Can You Hear Me Now?

Research and Tools on Ocean Communication

DECEMBER 13, 2012

PRESENTED BY WEI YING WONG, PH.D. COMMUNICATIONS PROJECT DIRECTOR
Today’s Presentation

• Background
  – Organization
  – Market Research Initiative

• Communications Research
  – Key findings & Implications
  – Case studies
Organizational Overview

• Collaborative NGO
• Founded by aquarium leaders
• Partner network of >1,600 aquariums, zoos, science museums (ZAMs) and other organizations
• North American focus but growing internationally

Our mission is to inspire action to protect the world’s ocean.
Market Research Initiative: Goals

1. Improve understanding of public opinion on the ocean, conservation, and related issues
   - Track changes in awareness, attitudes, and behaviors
   - Provide benchmarking on emerging issues

2. Perceptions of zoos, aquariums, & museums (ZAMs) and their role in conservation

3. Assist partners in integrating the research

4. Support outreach efforts to connect the ocean/individual action

5. Identify strategic opportunities with specific audiences/issues
# Market Research Initiative

## Phase 1: Baseline data

<table>
<thead>
<tr>
<th>Time frame</th>
<th>Sample population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug – Nov 2008</td>
<td>• 22,000+ US adults</td>
</tr>
<tr>
<td></td>
<td>• Oversampling in 10 US markets, 2 in Canada</td>
</tr>
<tr>
<td></td>
<td>• Additional data on youth, and 7 other nations</td>
</tr>
</tbody>
</table>

## Phase 2: Tracking data

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Sample population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer 2009</td>
<td>• 4,800+ adults</td>
</tr>
<tr>
<td>Summer 2010</td>
<td>• 8,500+ adults</td>
</tr>
<tr>
<td>Spring 2011</td>
<td>• 12,000+ adults</td>
</tr>
<tr>
<td>Spring 2012</td>
<td>• 17,000+ adults</td>
</tr>
</tbody>
</table>
Today’s Presentation

• Background
  – Organization
  – Market Research Initiative

• Communications Research
  – Key findings & Implications
  – Case studies
Key findings

1. Knowledge & awareness
2. Concern for the ocean
3. Understanding of threats
4. Willingness to act
5. Important constituencies
6. Perception of Marine Sanctuaries and ZAMs
What are the three most important issues currently confronting the United States?
Knowledge & awareness

- No evidence to indicate that the public’s awareness and understanding of the major ocean threats has increased
Knowledge & awareness

• No evidence to indicate that the public’s awareness and understanding of the major ocean threats has increased

❖ Implications
  – Shift from knowledge/literacy building to action inspiring
Concern for the ocean

- Want ocean to be protected on principle, but ocean generally seen as healthy
- Lack of urgency (except in times of major catastrophe, e.g. BP oil spill)
“The world’s ocean is endangered"
Concern for the ocean

- Ocean generally seen as healthy
- Lack of urgency (except in times of major catastrophe, e.g. BP oil spill)

**Implication**
- Focus on conveying urgency
- Guidance on what to do, especially in times of heightened awareness
Understanding of the threat

- Climate change increasingly seen as “overrated”, disconnected, and politicized
Understanding of the threat

• Climate change increasingly seen as “overrated”, disconnected, and politicized
• Ocean seen as overall healthy

❖ Implication
  - Connect abstract concepts (e.g. climate change) to specific place/animal that resonate for your audience
Willingness to act

- See themselves as “green friendly”
- Disconnected from level of understanding
What are you doing to support a “green-friendly lifestyle?”

- Using natural and organic products
- Changing lightbulbs in homes to CFLs/LEDs
- Nothing
- DNK
- Driving a hybrid
Willingness to act

- See themselves as “green friendly”
- Disconnected from level of understanding

**Implications**

- Start with the solution
- Act first, learning follows
Important constituency: Youth

- Most environmentally/socially conscious
- Strongest believers in the importance of personal action
- Influencers of household decisions
I am “green friendly”

**Bar Chart**

- **Scalar variable (level of agreement)**
- **Age group**
  - US Composite
  - Age 13-17
  - Age 18-21
  - Age 22-25
  - Age 26-34
  - Age >35

- The bars show the level of agreement across different age groups.
Individual citizens are personally responsible for protecting the environment.”
Important constituency: Youth

- Most environmentally/socially conscious
- Strongest believers in the importance of personal action
- Influencers of household decisions

**Implications**
- Focus on youth
- Provide guidance
Minorities

- Self report as *less knowledgeable* about environmental issues, but *more willing to act* for conservation
- More likely to vote for politician based on politician’s position on environmental issues

❖ **Implications**
  - Reach out to diverse audience
Perception of Marine Sanctuaries & ZAMs

- Low awareness of marine sanctuaries
- ZAMs seen as one of the most trusted sources of conservation information
- ZAMs expected to provide guidance on conservation actions
Have you heard of ... ?

- National parks:
  - US adult: 96.2%
  - Recent ZAM visitor: 96.8%

- National marine sanctuaries:
  - US adult: 16.7%
  - Recent ZAM visitor: 21.3%
What is a Marine Sanctuary?

<table>
<thead>
<tr>
<th>Rank</th>
<th>Description</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>DNK</td>
<td>565.0</td>
</tr>
<tr>
<td>2</td>
<td>A protected part of the ocean</td>
<td>49.9</td>
</tr>
<tr>
<td>3</td>
<td>A part of the ocean where no fishing is allowed</td>
<td>28.3</td>
</tr>
<tr>
<td>4</td>
<td>A part of the ocean where no recreational boating is allowed</td>
<td>19.4</td>
</tr>
<tr>
<td>5</td>
<td>A safe place for dolphins</td>
<td>15.9</td>
</tr>
<tr>
<td>6</td>
<td>A park by the water</td>
<td>13.7</td>
</tr>
<tr>
<td>7</td>
<td>A place to see sea birds</td>
<td>7.9</td>
</tr>
</tbody>
</table>
Perception of ZAMs

- Low awareness of marine sanctuaries
- ZAMs seen as one of the most trusted sources of conservation information
- ZAMs expected to provide guidance on conservation actions

**Implications**
- Important & unique role of ZAMs
- Opportunities to work with ZAMs
Market Research: Summary of findings

Problem

• The public cares, but needs to be reminded
• Climate change is the big concern, but also seen as overstated (and as yet unconnected to ocean health)
• The public believes the ocean is in good health, and even disasters don't do much to dent this impression
Solution

- High interest in personal actions
- Seeking suggestions from trusted sources
- Actions are the gateway to education, not vice versa
Market Research:  
Summary of findings

Motivation

• People want and expect ZAMs to offer guidance; ZAMs are credible messengers
• People increasingly want to be seen as "green"
Market Research: Summary of findings

Audience

• Youth especially interested and surprisingly influential
• Minorities self-report as less knowledgeable but more likely to take action
Today’s Presentation

• Background
  – Organization
  – Market Research Initiative

• Communications Research
  – Key findings & Implications
  – Case studies
Test case in online engagement

Activating their underlying concern for conservation (Online)
# Test case in online engagement

## Youth sentiment post-campaign

<table>
<thead>
<tr>
<th>Statement</th>
<th>End of campaign</th>
<th>Campaign + 1 year</th>
</tr>
</thead>
<tbody>
<tr>
<td>The world’s ocean is endangered</td>
<td>+14.8%</td>
<td>+9.3%</td>
</tr>
<tr>
<td>The ocean is affected by the actions of people</td>
<td>+10.1%</td>
<td>+10.1%</td>
</tr>
<tr>
<td>Climate change threatens ocean health</td>
<td>+18%</td>
<td>+12%</td>
</tr>
</tbody>
</table>

The Ocean Project
The Ocean Project’s OA study

National Public Opinion

Partners
- Interviews
- Online surveys
- Website/Social media

Identify Opportunities

Visitors
- Site specific
I ... “ocean acidification”

- have heard of
- am familiar with
- am informed about

Scalar Variable (level of agreement)

US composite  | Recent ZAM visitor (12mths)  | "Concerned abt CC"
14 | 22 | 31
11 | 14 | 21
10 | 12 | 18
I have heard of...

- US composite
- Recent ZAM (12mths)
- "Concerned" abt CC

Scalar Variable (level of agreement)

- Ocean Acidification
- Global Warming
I am worried about...

![Bar chart showing concerns about climate change and ocean acidification.](image)
OA Study summary

1. Visitor awareness and concern about ocean acidification (low, with great potential)
2. Visitor expectations and appreciation of conservation information (high)
3. Aquarium and science center visits as activation points (critical)
Acknowledgements

We would like to extend special thanks to NOAA for providing the bulk of the funding for our ongoing market research and collaborative outreach initiative through 2013.

Additional support provided by The Curtis and Edith Munson Foundation and a foundation that requests anonymity.

The Ocean Foundation serves as the fiscal sponsor for The Ocean Project.
Thank you! Questions?

CONTACT INFORMATION:
Wei Ying Wong
wywong@theoceanproject.org
www.TheOceanProject.org
www.TheOceanProject.org/MarketResearch