



# Mismanaged Fisheries are an Economic Threat

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OCTOBER 2022



# Methodology



## Phase 1: Focus Groups (Early June 2022)

Pacific Islands FFA: Port Moresby, Papua New Guinea (2 focus groups June 2-3, 2022)

Lat Am: Guayaquil, Ecuador (2 focus groups June 8-9, 2022)

Groups were among gen pop adults with no special fishing knowledge, split by gender, and 1.5-2 hours long

## Phase 2: Surveys (July - August 2022)

Pacific Islands FFA: Face-to-face survey of n=800 (MoE +/-3.6%) interviews across Papua New Guinea (n=500, MoE +/-4.4%), the Federated States of Micronesia (n=150, MoE +/-8.0%), and the Cook Islands (n=150, MoE +/-8.0%) July 1 - August 12, 2022

Lat Am: We also conducted a mixed mode online and face-to-face survey of n=808 (MoE +/-3.6%) interviews across Costa Rica (n=202), Ecuador (n=204), Mexico (n=202), and Panama (n=200) (MoE for each +/-6.9%) from August 5-31, 2022





# Key Findings

**Our mission starts from a strong base #1. There is a solid basis of support for the environment in both regions, but generally more “tangible” aspects.** People understand the importance of the environment but most top concerns are day-to-day issues (e.g., trash on the streets, pollution). People understand the impacts of climate change and sustainability; they are just not “in your face.” Most do believe natural resources are being mismanaged, however, and that it is important to protect natural resources for future generations.

**Our mission starts from a strong base #2. Most people in both regions understand the importance of and threats to fishing.** Majorities say fishing is an important resource to their economy. They also believe the future of fishing is under threat due to overfishing and declining fish populations. However, by itself, this does not achieve sufficient urgency or immediacy to drive action.

**Conceptually, sustainable fishing as a term is not immediately understood.** There is broad support for the actual tenets of sustainable fishing. People support and understand the importance of maintaining strong fish populations. But few people readily use the term “sustainable fishing.”

**The economy and cost of living are dominant. This is where we will aim our own narrative.** People are pessimistic about their country’s direction. Few people can afford their basic needs with ease. Additional issues (e.g., corruption, safety) will also play a role and can even extend our “economic angle” to a story about the “threats” people face in their daily lives. *Costa Rica is the exception; things there are not as dire.*

**Good news! There is a natural, consistent story covering both FFA and Lat Am.** Despite being a world apart, the trends between and within both regions are similar and lend themselves to an umbrella narrative. There are nuanced differences for emphasis, of course.

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**People are with us on the  
environment and natural  
resource use**



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# People understand the importance of the environment and generally identify two key threats: exploitation and pollution

“[Ecuador’s natural resources are] beaches, **fish**, oil, forests, parks, volcanoes. The **Galapagos islands**.”  
– *Woman, Guayaquil, Ecuador*

## Awareness

“**Climate change is happening around the coastal areas, a lot of coastal erosion**. Two people from hamlets have gone undersea, people have moved inland.”  
– *Woman, Port Moresby, Papua New Guinea*

“We have a lot of natural resources. Gas, gold, fishing, logging. **But the management of it is poor**.”  
– *Woman, Port Moresby, Papua New Guinea*

## Exploitation

“We have it all. Oil, gold, natural gas. But **our resources are being exploited**.”  
– *Man, Port Moresby, Papua New Guinea*

“Loose trash everywhere affects the environment. We should be planting trees. **Clean air is important, clean water is important**.”  
– *Woman, Guayaquil, Ecuador*

## Pollution

“Forest fires, industries, burning of trash, run-down vehicles and parts. Pollution of natural resources. They are contaminating the river. They are **contaminating water** [with their waste].”  
– *Man, Guayaquil, Ecuador*

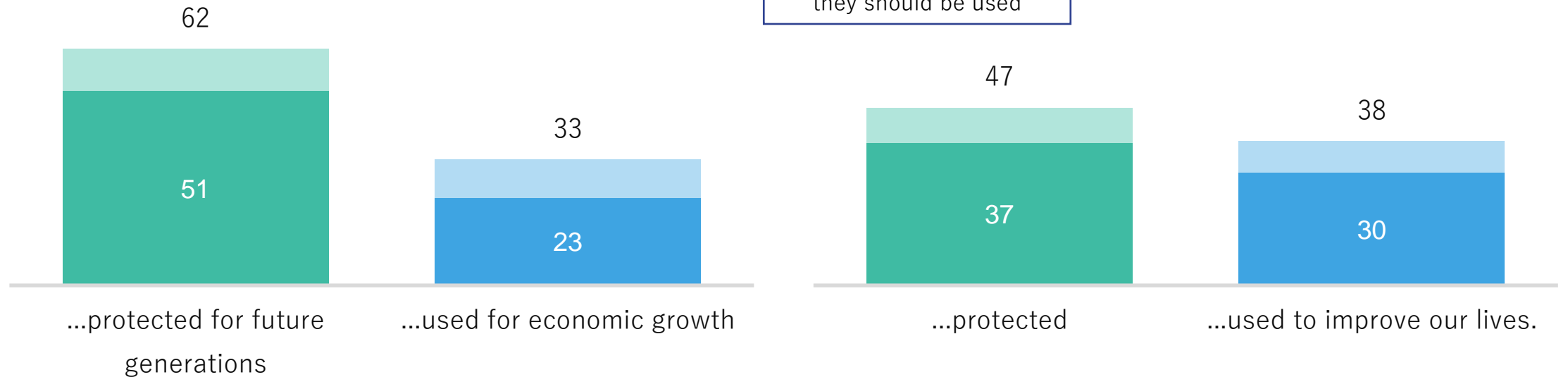
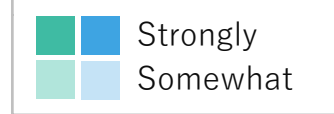
# Broad desire to protect natural resources for the future, though economic needs create urgency (as seen in PNG)

*Natural resources should be...*

Lat Am

FFA

40% of PNG say natural resources should be protected, while 44% say they should be used

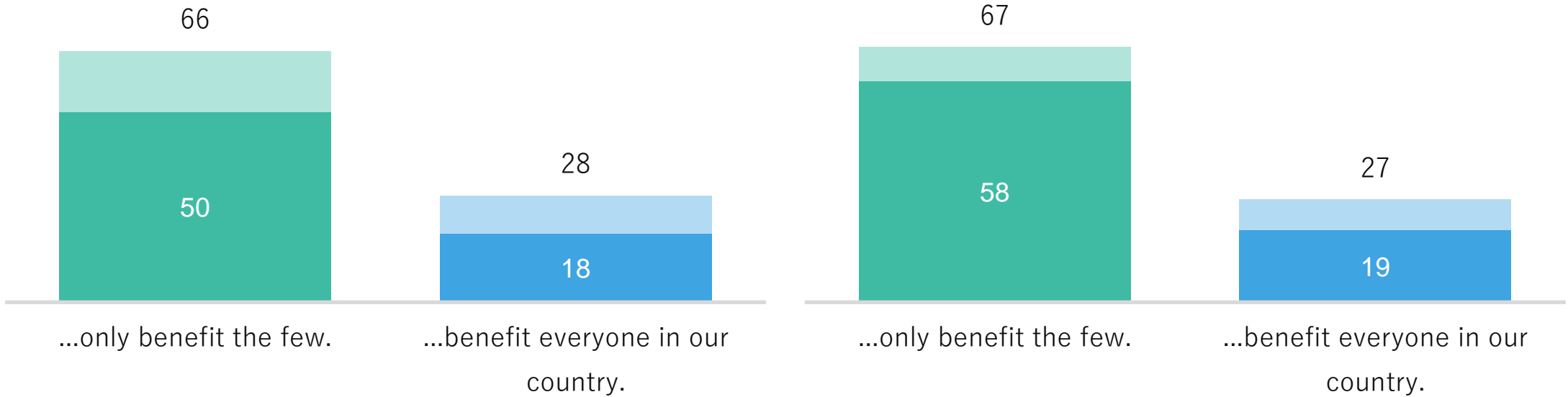


# Wide agreement current natural resources use is benefiting only the few

*Right now, our natural resources...*

Lat Am

FFA



# Strong belief natural resources are being exploited and overused

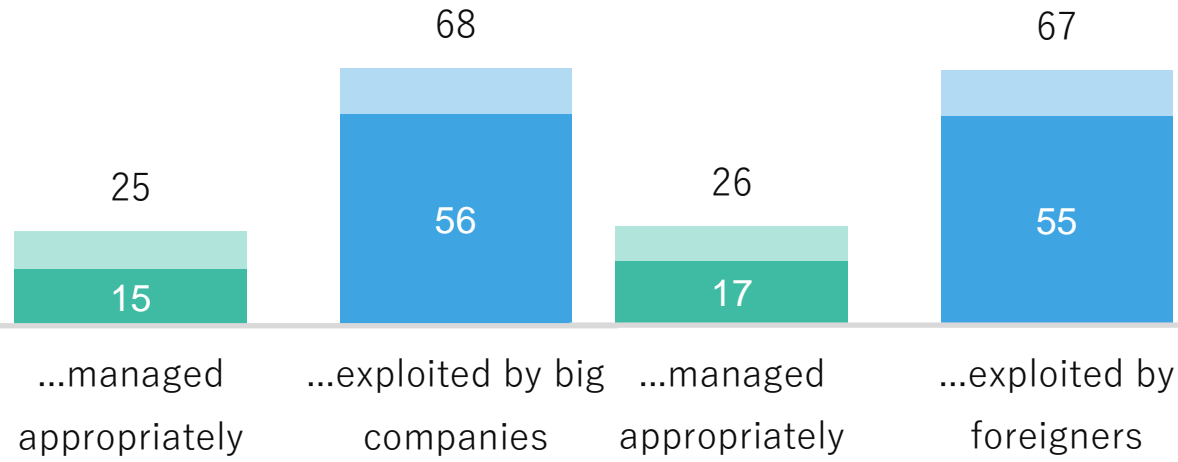
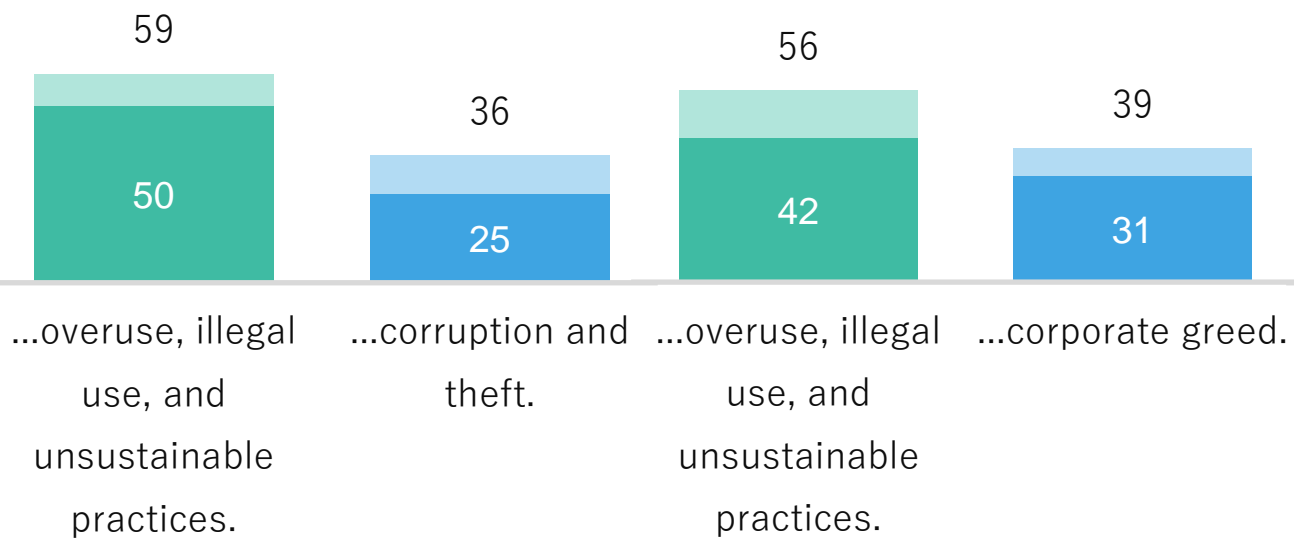
Lat Am

FFA

*The biggest threat to our natural resources is...*

*Our natural resources are being...*

53% of Ecuadorians say bigger threat to natural resources is corporate greed, while 42% say overuse, illegal use, and unsustainable practices



(Left-side) Q. Now, I am going to show you several pairs of statements about natural resources. Again, for each pair, please tell me which one comes closest to your own view.

(Right-side) Q. You'll now see a few pairs of statements about natural resources. Again, for each pair, please indicate which one comes closest to your own view, and how strongly you feel that way.





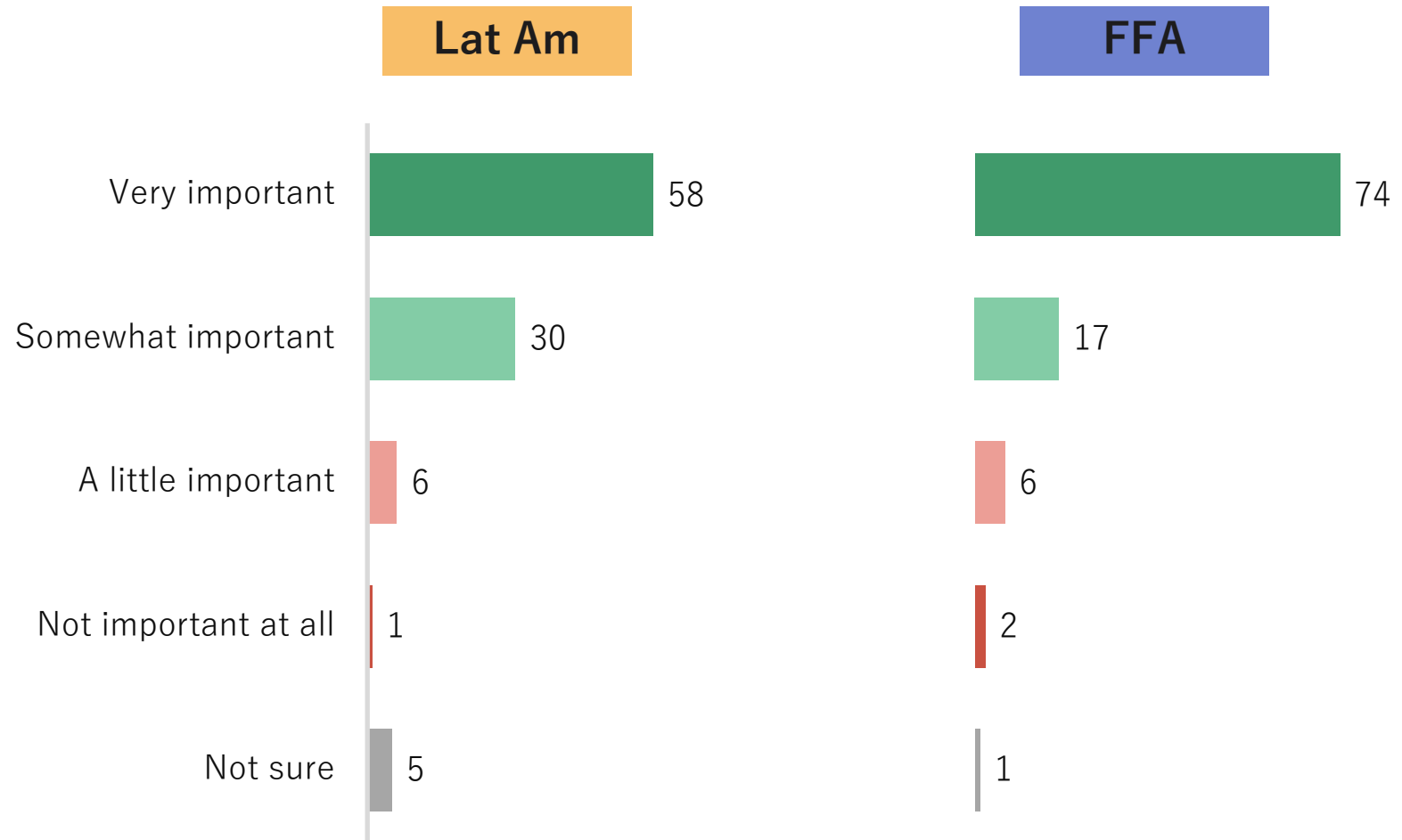
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**Fishing is an important resource, and people nominally understand the threats**



# Fishing is an important part of the economy

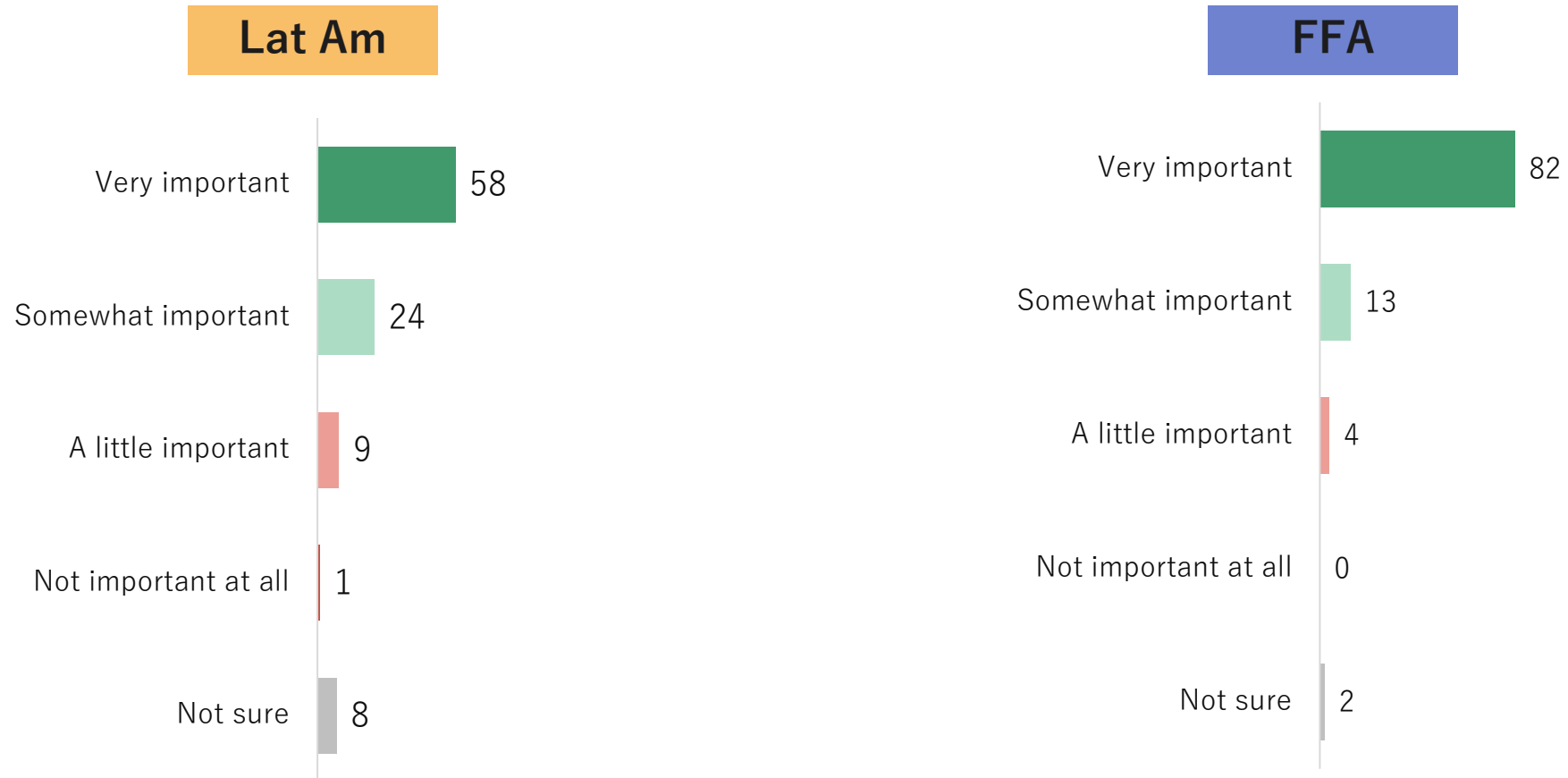
"It's a **great asset** that our nation has because it can generate lots of **income** and **earnings**. We are talking about the **biodiversity of fish** that are **exported**."  
– *Woman, Guayaquil, Ecuador*



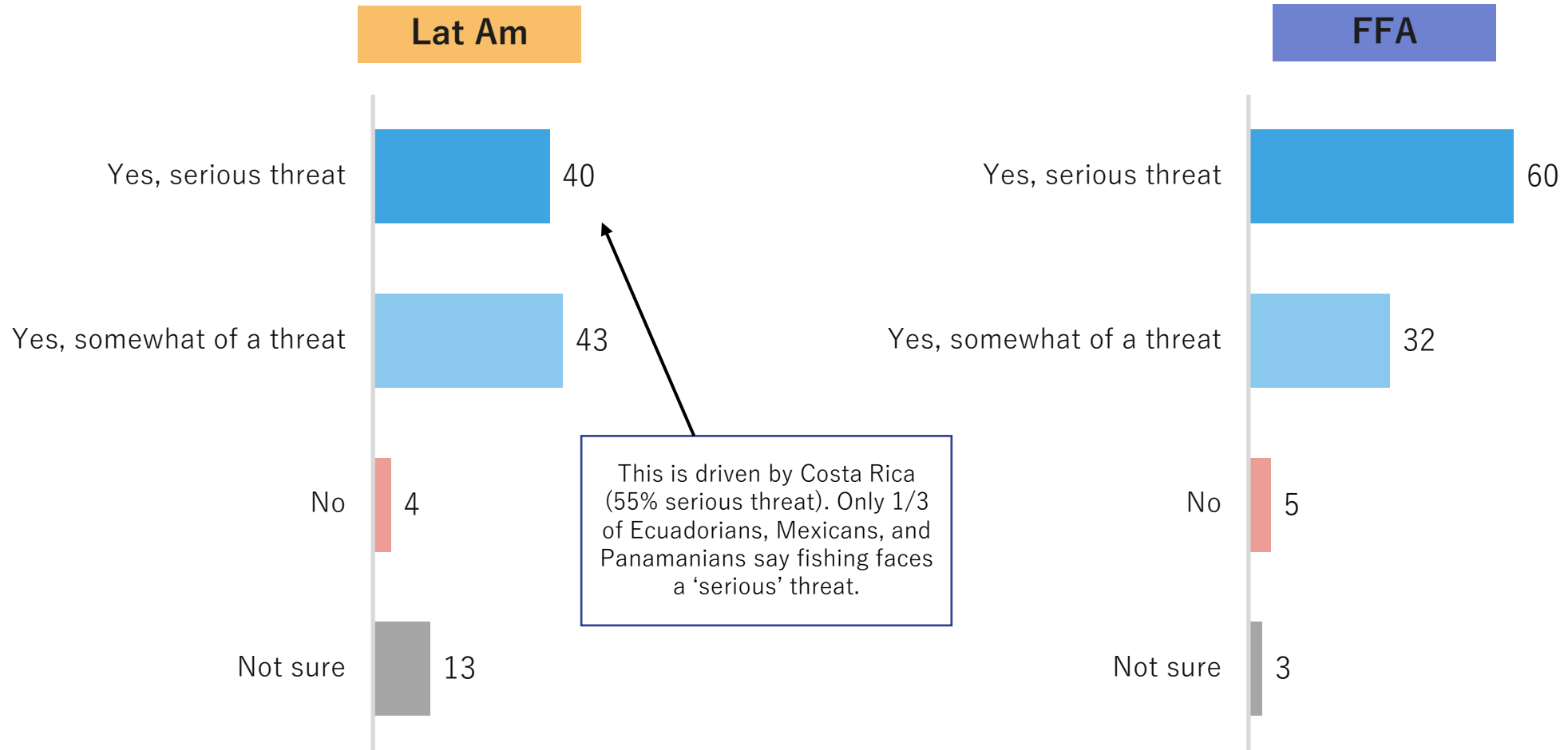
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# Maintaining strong fish populations is fundamental

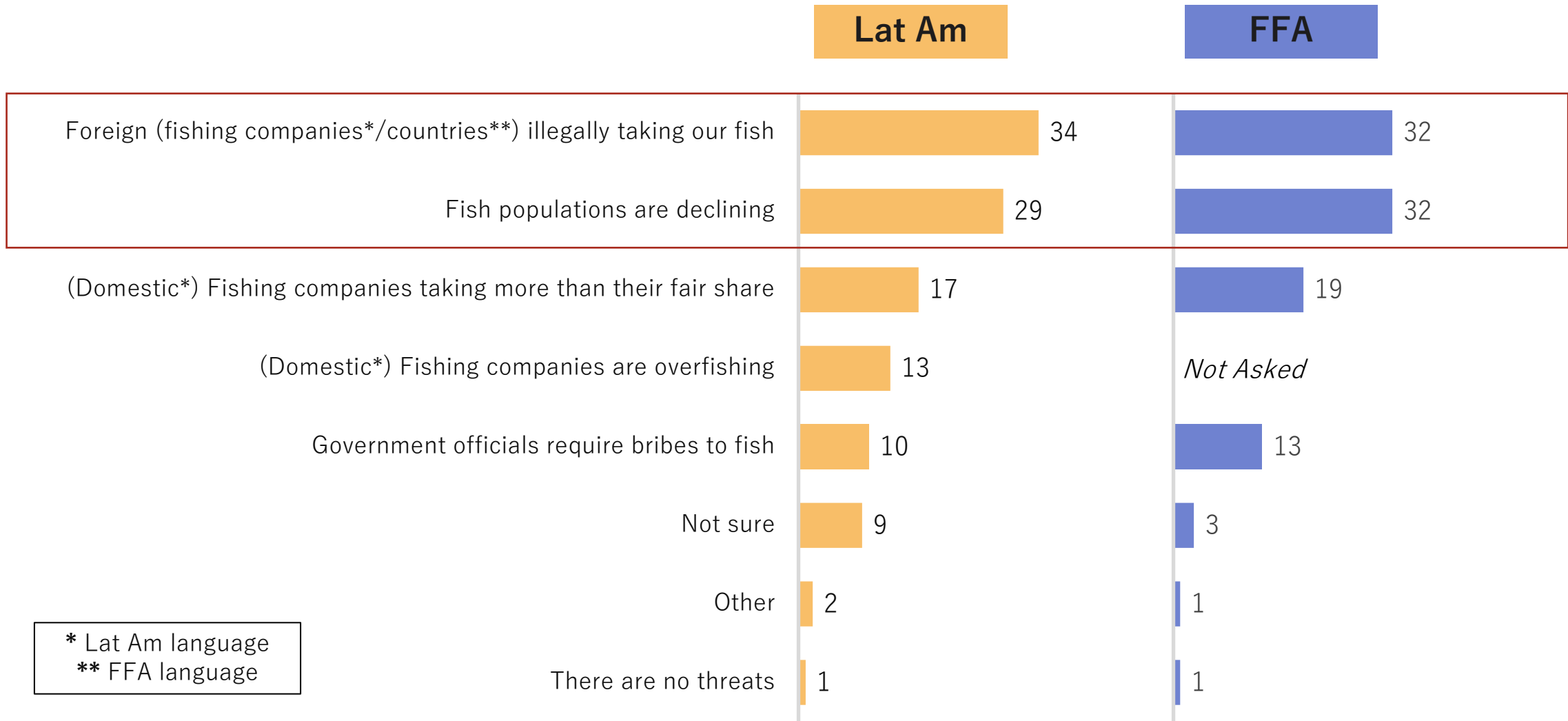
“Maintain strong fish populations”



# Mixed bag on “urgency” of the threat to fishing—FFA sees clear threat, but Lat Am is torn



# Pluralities identify those threats as foreign exploitation



Q. Some people say fishing and fishermen in [COUNTRY] face threats. (Below are a/l am going to read you a) list of those possible threats. Even if you are not too familiar, please tell me which ONE you think is the biggest threat facing fishermen and fishing in [COUNTRY].



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## What gives?

- So people are with us on environment. They share our values. They share our concerns.
- They think fishing is important to their country and believe maintaining strong fish populations is important.
- They even generally feel fishing is under threat, largely from exploitation.
- So, do they just not care?



A man with a white mustache, wearing a blue cap and a white t-shirt, is working at a fish market stall. The t-shirt has the text "MIGUEL ÁNGEL YUNES" and "CANDIDATO A GOBERNADOR DE VERACRUZ 2018" printed on it. He is using a knife to cut fish on a wooden board. The stall is cluttered with various items, including a white bucket, a large orange plastic tub, and a blue tarp. In the background, other people and a blue tarp are visible, suggesting an outdoor market setting.

The environment is very low  
on the priority list

# Economic concerns drive daily worries; environment far below other major concerns, like crime and corruption

“At a national level, many times we still don’t have sufficient [opportunities]. **50% of the population is unable to make ends meet.**”  
 – Woman, Guayaquil, Ecuador

“**Safety is on the decline.** [There is] **nowhere we can be safe.** No man’s land. Two months ago, I was **sitting waiting for bus**, and before I knew it someone **had a gun at me.**”  
 – Man, Guayaquil, Ecuador



Environment (clean air/water, extreme climate-related weather events, sustainability) 12 8

	Lat Am	FFA
Cost of living and prices	56	58
Safety and crime	51	27
Jobs and unemployment	48	49
Corruption and good governance	30	34
Poverty and hunger	23	13
Education, including schools and university	16	22
COVID-19 pandemic	12	10
Housing, including the cost, quality, and availability	9	14
Quality of infrastructure (roads, bridges, public buildings)	7	11
Health care, including quality, access and affordability	6	20
Quality public services (e.g., electricity, internet)	5	9
Discrimination against women	5	6
Quality and access to potable water	4	9
Tribalism and tribal conflict (FFA Only)	Not Asked	5



# People are struggling to get by

“In my case, it’s complex. **I’m not currently employed.** We’re not really, we’re **barely living, making ends meet.** It’s a bit tight.”  
 – Woman, Guayaquil, Ecuador

“**Crime, the economy, prices skyrocketing.** We’re really doing **bad.**”  
 – Man, Guayaquil, Ecuador

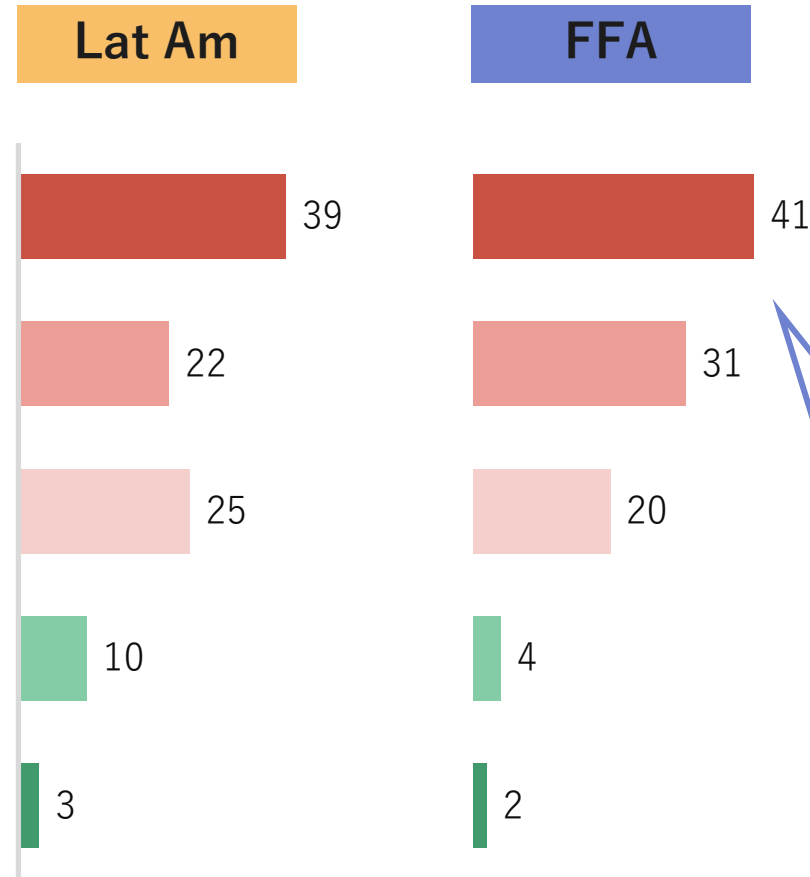
Not enough for our basic needs

Enough only for our basic needs

Enough for a decent living, but we cannot afford to buy expensive goods

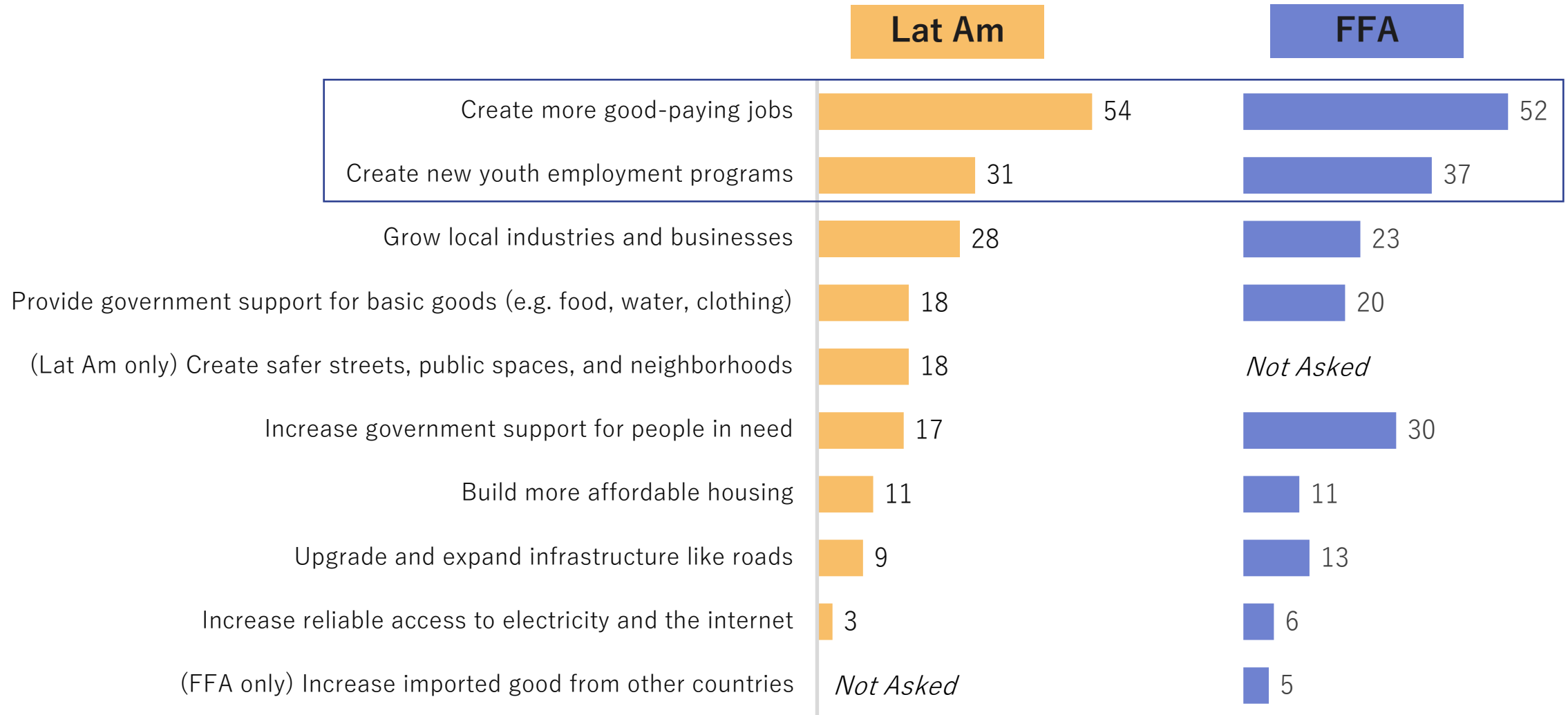
We can afford some expensive goods with some effort

We can afford everything we need with little or no effort



“Graduates roam the streets not being able to find jobs.”  
 – Woman, Port Moresby, Papua New Guinea

# Significantly, it's a jobs story



Q. Now, here is a list of economic actions the (*President/Prime Minister*) could take. Thinking about your family's financial situation, please indicate which TWO would have the most positive impact on you and your family.



# Economic messaging > Sustainability messaging (Lat Am)

Lat Am

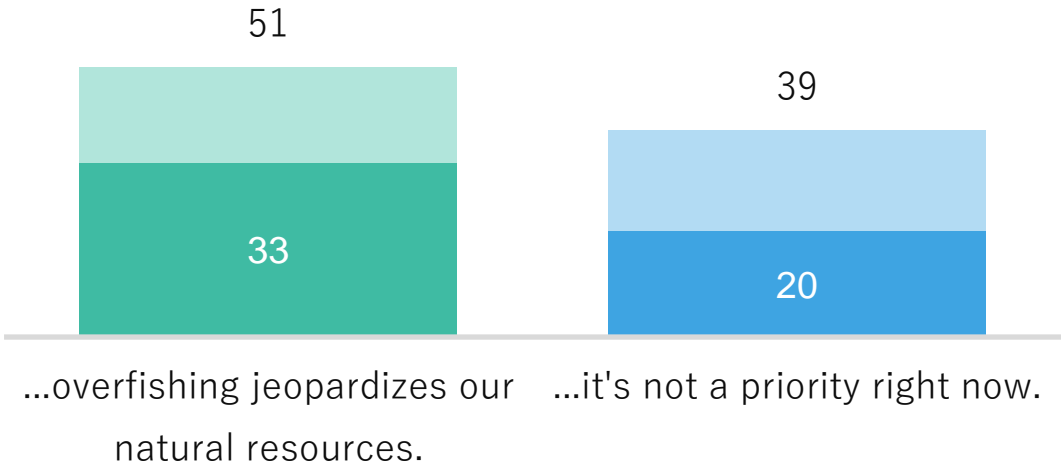
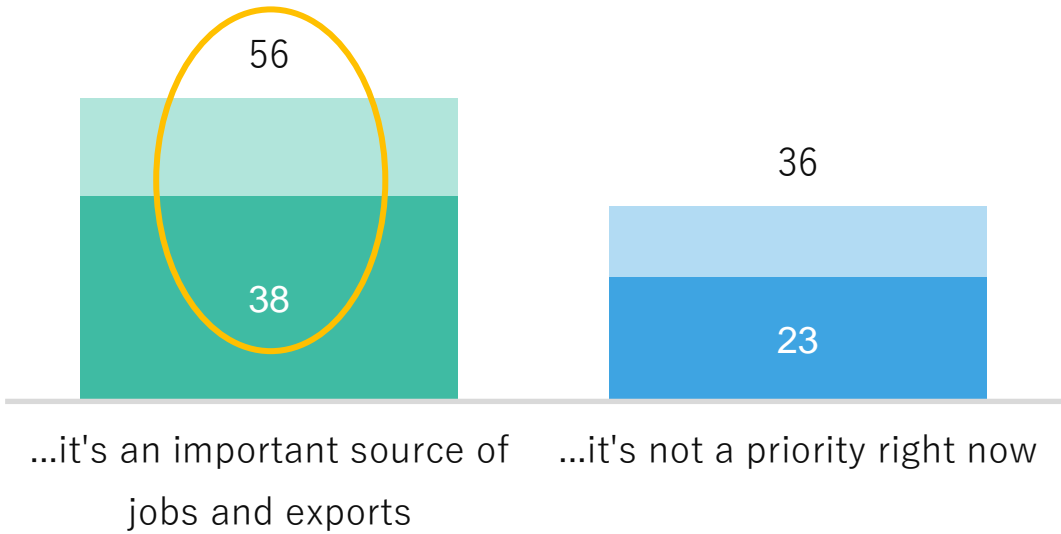
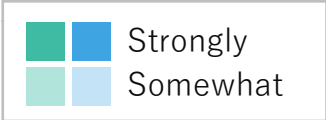
People who **support** more action in the fishing industry say...  
 People who **oppose** more action in the fishing industry say...

Econ industry

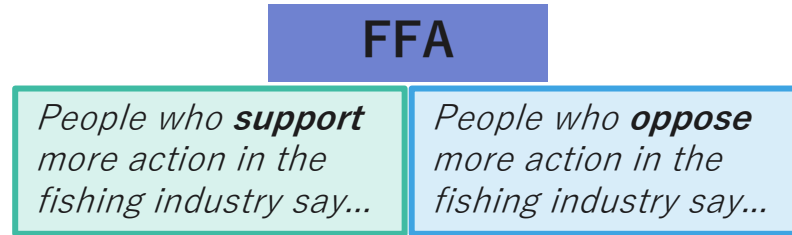
Natural resource

+20

+12



# Economic messaging > Sustainability messaging (FFA)



## Protect industry from gov

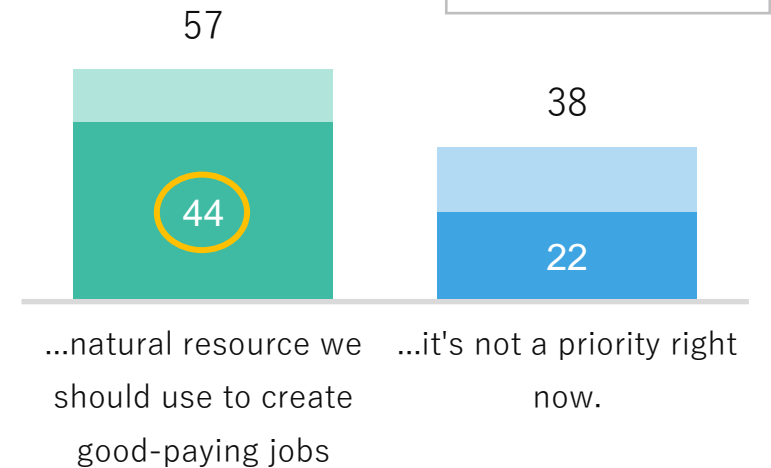
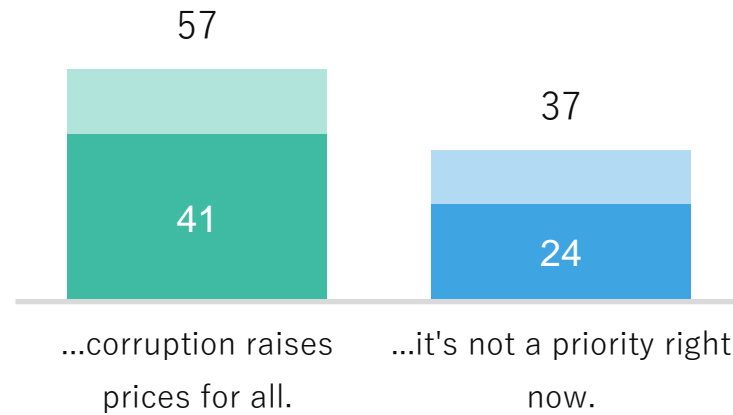
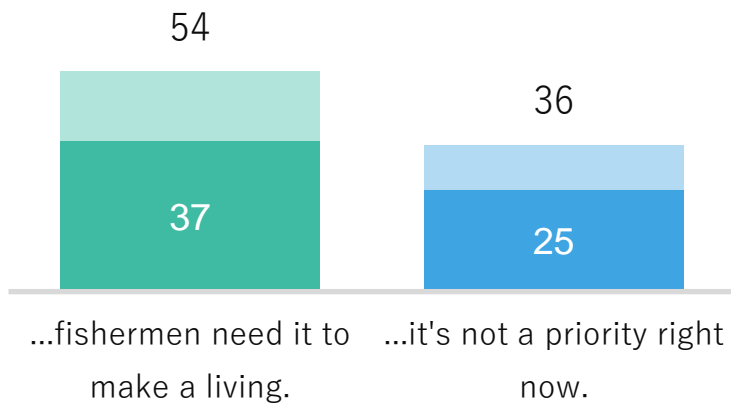
+18

## Link to corruption

+20

## Everyone, jobs

+19



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# How do we meaningfully land our message on sustainable fishing?

We start toward the bottom, but we are not without assets. People believe in the importance of fishing and also believe it is under threat.

Our approach has two linear and connected steps:

- Tie “natural resource protection” to “economic security”
- Tie “fishing / fisheries” to “natural resources.”

**We only succeed if people associate protecting fishing with creating jobs and improving daily life for people.**

To support this effort, we must additionally achieve the following elements:

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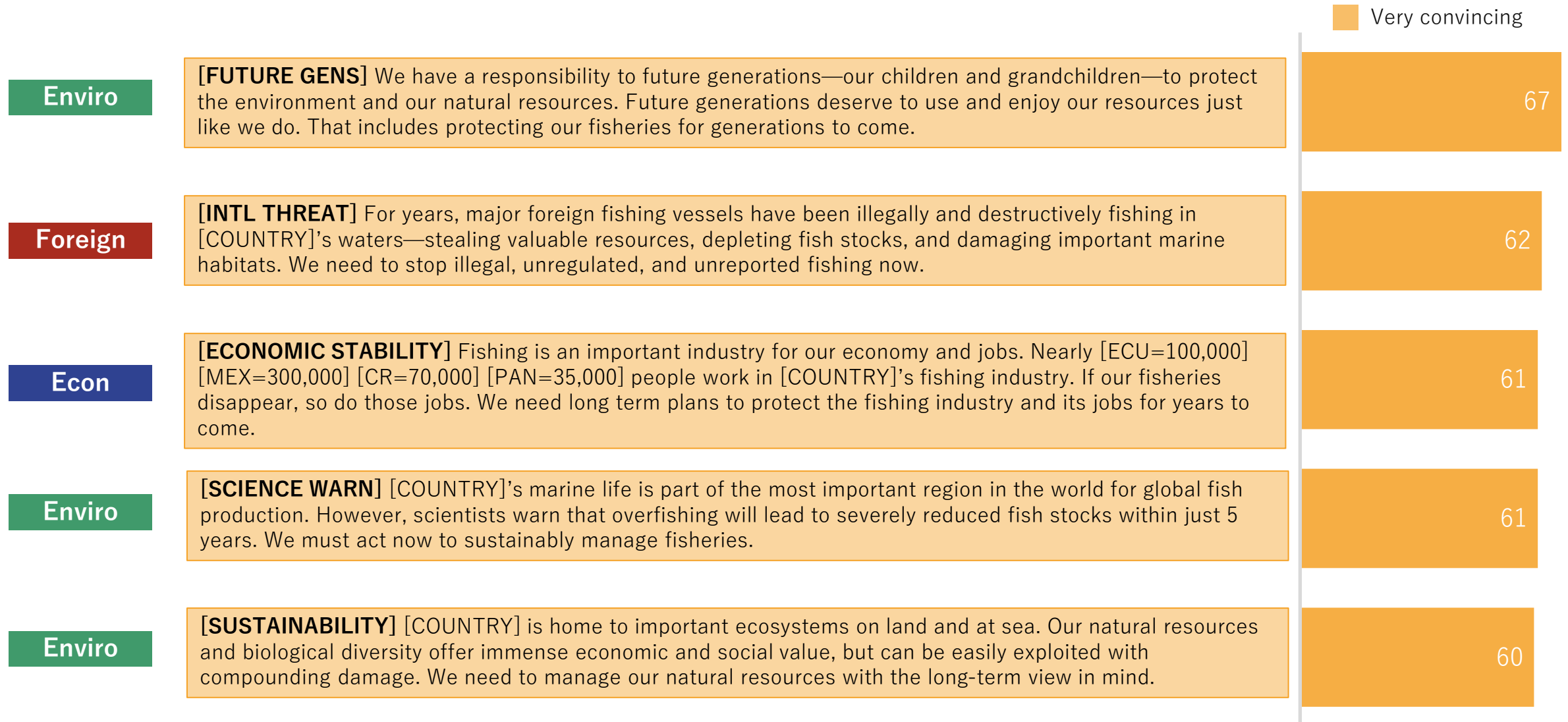
- **Broaden the scope of the industry.** It can't just be about fishermen. It's also canners, chefs, restaurant workers, market vendors, grocers, truck drivers, etc. We must make this fight more inclusive.
- **Raise the specter of exploitation.** Permissive exploitation (in FFA: by foreigners) is endangering the fishing industry. This theft of our natural resource only benefits the few.
- **Make this a daily struggle for people outside the industry.** Mismanagement costs jobs and raises prices. Put specific monetary or tangible figures to it. Damage to our fishing industry has a personally-felt daily economic impact.

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How do we talk  
about it?



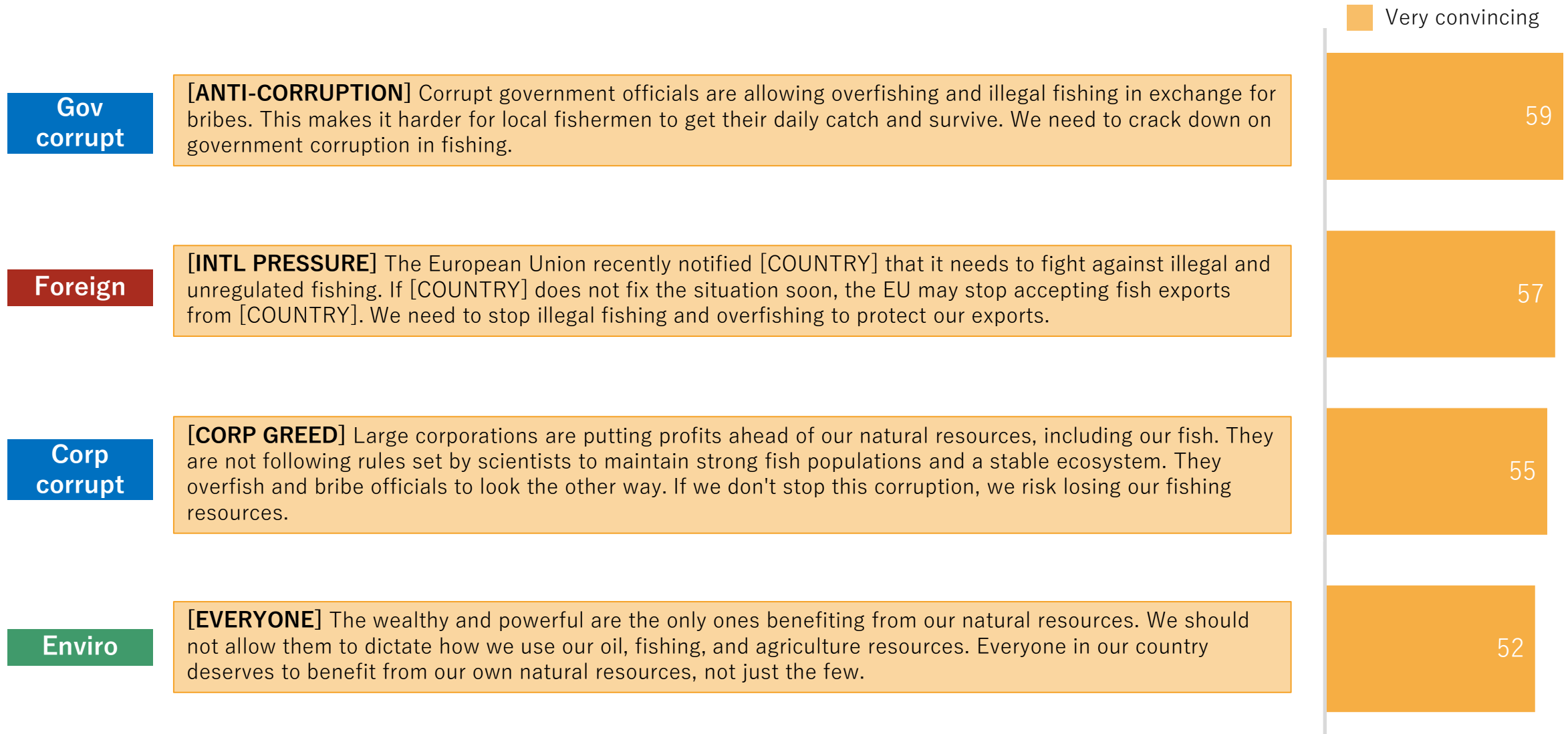
# Lat Am: Elements of each of these messages has power



Q. You’ll now see a series of statements some people have made about taking more action to protect the fishing industry. For each statement, please indicate how convincing it is to support more action to protect the fishing industry. (Very convincing, Somewhat convincing, A little convincing, Not at all convincing, Not sure).



# Corruption falls lower down on the list, but still strong

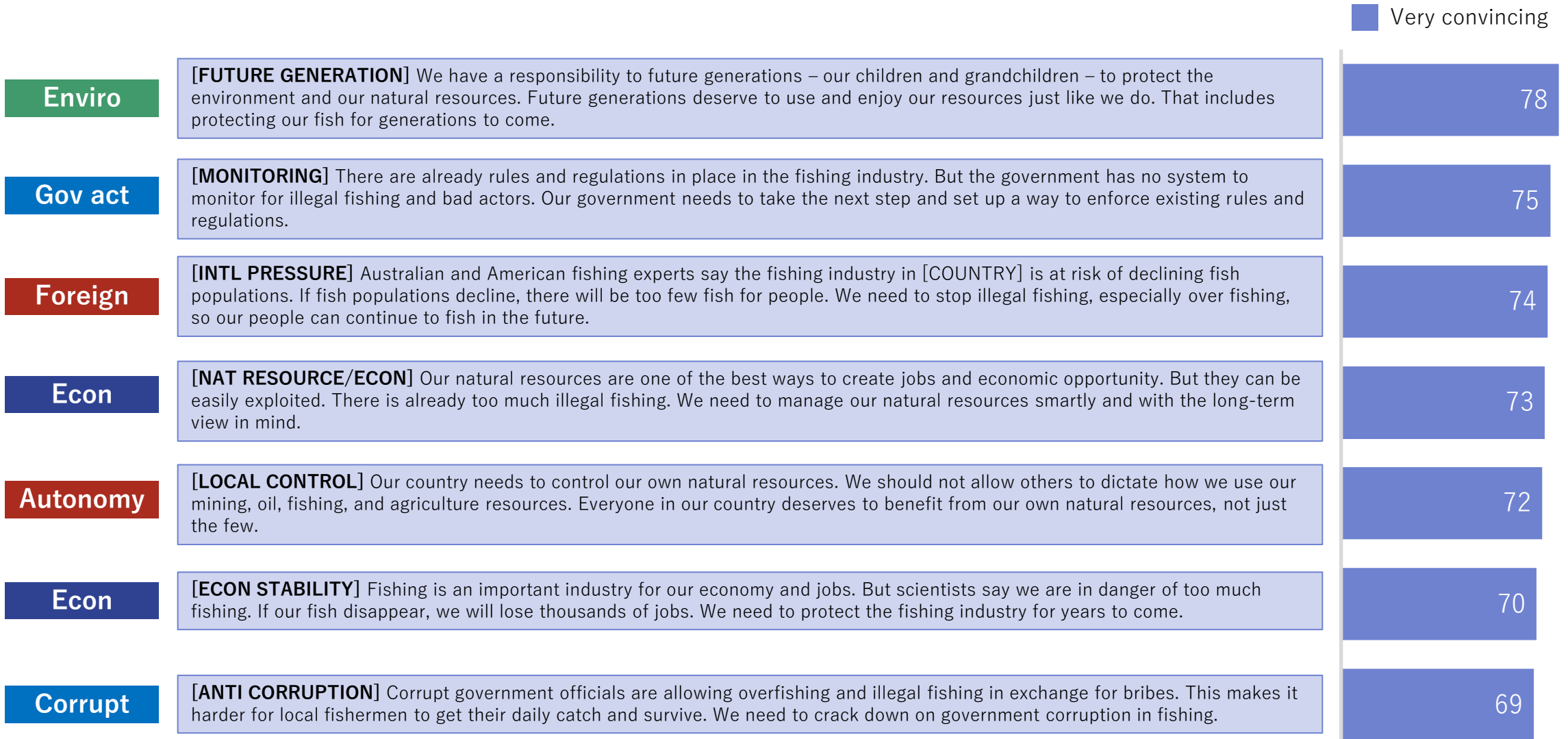


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# FFA: A similar story



Q. I am going to show you some statements some people have made about taking more action to protect the fishing industry. After you read each statement, please tell me whether that statement is very convincing, somewhat convincing, a little convincing, or not at all convincing to support more action to protect the fishing industry.

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# We hypothesized a few different strategic options

Option 1: Lean into environment and sustainability [Status quo]

Option 2: Link fishing to the economy: put jobs at the center of all of it

Option 3: Focus on government mismanagement + impact of corruption (higher costs for consumers, fewer jobs for workers)

Option 4: Go hard against big companies illegally and overfishing

Option 5: Go hard against foreign fishing



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# Putting these strategies in a larger context:

Option 1: Lean into environment and sustainability [Status quo]



Status quo, people already believe this but it lacks urgency

Option 2: Link fishing to the economy: put jobs at the center of all of it



Elevates to a top issue, part of immediate concerns

Option 3: Focus on government mismanagement + impact of corruption (higher costs for consumers, fewer jobs for workers)



The direct link and urgency are not there; a supporting role, perhaps

Option 4: Go hard against big companies illegally and overfishing



Similarly, insufficient to carry the day, but plays a supporting role

Option 5: Go hard against foreign fishing



Elements may work in FFA but isn't the whole story



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# Putting these strategies in a larger context:

Option 1: Lean into environment and sustainability [Status quo]

→ Status quo, people already believe this but it lacks urgency

★ Option 2: Link fishing to the economy: put jobs at the center of all of it

→ Elevates to a top issue, part of immediate concerns

Option 3: Focus on government mismanagement + impact of corruption (higher costs for consumers, fewer jobs for workers)

→ The direct link and urgency are not there; a supporting role, perhaps

Option 4: Go hard against big companies illegally and overfishing

→ Similarly, insufficient to carry the day, but plays a supporting role

Option 5: Go hard against foreign fishing

→ Elements may work in FFA but isn't the whole story

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The nuance:  
leveraging additional  
strategic and messaging  
elements



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## OPTION 3: Corruption

Option 1: Lean into environment and sustainability

Option 2: Link fishing to the economy: put jobs at the center of all of it

**Option 3: Focus on government mismanagement + impact of corruption (higher costs for consumers, fewer jobs for workers)**

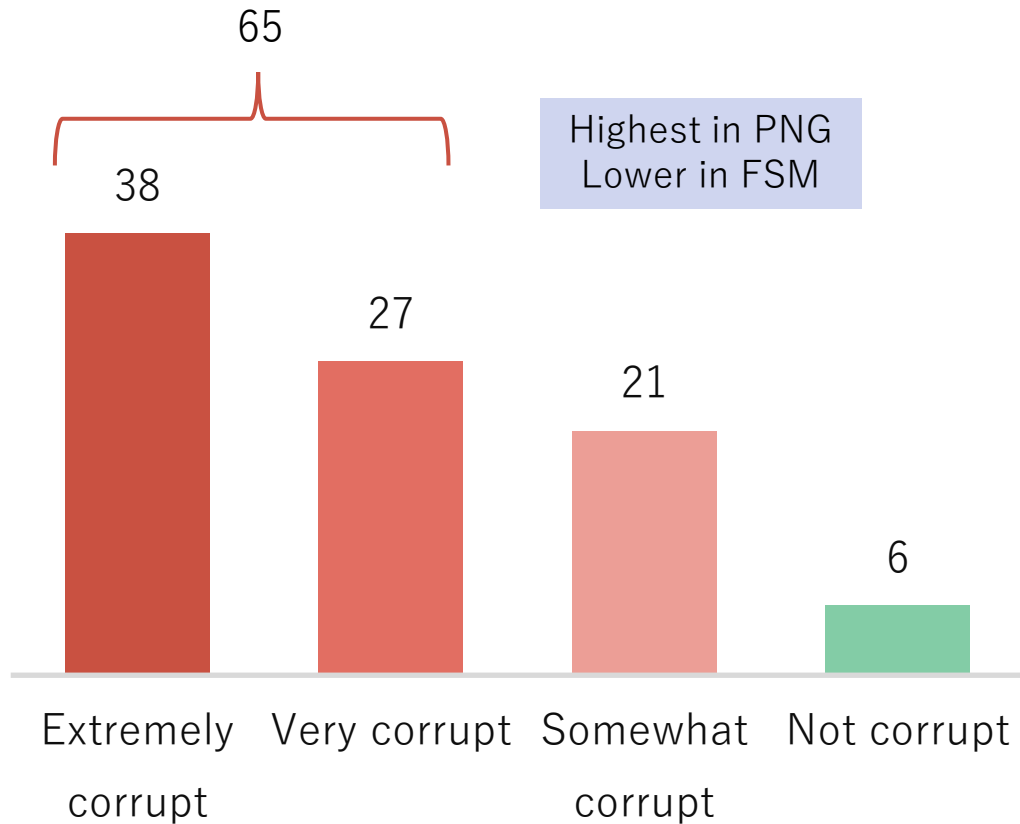
Option 4: Go hard against big companies illegally and overfishing

Option 5: Go hard against foreign fishing



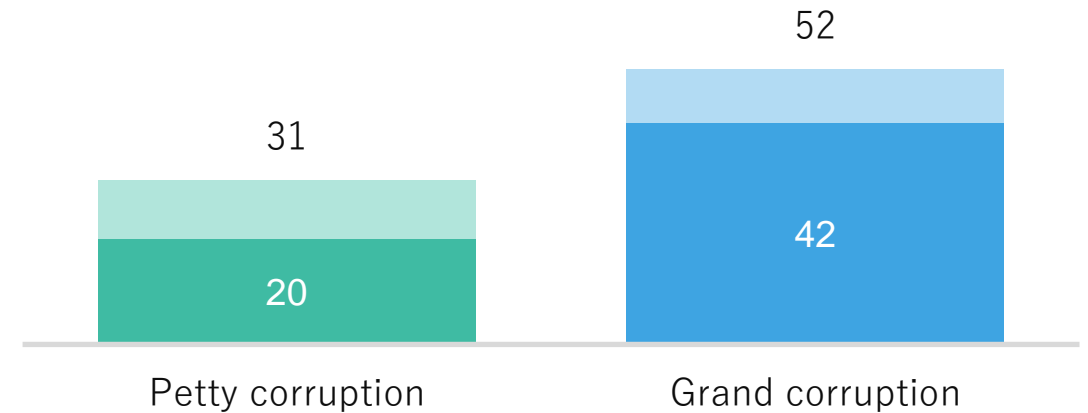
# Corruption is widespread in FFA, particularly grand corruption

Perception of national government



Bigger corruption issue...

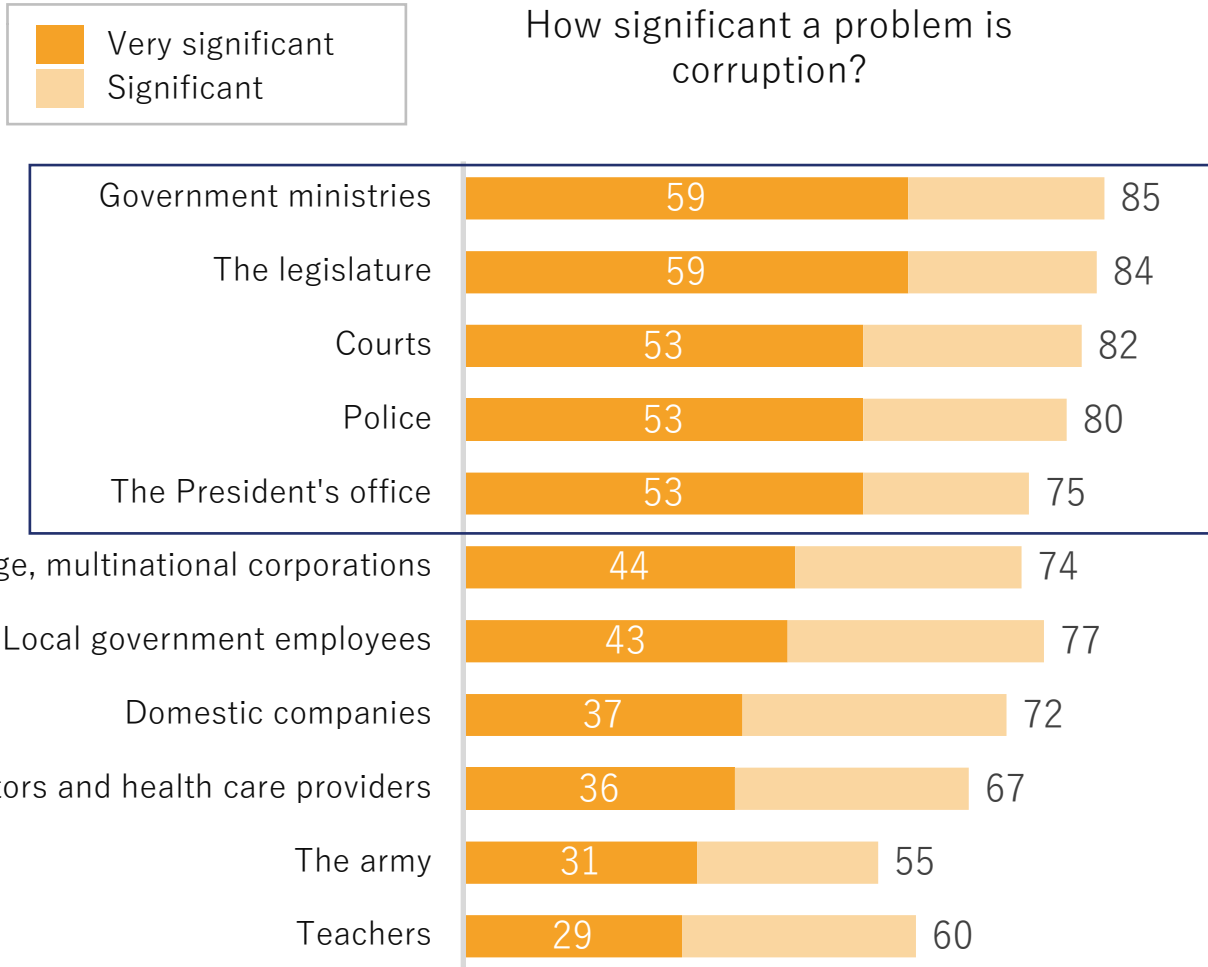
**“We cannot trust politicians now, we can’t trust them 20 years from now. We feel it can change, we just need to hold people accountable for the corruption.”**  
 – Woman, Port Moresby, Papua New Guinea



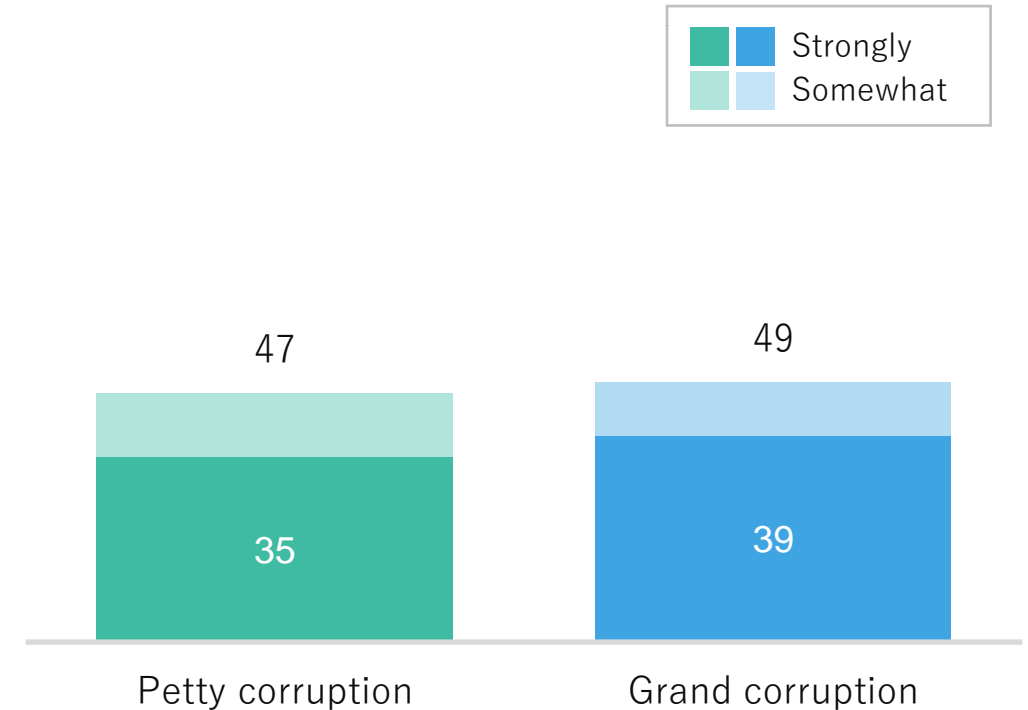
(Left) Q. Let me ask you something else. Thinking about the national government, some people believe the government is corrupt, and some people believe it is not corrupt at all. What about you, would you say the national government is corrupt or not corrupt?

(Right) Q. Now, I am going to show you several pairs of statements about government. For each pair, please tell me which one comes closest to your own view.

# And in Lat Am, corruption permeates all sections of society



*Bigger corruption issue...*



(Left) Q. For each of the following groups, organizations, agencies, etc. in [COUNTRY], how significant of a problem is corruption within that group?  
 (Right) Q. Now, I am going to show you several pairs of statements about government. For each pair, please tell me which one comes closest to your own view.



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# Government corruption is about economic mismanagement, struggling people

“Corruption in the nation has been an issue for 20, 30 years. In the end, **everyone steals**. What we need to see is for governments to actually do something for citizens. To strive for the government to **invest whatever they have in the public**. But, unfortunately, corruption has been a problem decades back, and the **burden falls on Ecuador**. This has been around way too long.”  
– Man, Guayaquil, Ecuador

“**Government is at fault for the economy**, there’s a **lot of corruption**. Our quality of life is very fragile, I’m not happy with how things are progressing in the economy. The **economy is being mismanaged**, they have enough resources, but the government is not driving change.”  
– Female, Port Moresby, Papua New Guinea

“Most of us are pretty poor. We have to **find a common good** to be able to support **infrastructure, jobs**. **We expect government to govern.**”  
– Man, Guayaquil, Ecuador

“**Nothing that the government is coming up with benefits the country as a whole**. We are struggling to sustain ourselves.”  
– Female, Port Moresby, Papua New Guinea

“This government is horrible, dreadful. I don’t see a single positive thing that they’re doing; even when I buy a lunch or whatever, **prices have just skyrocketed.**”  
– Man, Guayaquil, Ecuador

“I want government to fight corruption, but **most politicians are corrupted**. The previous and current governments are all the same, just acting in their own interests. After 20 years, it’s the same recycled leaders. **Corruption goes all the way down, there’s new government, but the same people on the payroll.**”  
– Female, Port Moresby, Papua New Guinea

“Those that are above the president, all those people who are fighting positions, all they do is just **squander the people’s wealth.**”  
– Woman, Guayaquil, Ecuador

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## OPTION 3: Corruption's impact on economy can help show people 'why' fishing industry is facing problems

### Option 3: Focus on government mismanagement + impact of corruption (higher costs for consumers, fewer jobs for workers)

Why do it: Government mismanagement is viewed as rampant in FFA countries and all Lat Am countries save Costa Rica. Further, government mismanagement is causing higher costs. Focusing on the impact of corruption—specifically higher costs—could elevate fishing reform from an environmental issue (last on the priority list) to a cost of living (top 3 on the priority list) and corruption (top 4) issue.

The data: On its own, anti-corruption messaging is strong: 6 in 10 people say it is a 'very' convincing reason to support more action to protect the fishing industry. By a 2:1 margin, corruption is viewed as a bigger problem than corporate greed.

But... Relative to other message frameworks, anti-corruption messaging is barely middle of the pack. In PNG focus groups, people struggled to connect the dots between government bribes, mismanagement, and higher prices.

Plus: Corruption in many of these countries is nearly intractable. We would be throwing our issue into a mostly uncontrollable quagmire. If we try to solve corruption, we create a larger mountain to overcome.

Still... We can use corruption and government mismanagement as a foil. This can be a "why" component to our otherwise economic story.

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## OPTION 4: Play off big companies

Option 1: Lean into environment and sustainability

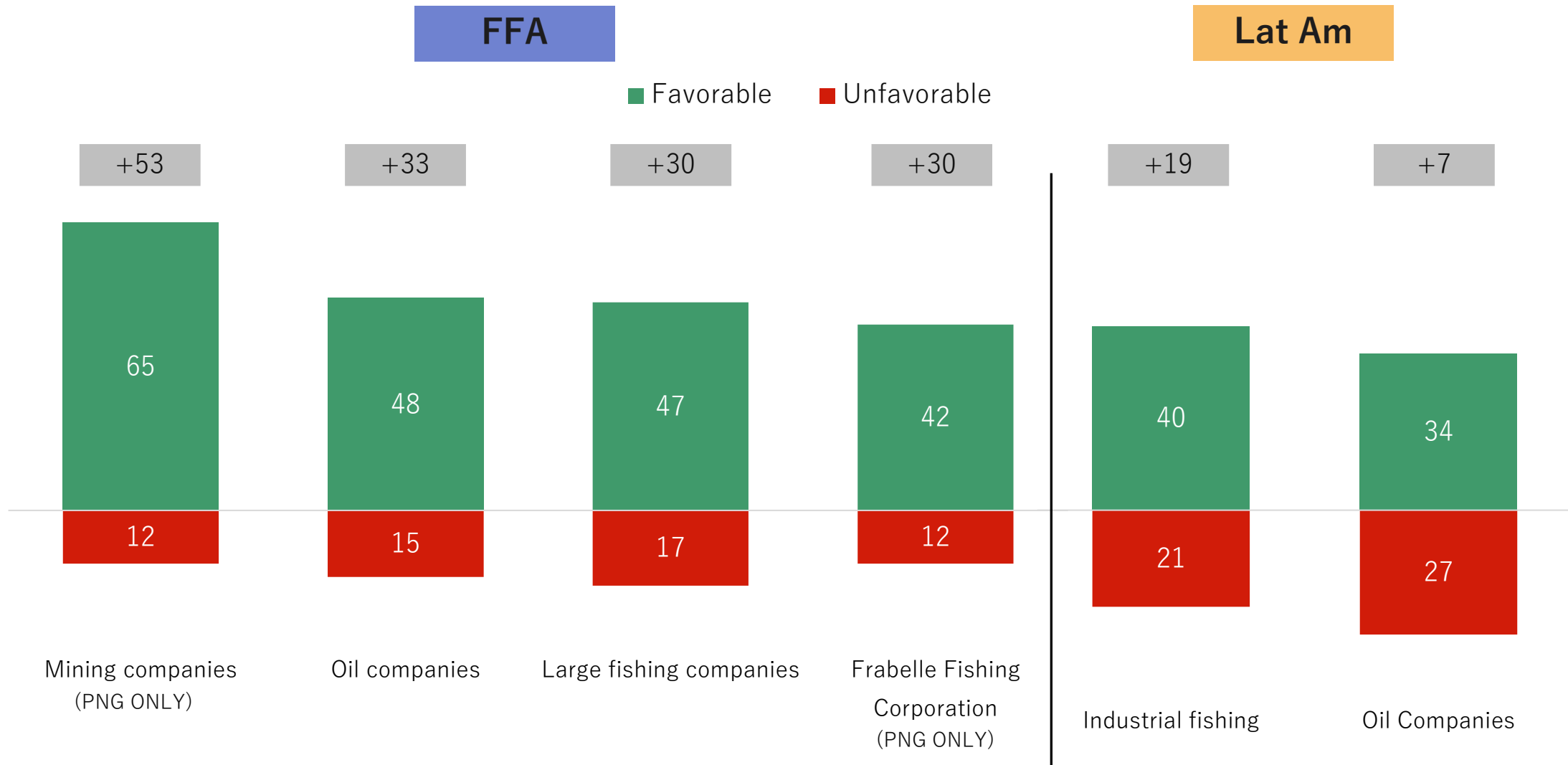
Option 2: Link fishing to the economy: put jobs at the center of all of it

Option 3: Focus on government mismanagement + impact of corruption (higher costs for consumers, fewer jobs for workers)

**Option 4: Go hard against big companies illegally and overfishing**

Option 5: Go hard against foreign fishing

# “Big corporations” are not a big bad; there are nuances



Q. I am now going to read through a list of names of people, groups and organizations. Please tell me whether you have a very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable opinion. If you do not have an opinion or have never heard of this, please say so.

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# Companies offer jobs, opportunities that the government is unable to

## Opportunity

“[During the pandemic], home delivery really grew. Doctors making home visits. They had to **innovate this**. Laboratory [techs] go to your home, take the blood test, do physical therapies. Many are doing well. **They had to innovate to break out of the crisis**. These are **opportunities that emerged**.”  
– Woman, Guayaquil, Ecuador

“**There are a lot of opportunities**, more on the processing side, for jobs. I know there are some plants up north.”  
– Woman, Port Moresby, Papua New Guinea

“I’d say the **creation of job opportunities** is partially the responsibility of not only the government but also the **company owners**.”  
– Man, Guayaquil, Ecuador

## Education

“Mining companies are good for the country because they **help with development and employment**. Lots of people are employed by them.”  
– Woman, Port Moresby, Papua New Guinea

“**These companies also develop schools for local people and provide training**. Locals can improve their skills level and have the ability to step up.”  
– Woman, Port Moresby, Papua New Guinea

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## OPTION 4: Big companies are not an intrinsic evil but can offer a foil when they are allowed to “exploit”

### Option 4: Go hard against big companies illegally and overfishing

Why do it: People are skeptical of big companies. In focus groups in both PNG and Ecuador, people thought big companies were overfishing and not abiding by fishing regulations. We would have a clear “bad guy” and plenty of hard data and facts to put in front of people—in other words, this is a real problem we could focus on.

But: Both the focus groups and the surveys raise flags in making this a core messaging strategy. While people know corporations bend or break laws and overfish, people also believe companies provide job opportunities when the government cannot or will not. Further, “domestic companies” are viewed very favorably in Lat Am, and Frabelle Fishing Corporation, though not universally known, holds nearly 4:1 positive ratings among the PNGers who do know it.

Bottom line: There is more nuance to this strategy than the others. More lines to walk. Corporations, while not good, are not the ‘big bad’. Centering big companies likely complicates our mission further.

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## OPTION 5: Play off foreign fishing

Option 1: Lean into environment and sustainability

Option 2: Link fishing to the economy: put jobs at the center of all of it

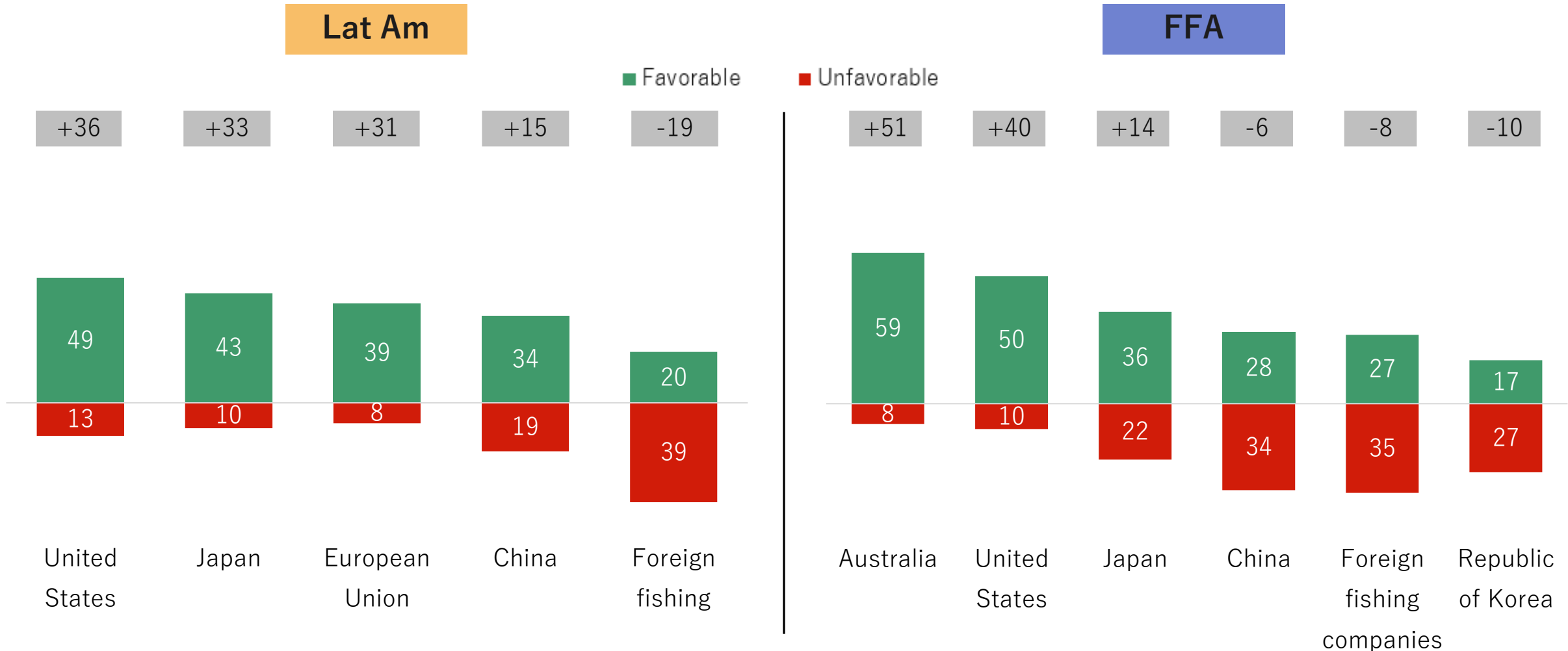
Option 3: Focus on government mismanagement + impact of corruption (higher costs for consumers, fewer jobs for workers)

Option 4: Go hard against big companies illegally and overfishing

Option 5: Go hard against foreign fishing



# “Foreign fishing” as a concept is unpopular, but most foreign actors are viewed favorably



Q. I am now going to read through a list of names of people, groups and organizations. Please tell me whether you have a very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable opinion. If you do not have an opinion or have never heard of this, please say so.





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# While people are against illegal (foreign or domestic) fishing, foreign countries offer export income and aid

## Aid + Support

“We have a lot of programs with the **US, they give us a lot of support.**”  
– Man, Port Moresby, Papua New Guinea

“We have **historical ties with Australia**, they have been with us for years.”  
– Man, Port Moresby, Papua New Guinea

“We **trade internationally** because the quality of our product is worth it, and [Asian countries] have the **purchasing power** to do so. It’s **better paid outside.**”  
– Woman, Guayaquil, Ecuador

“A good portion of [fish and seafood] remains here, and a great portion is exported. Obviously, we **export more than what remains.** We **try to export more of it** because it’s a **good source of income.**”  
– Man, Guayaquil, Ecuador

## Income + Pride

“We **export** because there are **species only produced in our seas, rivers**, so it’s **important to preserve** or else we will **face scarcity** in our future.”  
– Woman, Guayaquil, Ecuador

“We are the number one shrimp and tuna exporters, and we have with the Galapagos Islands and El Nino current. **It’s the ideal environment for fish, and that’s why many Asian ships come over here.** We are **extremely rich in seafood and fish.** We **have to safeguard this resource.**”  
– Woman, Guayaquil, Ecuador (Pro-Lasso)

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## OPTION 5: Similarly, foreign fishing is a useful foil when they are the cause of “exploitation”

### Option 5: Go hard against foreign fishing

Why do it: People in both FFA and Lat Am pick out foreign fishing as a serious problem facing the fishing industry. More than one in three people in Lat Am say this is the biggest threat to the industry. It also *is* a problem. Similar to pushing off of big companies, we have a lot of data to persuade people. Plus, the reality is in many of the countries we polled, foreign fishing is a larger percentage of fishing than domestic.

The data: Messaging built on the threat of foreign fishing is strong. “Foreign” as a term taps into societal currents. Though, similar to the nuance of ‘big corporations,’ foreign fishing can also represent a positive. Many of the big corporations providing jobs are foreign companies, including in fishing. In the Guayaquil focus groups, people took pride in the fact that Chinese fishing vessels crossed the ocean for Ecuador’s fish. And an ‘international pressure’ message (foreign countries are asking us to change) does just as well as an ‘international threat’ message.

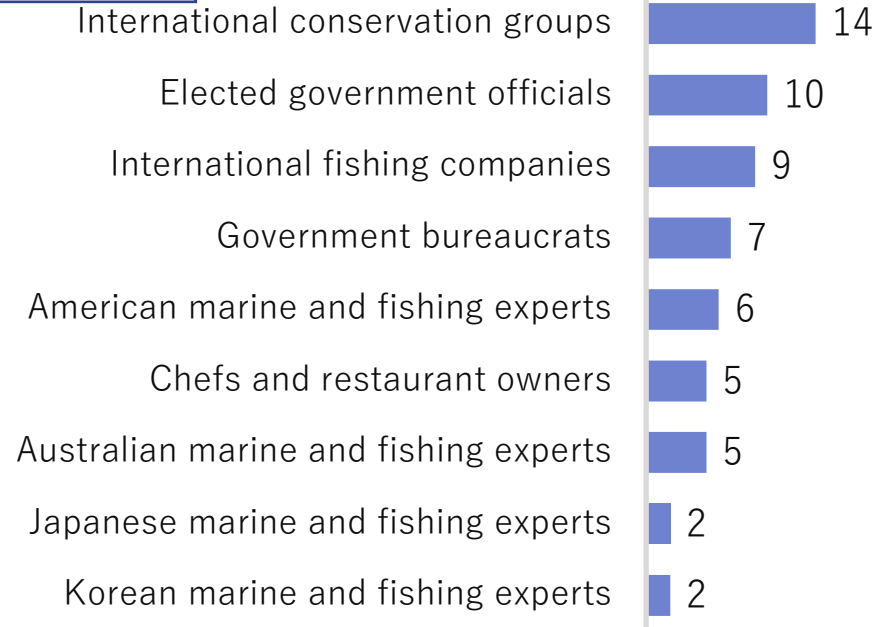
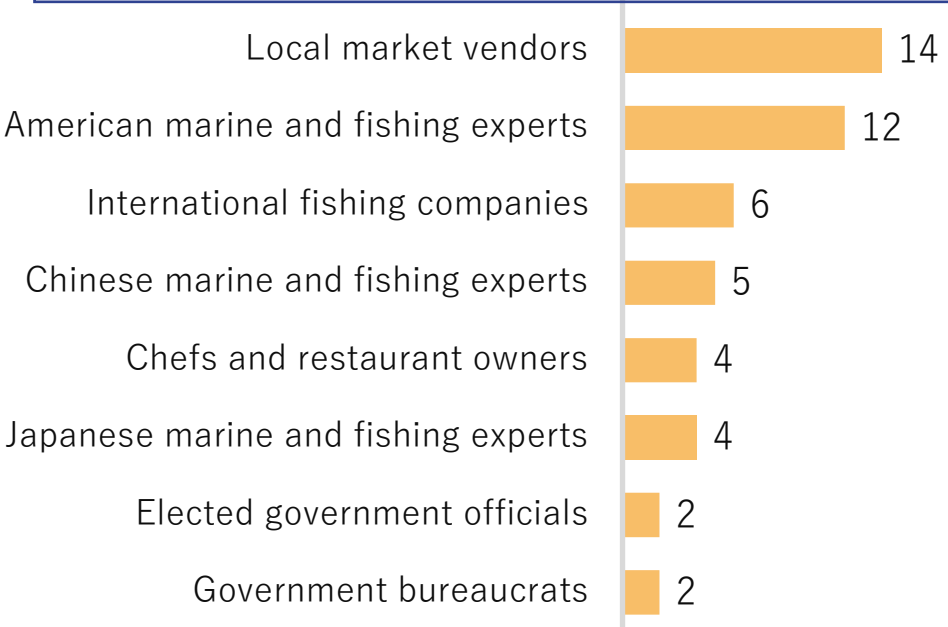
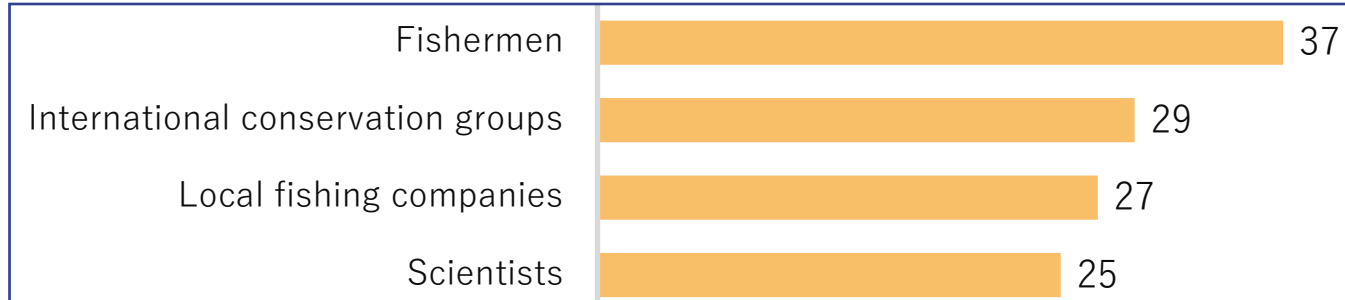
Plus: There are real concerns about where leaning into the foreign fishing angle will lead us. We will not have the biggest voice in this arena. Xenophobic interests could co-opt our strategy, leading us further astray. Focusing exclusively on foreign fishing also constricts our focus. Instead of increasing reforming the industry as a whole, we would be defining success as reducing one component.

Bottom line: Though media already covers it and activists push off of it, putting the threat of foreign fishing at the center of our strategy likely leaves us in less control.

# Fishermen are our strongest messengers; we can also deploy scientists and experts in Lat Am

Lat Am

FFA



Q. Now I am going to show you a list of some groups of people. After you read through the list, please tell me which TWO you would trust the most when it comes to information about the fishing industry in [COUNTRY].



---

# Strategic Recommendations



## Recommendations

1

---

**Overall Strategy: make mismanaged fisheries an economic threat.** The economy is the top issue in each country. Specifically, the high cost of living and lack of good-paying jobs. To have any chance of success, we need to associate the fishing industry with the economy. People already, generally, understand the environmental problems of unsustainable fishing practices. They do not fully grasp how problems in the fishing industry impact the entire economy.

---

2

**Strategic element 1: elevate “fishing” a natural resource.** People believe in the importance of fishing, but they do not put it at the level required to make this an urgent story for them. No direct approach is likely to succeed. Rather, we need to elevate fishing as a “natural resource,” which allows us to make the story a personal economic one instead of a macro, abstract, or esoteric story that doesn’t feel like it affects people in their daily lives.

---

3

**Strategic element 2: make natural resource protection an economic story.** It really is all about the economy. If we want to have a voice and raise urgency, we must make environmental issues a microeconomic story affecting people’s daily lives. The strongest approach we have here is to elevate the specter of natural resource loss/exploitation and the economic damage that would cause, not only for people today but future generations as well.

---

4

**Strategic element 3: broaden the economic reach of fishing.** Show people jobs they are in (or could see themselves in) are affected by a mismanaged fishery. It is about protecting jobs. Creating new jobs. Fishing jobs, yes. But also canning jobs, jobs for market vendors, chefs, restaurant workers, truck drivers, grocery workers, boat repair and maintenance services, and more. A stable, well-managed fishery supports jobs that create opportunities for people and put food on tables, not just of fishermen.

---

5

**Strategic element 4: make “exploitation” our enemy.** People in both FFA and Lat Am pick out foreign fishing as a serious problem facing the fishing industry. People also see grand corruption disrupt their daily economic lives. Pulling back the curtain on how these factors exploit and damage the fishing industry—a natural resource that creates jobs and opportunity—helps tell our story in a way that matters to people.

---

# Target groups

Two groups stand out at this stage as most open to persuasion. Additional analysis will refine these target groups, but for now:

**1) Low information groups:** People who are not as aware of fishing threats or do not see natural resources being exploited. More information moves them in our direction. They come to see fishing as under threat. These groups tend to be lower educated. In FFA they are in both the 18-24 age group (men and women) and the 50+ group (men only). In Lat Am they tend to be women, 18-34.

And

**2) Economically stressed groups:** People who are struggling the most and who prioritize jobs, cost of living and the economy highest. These groups are already more likely to see fishing as under very serious threat and move even further in our direction with more information. Obviously, this group is lower income. In FFA, they are also in the 25-50 age bucket (working age), and women 50+ (matriarchs). In Lat Am, they are younger (18-34), and more likely to be women than men.

# Country-specific nuances, relevant to strategy

## FFA



PNG

People are in bad shape. Half state their income is “not enough for our basic needs”

Economy is the **dominant concern**—particular focus on job creation

Corruption is rampant, and leaning into corruption works more here than anywhere else

**Safety and crime are a top 4 concern** in these countries



FSM

Economic situation is not as dire, but overall still tops the list of concerns

In better general shape than PNG, but with similar concerns—the intensity is just lower.

**“Overfishing”** seen as **biggest threat** to fishing and can play a stronger role here

Lowest level of belief that the national government is corrupt



COOK

**Highest baseline importance of fishing industry** to country’s economy

**“Foreign countries”** illegally taking fish seen as **biggest threat** to fishing

Particularly strong support for **“natural resources should benefit everyone”**

## Lat Am



CR

More environmentally-friendly and sustainability-oriented

Highest belief that **future of the fishing industry is under threat**

Highest concern for cost of living and prices, despite less dire situation and less pessimism

Corruption angle is least strong here

Most receptive to scientist warnings



PAN

Lowest baseline importance of fishing industry to country’s economy

Lowest concern for safety and crime

Least concerned about climate change, but higher baseline importance of sustainable fishing

Most persuadable on sustainability and importance of fishing to the economy (based on pre/post message test shifts)



MEX

Higher concern for safety and crime

Greatest environmental concern is water scarcity and drought

Least open to ‘sustainability’ as a term, but very open to sustainability tenets



ECU

Highest baseline importance of fishing industry to country’s economy

Highest concern for safety and crime

Less likely to feel ‘confused’ about possible threats to the fishing industry

Highly receptive to messaging around wrongful exploitation of natural resources

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# Message box

*Based on the strategy we outline, here is a draft message box. A message box is not a word-for-word ad script nor is it meant to be used in communications as-is. Rather, it establishes our central strategic narrative.*

Fishing in [COUNTRY] is a critical natural resource that we must protect. It provides jobs beyond just fishermen—from canners, to restaurant to grocery workers, to truck drivers, to market vendors. It provides opportunities for our young people, at a time when too many graduates roam the streets looking for work. And it provides a source of food, without which prices for all other foods increases.

Unfortunately, exploitation of our natural fishing resources means fish stocks are disappearing. Fewer fish is a problem for all of us. If we do not protect our fishing industry, we will lose XX jobs every year, and prices of food will increase by XX.

This threat is real. Fishermen and scientists tell the same story. We must stop the exploitation of our natural fishing resource. Government needs to create a sustainable approach to fishing that protects this resource today and for future generations.



---

# Message box elements

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Main theme

Unfortunately, exploitation of our natural fishing resources means fish stocks are disappearing. Fewer fish is a problem for all of us. If we do not protect our fishing industry, we will lose XX jobs every year, and prices of food will increase by XX.

This threat is real. Fishermen and scientists tell the same story. We must stop the exploitation of our natural fishing resource. Government needs to create a sustainable approach to fishing that protects this resource today and for future generations.

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Tie directly to economy, both today and tomorrow.

Unfortunately, exploitation of our natural fishing resources means fish stocks are disappearing. Fewer fish is a problem for all of us. If we do not protect our fishing industry, we will lose XX jobs every year, and prices of food will increase by XX.

This threat is real. Fishermen and scientists tell the same story. We must stop the exploitation of our natural fishing resource. Government needs to create a sustainable approach to fishing that protects this resource today and for future generations.

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Unfortunately, exploitation of our natural fishing resources means fish stocks are disappearing. Fewer fish is a problem for all of us. If we do not protect our fishing industry, we will lose XX jobs every year, and prices of food will increase by XX.

Exploitation as  
the threat

This threat is real. Fishermen and scientists tell the same story. We must stop the exploitation of our natural fishing resource. Government needs to create a sustainable approach to fishing that protects this resource today and for future generations.

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Leverage our two messengers



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# Message box elements

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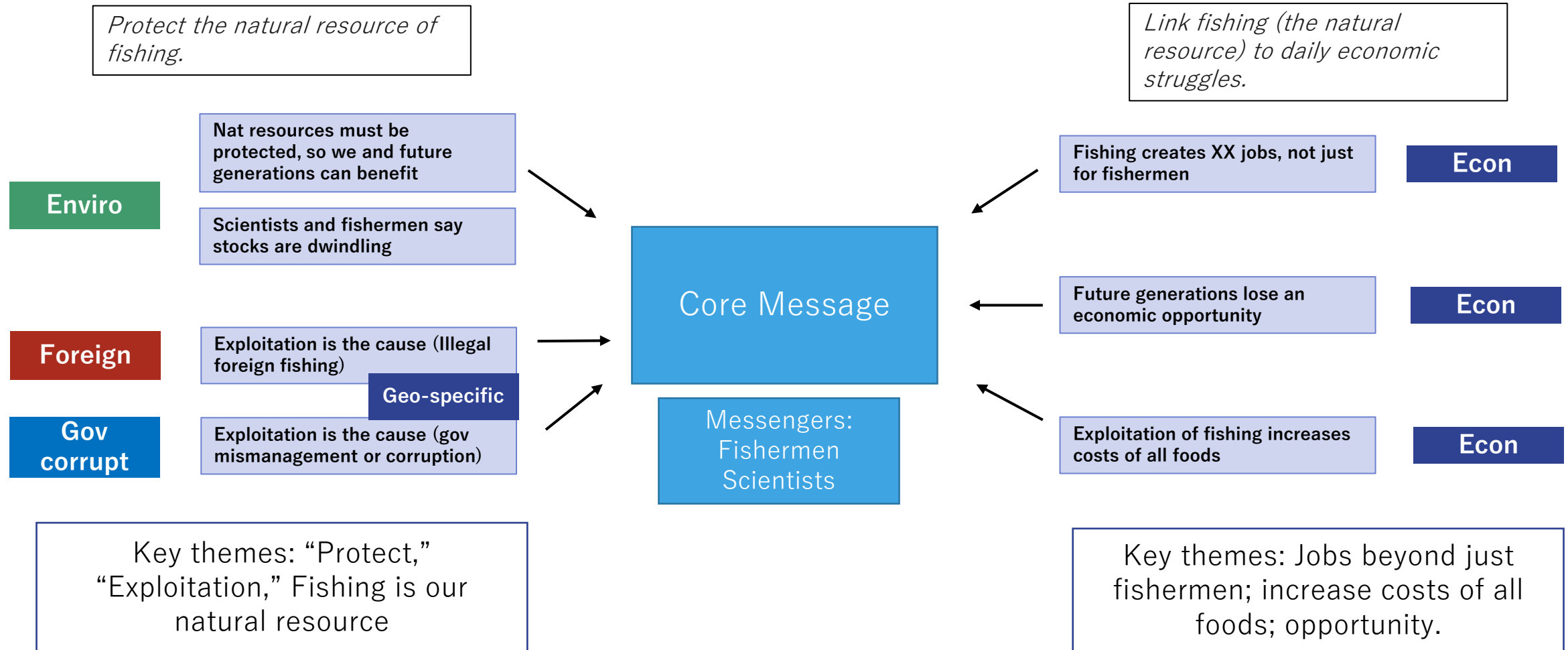
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Refrain of main theme



# Elements of the tested messages, in action



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# Appendix



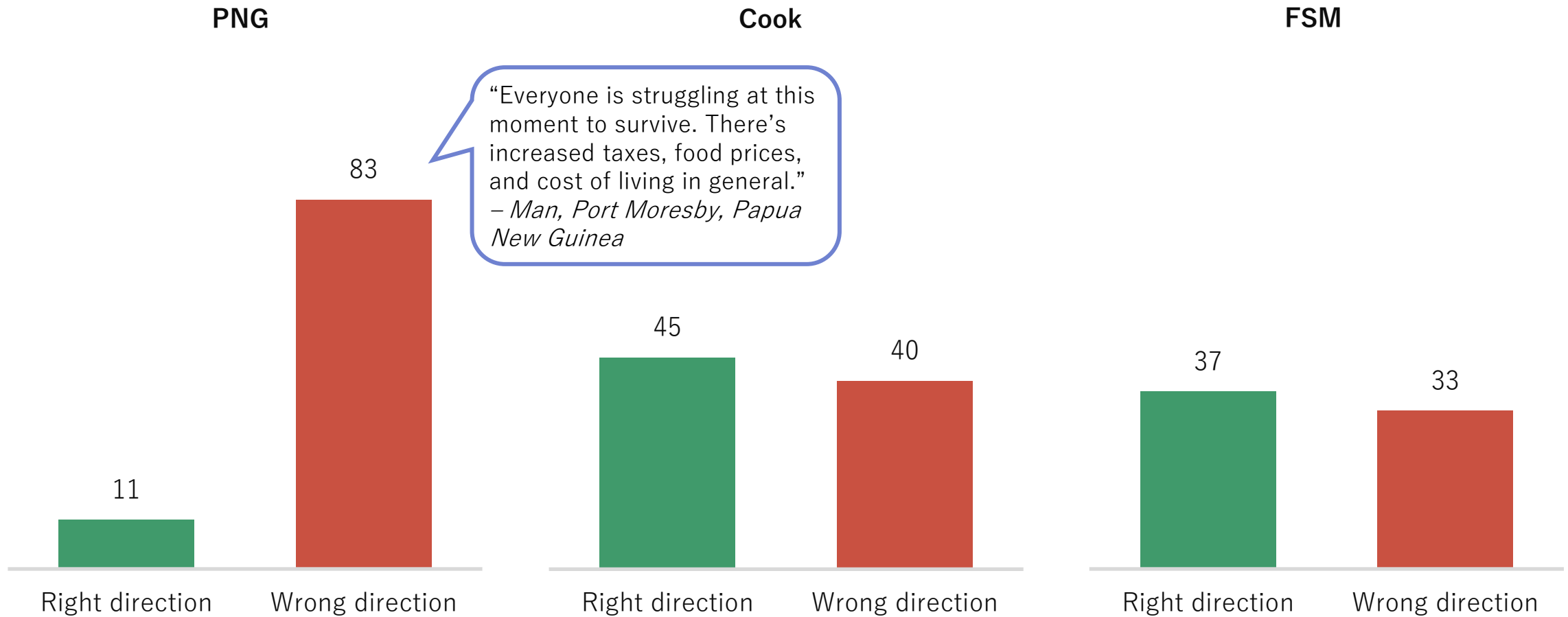
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# Broad pessimism

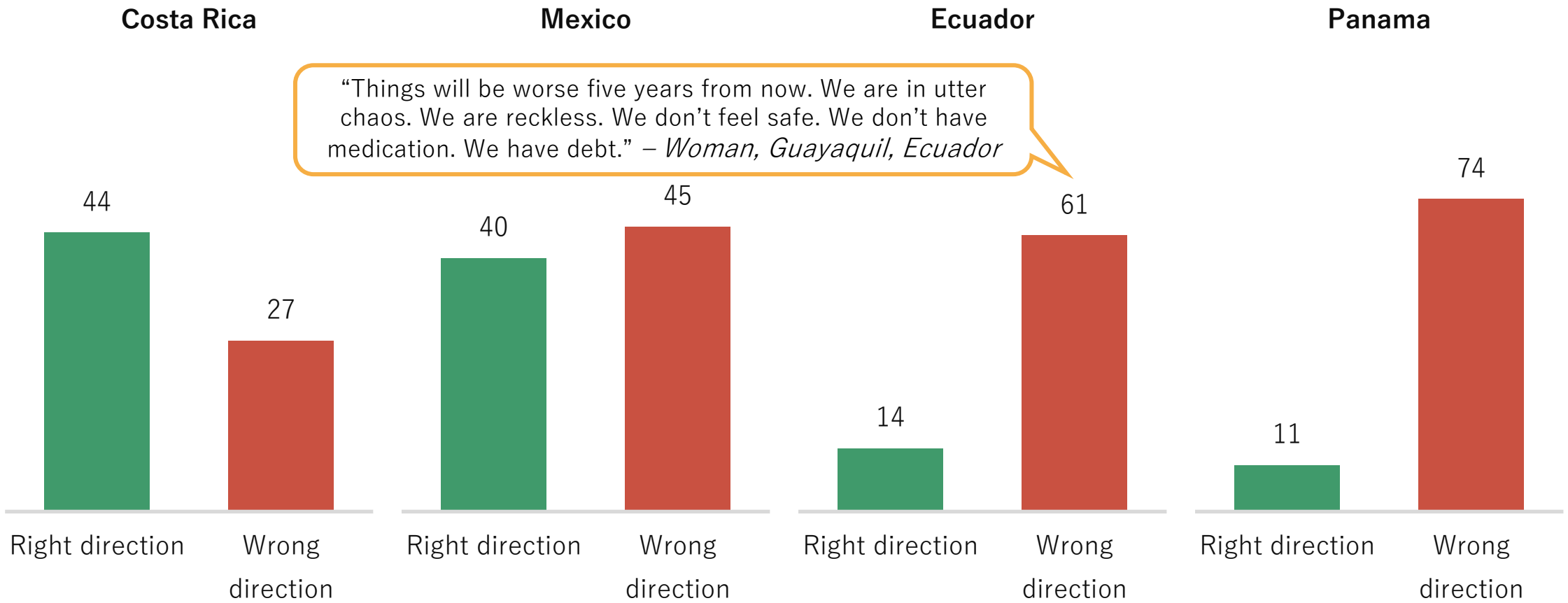




# PNG residents are under extreme stress; Cook and FSM residents have a mixed outlook



# Outside Costa Rica, Lat Am residents are pessimistic



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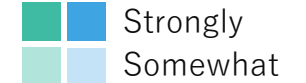
# Role of government

GOBERNACION DEL AZUAY

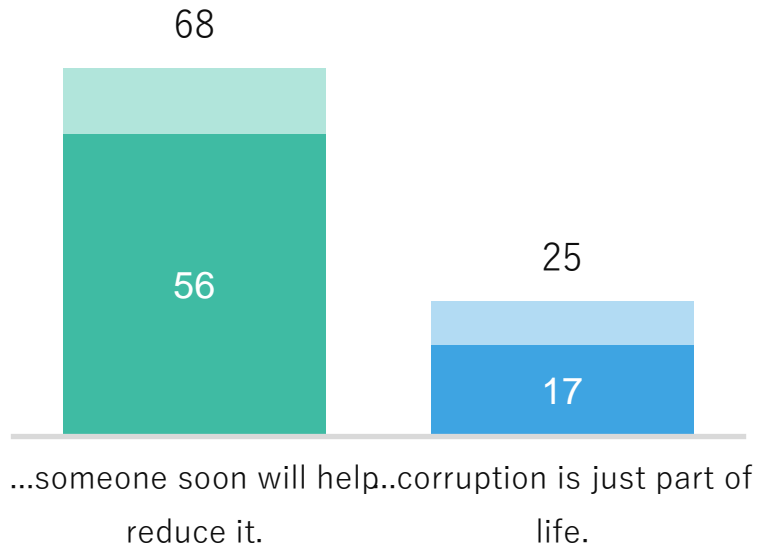
# There is hope for change in FFA, and belief in Lat Am that the people have the power to make their lives better

FFA

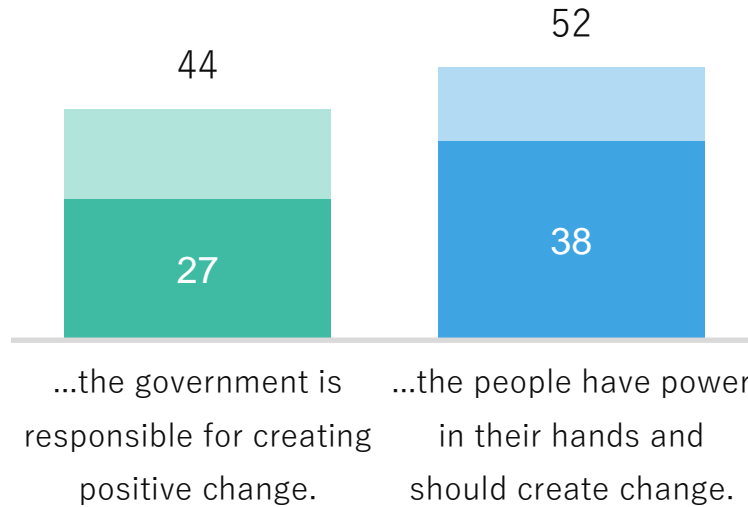
Lat Am



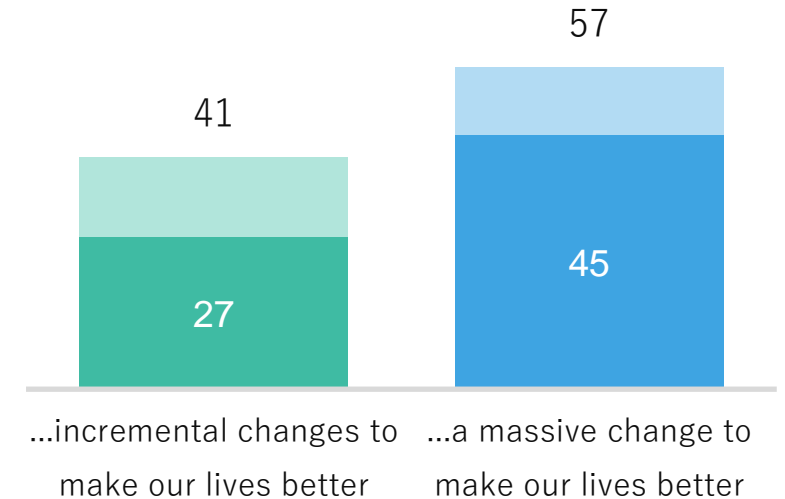
*Dealing with corruption...*



*Who is responsible for change...*



*We need to make...*

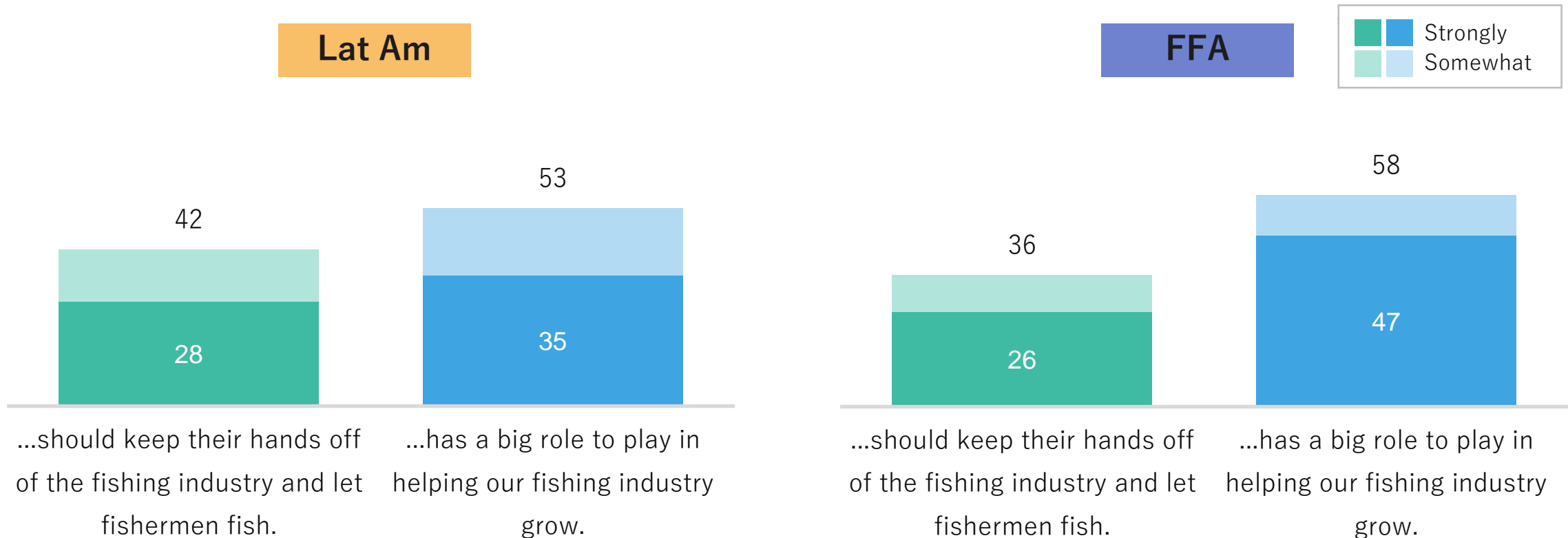


Q. Now, I am going to show you several pairs of statements about government. For each pair, please tell me which one comes closest to your own view.



# Majorities view government as having a big role to play in helping fishing industry grow

*The government...*

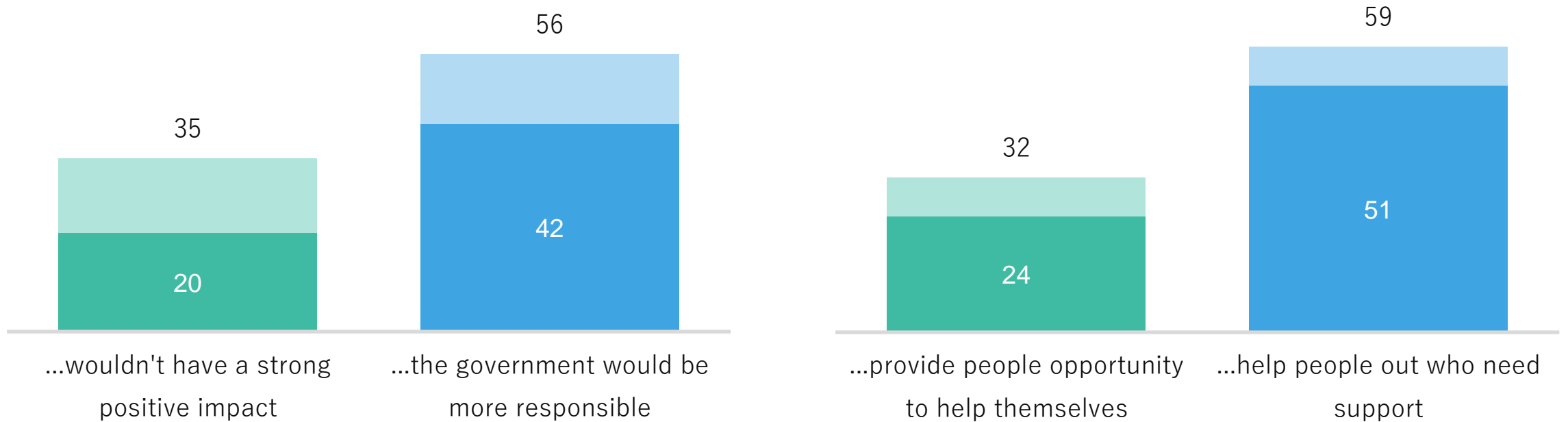
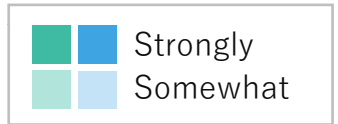


(Left-side) Q. Now, you'll see two statements about the fishing industry. Please read both and indicate which one comes closer to your own view.  
 (Right-side) Q. Now, I am going to read you two statements about the fishing industry. Please tell me which one comes closer to your own view.

# Over half of people expect government to provide support to those who need it; more than half believe gov would be better with more women in leadership

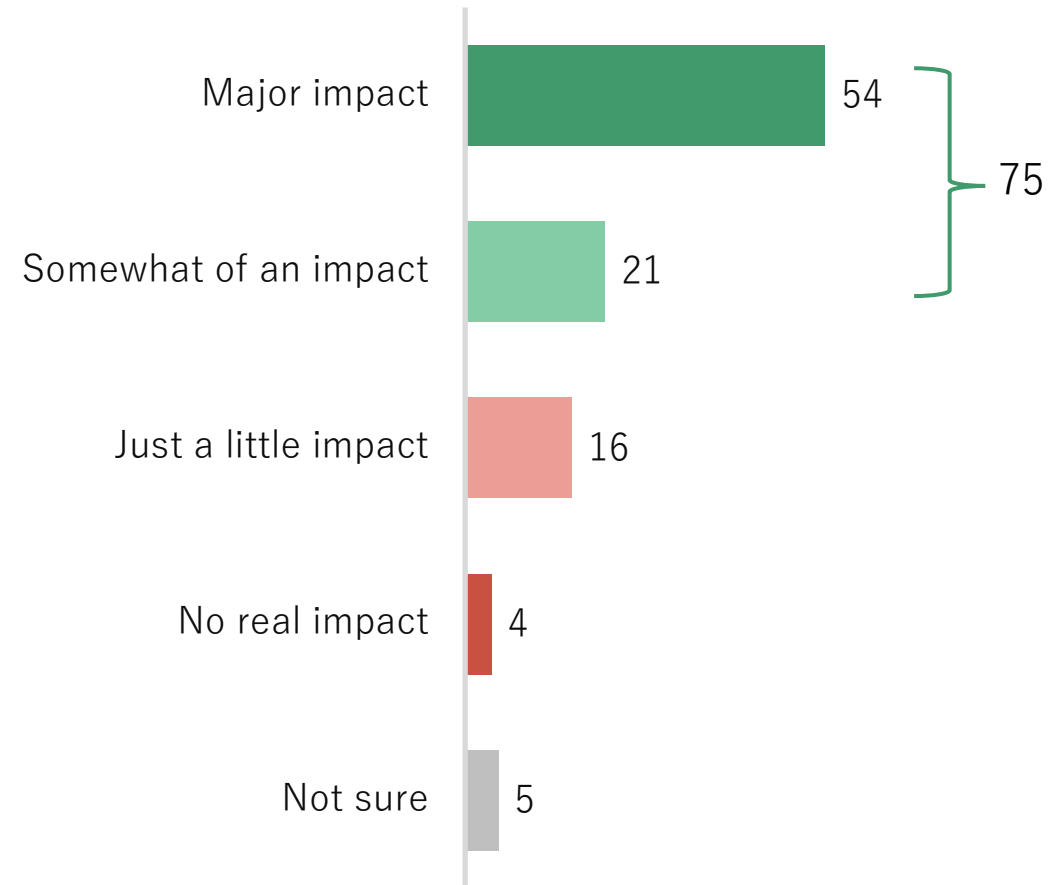
*More women in government...*

*I expect government to...*



# Most believe more government transparency would reduce corruption

Impact of Increasing Government Transparency on Corruption



Q. Some people say increasing government transparency may help reduce corruption. What about you – would making government decisions and spending more transparent have a major impact on corruption, somewhat of an impact, just a little impact, or would it have no real impact on corruption?

---

# Full text of debates





---

# Head-to-head debate in FFA – full text

## Our message

**(1/3 SAMPLE) [PROTECT INDUSTRY FROM GOV]** We need to act now to protect the fishing industry from government mismanagement and corruption. Fishermen are fishing to make a living. Government mismanagement makes it harder for fishermen to get their daily catch and sell it by making harder rules for local, small fisherman compared to the big companies, especially foreign ones. Corrupt government officials should not be telling our fishermen what to do.

**(1/3 SAMPLE) [LINK TO CORRUPTION]** The fishing industry faces problems from government corruption just like other industries. The government allows illegal fishing and forces fishermen to pay bribes to fish. The fishermen have to pay these bribes somehow, which increases the cost of fish for the rest of us. This is wrong. We need to crack down on government corruption and help all industries, including fishing, grow without government interference.

**(1/3 SAMPLE) [EVERYONE, JOBS]** We need to use our natural resources for the benefit of everyone, not just the few. That includes our fish. It is one of our many natural resources we should use to create good-paying jobs, instead of squandering or stealing to benefit the elites. We need to listen to scientists and fishermen to determine the best way to ensure fishing for generations to come.

**VS**

## Opposition message

**[PRIORITY]** The fishing industry is not a priority right now. It is doing fine as is. There are more important issues the government should deal with, like creating more job opportunities, helping businesses grow, reducing crime, and building more schools. We do not need to take more action on the fishing industry. We need more action on issues that affect everyone.



---

# Head-to-head debate in Lat Am – full text

## Our message

**(1/2 SAMPLE) [ECON INDUSTRY]** The fishing industry is an important source of jobs and exports in [COUNTRY], but our marine resources are threatened. The EU recently warned us they will ban our fish exports if we cannot control overfishing and illegal fishing practices. We need to act now to protect the jobs and exports in the fishing industry.

**(1/2 SAMPLE) [NAT RESOURCE]** According to marine scientists, only 50 percent of fish stocks in [COUNTRY]'s waters are biologically sustainable. Overfishing and illegal fishing practices are putting fish stocks in danger of collapse, jeopardizing one of our most important natural resources. We need to act now to protect the biodiversity and viability of our marine life for future generations.

**VS**

## Opposition message

**[PRIORITY]** The fishing industry is not a priority right now. It is doing fine as is. There are more important issues the government should deal with, like creating safer communities, reducing crime and helping businesses grow. We do not need to take more action on the fishing industry. We need more action on issues that affect everyone.

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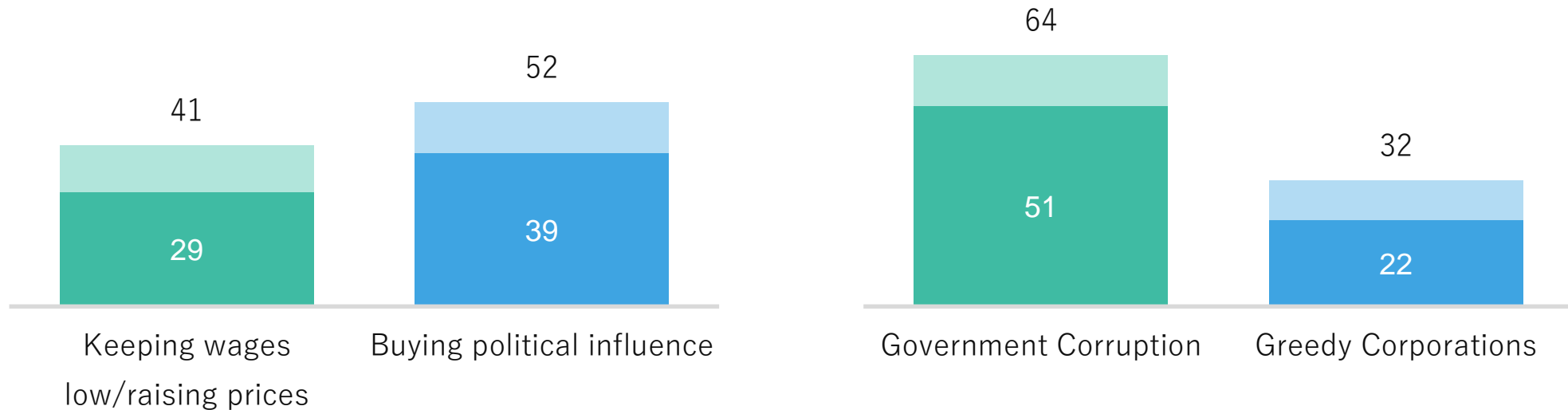
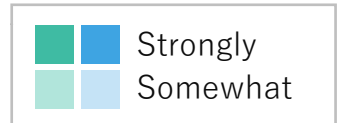
# Nuanced views on corporations



# Corporate influence in government is a bigger problem than corporate greed

*Biggest corporate issue...*

*...the primary problem*



Q. Now, I am going to show you several pairs of statements about government. For each pair, please tell me which one comes closest to your own view.

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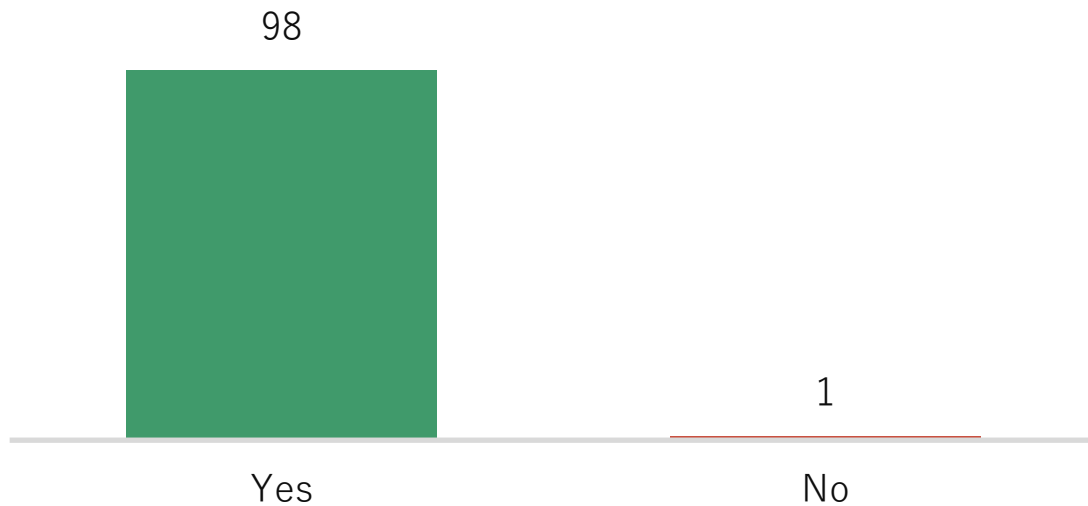
# Increasing support for our positions



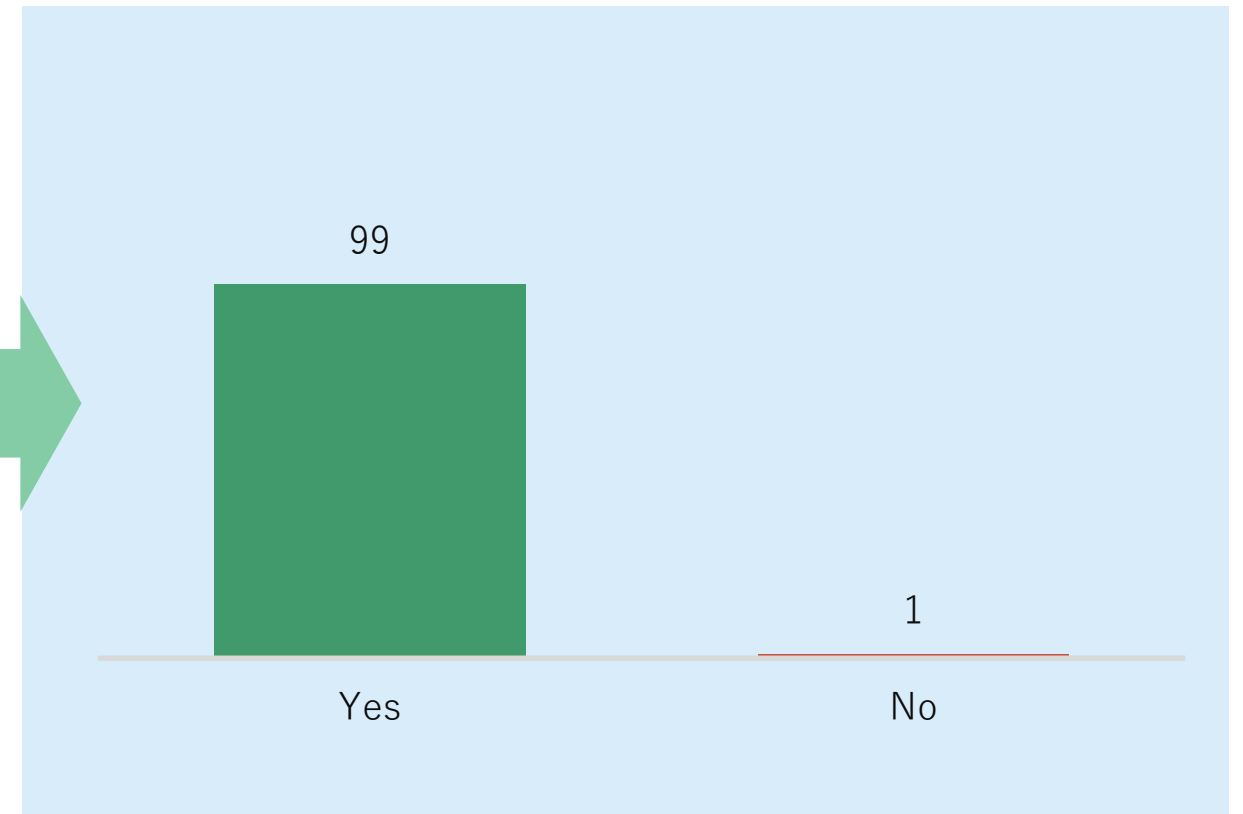
# Fish are a natural resource, full stop

Fish as a Natural Resource

Initial



Final

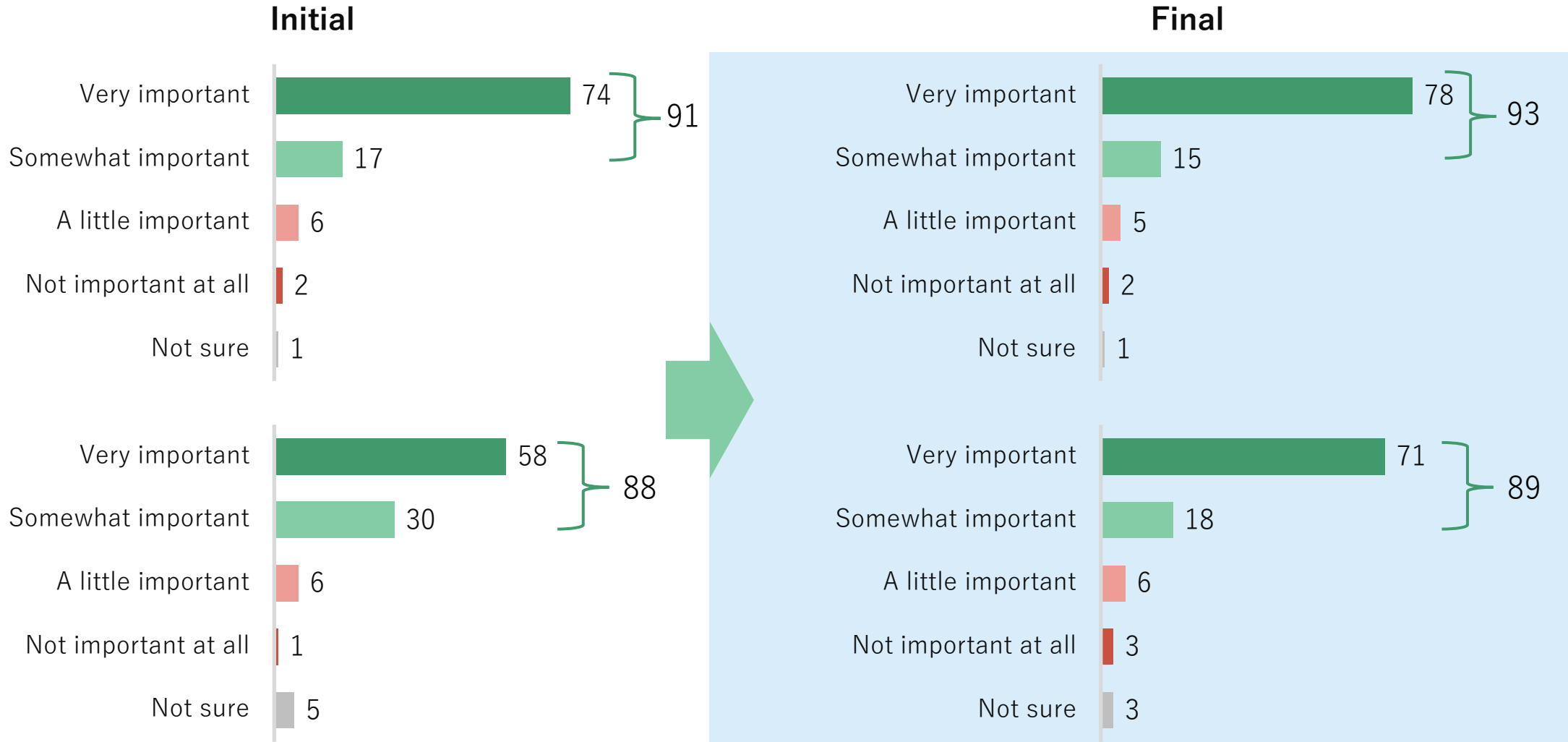


# High baselines for “importance” of fishing to the economy

Importance of Fishing Industry to Country’s Economy

**FFA**

**Lat Am**



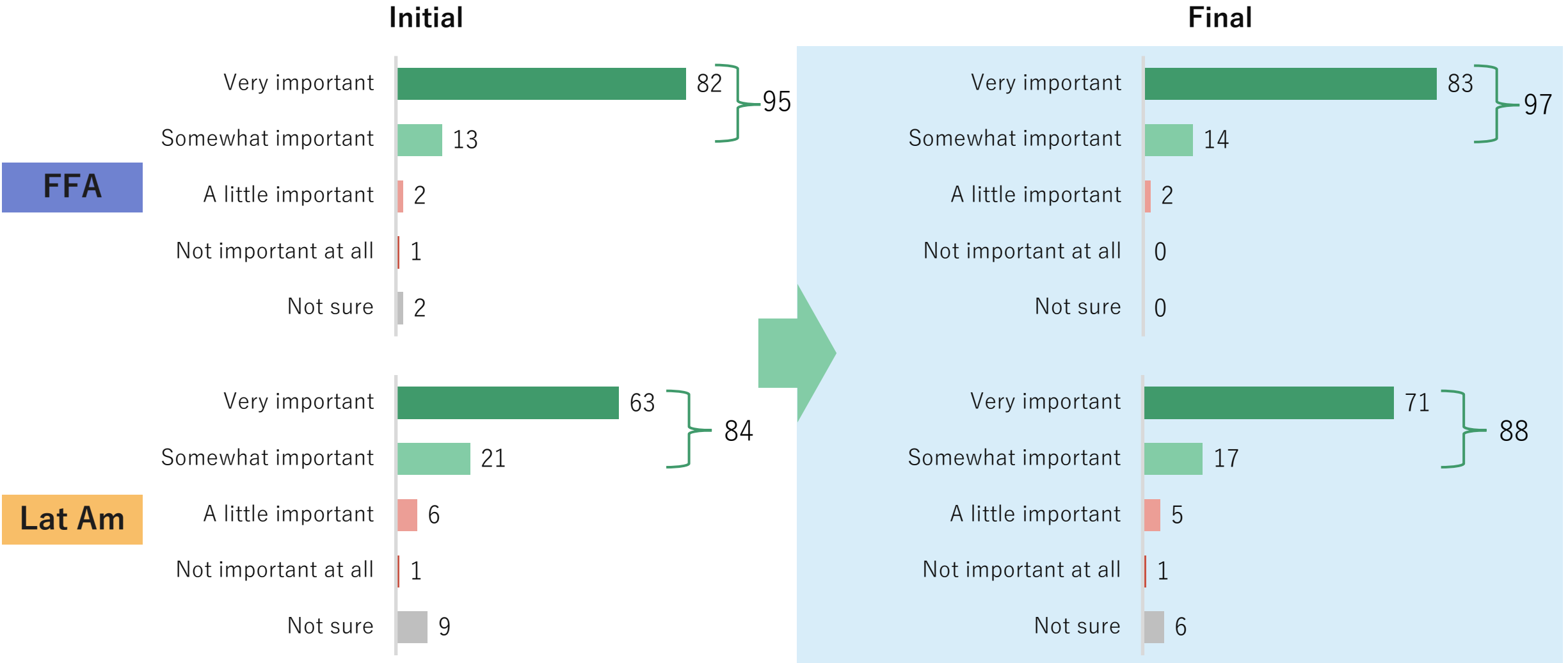
(Left-side) Q. From what you may know, how important is the fishing industry to the country’s economy?

(Right-side) Q. Now that you have more information, I am going to ask a few questions again. How important is the fishing industry to the country’s economy?



# “Sustainable fishing” is more important after messaging in Lat Am

Importance of Sustainable Fishing to Fishing Industry’s Long-Term Stability



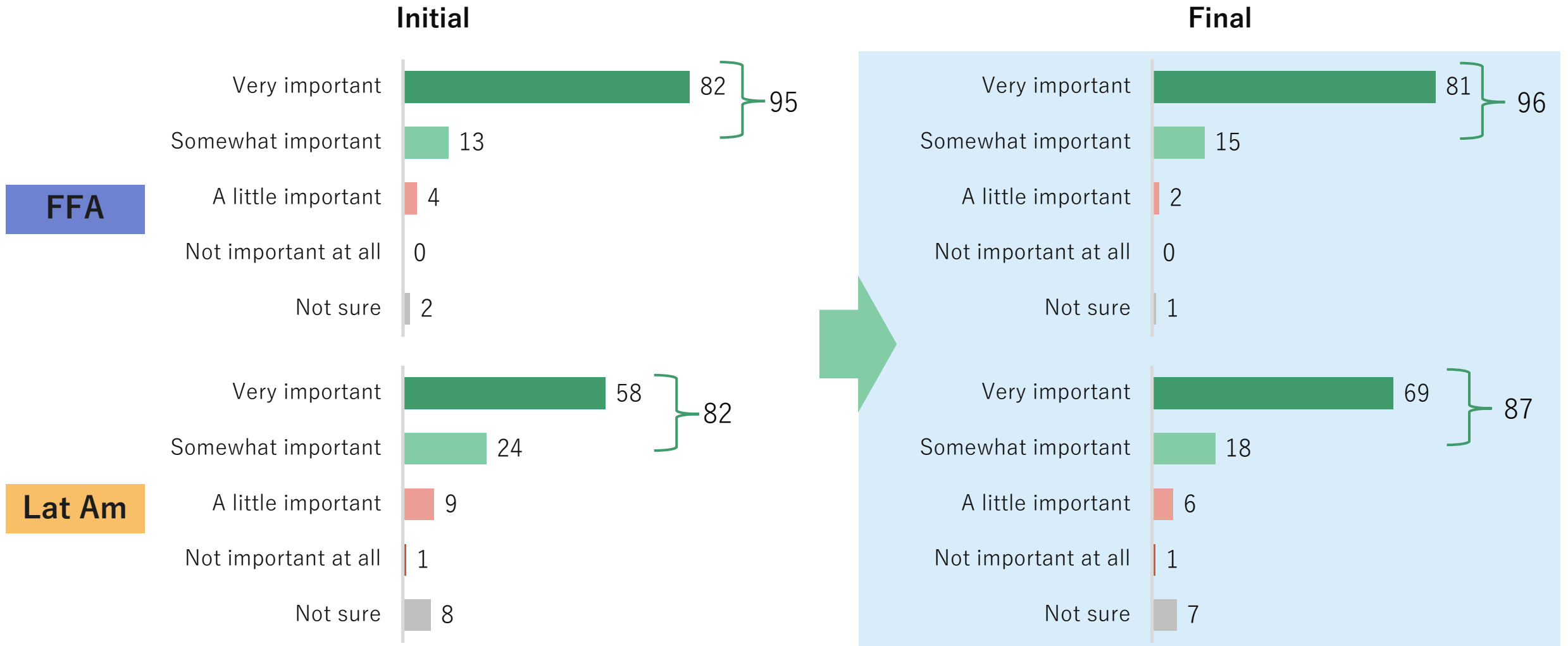
(Left-side) Q. From what you may know, when it comes to the long-term stability of the fishing industry, how important is sustainable fishing?

(Right-side) Q. How important is sustainable fishing?



# Support for maintaining strong fish populations grows in Lat Am

Importance of Maintaining Strong Fish Populations to Fishing Industry's Long-Term Stability

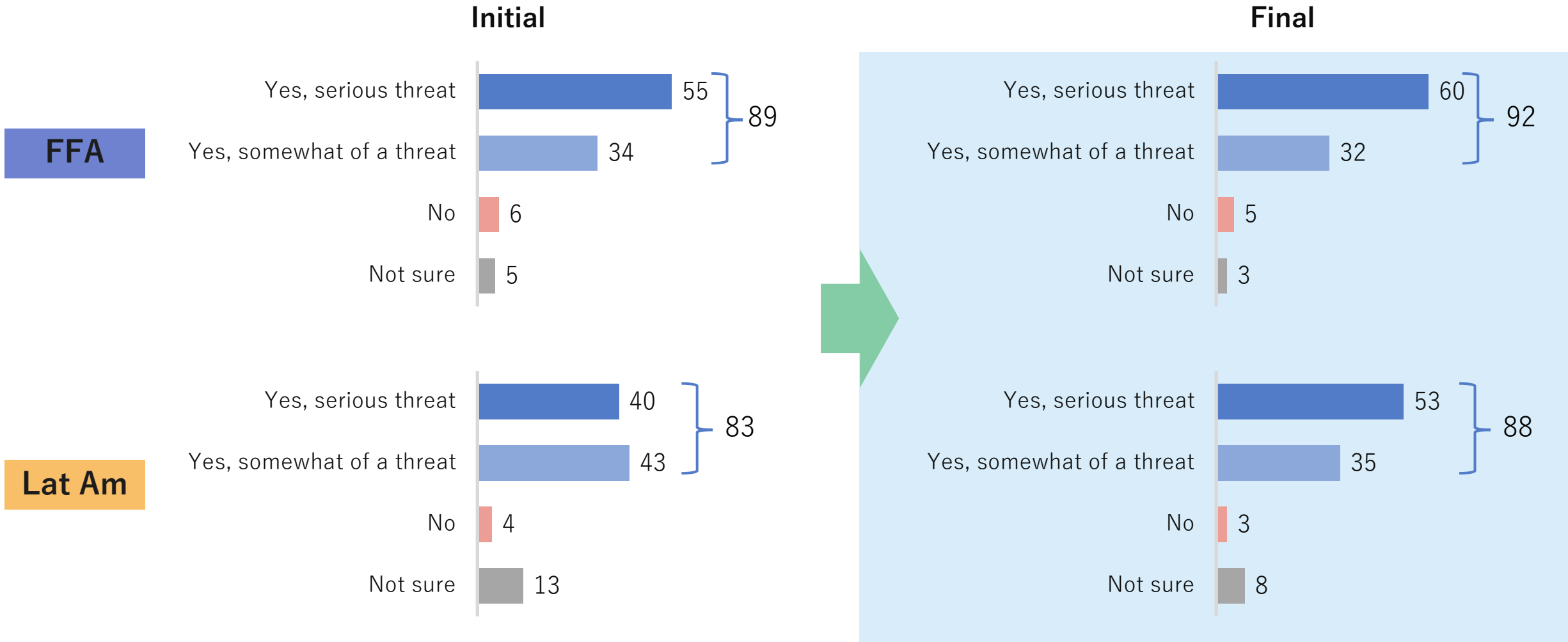


(Left Side) Q. From what you may know, when it comes to the long-term stability of the fishing industry, how important is maintaining strong fish populations?

(Right-side) Q. How important is sustainable fishing?

# “Serious” threats to fishing increase with messaging

Perceived Threat to Future of Fishing Industry



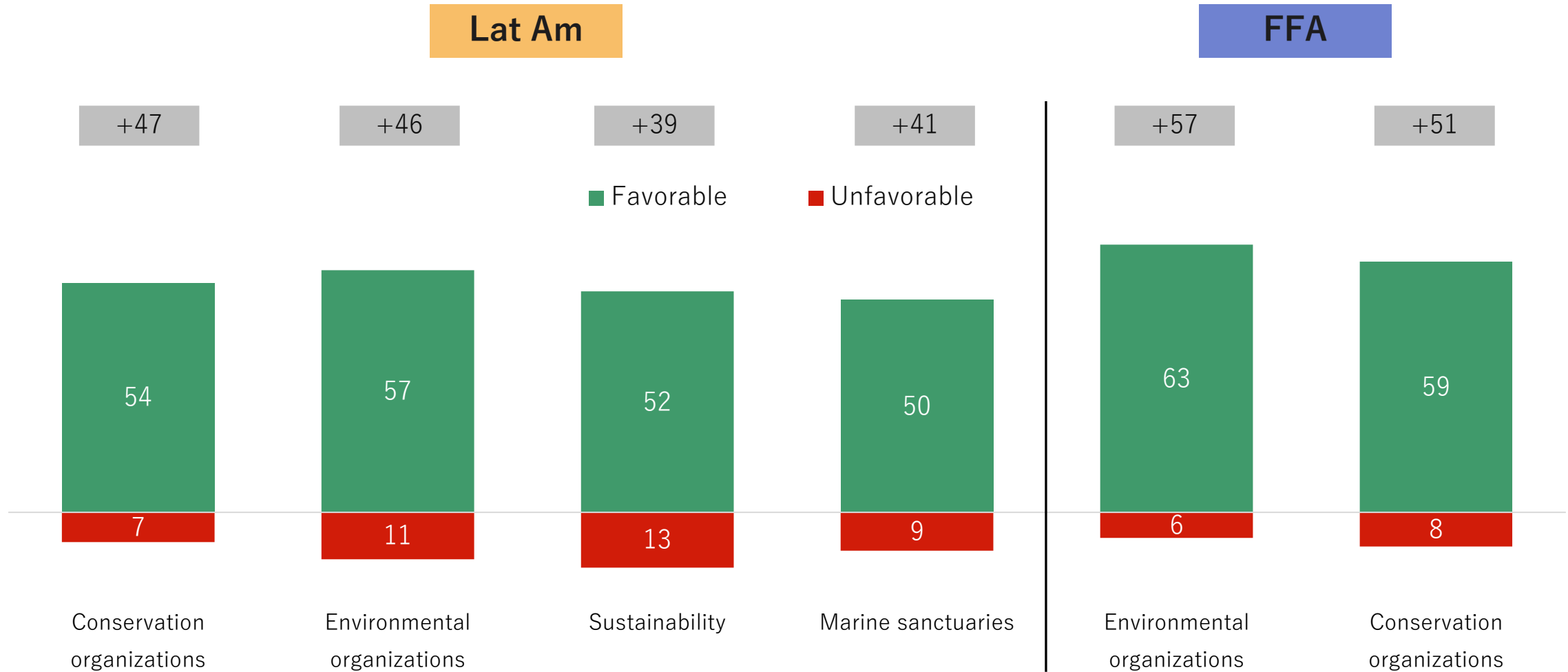
(Left-side) Q. Generally speaking, when it comes to fishing and the fishing industry in [COUNTRY], is the future of the fishing industry under threat?

(Right-side) Q. And is the future of the fishing industry under threat?

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# Favorable views of environment and fishing

# Environmental orgs are well-liked in both geos

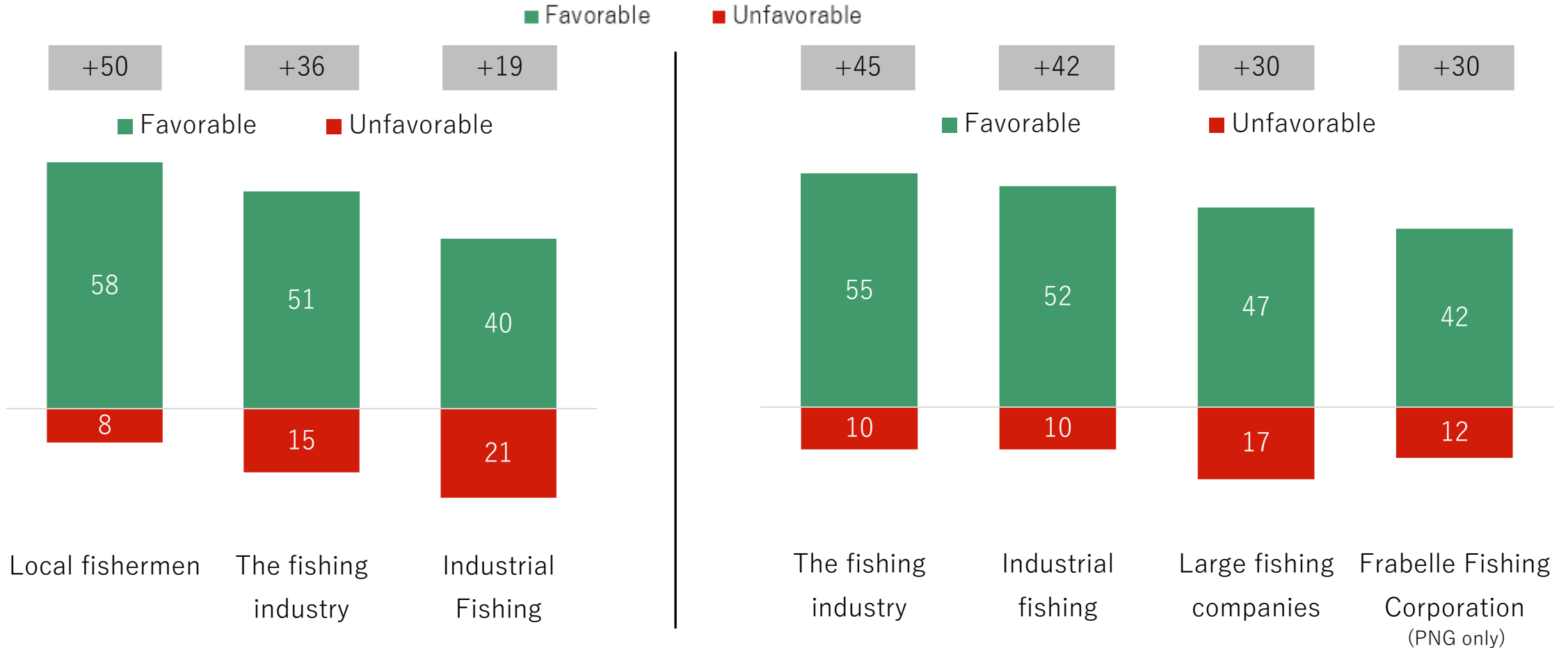


Q. I am now going to read through a list of names of people, groups and organizations. Please tell me whether you have a very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable opinion. If you do not have an opinion or have never heard of this, please say so.

# Local is better, but the fishing industry is generally favorable

Lat Am

FFA



Q. I am now going to read through a list of names of people, groups and organizations. Please tell me whether you have a very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable opinion. If you do not have an opinion or have never heard of this, please say so.



---

# Fishing is not quite an ‘industry’ in PNG, but clearly an important resource in FFA broadly

“Fishing is for livelihood, especially for people in the coastal area. It’s their source of income.”  
– Woman, Port Moresby, Papua New Guinea

**Fishing is simply seen as a source of income and sustenance for local people and families.** It is small-scale and subsistence.

“It’s more small scale fishing here, local. Most males go fishing as a source of income for villagers. There is soil erosion due to climate change, so **fishing is their only source of income**. They have to buy veggies, and they make money off of fishing to accommodate that.”  
– Man, Port Moresby, Papua New Guinea

*We received blank stares for ‘what is sustainable fishing?’*

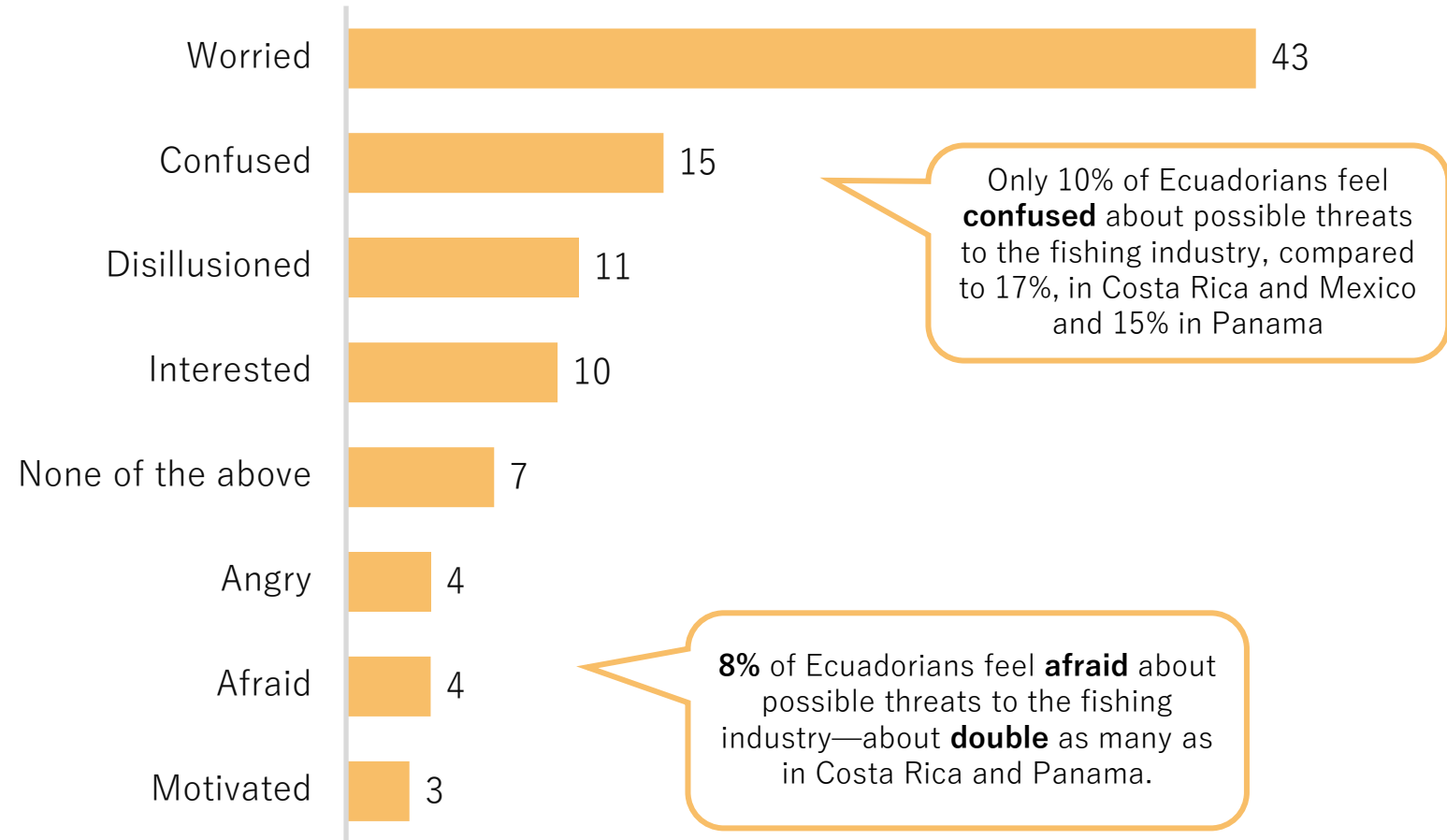
**Papua New Guineans do not know ‘sustainable fishing’.** They have some sense of sustainability as a concept, but not in the context of fishing.

*We received blank stares for ‘what might sustainability look like in fishing?’*

**95%+ of residents in Papua New Guinea, Cook Islands, and Federated States of Micronesia believe fish are a ‘natural resource’.**

# People are worried, but they're not springing into action

Feelings about Possible Threats to Fishing Industry



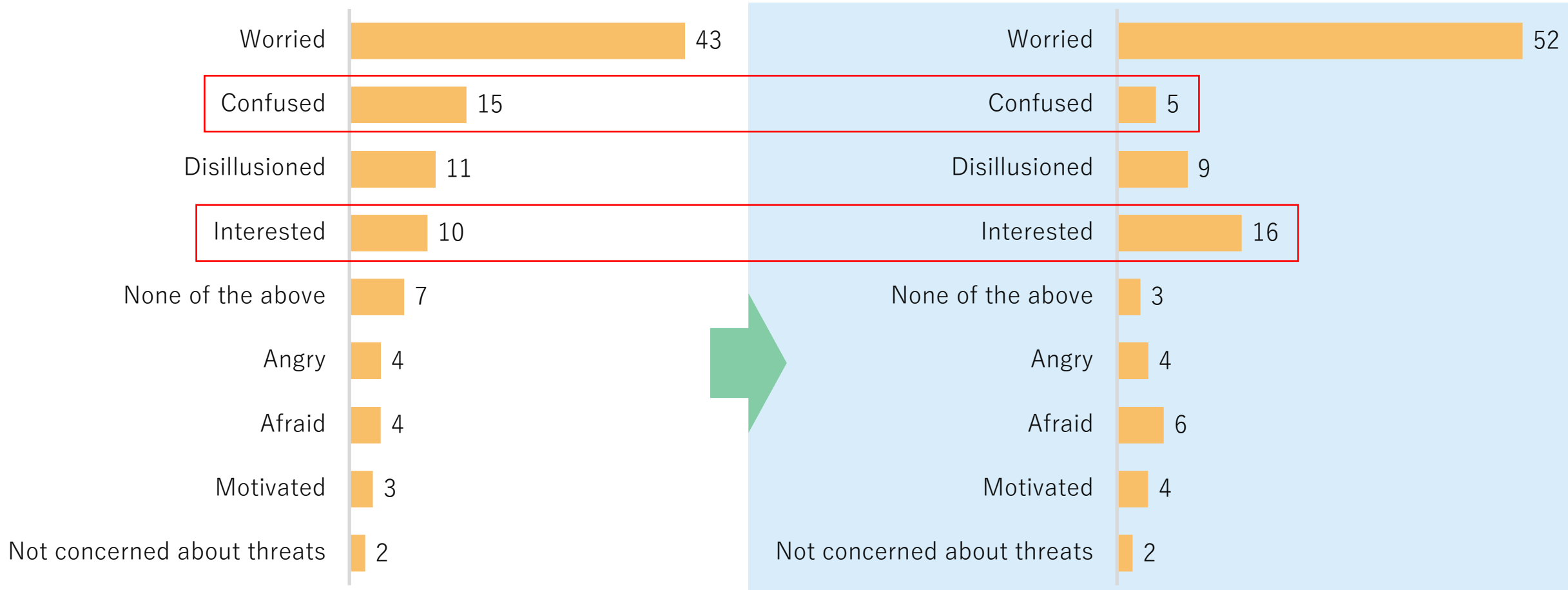
Q. Of the following emotions, which ONE would you say best describes the way you feel about possible threats to the fishing industry?

# We can increase worries, lessen confusion, and spark interest

Feelings about Possible Threats to Fishing Industry

**Initial**

**Final**

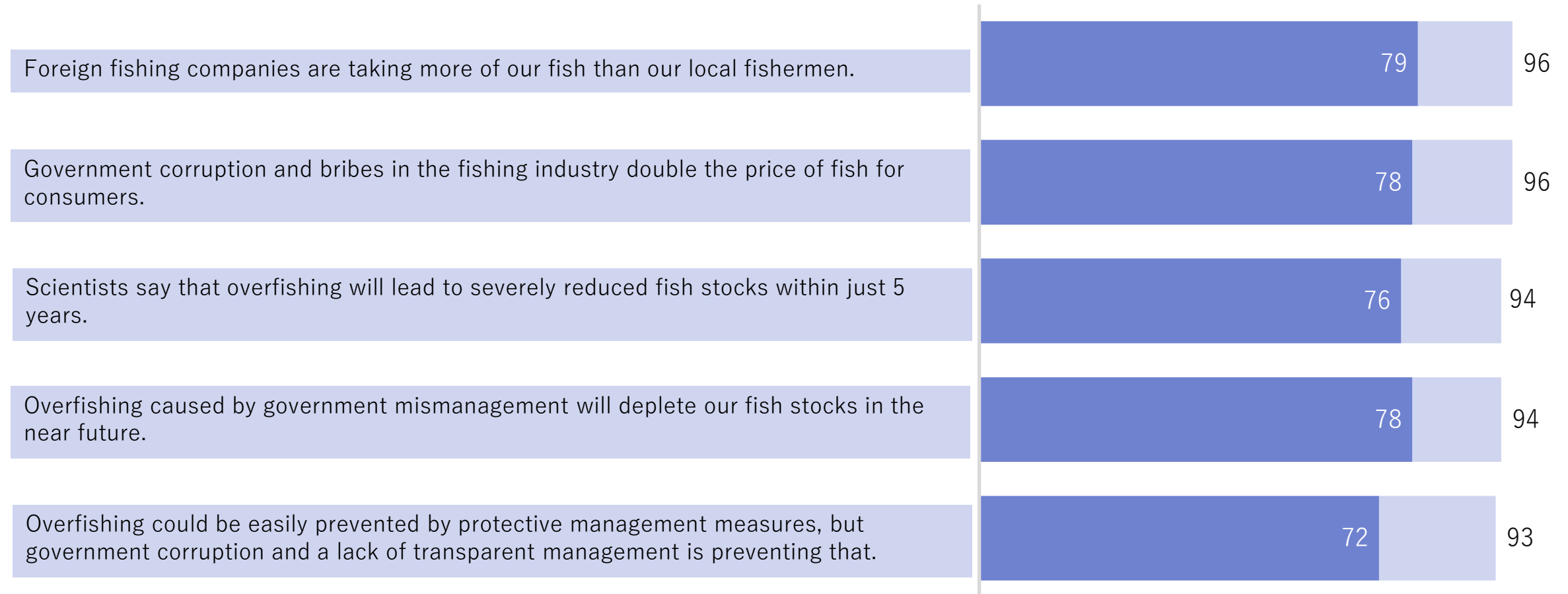
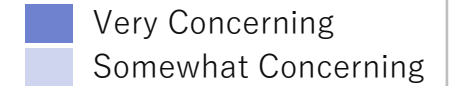


Q. Of the following emotions, which ONE would you say best describes the way you feel about possible threats to the fishing industry?



# Producer and consumer impacts are more concerning than are purely scientific ones

How concerning are these statements about the industry?



Q. I am going to go through several statements about fishing in [COUNTRY]. For each statement, please tell me whether the information is very concerning, somewhat concerning, not very concerning, or not at all concerning to you.

# Coastal proximity matters... to an extent

Proximity to Coast



How important is the fishing industry to the country's economy? (% Very important)

63%

57%

56%

Right now, our natural resources benefit everyone rather than the few

22%

26%

29%

Natural resources should be protected for future generations rather than econ growth

67%

63%

58%

**Coastal communities have a clearer understanding of the fishing industry and the threats it faces**, including the value of fishing to both the economy and future generations, and the unequal distribution of resources. Surprisingly, **opinions varied little across most other items (including sense of urgency)** and the same strategies should be used to engage reform.

# Thank You.

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