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# Wilderness Society

## Survey of King Island Residents

### Research Report





enterprise marketing & research services

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# Section One

## Executive Summary

# Executive Summary

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## Introduction to the Research – King Island Residents Survey

US oil and gas company ConocoPhillips has applied to conduct seismic blasting to explore for gas reserves in the sea to the west of King Island. Seismic blasting uses high-pressure sound waves to detect gas under the seabed. The acquisition area is located 27km west of King Island and covers an area of 4,089km<sup>2</sup>, including part of the Zeehan Commonwealth Marine Reserve. This seismic blasting is proposed to take place between August 1 – October 31, 2021.

In order to gain feedback from King Island residents, aged 18 years and over, and determine the level of support for and opposition to the proposed seismic testing, the Wilderness Society instructed EMRS, the independent research firm, to design and implement a survey giving all King Island residents an equal opportunity to have their say about the testing.

EMRS was assigned to undertake the design and conduct of the research, in close consultation with the Wilderness Society, and to provide full analysis and reporting on the data gathered.

### Quantitative Survey of King Island Residents

In order to collect the required information to meet the specified objectives, EMRS adopted a quantitative survey methodology: namely, the approach of an unaddressed mail survey that was delivered to all households on King Island, with a return-paid envelope addressed to EMRS.

Survey packs landed in mailboxes in the week commencing the 19<sup>th</sup> of July 2021, and the completed returns were accepted up until the 27<sup>th</sup> of August 2021. In total, n=537 King Island residents aged 18 years and over participated in the survey.

**The following report presents the findings of the survey. The data gathered and analysis of the results are provided in detail in the body of the report, while this summary presents the key informational insights gained.**

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# Executive Summary

## Level of Community Support for Seismic Blasting Gas Exploration

Negative attitudes toward seismic blasting for gas exploration in the sea off King Island were dominant, with 96% of the residents surveyed opposing it to some degree and the great majority of these stating they “definitely oppose” it.

- **96% - TOTAL OPPOSE**
  - 93% “definitely oppose”
  - 3% “somewhat oppose”
- **2% - TOTAL SUPPORT**
- 2% - “unsure”

## Level of Community Awareness of the Seismic Blasting Plans

There was a high level of overall awareness among the surveyed residents of the plans for the seismic blasting to the West of King Island. The majority confirmed they had been aware of it to some degree prior to the survey.

- **85% - TOTAL AWARE**
  - 50% “definitely aware”
  - 35% “somewhat aware”
- **14% - TOTAL UNAWARE**
- 1% - “unsure”

## Whether the King Island Community Should Have a Say in the Proposed Seismic Testing Going Ahead

The residents surveyed expressed a strong call for the community to have a say in whether the proposed seismic blasting goes ahead, with 97% saying yes to some degree and the great majority of these stating “yes, definitely”.

- **97% - TOTAL YES**
  - 93% “yes, definitely”
  - 4% “yes, somewhat”
- **3% - TOTAL NO**
- 0% (n=1) - “unsure”

## Whether the King Island Community Has Had a Say in the Decision-Making Process

In contrast, the majority of surveyed residents felt that “no”, the community had not had a say in the decision-making process on the proposed seismic blasting.

- **77% - TOTAL NO**
- **15% - TOTAL YES**
  - 9% “yes, definitely”
  - 6% “yes, somewhat”
- 8% - “unsure”

# Executive Summary

## Level of Community Support for Oil and Gas Exploration

Negative attitudes toward oil and gas exploration in the sea off King Island more generally were also pronounced, with 94% of the residents surveyed opposing it to some degree and the great majority of these stating “definitely oppose”.

- **94% - TOTAL OPPOSE**
  - 89% “definitely oppose”
  - 5% “somewhat oppose”
- **5% - TOTAL SUPPORT**
- 1% - “unsure”

## Perceived Importance of the Marine Environment

A high degree of importance was attributed to the marine environment, with 99% of the residents confirming it was important to them to some degree and the great majority of these stating “very important”.

- **99% - TOTAL IMPORTANT**
  - 95% “very important”
  - 4% “somewhat important”
- 0% (n=2) - “not very important”
- 0% (n=2) - “unsure”

### In summary:

- ❖ A high level of community opposition was evident to both the seismic blasting for gas exploration, and oil and gas exploration more generally, in the seas off King Island.
- ❖ There was a relatively high level of overall community awareness of the seismic blasting plans.
- ❖ The clear majority of residents felt the community should have a say in whether the seismic blasting goes ahead; and the majority were of the view that the community had not had a say in the decision-making process.
- ❖ Virtually all residents confirmed that the marine environment was important to them to some degree.

## Section Two

# Introduction

# Background, Scope and Aims of the Research

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## Background to the Research

US oil and gas company ConocoPhillips has applied to conduct seismic blasting to explore for gas reserves in the sea to the west of King Island. Seismic blasting uses high-pressure sound waves to detect gas under the seabed. The acquisition area is located 27km west of King Island and covers an area of 4,089km<sup>2</sup>, including part of the Zeehan Commonwealth Marine Reserve. This seismic blasting is proposed to take place between August 1 – October 31, 2021.

## Scope of the Research

In order to gain feedback from King Island residents, aged 18 years and over, and determine the level of support for and opposition to the proposed seismic testing, the Wilderness Society instructed EMRS, the independent research firm, to design and implement a survey giving all King Island residents an equal opportunity to have their say about the testing.

EMRS was assigned to undertake the design and conduct of the research, in close consultation with the Wilderness Society, and to provide full analysis and reporting on the data gathered.

## Aims of the Research

### ***Quantitative Survey of King Island Residents***

In order to gain feedback from King Island residents on the proposed seismic testing to search for gas reserves, the primary aim of the research was to identify:

- The level of support for and opposition to seismic blasting for gas exploration in the sea off King Island; along with
  - Awareness of the proposed testing among the King Island community;
  - Perceptions of the community having a say on the testing; and
  - The work and recreational uses of the seas around King Island.
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# Objectives of the Research

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## Objectives of the Research

### *Quantitative Survey of King Island Residents*

Specifically, the informational objectives were to evaluate, via a quantitative survey methodology:

- The level of support for and opposition to the seismic blasting for gas exploration in the sea off King Island;
- Awareness prior to the survey of plans by an oil and gas exploration company to undertake seismic blasting to the west of King Island;
- Views on the King island community having a say on the proposal and being involved in the decision-making process on it going ahead;
- The level of support for and opposition to oil and gas exploration in general in the sea off King Island;
- The respondents' perceptions of the importance of the marine environment;
- The extent of their dependence on a marine-based income;
- The sector of the economy in which they work; and
- Their usage of the seas around King Island.

# Research Methodology

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## The Research Methodology

### *Quantitative Survey of King Island Residents*

In order to collect the required information to meet the specified objectives, EMRS adopted a quantitative survey methodology: namely, the approach of an unaddressed mail survey that was delivered to all households on King Island, with a return-paid envelope addressed to EMRS.

The survey package sent to each household on King Island included:

- A letter,
- Three copies of the survey – one for each adult in the household (up to 3 adults), and
- One reply-paid envelope.

In order to ensure that additional survey requirements were met, additional polling packs were provided for residents to pick up at the Currie Post Office.

The data was collected by means of EMRS' own research capability, with the progress and content of the data collection being closely monitored throughout to ensure quality control.

Survey packs landed in mailboxes in the week commencing the 19<sup>th</sup> of July 2021, and the completed returns were accepted up until the 27<sup>th</sup> of August 2021. In total, n=537 King Island residents aged 18 years and over participated in the survey.

# Reporting on the Results

## Reporting on the Results

Where percentages do not sum to 100, this may be due to rounding or where respondents were able to give multiple responses. Throughout the report, an asterisk<sup>(\*)</sup> denotes the reason for the results not summing to 100 per cent.

**The following report presents the findings of the quantitative research, conducted among a cohort of n=537 King Island residents aged 18 years and over, to identify their perceptions of the proposed seismic testing for gas exploration in the seas off King Island, their views on the level of community consultation on the proposal, the value they place on the marine environment, and their use of the seas around King Island for work and recreation.**

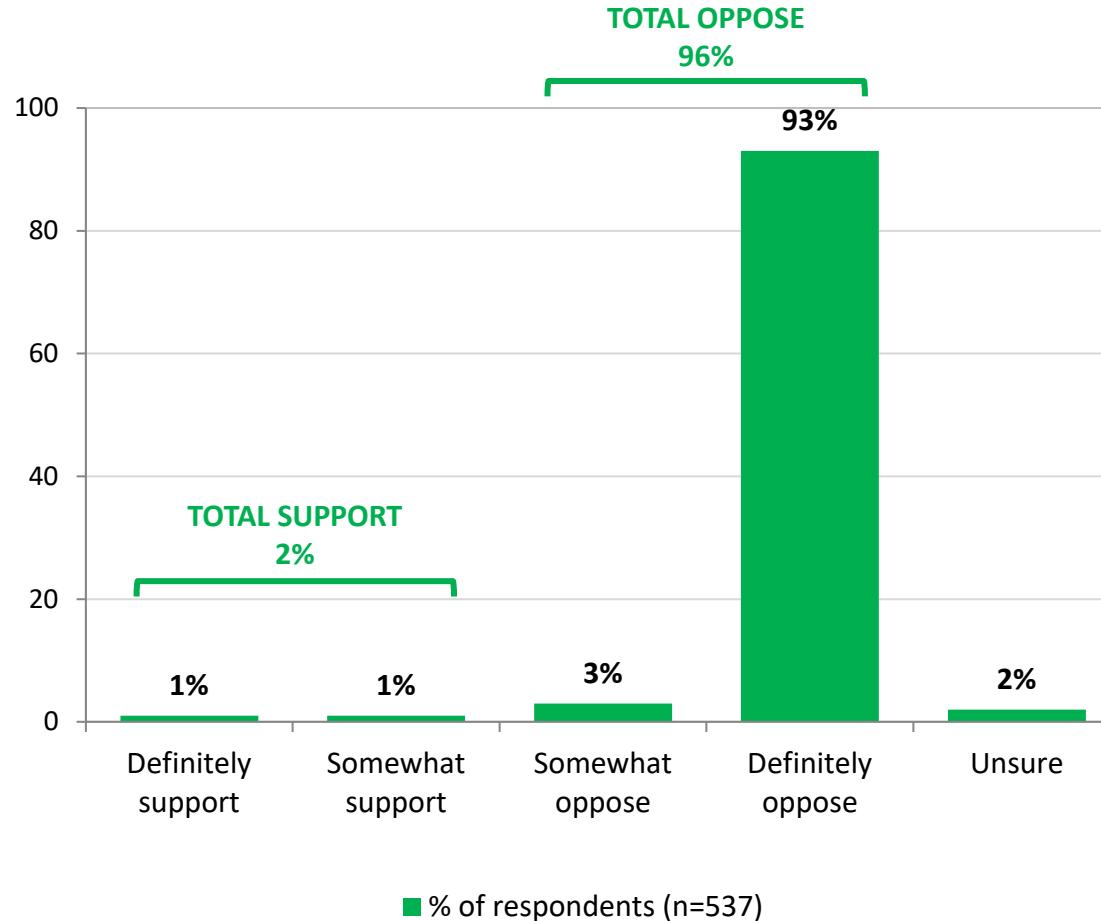
**The research results have been presented predominantly in charts. Any statistically significant variations in the results across the population subgroups have been remarked upon in the analytical commentary accompanying the charts.**

## Section Three

# The King Island Residents Survey Results

# Level of Support for Seismic Blasting Gas Exploration

**Chart 1 – Level of Support for Seismic Blasting Gas Exploration**  
(Percentage of all respondents)



The clear majority of the residents surveyed confirmed that they “definitely oppose” the seismic blasting for gas exploration in the sea off King Island (93%).

Including the 3% who said “somewhat oppose”, a combined total of 96% were in opposition.

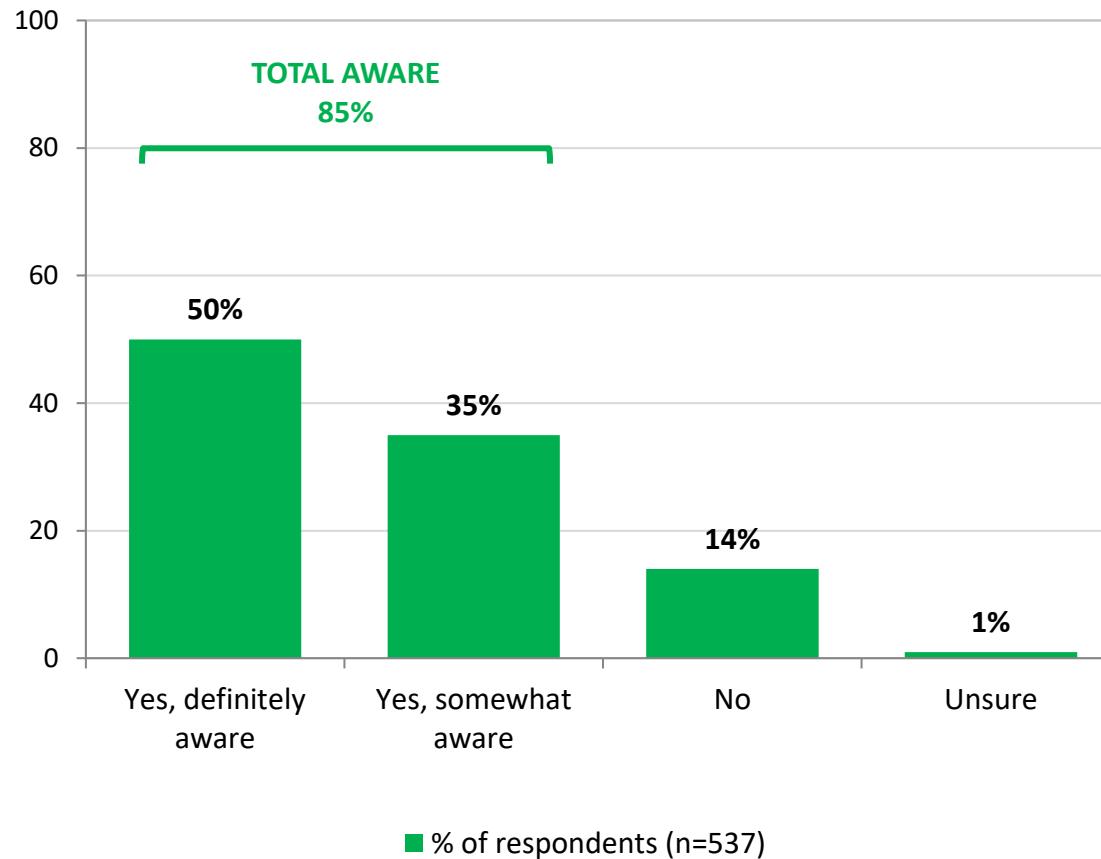
By population subgroup, the following finding emerged:

- Respondents who used the seas around King Island for **general recreation** were significantly more likely to “definitely oppose” the seismic blasting (95%).

**Q. Do you support or oppose seismic blasting for gas exploration in the sea off King Island?**

# Level of Awareness of the Seismic Blasting Plans

**Chart 2 – Level of Awareness of the Seismic Blasting Plans**  
(Percentage of all respondents)



The majority of residents surveyed confirmed that they were aware to some degree of plans by an oil and gas exploration company to undertake seismic blasting to the west of King Island (85% in total).

Of these, one half said “yes, definitely aware” (50%).

By population subgroup, the following were significantly more likely to be aware of the plans for seismic blasting:

- Those who were **fully dependent on a marine-based income**, 73% of whom said “yes, definitely aware”.
- Those who worked in the **fishing sector**, 68% of whom said “yes, definitely aware”.

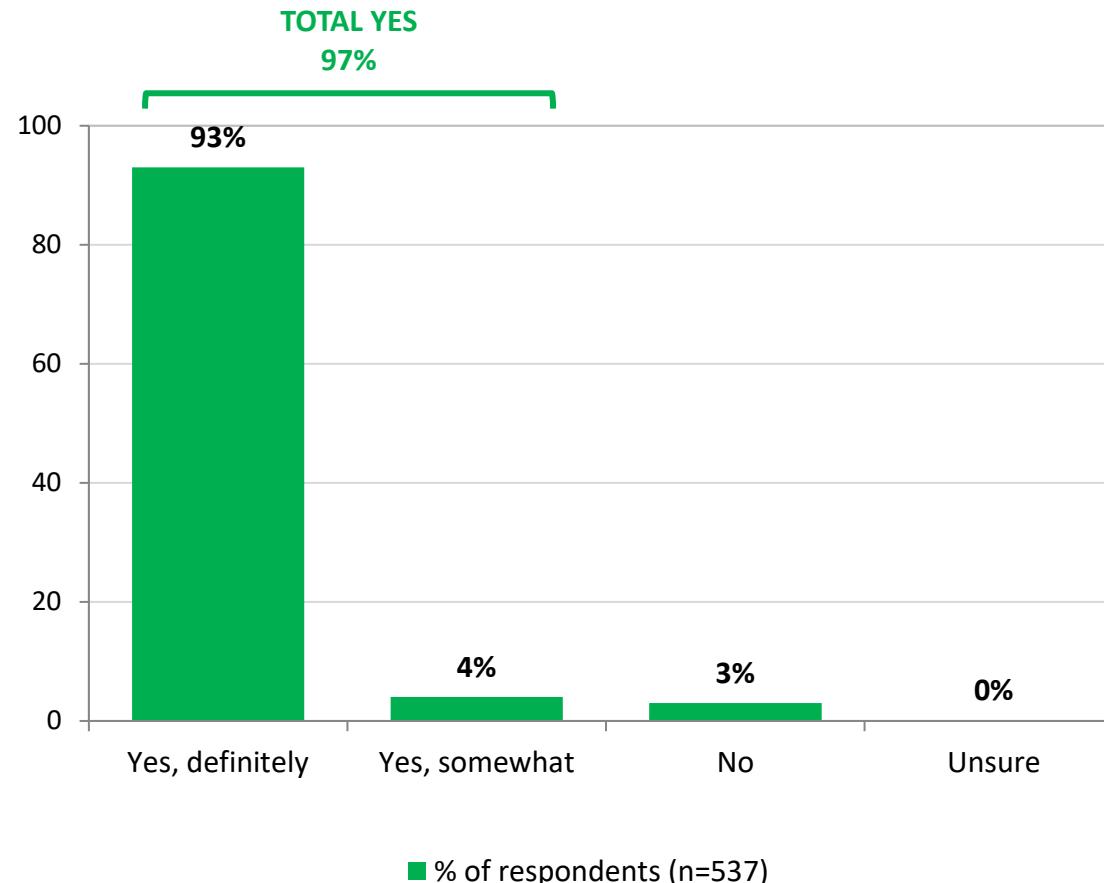
As compared to:

- Respondents working in the **manufacturing sector**, who were significantly more likely to report “no”, they were not aware of the plans (60%).

**Q. Before today, were you aware of plans by an oil and gas exploration company to undertake seismic blasting to the west of King Island?**

# Whether the King Island Community Should Have a Say in the Proposed Seismic Testing Going Ahead

Chart 3 – Whether the King Island Community Should Have a Say in the Proposed Seismic Testing Going Ahead  
(Percentage of all respondents)



The clear majority of the residents surveyed confirmed that the King Island community should have a say in the proposed seismic blasting going ahead (97% in total).

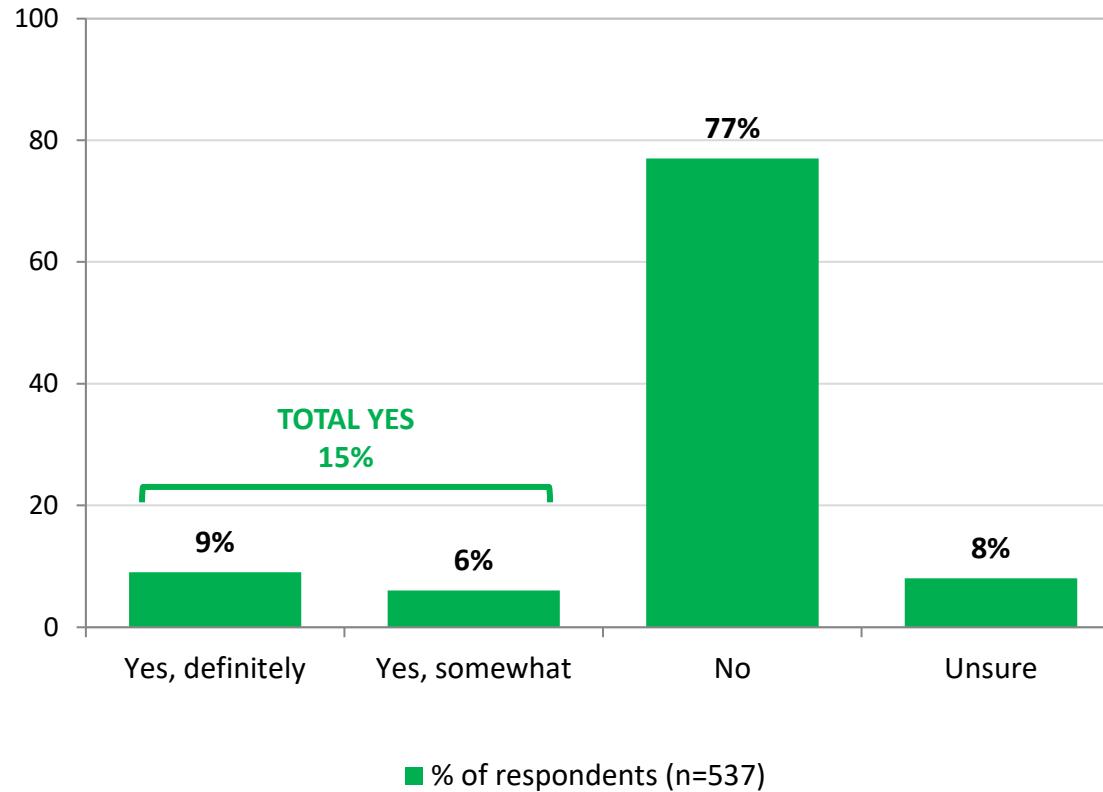
Of these, the most significant proportion by far said “yes, definitely” (93%).

By population subgroup, there were no significant variations to be noted.

Q. Do you think the King Island community should have a say in whether this proposed seismic blasting goes ahead?

# Whether the King Island Community Has Had a Say in the Decision-Making Process

**Chart 4 – Whether the King Island Community Has Had a Say in the Decision-Making Process (Percentage of all respondents)**



In contrast to the previous result, the clear majority of the residents surveyed felt that “no”, the King Island community has not had a say in the decision-making process or were “unsure” (85% in total).

Of these, the most significant proportion by far said a definitive “no” (77%).

Just 15% in total said “yes”.

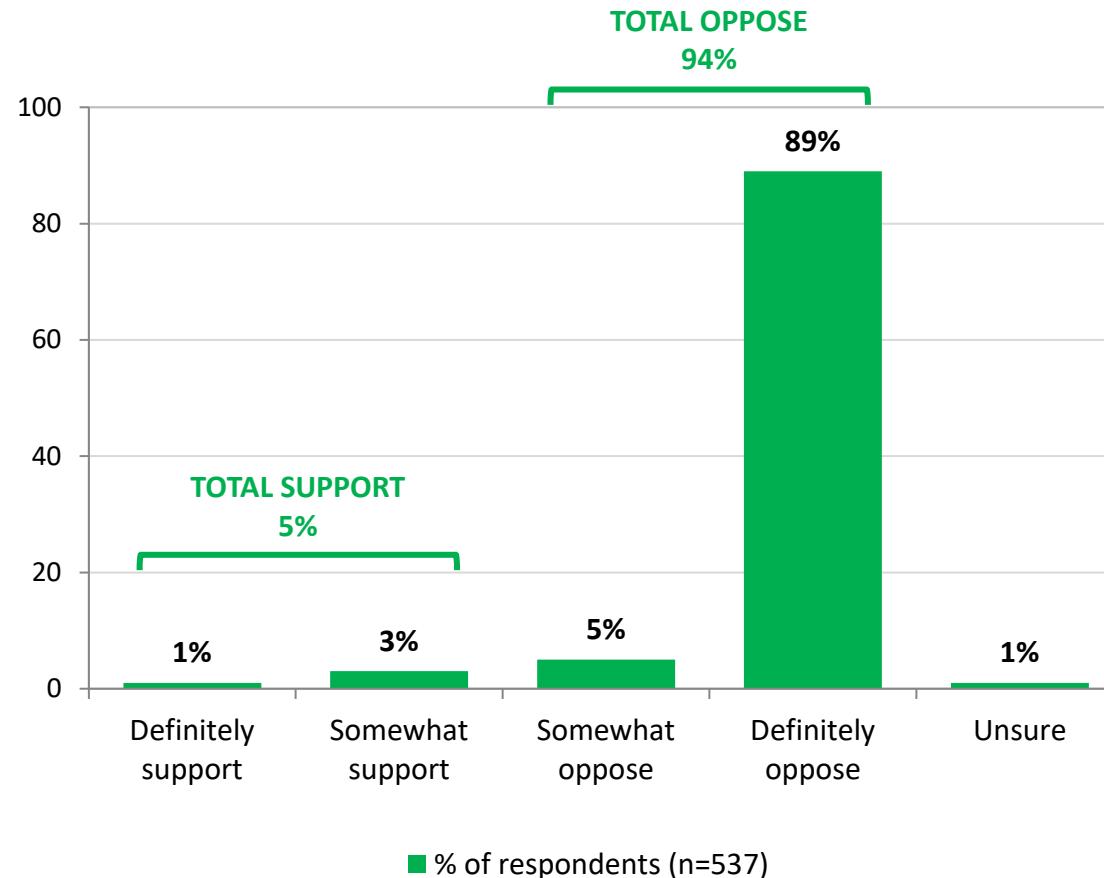
By population subgroup, the following finding emerged:

- Respondents who were **fully dependent on a marine-based income** were somewhat more likely to state “yes, definitely” (19%) than the other income groups.

**Q. Do you feel that the King Island community has had a say in the decision-making process?**

# Level of Support for Oil and Gas Exploration

**Chart 5 – Level of Support for Oil and Gas Exploration**  
(Percentage of all respondents)\*



\*Percentages may not sum to 100 due to rounding.

The clear majority of the residents surveyed opposed oil and gas exploration in the sea off King Island (94% in total).

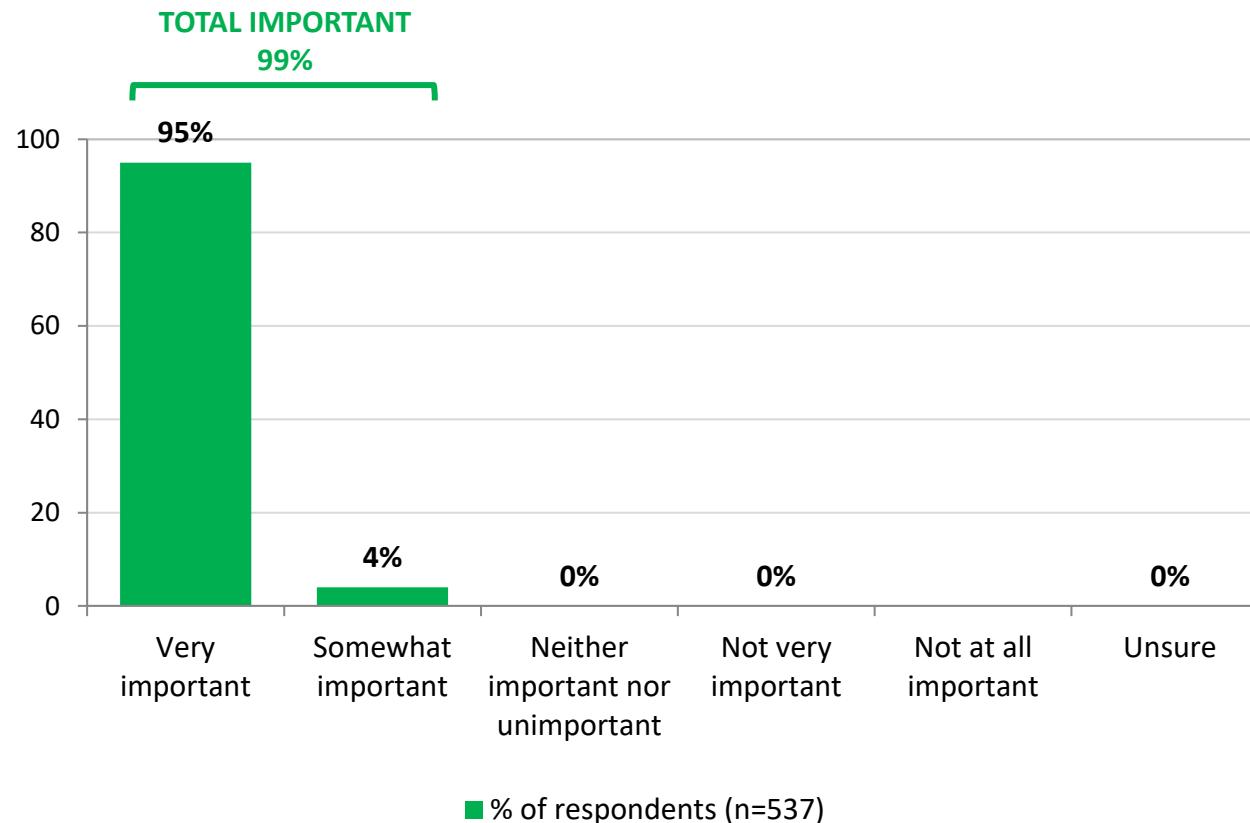
Of these, the greater proportion by far said “definitely oppose” (89%).

By population subgroup, there were no significant variations to be noted.

**Q. Do you support or oppose oil and gas exploration in the sea off King Island?**

# Perceived Importance of the Marine Environment

**Chart 6 – Perceived Importance of the Marine Environment**  
(Percentage of all respondents)†



Nearly all of the residents surveyed confirmed that the marine environment was important to them to some degree (99% in total).

Of these, the great majority said it was “very important” (95%).

In total, just n=2 respondents stated it was “not very important” to them.

By population subgroup, there were no significant variations to be noted.

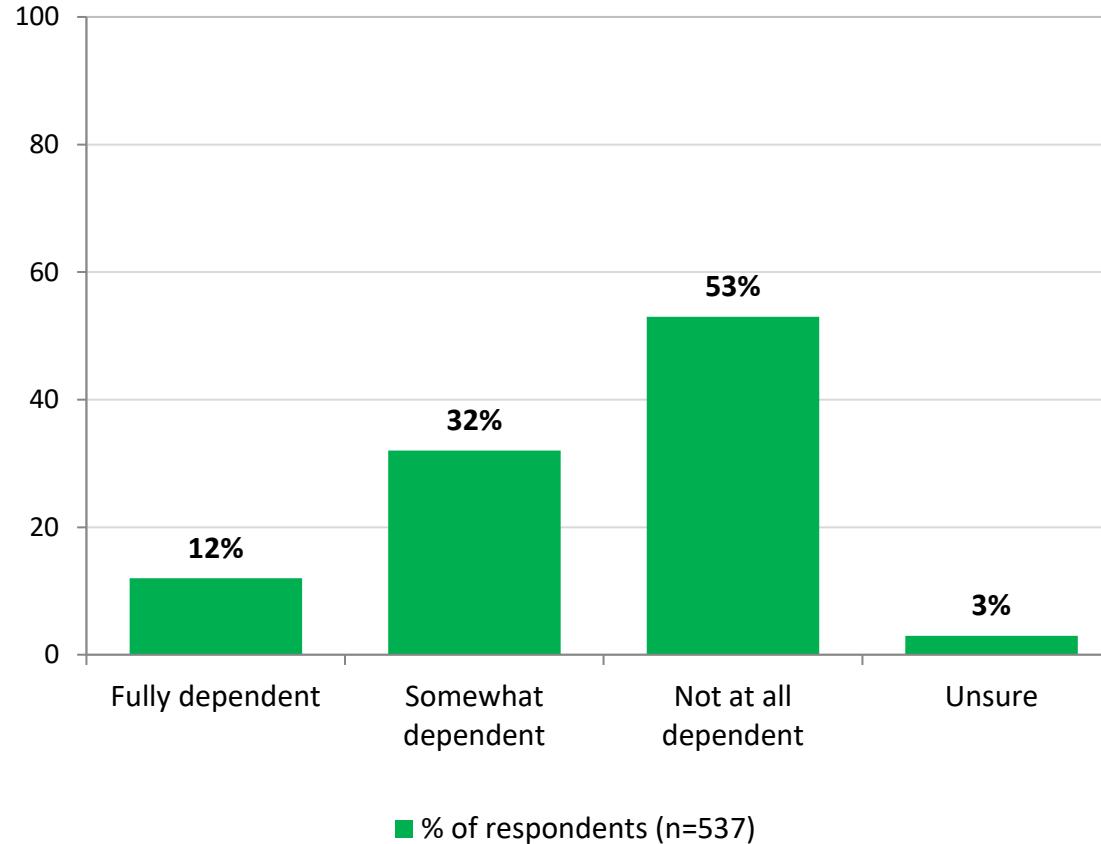
†The “0%” figures in the chart represent n=1 stating “neither important or unimportant”, n=2 stating “not very important”, and n=2 stating “unsure”.

**Q. How important is the marine environment to you?**

# Extent of Dependence on a Marine-Based Income

## Survey Population Subgroups

Chart 7 – Extent of Dependence on Marine-Based Income  
(Percentage of all respondents)



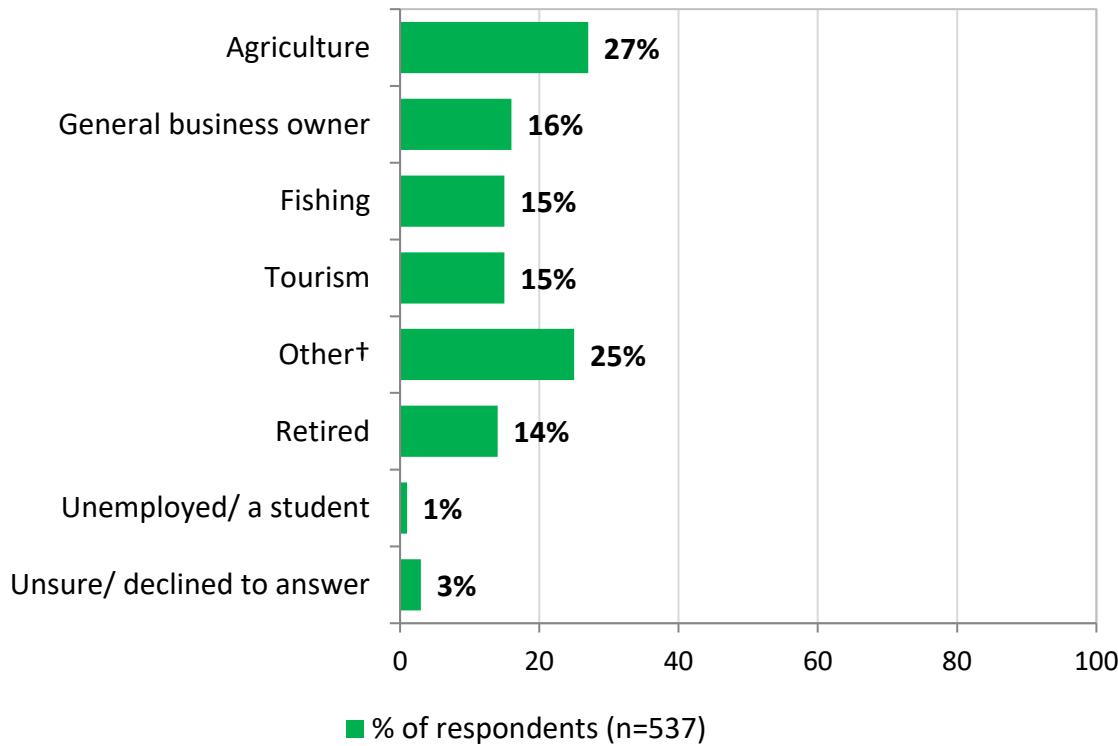
Whilst the residents surveyed tended to report that they were “not at all dependent” on a marine-based income (53%), a relatively significant proportion confirmed that they were to some degree (44% in total).

Q. To what extent are you dependent on a marine-based income?

# Employment Categories

## Survey Population Subgroups

**Chart 8 – Employment Categories**  
(Percentage of all respondents)\*



The leading sector of the economy in which the surveyed residents of King Island worked was “agriculture” (27%), followed by “general business owner” (16%), and “fishing” and “tourism” (15% in each case).

\* Percentages do not sum to 100 due to multiple responses being possible.

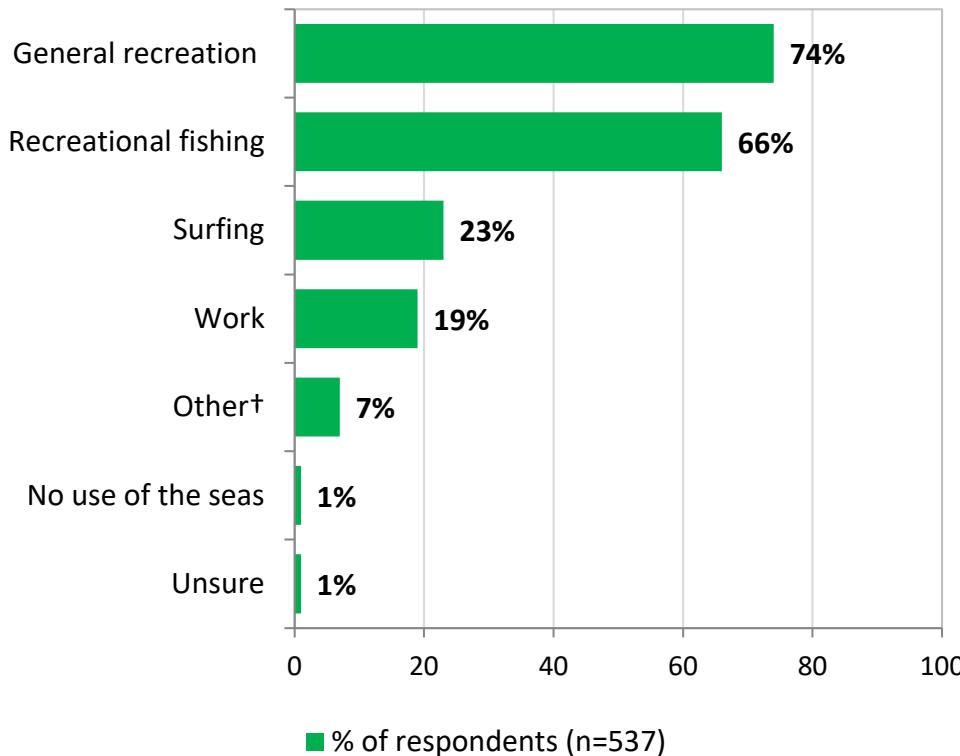
† “Other” employment sectors, each mentioned by 4% or less, included “education”, “retail/ hospitality”, “health”, “transport/ freight”, “manufacturing”, “kelp industry”, “Government”, and “trades work”.

**Q. What sector of the economy do you work in?**

# Use of the Seas around King Island

## Survey Population Subgroups

**Chart 9 – Use of the Seas around King Island**  
(Percentage of all respondents)\*



\* Percentages do not sum to 100 due to multiple responses being possible.

† “Other” uses, each mentioned by 3% or less, included “spiritual practices/ meditation”, “walking/ beachcombing”, “natural beauty/ nature”, and “exercise/ mental health”.

As the responses indicated, the majority of residents used the seas around King Island for recreational activities.

Most frequently mentioned was “general recreation – e.g. swimming, diving, boating etc.” (74% in total), followed by “recreational fishing” (66%).

“Surfing” and “work” also recorded relatively high rates of mention (23% and 19% respectively).

Just 1% of the respondents (n=3) reported that they made “no use of the seas”.

Respondents significantly more likely to mention using the seas for “**work**” were:

- Those **fully dependent on a marine-based income** (79%)
- Those employed in **fishing** (80%)

Respondents significantly more likely to mention using the seas for “**recreational fishing**” were:

- Those employed in **agriculture** (80%)

Respondents somewhat more likely to mention using the seas for “**general recreation**” were:

- Those employed in **tourism** (88%)
- Those classified as a **general business owner** (88%)

Respondents somewhat more likely to mention using the seas for “**surfing**” were:

- Those employed in **fishing** (37%)

**Q. How do you use the seas around King Island?**