However, this sub-group is more likely to consider giving their time to a volunteer group (35%).

Conclusions and Implications

- With the ageing population in Australia, and the consequent decline in volunteer numbers, there is an increased call for younger people to become more active in volunteering.
- Of significance is the finding in this research that people are far more interested in the idea of a 'Clean Up the Victorian Coast' day than in joining a volunteer group (49% vs 29% respectively).
 - This is a concept that is well worth considering. With higher interest levels among younger respondents, females and those who use the coast more frequently, should such a Clean Up day be developed, marketing should be targeted towards this segment of the community.
- Opportunities to engage the Victorians who *are* willing to contribute financially towards the preservation of the coast could be further explored, particularly given the substantial amounts that they were prepared to offer.
- As Victorians with beach houses are generally less inclined to want to contribute financially, and more willing to contribute their time, funding for conservation and preservation could be targeted towards this group to encourage custodial initiatives such as the planting of native vegetation to avoid sand degradation, and fencing off areas to protect native species of flora and fauna.

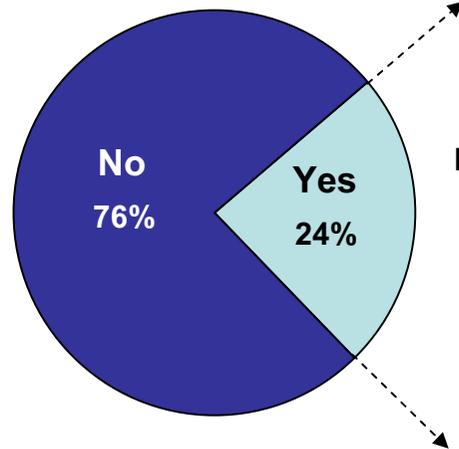


Coastal & Marine Environment Information

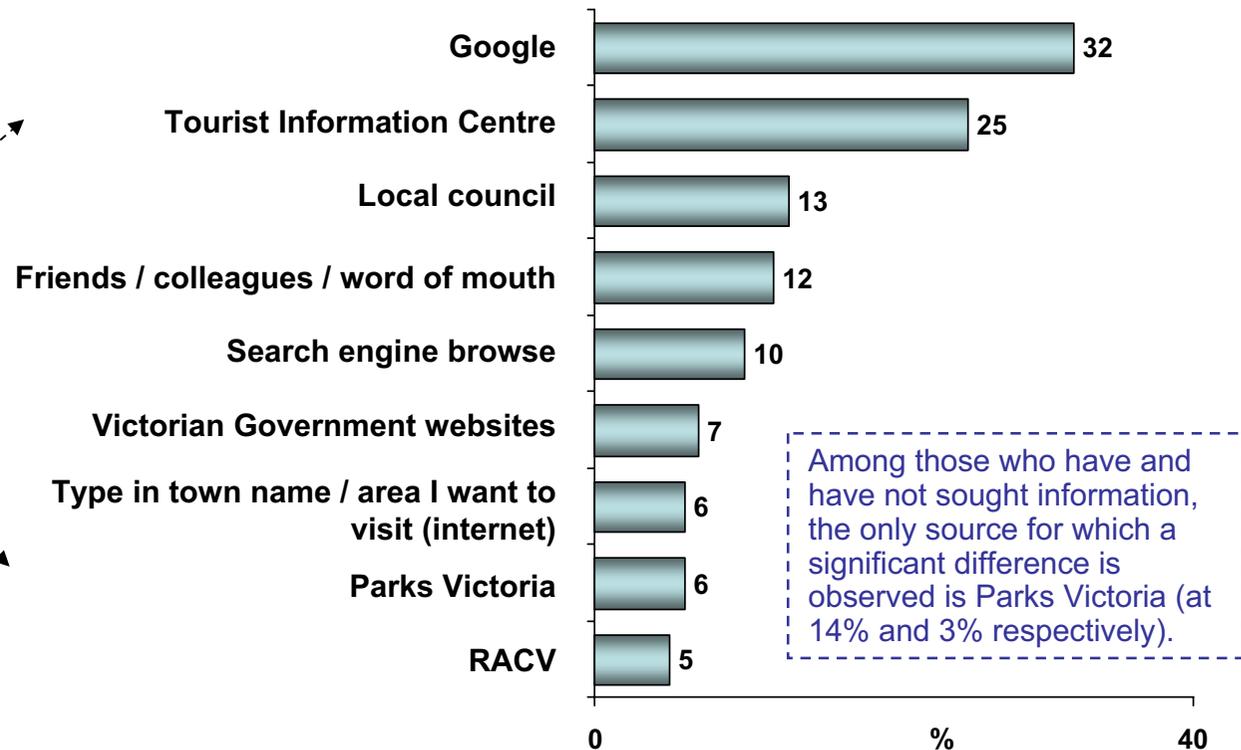


Google and Tourist Information Centres are the main information sources

Actively Sought Information? (in last 12 months)



Sources Have / Would Use to Get Information



- Almost one quarter (24%) of respondents had actively sought information on the Victorian coast or marine environments in the last 12 months. Those who are more likely to have done so are members of environmental or conservation groups (47%), people who use the coast more frequently, those who are concerned about the coast (33% vs 16% of others), and those who live within 15 kms of the coast (29% vs 20% of others). Notably, only 4% of Western Port Bay residents had done so.

Base: All telephone respondents (n=601). Weighted data. Top mentions only (5%+).

Q.35 Have you actively sought any information on the Victorian coast or marine environments in the last 12 months?

Q.36 What sources do or would you use to get information, or find out about the Victorian coast or marine environments? This may be in relation to your local area, specific developments, or even if you are planning a trip to an area of the Victorian coast. Where or who else would you source information from? **(PROBE FULLY. DO NOT PROMPT – ACCEPT MULTIPLE RESPONSES)**



Information Sources: Focus on Internet Sites

Sites Used by Those Who Had Sought Information in Last 12 Months

Google / 'Search engine'
Parks Victoria
Parks and Gardens
RACV
Victorian Government website
DSE / DNRE
Ports and Harbours
Tourist sites / Tourism Victoria /
tourismvictoria.com.au / www.visitvictoria.com.au
Local Government website
Type town name and search
What's On website
Clean Ocean
Coastal Care
East Coast Action Group
Bureau of Meteorology
Australian Bureau of Statistics

Sites That *Would Be* Used by Others (Who Had Not Sought Information in Last 12 Months)

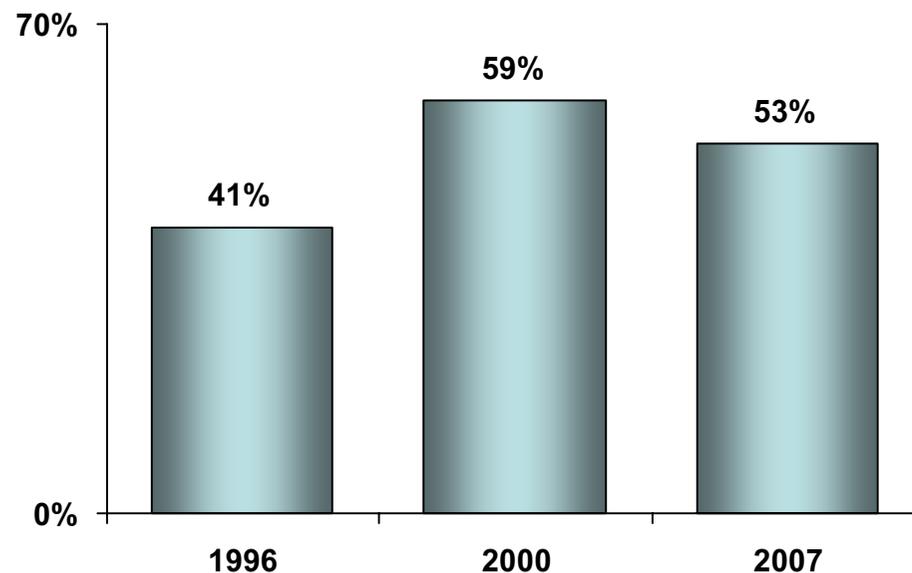
Google
Parks Victoria
Parks and Gardens
RACV
Victorian Government website
Department of Environment website
Fisheries and Wildlife
Vic Tourism / Tourism Board / Victoria Tourist
Bureau / Visit Victoria website
Local Government website / City of Geelong /
Bayside City Council
Local town name eg: www.angelsea.com.au /
www.mymelbourne.com

A similar mix of websites was mentioned both by those who *have* sought information on the coast online in the last 12 months, and those who *have not* sought information, but suggested that they would look online.



Awareness of Organisations

Aware of Coast Action Groups?

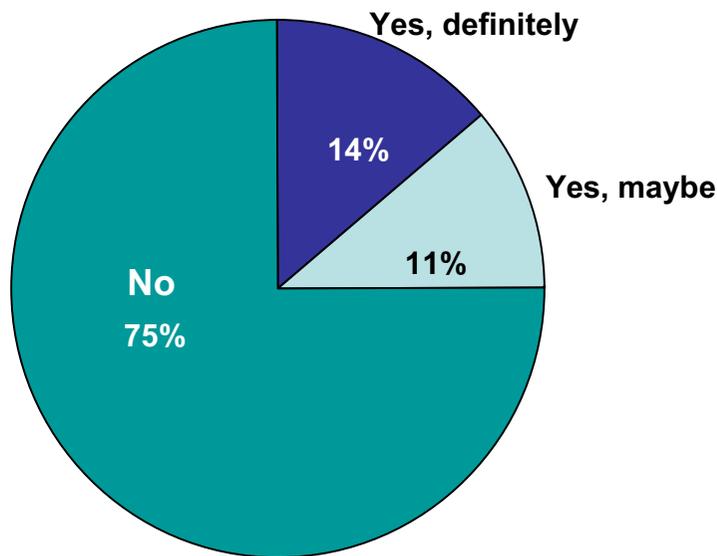


- Among respondents living under 30kms from the coast, awareness of Coast Action Groups has declined somewhat since the 2000 study (53%, down by 6 percentage points).
- People who more likely to have heard of Coast Action Groups are those:
 - In general who live 15kms or under from the Coast (58%), and in particular, those living under 5kms (70%);
 - Involved in a conservation or environmental group (70%); and
 - Who have sought out information about the Victorian coast in the last 12 months (70%).
- Males from metropolitan areas (42%), and those from non English speaking backgrounds (73%), are less likely to be aware of Coast Action Groups.

Base: All telephone respondents living < 30kms of the coast (n=387). Weighted data.

Q.37 Have you heard of Coast Action Groups; people who get together to look after and conserve coastal resources in local areas?

Aware of Victorian Coastal Council?



- Awareness of the Victorian Coastal Council was relatively low, with one quarter (25%) stating that they had either *definitely heard* (14%) or *maybe heard* (11%) of the organisation which has developed a strategy for the coast.
- Those who named their nearest coastline as the East Coast were much more likely to have heard of the VCC than those from Western Port Bay (37% vs 8% respectively).
- There were no statistically significant variances among the other sub groups surveyed.

Base: All telephone respondents (n=601). Weighted data.

Q.40 Have you heard of an organisation called the Victorian Coastal Council which has developed a strategy for the coast?



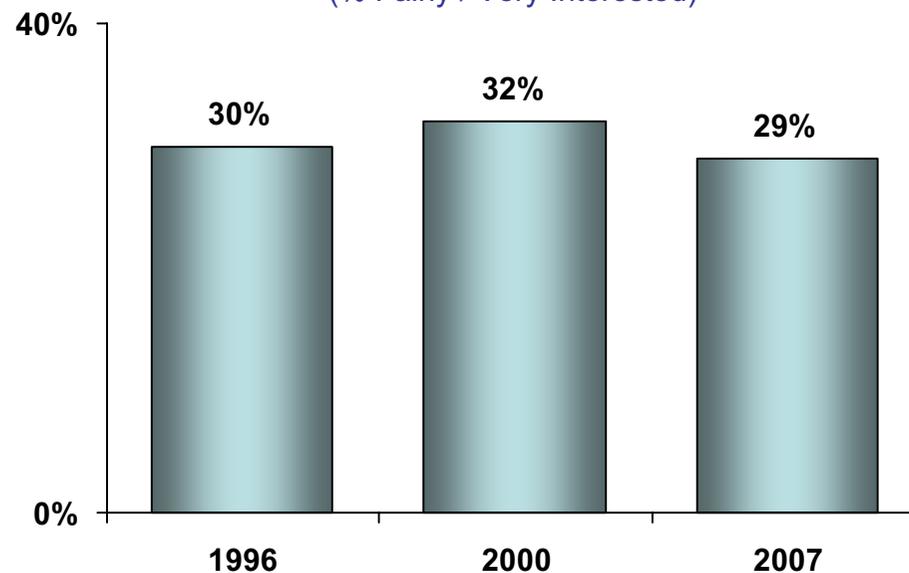
Interest in Participating



Consistent, limited interest in joining a coastal volunteer group

Interest in Joining a Coastal Volunteer Group

(% Fairly / Very Interested)

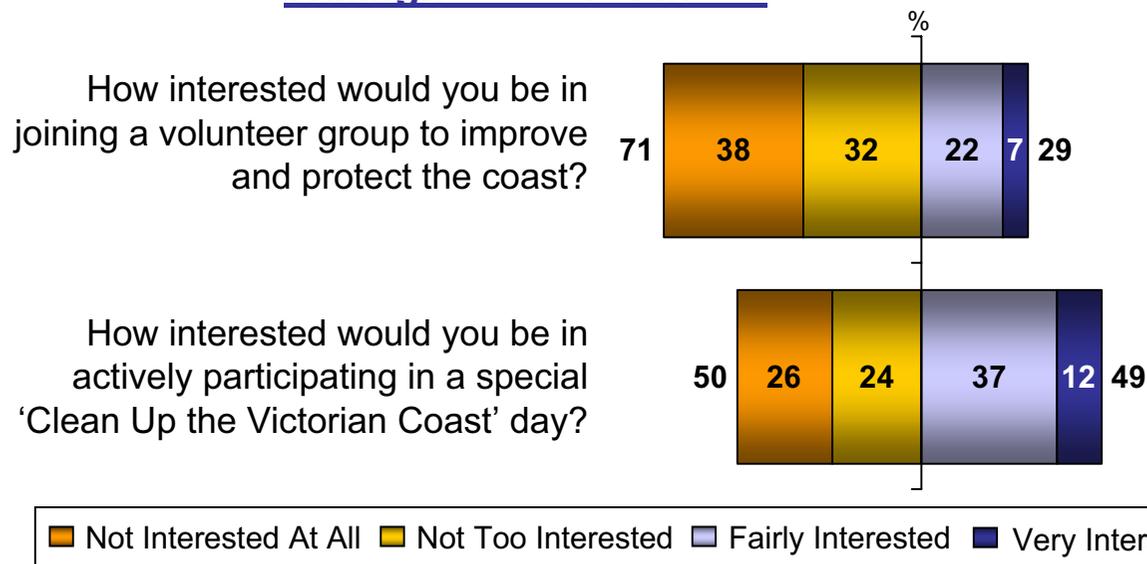


- The overall desire to join a Coastal Volunteer Group has changed very little since 1996, with three in ten respondents (29%) showing interest, down slightly from 2000.
- Those surveyed who did show interest were more likely to be females (38% vs 19%), living less than five kilometres from the Coast (38%), and under the age of 31 (35%).
- West Coast (37%) residents were more likely to be interested in joining than those from the other areas surveyed; those in the Bays 28% and on the East Coast 30%.

Base: All telephone respondents (n=601). Weighted data.

Q.38 How interested would you be in joining a volunteer group to improve and protect the coast?

Willingness to Volunteer



- By contrast with those showing interest in joining a volunteer group (29%), just under half of those interviewed (49%) said they would be interested in actively participating in a special 'Clean Up the Victorian Coast' Day. Interest is higher among those who are:
 - Female: 56% vs 42% of males *very / fairly interested*;
 - Aged 15 - 30 years: 58%;
 - Into fishing: 54%;
 - Owners of a beach property that they don't live at permanently: 59% vs 48% of others;
 - Tertiary qualified: 54% vs 44% of those without a tertiary qualification;
 - Members of an environmental or conservation group: 65%; and
 - Those who had used the coast at least 6 times in the last 12 months: 58% vs 41% of those who visited 1-5 times and 29% of non-users.

Base: All telephone respondents (n=601). Weighted data.

Q.38 How interested would you be in joining a volunteer group to improve and protect the coast?

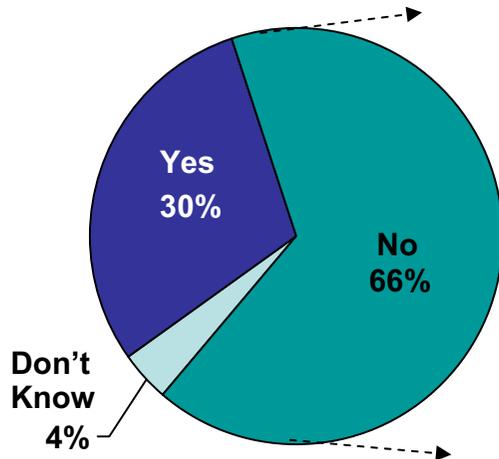
Q.39 How interested would you be in actively participating in a special 'Clean Up the Victorian Coast' day?



Willingness to Contribute Financially

Some are willing to make a financial contribution

Willing to Offer Financial Support?



■ While two thirds of respondents (66%) are not willing to contribute financially towards a higher level of preservation for the coast, a reasonable three in ten are (30%). Willingness to contribute was much higher among those who belong to an environment or conservation group (at 50%). More frequent visitors to the coast were also more willing to contribute, with those who have visited the coast 6 or more times in the last 12 months at 37%, those with 1 – 5 visits at 24% and non-visitors at just 14%.

Reasons For Not Contributing	Total %
Cannot afford it / do not have any money / limited income	34
Already pay enough tax / tax should cover it	19
The Government's responsibility / up to the Government	19
Already contribute to charity / rather give to other charity	8
Other financial priorities	7
No interest in donating	5
No guarantee money will be used properly / how managed	5
The local council/authorities responsibility	5
Cannot afford it but would contribute	5

Base: Respondents who answered 'no' to Q.42 (n=408). Weighted data. Top mentions only (5%+).

Q.43 Why do you say that?

■ The three top reasons *by far* as to why people are not willing to make a financial contribution are because they *cannot afford it / do not have the money / limited income* (34%), that they *already pay enough tax / their tax should cover it* (19%), and any financial support being seen as the *government's responsibility* (19%).

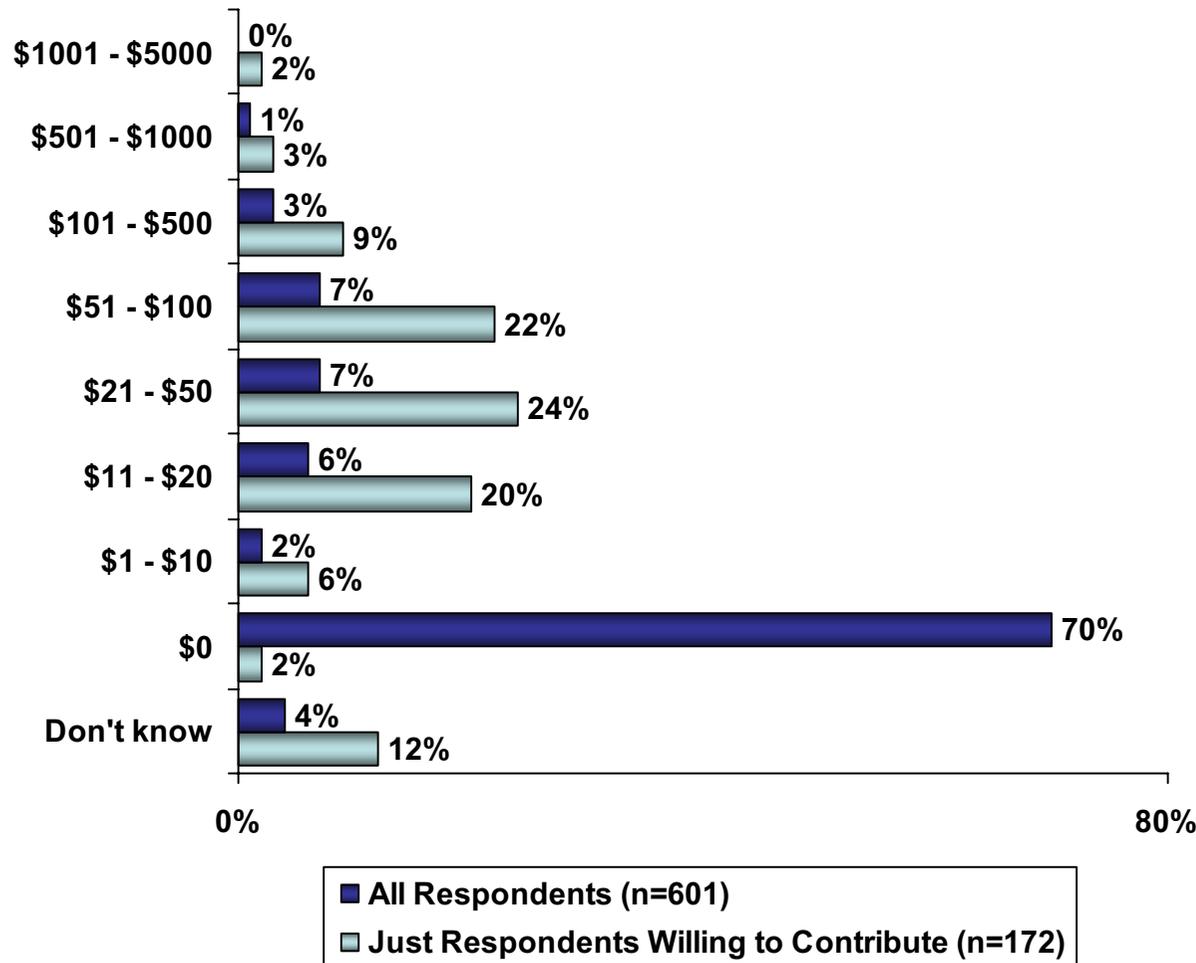
Base: All telephone respondents (n=601). Weighted data.

Q.42 To better protect Victoria's coast and marine environments, and keep them in a state our grandchildren will enjoy, much more funding is needed than is currently available. Would you be willing to offer financial support, by whatever means, to ensure a much higher level of preservation of the Victorian coast and marine environments, and/or the development of required coastal facilities and amenities? **154**



How Much People are Willing to Contribute

Amount Willing to Contribute Per Annum



- Among those willing to contribute financially, per annum amounts ranged from \$5 to \$5,000, with the average amount being \$213 (or \$59 among all respondents).
- Those living closer to the coast suggested the highest amounts (supporting the finding in previous waves that such an initiative could be managed via Council rates).
- Those aged under 30 years were most likely to contribute, and suggested a significantly higher amount than those aged 31+. That is, among all respondents, including those not willing to contribute anything, they offered an average of \$128, compared to \$35 respectively.
- Interestingly, those in the \$60-85K income bracket were the most generous (\$146 on average – again among all respondents), whereas those earning more than this were the least generous (at \$28 on average).
- See over for more detailed sub-group results.

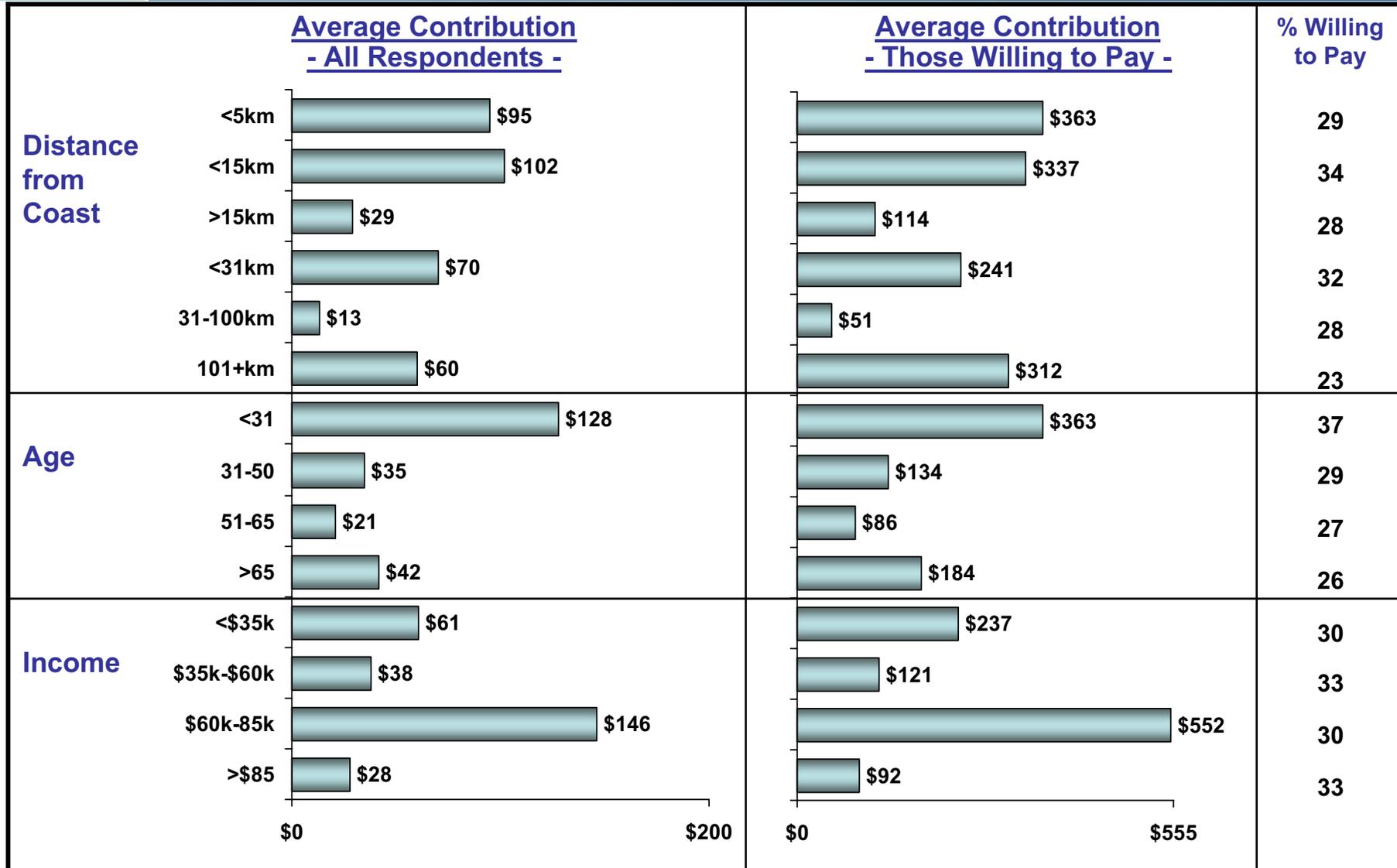
Base: All telephone respondents (n=601). Weighted data shown.

Base: Respondents who answered 'yes' to Q.42 (n=172). Weighted data

Q.44 How much would you be willing to contribute, say on a per year basis?



Amount Willing to Contribute by Key Sub-groups



Base: All telephone respondents (n=601). Weighted data.

Base: All telephone respondents who answered 'yes' to Q42, Willing to Pay (n=172). Weighted data.

Q.44 How much would you be willing to contribute, say on a per year basis?



General Knowledge and Perceptions



General Knowledge and Perceptions

- To better understand people's knowledge, respondents were asked whether they think each of a series of different actions are harmful to the coastal or marine environment.
- Also contained in this section is what people think constitutes a good experience on the Victorian coast and/or in the marine environment.

Key Results

- Most Victorians recognise driving a car or 4WD on the beach as harmful to the coastal and marine environment (85%), while significantly fewer people recognised walking over dunes to get to the beach as being harmful, which is consistent with 2000 results (at 56% and 58% respectively). This explains why a number of people raised this as a concern in the qualitative research.
- A similar result is observed for collecting seaweed, shells or rocks from the beach, which 53% think is harmful and a significant 43% believe is not harmful.
- There has been a significant decline in people thinking that lifting a rock and looking for animals is harmful – from 43% in 2000 to 35% this wave.
- Some groups were significantly less likely to understand that these activities are harmful, especially those from a non-English speak background, those who are into fishing, younger Victorians and males.



General Knowledge and Perceptions

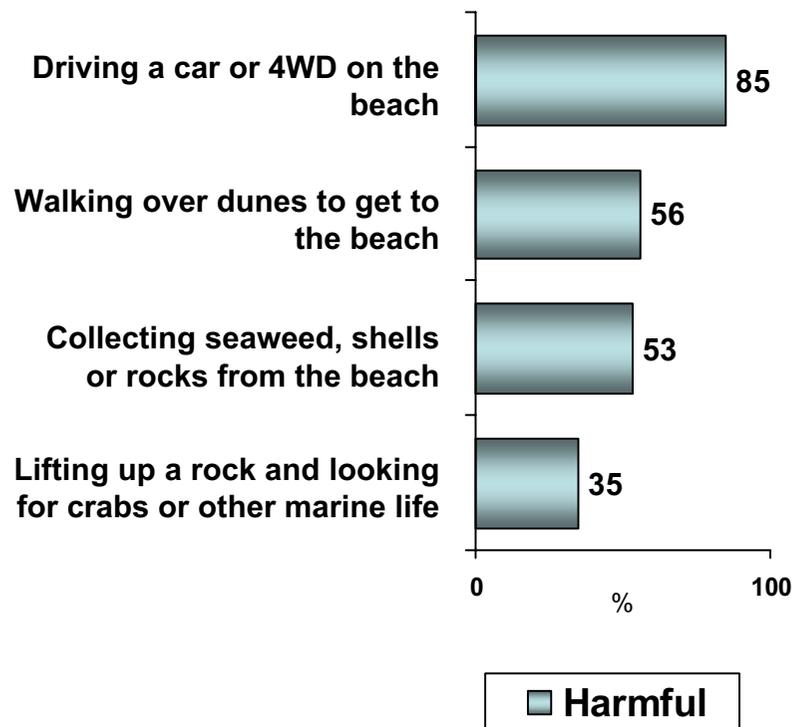
- The top three factors that are seen to contribute to a good coastal or marine environment experience are the *beach being free of litter and debris, clean clear water, and a pristine / natural / undeveloped environment*.
 - At the next level down, a reasonable proportion mentioned the beach *not being too crowded with other people, and toilet facilities and changing rooms* remain fairly important.

Conclusions and Implications

- Given the large segment of the community who still believe that walking over sand dunes is not harmful (42%), this is a key topic on which people requiring education.
 - Those most in need of education on this and other harmful activities are those from a non-English speaking background, those who are into fishing, younger Victorians aged 15-30 years, and males. Education activities should be targeted towards these groups.
- People's sense of what constitutes a good coastal experience point to an increased sensitivity to the impacts of human activities on the coast, which was certainly observed during qualitative discussions in the Community Engagement Forums, as well as throughout a number of measures in the survey.

Specific Actions Considered Harmful

Are These Harmful Actions?



- Of the various actions, driving a car or 4WD on the beach was most commonly recognised as harmful to the coastal and marine environment (85%).
- Significantly fewer people recognised walking over dunes to get to the beach as being harmful, which is consistent with 2000 results (at 56% and 58% respectively). This explains why a number of people raised this as a concern in the qualitative components of the research. Indeed, a large segment of the community (42%) still believe that walking over sand dunes is not harmful – making this a key area requiring community education.
 - Some groups were significantly less likely to understand that this is harmful, and are hence more in need of education – especially those from a non-English speak background, which 56% see as not harmful, those who are into fishing at 53%, younger Victorians aged 15-30 years, at 51%, and males, at 47% vs 36% of females.
 - Indeed, these groups were generally less inclined to see all of the actions specified as harmful.
- A similar result is observed for collecting seaweed, shells or rocks from the beach, which 53% think is harmful and a significant 43% believe is not harmful.
- There has been a significant decline in people thinking that lifting a rock and looking for animals is harmful – from 43% in 2000 to 35% this wave.



Litter free beaches remain a top factor for ensuring a good day at the beach

Factors for a Good Coastal or Marine Environment Experience



- The top three factors (by far) that are seen to contribute to a good coastal or marine environment experience are the *beach being free of litter and debris* (39%, up from 32% in 2000), *clean clear water* (at 32%, up significantly from 2% in 2000), and a *pristine / natural / undeveloped environment* (31% mentioned this, which was a new code).
- At the next level down, a reasonable proportion mentioned the beach *not being too crowded with other people* (17% up from 10% in 2000). *Toilet facilities and changing rooms* remain fairly important (at 15% compared to 12%), while there is much less emphasis on *safe swimming conditions* than in 2000 (down from 14% to 6%).
- These findings point to an increased sensitivity to the impacts of human activities on the coast, which was certainly observed during qualitative discussions in the Community Engagement Forums.

Base: All telephone respondents (n=601). Weighted data. Top mentions only (8%+).

Q.28 What do you feel are the things that contribute to a good coastal or marine environment experience? What else? **PROBE FULLY**
(DO NOT READ OUT - PROBE TO CLASSIFY, MULTIPLE RESPONSES).